KENNESAW STATE UNIVERSITY
OFFICE OF FISCAL SERVICES

HOW TO

Create a Special Request Requisition

This job aid will go through the steps on how to create a ***Special Requisition****. Special Requisitions are created to purchase items not found on the GeorgiaFIRST Marketplace, and the Office of Procurement's buyer team members handle these purchases. If you have not checked if the items you would like to purchase are on the marketplace, please review the* ***How to Purchase Items via the GeorgiaFIRST Marketplace*** *job aid.*

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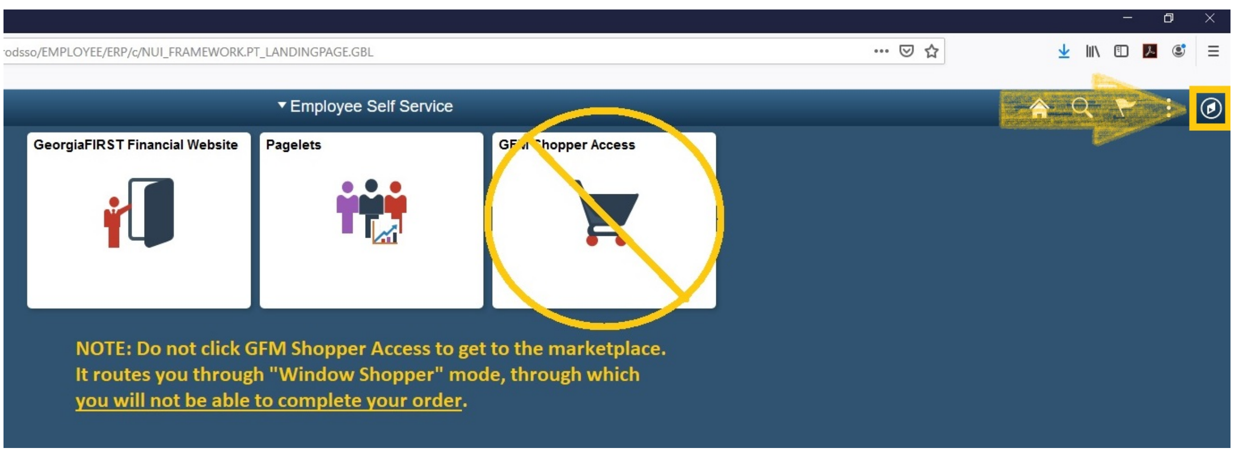
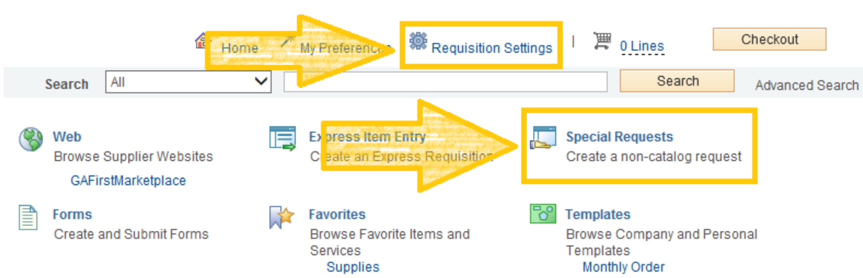
1. Log in to **PeopleSoft** via https://www.usg.edu/gafirst-fin/ by clicking GeorgiaFIRST Financials under **Core Users** on the right of the page. You will be prompted to log in using **Duo**.
2. Click the compass icon at the top right of the page. This opens the NavBar menu.
    a. NOTE: Do not click the *GFM Shopper Access* tile to get to the marketplace. It routes you through "Window Shopper" mode, through which you will not be able to complete your order.



3. On the NavBar menu, click **Navigator** > **eProcurement** > **Requisition.**
4. On the new page, click **Special Requests**.



    a. To Note: **Requisition Settings** can be used to enter default settings/data; a timesaving option when creating multi-line requisitions. To do so, click the link prior to selecting **Special Request**. Please only use this function for the **Supplier, Unit of Measure** and **Category Code**. These fields will populate as the default information on every line of your requisition.

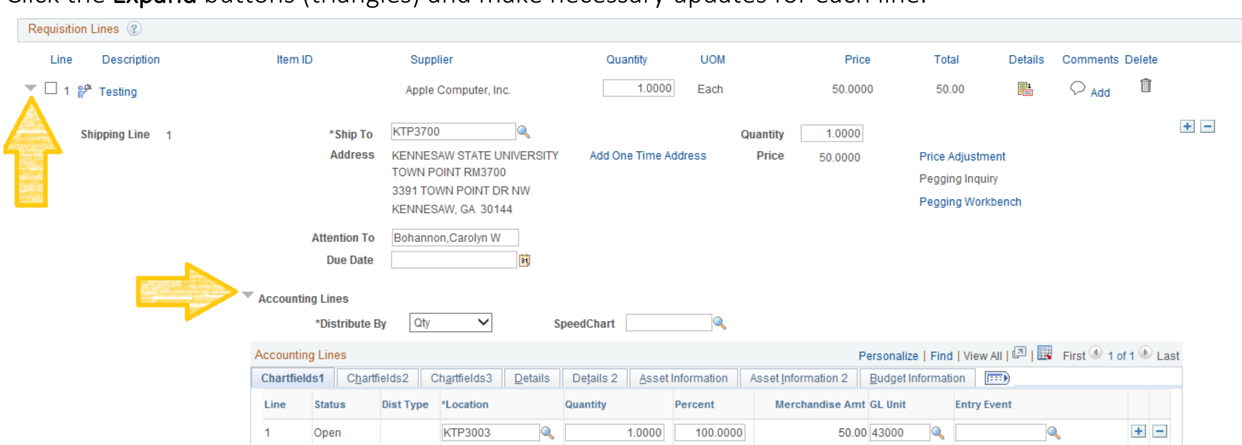
5. If you did not use **Requisition Settings,** complete the steps below **for each line/item you need to enter** – including credit lines and shipping/freight**:**
    a. Enter an **Item Description.**
    b. Enter the **Price** of the item.
    c. Enter the **Quantity** requested.
    d. Enter or select the **Unit of Measure** (most common is EA and JOB) .
    e. Enter the NIGP/Category code in the **Category** field using the Category Code Reference sheet – found on Fiscal Services website in the job aids section. *(It is not recommended to use the search function for this field)*
    f. Enter the **Supplier ID** or the **Supplier Name.**
    g. If you have any information associated with the line, enter it in the **Additional Information** field.
    h. Check the **Show at Receipt** and **Show at Voucher** checkboxes.
    i. Select the **Add to Cart** button.
    j. The following fields will remain blank: Due Date, Supplier Item ID, Mfg ID, and Mfg Item ID.

6. Confirm the Shopping Cart updated with your requisition line(s) in the upper right corner.
7. Select the **Checkout** button located beside the Shopping Cart.
8. Enter a name for your requisition in the **Requisition Name** field.
9. You can update the distribution/accounting information, using one of two methods below ***(Individual Lines or Multiple Lines)***:
    a. **NOTE: When using either option for accounting allocation changes:**
        i. If you use the SpeedChart function, you must populate the **BudRef** field on the **Chartfields 2** tab.
        ii. If you manually enter the allocation, you must first populate the **GL Unit** field on the **Chartfields 1** tab in addition to populating the **BudRef** on the **Chartfields 2** tab.

SPECIAL NOTE for UITS related CAPITAL Purchases

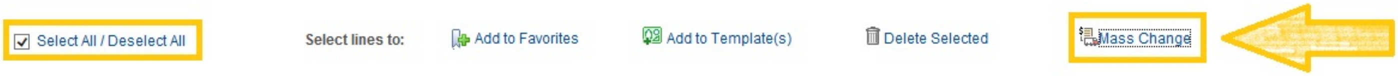
To Update Accounting Allocation on Individual lines:

Click the **Expand** buttons (triangles) and make necessary updates for each line.



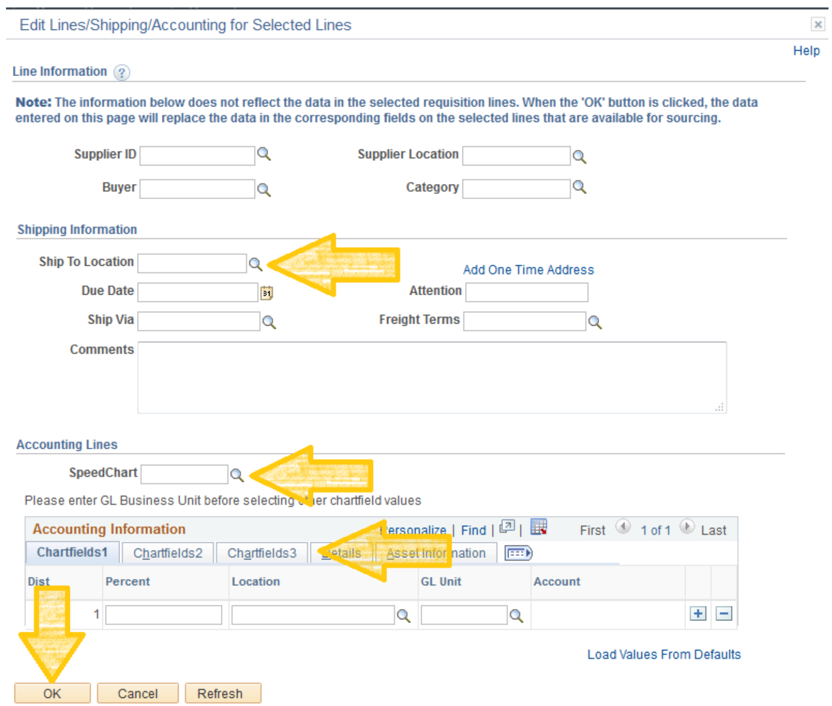
To Update Accounting Allocation on Multiple lines simultaneously:

Select the line checkboxes of all the lines you need to update, then select the **Mass Change** link



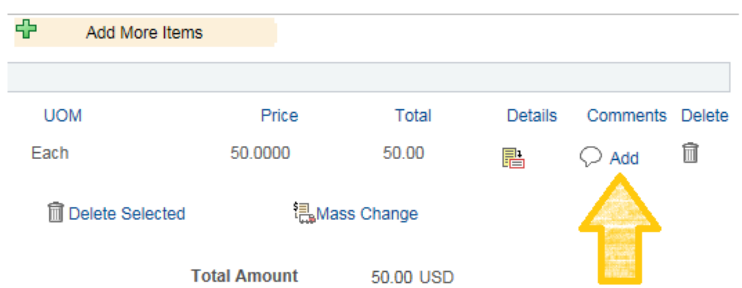
-Update the accounting allocation by populating the information in the **Chartfields 1 – 3** tabs, or by using the **SpeedChart** field.

-Update the **Ship To Location** if necessary.



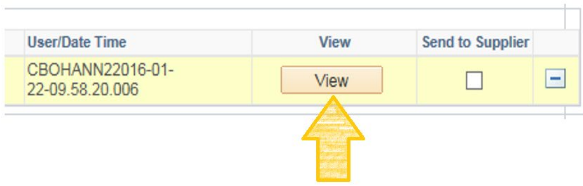
-Click **OK**, and then click **OK** for **All Distribution Lines** to apply changes to all the selected lines.

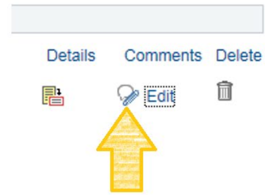
10. To add supporting documentation, click on the comment bubble **or** **Add** at the end of the first line of your requisition; **DO NOT** use the *"Add More Comments and Attachments"* link at the bottom of the screen.



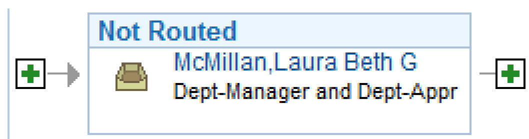
11. Click **Add Attachments** and **Browse** for the saved scanned documents.
12. Once located, click on your file and click **Open.**
13. Click **Upload** and then **OK.**

14. To verify you have attached your document(s), you will be able to see a **View** button; and when you return to the **review and submit** screen, you will see a paperclip attached to the comments bubble on the line you added it to.





15. Enter the business purpose or comments in the **Approval Justification** field (**NOTE:** Do not include any slashes (**this: /**) in your comments)
16. Select the checkboxes for **Show at Receipt** and **Shown at Voucher.**
17. *To insert any additional approvers (if requested or required),* click **Save for Later** then the **Preview Approvals** link.
    a. Click on a green plus sign to search for the **User ID** of the Approver you would like to insert, click **Insert.**



    b. Click the **Apply Approval Changes** button.
18. Click **Save & Submit** to submit the requisition lines into the approval workflow.

SPECIAL NOTE: Assets and Small Value Property

If the purchase is for an item that is classified as **Small Value Property** (cost including delivery and set-up is between $3,000 and $4,999.99), please use the following account codes:

743200 – general equipment
743230 – computer equipment
743500 – furniture
744200 – IT equipment (NOT computers)

If the purchase is for an item that is classified as an **Asset** (cost including delivery and set-up is equal to or greater than $5,000), please use the following account codes:

843100 – general equipment
843300 – computer purchases
843320 – computer hardware
843390 – other IT purchases
841100 – vehicles

If you have a question regarding if an item is an asset or not, please contact the Office of Finance and Accounting (x6214) – Asset Management department resource account (assetman@kennesaw.edu) .