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.

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.

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 UserID 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) .