

Create an EFS Requisition from a U Market Cart

This job aid is intended to be used by those UStores or requisition preparers who will use the requester role in U Market. These steps are required to find U Market shopping carts that have been assigned to a specific requester. This job aid outlines the steps to move a cart from U Market to EFS and then finish entering and submitting the order.

1. Navigate to **EFS home page > eProcurement > Create Requisition.**
2. From the **Web** tab, click <U Market>.
3. Check your Action Items to see if there are new draft carts assigned to the requester. Click <Action Items>.



Select a draft cart that has been assigned to you by clicking the Shopping Cart Name.

4. Make any adjustments needed on the order. Verify *Cart Name* and *Description*. Click the item checkbox at the end of the line on the right. Select an action from the **For selected line items** drop-down menu in order to make changes to the cart. Click <Go>. All edits to the cart should be made before returning the cart to EFS. Click <Save> to save any changes made to the cart.

Shopping Cart

7 Item(s) for a total of **932.61** USD

Return Cart Save Proceed to Checkout

Cart Name: 2013-03-13 UMN Holly Fisher
 Description: Fishery boots and gloves
 Prepared by: CREQ070
 Prepared for: Al Haskall
 Select a different user...

Supplier / Line Item Details

Show line details For selected line items Add To Favorites Go

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
87012-10 BOOT HAZMAX 16"ST TOE CS1PR 10 Hazmax Hazardous Materials Boots Size 10. Boot height: 40.6cm. One-piece injection molded construction. Ultragrip Sipe Sole provides slip resistance. Steel mid-sole safety t and ladder shank. Upper color: chemical more info...	21921-968 (CS)	1UNIT CS - Case	160.74	3	CS - Case 482.22 USD	<input type="checkbox"/>

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5. Click <Proceed to Checkout>.
6. Review the details of the order.
 - a. Review Codes, and check to make sure that the Capital or Non-Capital Category is correctly assigned for all purchases and assets.

Codes			
Capital/Non-Capital	Class	Category	edit
Non-Capital	Lab & Medical Supplies 81000	L0230000 Other Lab/Medical Supplies	

- b. Click the **Justification** tab to see the notes that were entered by the shopper about the justification, ChartField information, and shipping information. *Tip: Select and copy this information using the Ctrl+C keys.*

Requisition	Justification (1)	Attachments	History
 			
<div style="background-color: #e0f0ff; padding: 2px;">Justification (5W's)</div>			
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Records found: 1 ?</p> <p>Sandra Boyd</p> <p>Applies To: Requisition - 939447</p> <p>Requisition assigned - 3/14/2013 9:30 AM</p> <p>Per Al Haskall, ordered safety equipment for researchers in the fishery near the Temperance River. 1000-10428-20090-720104 Ship to Fishery Lab 6, room 101</p> </div>			

7. Click <ReturnCart to EFS> in the top right.
8. Notice that the **Requisition Summary** box is populated with the order. Click <3. Review and Submit>.
9. Expand the requisition line using the caret on the left of the line number, or select all lines and click <Modify Line/Shipping /Accounting>. Add the Ship To information (P + Dept ID number, click the Look Up icon, and select the Ship To value).
10. Paste (Ctrl+V keys) the justification into the *Justification* field. Enter the ChartField information in the appropriate fields. Review the justification to make sure that the 5Ws are included.
11. Click <Save and Submit>.