

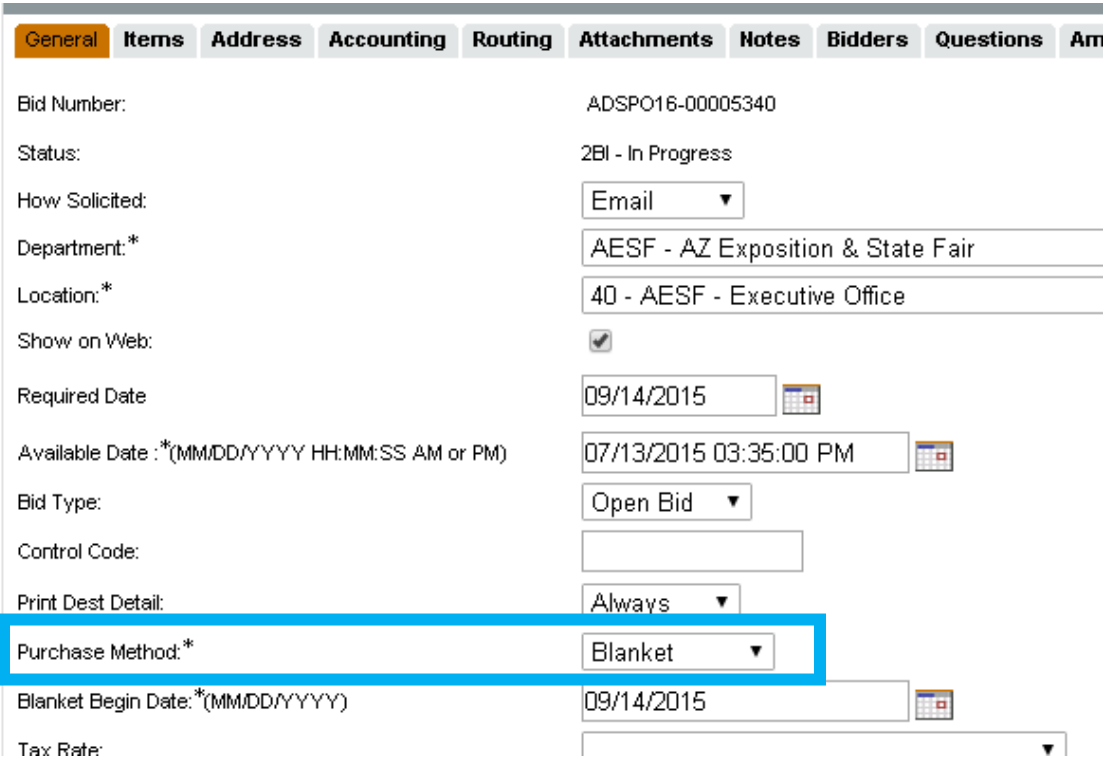


# Hot Sheet



Topic	Open Market Bids
<b>Document Types Involved</b>	Bid <input checked="" type="checkbox"/> Requisition <input type="checkbox"/> PO <input type="checkbox"/> Receipt <input type="checkbox"/> Invoice <input type="checkbox"/> Credit Memo <input type="checkbox"/> Report <input type="checkbox"/> Vendor <input type="checkbox"/> User Profile <input type="checkbox"/> Agency Setup <input type="checkbox"/> Other <input type="checkbox"/>
<b>Reason for Publication</b>	<p>It is important to consider your desired end result when establishing a Bid, and to follow proper process to support that end result.</p> <p>Problem Statement:</p> <ul style="list-style-type: none"> <li>• An Open Market Bid that is tied to a Requisition will create a new pre-encumbrance in AFIS when it is converted to an Open Market Purchase Order.</li> <li>• If that Open Market Purchase Order is converted to a Master Blanket Purchase Order, it will <b>NOT</b> liquidate the pre-encumbrance.</li> </ul> <p><b>As a result of the above, you will end up with an outstanding pre-encumbrance in AFIS that you cannot correct.</b></p> <p> Wrong Process:</p> <ol style="list-style-type: none"> <li>1. Create an Open Market Requisition               <ul style="list-style-type: none"> <li>• Establishes AFIS pre-encumbrance</li> </ul> </li> <li>2. Convert the above Open Market Requisition to an Open Market Bid with a <i>Purchase Method</i> of Open Market</li> <li>3. Award Bid</li> <li>4. Create PO               <ul style="list-style-type: none"> <li>• System creates an Open Market Purchase Order to match <i>Purchase Method</i></li> </ul> </li> <li>5. Convert Open Market Purchase Order to Master Blanket Purchase Order  <b>YOU NOW HAVE A PRE-ENCUMBRANCE IN AFIS YOU CANNOT LIQUIDATE</b> </li> </ol>
<b>Recommended Strategy</b>	<p> Best Practice:</p> <p>The key to success is to ensure that the <i>Purchase Method</i> of a Bid is correctly set to the desired end result.</p> <p><b>Desired End Result: Master Blanket Purchase Order (Contract):</b></p> <ol style="list-style-type: none"> <li>1. Create an Open Market Requisition               <ul style="list-style-type: none"> <li>• Establishes AFIS pre-encumbrance</li> </ul> </li> <li>2. Convert the above Open Market Requisition to an Open Market Bid with a <i>Purchase Method</i> of Blanket</li> <li>3. Award Bid</li> <li>4. Create PO               <ul style="list-style-type: none"> <li>• System creates a Master Blanket Purchase Order to match <i>Purchase Method</i></li> <li>• Liquidates AFIS pre-encumbrance 😊</li> </ul> </li> </ol>

	<p><b>Desired End Result: One-Time Purchase</b></p> <ol style="list-style-type: none"> <li>1. Create an Open Market Requisition <ul style="list-style-type: none"> <li>• Establishes AFIS pre-encumbrance</li> </ul> </li> <li>2. Convert the above Open Market Requisition to an Open Market Bid with a <i>Purchase Method</i> of Open Market</li> <li>3. Award Bid</li> <li>4. Create Purchase Order <ul style="list-style-type: none"> <li>• System creates an Open Market Purchase Order to match <i>Purchase Method</i></li> <li>• Liquidates original AFIS pre-encumbrance and establishes a new pre-encumbrance</li> </ul> </li> </ol>
Screenshots	<p>General Tab of a Bid:</p>  <p>The screenshot shows the 'General' tab of a bid form. The form includes fields for Bid Number (ADSP016-00005340), Status (2BI - In Progress), How Solicited (Email), Department (AESF - AZ Exposition &amp; State Fair), Location (40 - AESF - Executive Office), Show on Web (checked), Required Date (09/14/2015), Available Date (07/13/2015 03:35:00 PM), Bid Type (Open Bid), Control Code, Print Dest Detail (Always), Purchase Method (Blanket, highlighted with a blue box), Blanket Begin Date (09/14/2015), and Tax Rate.</p>