

Hot Sheet



Topic	Purchase Orders Cannot be Sent
Document Types Involved	Bid <input checked="" type="checkbox"/> Requisition <input type="checkbox"/> PO <input checked="" 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"/>
Reason for Publication	<p>Some Purchase Orders (both Open Market and Master Blanket) are stuck in Ready to Send (3PRS) status with no way to send them to the vendors. These Purchase Orders were either entered prior to July 7 or were created from a Bid from Fiscal Year 2015. In both cases the <i>Fiscal Year</i> field on the General Tab of the Purchase Order is 2015. Because there is no Fiscal Year roll period this year documents with a Fiscal Year value of 2015 cannot be sent.</p>
Steps Resulting in Scenario	<p>Purchase Orders Created from Bids:</p> <ol style="list-style-type: none"> 1. A bid (with Purchase Method Open Market or Master Blanket) was created and/or Sent in Fiscal Year 2015. <ol style="list-style-type: none"> a. The bid is not attached to a Fiscal Year 2015 Requisition. 2. The bid is converted to a Purchase Order in Fiscal Year 2016. <ol style="list-style-type: none"> a. The bid may have been awarded in Fiscal Year 2015 or 2016. b. The Purchase Order may be an Open Market or a Master Blanket. 3. The Fiscal Year 2015 Purchase Order is submitted for approval and approved. <ul style="list-style-type: none"> •  The Purchase Order is in 3PRS-Ready to Send status but there is no option to send it on the Summary tab. <p>Purchase Orders Created before July 7, 2015:</p> <ol style="list-style-type: none"> 1. A Purchase Order (Open Market or Master Blanket) was created in Fiscal Year 2015. 2. The Fiscal Year 2015 Purchase Order is submitted for approval and approved. <ul style="list-style-type: none"> •  The Purchase Order is in 3PRS-Ready to Send status but there is no option to send it on the Summary tab.

- Recommended Strategy**
1. The Purchase Order will need to have a Fiscal Year date of 2016 so that it can be sent to the vendor.
 2. Cancel and clone the existing Purchase Order (Open Market or Master Blanket).
 - Add a note on the Notes tab of the Fiscal Year 15 Purchase Order explaining the reason for cancellation.
 3. Process the new Purchase Order through approvals and sending it to the vendor.
 - Add a note on the Notes tab of the Fiscal Year 16 Purchase Order linking it back to the Fiscal Year 15 Purchase Order.

Screenshots

1. General Tab of the Original Bid:

Open Market Bid DEMA15-00005295 Status: 2BPO - Bid to PO

General | Items | Address | Accounting | Routing | Attachments(4) | Notes | Bidders | Questions | Amendments | Q & A | Reminders | **Summary**

Header Information

Bid Number:	DEMA15-00005295	Description:	Backhoe Loader (M15-0026)	Status:	2BPO - Bid to PO
Purchaser:	Kyle Matthew	Minor Status:		How Solicited:	Email
Organization:	Arizona Department of Emergency and Management Affairs	Department:	IM - Training Site - Suffix (IM)	Location:	00066 - Training Site - (IM Suffix) (ITAM F
Fiscal Year:	15	Allow Electronic Quote:	Yes	Required Date:	06/18/2015
Snow On web:	Yes	Available Date:	06/18/2015 10:11:00 AM		
Bid Opening Date:	06/29/2015 03:00:59 PM				
Purge Date:					

2. General Tab of the resulting Master Blanket Purchase Order - Fiscal Year 2015 is Problematic:

Master Blanket Purchase Order DEMA15-097932

General | Items | Vendor | Routing | Control | Attachments(19) | Notes(2) | Change Orders(2) | Reminders | Summary

PO Number:	DEMA15-097932	Release:	0
Short Description:	Backhoe Loader (M15-0026)	Status:	3PCA -
Purchaser:	Kyle Matthew	Receipt Method:	Quantity
Fiscal Year:	2015	PO Type:	Blanket
Department:	IM - Training Site - Suffix (IM)	Organization:	Arizona
Location:	00066 - Training Site - (IM Suffix) (ITAM Funds)		
P-Card Enabled:	No	Solicitation Enabled:	No
Type Code:		Print Format: *	Purch

3. Notes Tab of the original Master Blanket Purchase Order:

Jul 14, 2015	Christina Garza	<input type="checkbox"/>	Need to cancel original MB due to technical difficulty in ProcureAZ/New AFIS transition. Will re-create for FY16.
--------------	-----------------	--------------------------	---

- Cancel and clone the Purchase Order

4. General Tab of the cloned Master Blanket Purchase Order:

Master Blanket Purchase Order DEMA16-098053 Status: 3PS - Sent

General Items Vendor Routing Control Attachments(19) Notes(3) Change Orders Reminders **Summary**

Header Information

Purchase Order Number:	DEMA16-098053	Release Number:	0	Short Description:	Backhoe Loader (M15-0026)
Fiscal Year:	2016	Purchaser:	Kyle Matthew	Receipt Method:	Quantity
Organization:	Arizona Department of Emergency and Military Affairs	PO Type:	Blanket	Minor Status:	
Department:	MA - Division of Military Affairs	Location:	00004 - Procurement Office (State)	Type Code:	
Alternate ID:		Entered Date:	07/09/2015 02:15:56 PM	Control Code:	

5. Notes Tab of the cloned Master Blanket Purchase Order:

Jul 14, 2015	Christina Garza	<input type="checkbox"/>	Cloned from DEMA15-097932. Canceled original MB due to technical difficulty in ProcureAZ/New AFIS transition.
--------------	-----------------	--------------------------	---