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| **ProcureAZ Activity - Student Data Card** | | | |
| Process an Informal Quote and Recommendation | | | Activity LA-6 |
| **Login Information:** | | | |
| ProcureAZ URL | http://procuretrain.az.gov | | |
| Note your Student Number: |  | | |
| BP User ID | | **BPTrain***<student number>* | |
| BP Password | | **password** | |
| Approver ID | | **APPVTRAIN** | |
| Approver Password | | **password** | |
| Use these values for completing all activities that reference these values: | | | |
| Department | **ADTRN** | | |
| Location | **TRNF** | | |
| **Accounting Information:** | | | |
| **Function Code 1** | | | |
| Budget Fiscal Year | **2015** | | |
| Function | **RMDITA9760** | | |
| Object | **7599** | | |
| **Function Code 2** | | | |
| Budget Fiscal Year | **2015** | | |
| Function | **RMDADM9780** | | |
| Object | **7112** | | |
| Use these values for completing activities: | | | |
| Activity 6.1 Step B.3 | Department **ADTRN** | | |
| Activity 6.1 Step B.4 | Location **TRNF** | | |
| Activity 6.1 Step B.9 | **Requisition** **#** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| Activity 6.1 Step F.12 | **Any File Less than 10MB** | | |
| Activity 6.1 Step G.11 | **Any File Less than 10MB** | | |
| Activity 6.1 Step H.11 | **Any File Less than 10MB** | | |
| Activity 6.1 Step I.11 | **Any File Less than 10MB** | | |

Activity LA-6

Process an Informal Quote and Recommendation

Scenario

You would like to submit a Requisition for Informal Bid by three (3) vendors in order to get the best possible price. The agency would like to be able to use the PCard for the purchase, so you will include that criteria on the requisition. You will create a Requisition and complete the Informal Bid options. You will enter a custom email for the vendor. You will then enter the pricing information for the quotes and complete the P-Card Requisition.

Setup

* User is logged in to the ProcureAZ home page as a Basic Purchasing (BP) user.

You will

* Create a Open Market Requisition for Informal Bid, including desire to use PCard for the purchase.
* Complete Informal Bid Options.
* Send a Notification to select Vendors.
  + Modify the standard text of the Notification.
  + Add attachments to the Notification.
* Add the Vendor’s Informal Quotes to the Requisition
* Recommend a Vendor and add the recommended vendor pricing to the requisition.

Steps

1. Create the new Requisition document.
   1. In the Header Bar, click **Documents**.
   2. Hover the mouse over **Requisitions**. The Requisitions menu expands.
   3. Click **New**. The New Requisition document opens.
2. Complete the data entry on the General tab.
   1. In the **Requisition Type** drop down menu, select **Open Market**.
   2. In the Short Description field, enter today’s date, your user name and Special Signage (example: 12 May DATrain1 Special Signage)*.*
   3. In the **Department** drop down menu, select **the Department** on your **Training Data Card**.
   4. In the **Location** drop down menu, select **the Location** on your **Training Data Card**.
   5. Click the checkbox for **P-Card Desired**.
   6. Click the **Save & Continue** button. Observe the Confirmation Message that is displayed.
   7. Click the checkbox for **P-Card Enabled**.
   8. Click the **Save & Continue** button. Observe the Confirmation Message that is displayed.
   9. On your Training Data Card, write down the **Requisition Number** that has been assigned to the Requisition in the space provided for Activity 6.1.
3. Add an Item to the Requisition.
   1. Click the **Items** tab.
   2. On the Items > General tab, click the **Add Open Market Item** button.
   3. In the **Description** field, enter Warning sign, at least 3 x 4 with post.
   4. In the **Quantity** field, enter **6**.
   5. Observe the **Unit Cost** field is $0.00.
   6. Observe the UOM field is EA-Each.
   7. In the **NIGP Class** field, click the **eyeglass icon**. The NIGP Code Browse page opens in a pop-up window.
   8. In the **NIGP Keyword** field, enter signage.
   9. Click the **Search** button.
   10. In the results, click the radio button for **559-70 Signage (Includes Destination, Routing and Advertising)**.
   11. Click the **Save & Exit** button.
4. Add another Item to the Requisition.
   1. On the Items > General tab, click the **Add Open Market Item** button.
   2. In the **Description** field, enter Trail Sign.
   3. In the **Quantity** field, enter 12.
   4. Observe the **Unit Cost** field is $0.00.
   5. Observe the UOM field is EA-Each.
   6. In the **NIGP Class** field, click the **eyeglass icon**. The NIGP Code Browse page opens in a pop-up window.
   7. In the **NIGP Keyword** field, enter signage.
   8. Click the **Search** button.
   9. In the results, click the radio button for **559-70 Signage (Includes Destination, Routing and Advertising)**.
   10. Click the **Save & Exit** button.
   11. Click the **Save & Exit** button, again.
5. Complete the Informal Bid options.
   1. In the Requisition, click the **Vendors** tab.
   2. Click the **Lookup & Add Vendors** button.
   3. In the **Vendor Name** field, enter **Cottage.**
   4. Click the checkbox for **A & A Cottages.**
   5. Click **Save & Exit**
   6. Click the **Lookup & Add Vendors** button again.
   7. Click the **Find Vendors for All Commodity Code on the Req** button.
   8. Select the **first 2 vendors** with the **Alternate ID beginning with PZ….** in the list by checking the box in the left column.
   9. Click **Save & Exit**.
   10. Scroll below the added vendors and check the **Publish Informal Bid On Web** check box.
   11. Check the **Restricted informal bid** option.
   12. In the **Bid Ending Date** field, select the **next business day**.
   13. Click **Save & Continue**.
6. Modify email notification, add an attachment and send to the selected Vendors.
   1. On the Vendors tab, Click the **Notify Vendor** button at the bottom of the page
   2. Observe that you have the option of selecting one or more Vendors.
   3. Click the checkbox under **Send Notification** to select all vendors.
   4. Click the **Send Notification to Select Vendors** button.
   5. Review the standard text email.
   6. Observe that you can modify the email text, Upload Attachments, Send Notification and/or Cancel & Exit.
   7. Modify email, changed Buyer Name: from **Christina Garza** to **<your name>.**
   8. Modify email, changed Buyer Phone: from **(602)542-9140** to **(602) 555-1234**.
   9. Click the **Browse** button.
   10. Navigate to the **Documents** folder (look on the left side of the file window for the shortcut).
   11. Double-Click **Documents for Training**.
   12. Select the file noted on your training card for **Activity 6.1 Step F.12.**
   13. Click **Open**.
   14. In the **Description** field, enter **Signage requirements**.
   15. Click Upload Attachments.
   16. Click **Send Notification**.
   17. In the pop up window, click **OK**.
   18. Click **OK** again to return to the Vendor page
7. Enter the informal quote information for the first vendor.
   1. On the Vendors tab, for **A & A Cottages**, click the **Create** link in the Informal Quote column.
   2. Observe Header Information, **P-Card Desired = Yes**.
   3. On the Informal Quote page, in the **Unit Cost** field for Item #1, enter **100.00**.
   4. On the Informal Quote page, in the **Unit Cost** field for Item #2, enter **60.00**.
   5. Click **Save & Continue**.
   6. Click **Manage Attachments**.
   7. Click the **Add File** button. The Add File page opens.
   8. Click the **Browse** button.
   9. Navigate to the **Documents** folder (look on the left side of the file window for the shortcut).
   10. Double-Click **Documents for Training**.
   11. Select the file noted on your Training Data Card for **Activity 6.1 Step G.11.**
   12. Click **Open**.
   13. In the **Name** field, enter Quote 1.
   14. Click **Save & Exit**.
   15. Click **Save & Exit** again.
   16. Click **Save & Exit** again.
8. Enter the informal quote information for the second vendor.
   1. On the Vendors tab, for the second vendor, click the **Create** link in the Informal Quote column.
   2. Observe Header Information, **P-Card Desired = Yes**.
   3. On the Informal Quote page, in the **Unit Cost** field for Item #1, enter **125.00**.
   4. On the Informal Quote page, in the **Unit Cost** field for Item #2, enter **85.00**.
   5. Click **Save & Continue**.
   6. Click **Manage Attachments**.
   7. Click the **Add File** button. The Add File page opens.
   8. Click the **Browse** button.
   9. Navigate to the **Documents** folder (look on the left side of the file window for the shortcut).
   10. Double-Click **Documents for Training**.
   11. Select the file noted on your Training Data Card for **Activity 6.1 Step H.11.**
   12. Click **Open**.
   13. In the **Name** field, enter Quote 2.
   14. Click **Save & Exit**.
   15. Click **Save & Exit** again.
   16. Click **Save & Exit** again.
9. Enter the informal quote information for the third vendor.
   1. On the Vendors tab, for the third vendor, click the **Create** link in the Informal Quote column.
   2. Observe Header Information, **P-Card Desired = Yes**.
   3. On the Informal Quote page, in the **Unit Cost** field for Item #1, enter **115.00**.
   4. On the Informal Quote page, in the **Unit Cost** field for Item #2, enter **90.00**.
   5. Click **Save & Continue**.
   6. Click **Manage Attachments**.
   7. Click the **Add File** button. The Add File page opens.
   8. Click the **Browse** button.
   9. Navigate to the **Documents** folder (look on the left side of the file window for the shortcut).
   10. Double-Click **Documents for Training**.
   11. Select the file noted on your Training Data Card for **Activity 6.1 Step I.11.**
   12. Click **Open**.
   13. In the **Name** field, enter Quote 3.
   14. Click **Save & Exit**.
   15. Click **Save & Exit** again.
   16. Click **Save & Exit** again.
10. Complete the vendor recommendation process for the Requisition.
    1. On the Vendors tab, click the **Informal Quote Tabulation** button.
    2. For the vendor with the lowest Quote Total, click the **Apply Pricing** button.
    3. In the pop up window, click **OK**.
    4. Click the **Apply Selected Pricing to Req Items** button.
    5. In the pop up window, click **OK**.
    6. Click the **Close Window** button.
    7. Observe that the Recommended checkbox for the Vendor is Checked
11. Observe the pricing selected has been added to the items.
    1. Click the **Items** tab.
    2. Observe the **Net Unit Cost** for Item 1 has been updated.
    3. Observe the **Net Unit Cost** for Item 2 has been updated.
12. Complete the Accounting information on the Requisition.
    1. Click the **Header > Accounting** tab.

**NOTE: Refer to the Accounting Information section of the Training Data Card**

* 1. Use the accounting information from **Function Code 1***.*
  2. Click the **Save Based on Percentages** button.
  3. Click the **Rebuild for All Items** button. The document will need up to a minute to process the new accounting information.
  4. When the process is complete, click the **OK** button in the dialog box that appears.

1. Optional: Submit the Requisition for approval.
   1. Click the **Summary** tab.
   2. Review the information on the Summary tab.
   3. Observe **P-Card Desired** = **Yes**.
   4. Click the **Submit for Approval** button.
   5. In the pop up window, click **OK**.
   6. Select **Automatic approval**.
   7. Click **Save & Continue**.
   8. In the Navigation Bar, click **Home** to return to the Home

In review, you…

* Created a P-Card Open Market Requisition for Informal Bid.
* Completed Informal Bid Options.
* Sent a Notification to select Vendors.
  + Modified the standard text of the Notification.
  + Added an attachment to the Notification.
* Added the Vendor’s Informal Quotes to the Requisition.
* Recommended a Vendor and added the recommended vendor pricing to the requisition.