

## ProcureAz Alert

**Date:** June 3, 2016

**To:** State Agencies

**From:** ProcureAZ Help Desk

**Re:** New: Processing Next Fiscal Year Documents

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Fix deployment was completed Wednesday night to allow for processing Fiscal Year 17 documents all the through sending to vendors.

- Please see the attached Quick Reference Guide for instructions and AFIS conditions that must be met.

GAO has also posted a Webstory at <https://gao.az.gov/procureaz-document-posting-fy17-now-available-afis>.

If you have any questions please contact the Help Desk at 602-542-7600, option 3 or email [procure@azdoa.gov](mailto:procure@azdoa.gov).

Thank you

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**PROCUREAZ HELP DESK**  
602-542-7600  
[procure@azdoa.gov](mailto:procure@azdoa.gov)

## Pre-Processing On and Off Contract Orders for the Next Fiscal Year

In ProcureAZ it is now possible to process on and off contract orders for the next fiscal year all the way through sending them to vendors.

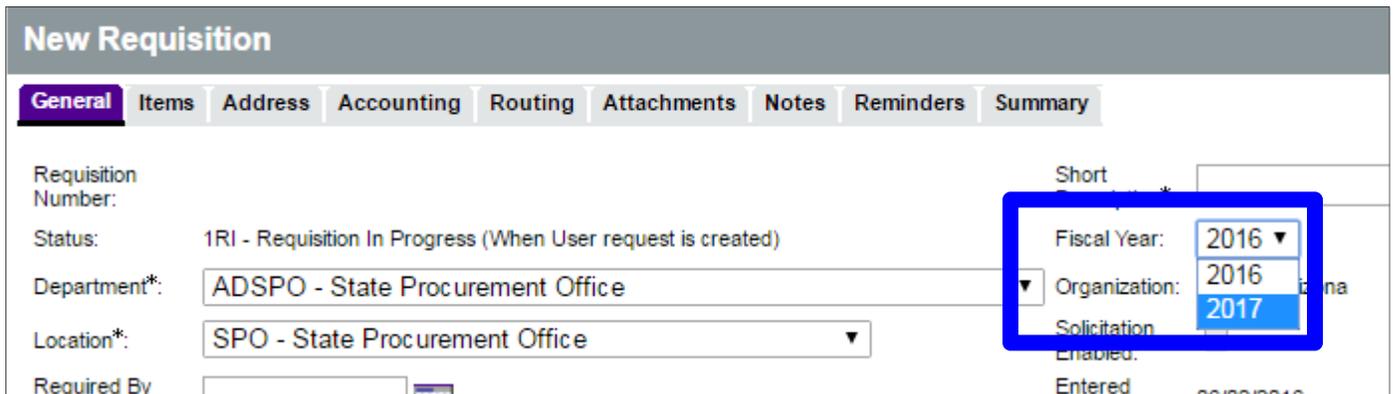
**AFIS NOTE:** For next Fiscal Year RQPZ1 and POPZ1 documents associated with Type 1 or Type 2 appropriations, there must be an appropriation and budget loaded in AFIS for that Fiscal Year. For RQPZ1 and POPZ1 associated with Type 3 appropriations, it is not necessary to have appropriation or budgets loaded in AFIS to process.

Agencies must ensure that all policies and statutory requirements are being followed when posting documents to a future fiscal year. Always take into consideration when the goods and/or services will be received. Any requisitions or purchase orders processed for a future Fiscal Year must be for goods or services that will be received on or after July 1 of that Fiscal Year.

### Creating Requisitions for the Next Fiscal Year from Scratch

Log in to ProcureAZ and start the requisition as normal – click on the Documents dropdown in the colored Navigation Bar along the top of the screen. Then, hover the mouse over **Requisitions** to generate the Requisitions submenu on the right and click **New**. The General tab of your blank new Requisition document will display.

The Fiscal Year field defaults to the current one. To select the future Fiscal Year use the drop down menu:



The screenshot shows the 'New Requisition' form with the following fields and values:

- Requisition Number: [Empty]
- Status: 1RI - Requisition In Progress (When User request is created)
- Department\*: ADSPO - State Procurement Office
- Location\*: SPO - State Procurement Office
- Required By: [Empty]
- Fiscal Year: 2016 (dropdown menu is open, showing 2016 and 2017)
- Organization: Arizona
- Solicitation: [Empty]
- Entered: 08/02/2016

Finish entering information as normal for both on and off contract orders.

Submit the document for approval. After all approvals are applied send the resulting purchase order to the vendor.

**PAYMENTS FOR NEXT FISCAL YEAR PURCHASES MAY NOT BE MADE PRIOR TO THAT FISCAL YEAR.**

## Pre-Processing On and Off Contract Orders for the Next Fiscal Year

### Creating Requisitions for the Next Fiscal Year by Cloning Existing Requisitions

Log in to ProcureAZ and find the requisition to clone using Advanced Search or other search process.

At the bottom of the Summary tab of the requisition click the Clone button:

Approval Path - 00TEST - ( Test OM Req Apprval )								
Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
	1	Elli Balstad-deleted	Eric Jacobsen Theresa Green System Administrator	10	05/06/2016 09:07 AM	05/06/2016 09:07 AM	Approved (Eric Jacobsen)	

A dialog will appear asking users to select the correct fiscal year for the new document. The document will default to the current fiscal year. To select a different one, use the drop down menu:

NIGP Code Browse | My Account | Customer Service | About Current Organization: State of Arizona June 2, 2016

Home Items Documents Vendors Quick Buy Find It

Please select the fiscal year for the new document from the dropdown below.

Fiscal Year: 2016 ▼

2016

2017

Save & Continue Cancel & Exit

Finish changing/entering information as normal for both on and off contract cloned requisitions.

Submit the document for approval. After all approvals are applied send the resulting purchase order to the vendor.

**PAYMENTS FOR NEXT FISCAL YEAR PURCHASES MAY NOT BE MADE PRIOR TO THAT FISCAL YEAR.**

END