

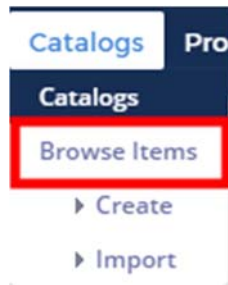
How to Create a On-Contract Requisition for the Next Fiscal Year

The purpose of this document is to provide guidance on how to create a requisition using the catalog for the next fiscal year. This document will assist agencies on how to properly create new orders for the next fiscal year in APP.

This document is a quick-reference guide for agency users creating new requests using the catalog for the next fiscal year in APP. If you have any questions, please contact the APP Help Desk at app@azdoa.gov.

Create a On-Contract Requisition for the Next Fiscal Year

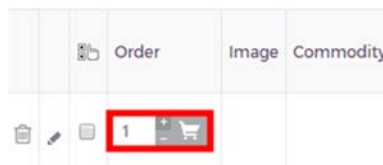
1. From any page in the APP, navigate to the Catalogs drop-down menu and select Browse Items.



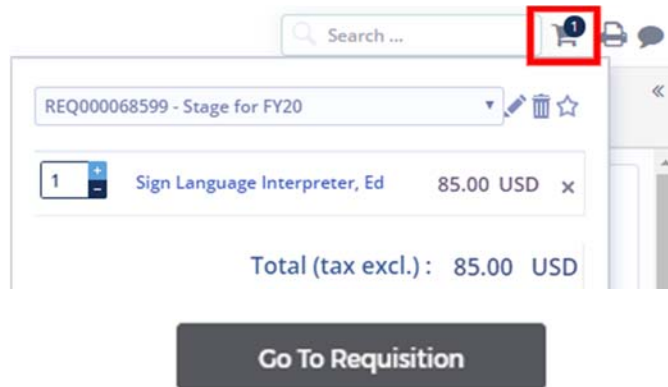
2. From the Browse Items page, you can enter a simple keyword search for the item or items you would like to add to the requisition or use the search filters to help filter the search results. You can filter by supplier or contract which may be helpful for you to find the correct items to order.



3. Select the line items that you will be ordering and add them to your cart by clicking on the Add to Cart icon.




5. Once your items have been selected and added to your cart, click on the shopping cart icon located on the top right-hand side of the page and then click on Go to Requisition.



6. Enter the mandatory fields in order to create the new requisition. **Do not update the fiscal year field. Leave it as the current fiscal year.**

The screenshot shows the 'HEADER' section of a requisition form. The 'Status' is 'Draft'. The 'Requisition Type' is 'On-Contract'. The 'Short Description' is 'Stage for FY'. The 'Requester' is 'Gomez Ralph'. The 'Site' is empty. The 'ID Type' is empty. The 'Files' section has a button 'Click or Drag to add files'. The 'ORGANIZATIONAL STRUCTURE' section is collapsed. The 'Legal company', 'Agency', 'Division', and 'Department' fields are empty. The 'Special Purchase Type' is 'Special Purchase Type'. The 'Fiscal Year' is '2020'. The 'Set aside spend' is 'Set aside spend'.

7. Go to the line items you added at the bottom of the Purchase Requisition tab and click on the Pencil icon to edit the item on the requisition.

	#	Ref.	Short Description
	68599-1	CTR044708-10	Sign Language Interpreter, Educational (K-12) Base Rate

8. Edit the required fields to show the correct quantity, tax and supplier contact. **Ensure the delivery date is set to after the start of the new fiscal year.**

DESCRIBE THE ITEM / SERVICE

Short Description :

Commodity :

Total Ordered Quantity : Hour

Delivery Date :

Service To Date :

Comment :

Attachments :

Requisition Status : Draft

FIND OR ADD SUGGESTED SUPPLIER

Supplier : PCI & TSLLC

Order Supplier/Distributor :

Supplier Contact :

ESTIMATE COMMERCIAL COSTS

Price : 85.000000 USD

Tax :

% discount :

Total Amount : 85.0000

DEFINE DELIVERY PLACE

State Procurement C

State Procurement Office
100 N 15th Ave, Suite 402
85007 Phoenix
Arizona
UNITED STATES

9. Click on Budget Information and you will see that the Fiscal Year and Budget Fiscal Year is now showing the new fiscal year. If the previous year is still showing go to the top of the page and click on Reset Allocations to reset the budget line information on the line item. Then click on Budget Information to see the fiscal year.

BUDGET INFORMATION

BUDGET ALLOCATION - MINIMUM REQUIRED FIELDS FOR SUCCESSFUL ENCUMBRANCE

- If allocation elements, Accounting Template or Function are blank, then dimensions marked as bare minimum to process the requisition will be mand.
- Those bare minimum allocation elements are: Budget Fiscal Year, Unit, Fund, Appr Unit, Object, Task and Agency (AFIS - Department)

+ Allocation Filled in : Percentage Amount To be allocated : 0 %

+ Copy Line(s) Copy # :

	%	Pretax Amount (USD)	Agency	Organization	Fiscal Year	Budget Fiscal Year
D	100.00 %	85.000000	Arizona Departmer	State Procurement	2020	2020

1 Result(s)

10. Duplicate steps 6 through 9 for each line item in your requisition.

11. Click on Save & Close located at the top of the page to save your changes.

Save & Close



You can not go any further with this order until the new fiscal year starts.



Start of New Fiscal Year

1. Once the new fiscal year has started, from any page in the APP, navigate to the Procurement drop-down menu and select Browse Requisitions.



2. You have a variety of different search options available for you to utilize, however, searching by Requisition Status would be the recommended method as all your requisitions will be in a Draft status. Click on the drop-down arrow and select Draft and then click Search.

Keywords: Alerts: ... Requester: ... My requests: Search Advanced search

Header

Supplier: ... Date: to Requisition Type: Trigna ID:

Organization: ... Contract: ... Tax Rates:

Commodity: ... Requisition Status:

ID Type:

3. Select the requisition and click on the Pencil icon to edit the draft requisition.

	Requester	Code	Short Description
	GOMEZ Ralph	REQ000068599	Stage for FY20

4. Update the Fiscal Year field from the old fiscal year to the new fiscal year by clicking on the Elipsis icon and then selecting the new fiscal year.

HEADER

Requisition Status : Draft

Requisition Type : On-Contract

Short Description : Stage for FY20

Requester : Gomez Ralph

Site : State Procurement Office

ID Type :

Files : Click or Drag to add files

Special Purchase Type :

Fiscal Year : 2019 - State of Arizona

Set aside spend :

Fiscal Year Filter (Current)

Close


Keywords : Search Reset

Label

+ State of Arizona

1 Result(s)

5. Go to the line items you added at the bottom of the Purchase Requisition tab and click on the Pencil icon to edit the item on the requisition.

	#	Ref.	Short Description
	68599-1	CTR044708-10	Sign Language Interpreter, Educational (K-12) Base Rate

6. Click on Budget Information and add the remaining budget line on the PO. Click on Save & Close located at the top of the page to save your changes.

Save & Close

7. Duplicate steps 5 and 6 for each line item in your requisition.

8. Click on Submit for Approval located at the top of the page to submit the requisition for approval. Once final approved, the requisition will be ordered and the PO will be created for the new fiscal year.

*****END OF CREATE A ON-CONTRACT REQUISITION FOR THE NEXT FISCAL YEAR QRG*****