

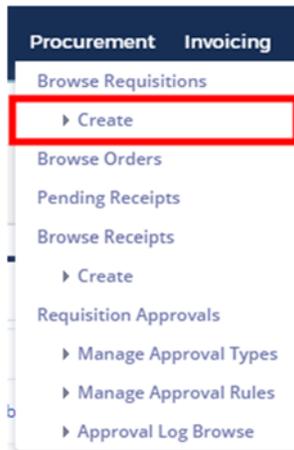
How to Create a Off-Contract Requisition for the Next Fiscal Year

The purpose of this document is to provide guidance on how to create a off-contract requisition 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 for the next fiscal year in APP. If you have any questions, please contact the APP Help Desk at app@azdoa.gov.

Create an Off-Contract Requisition for the Next Fiscal Year

1. From any page in the APP, navigate to the Procurement drop-down menu and select Create.



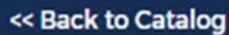
2. From the Create page, enter the mandatory fields in order to create the new requisition. **Do not update the fiscal year field. Leave it as the current fiscal year.**

A screenshot of the 'Create' requisition form in the APP. The form has a 'HEADER' section with fields for Status (Draft), Requisition Type (On-Contract), Short Description (Stage for FY), Requester (Gomez Ralph), Site, ID Type, and Files. The 'On-Contract' and 'Stage for FY' fields are highlighted with a red box. The 'Fiscal Year' field is set to 2025 and is crossed out with a red X. Below the header is the 'ORGANIZATIONAL STRUCTURE' section with fields for Legal company, Agency, Division, and Department.

3. Click on the Save button located at the top of the page to save your changes.

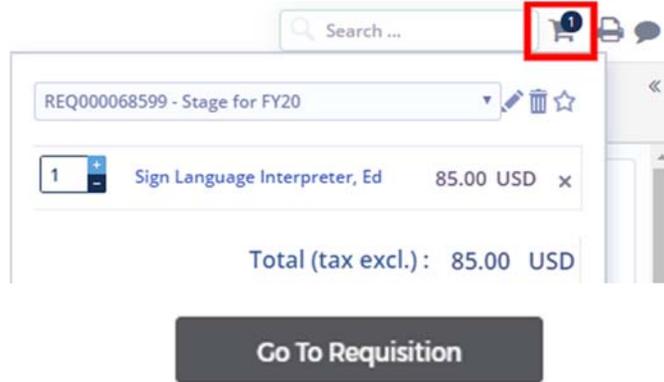


4. Click on Back to Catalog located at the top of the page and select the line items that you will be ordering.



5. Click on Add Non-Catalog Item to Cart and enter the mandatory fields. Once your item has been created and added to your cart, click Save and Close and the item will be added to your shopping cart. Duplicate this step for each line item.

6. Click on the shopping cart icon located on the top right-hand side of the page and then click on Go to Requisition.



7. Go to the line item you add 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 :

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

Save & Close

11. Duplicate steps 7 through 10 for each line item in your requisition.



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 best 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: Tririga 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.

The screenshot shows the 'HEADER' section of a requisition form. The 'Fiscal Year' field is set to '2019 - State of Arizona' and has a red box around its dropdown arrow. Below the header is a 'Fiscal Year Filter (Current)' dialog box. It contains a search bar with 'Keywords:' and buttons for 'Search' and 'Reset'. Below the search bar is a list of results with a 'Label' column. One result is shown: 'State of Arizona', with a red box around the '+i' icon to its left. At the bottom of the filter, it says '1 Result(s)'. A 'Close' button is at the top right of the filter dialog.

5. Go to the line item 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 OFF-CONTRACT REQUISITION FOR THE NEXT FISCAL YEAR QRG*****