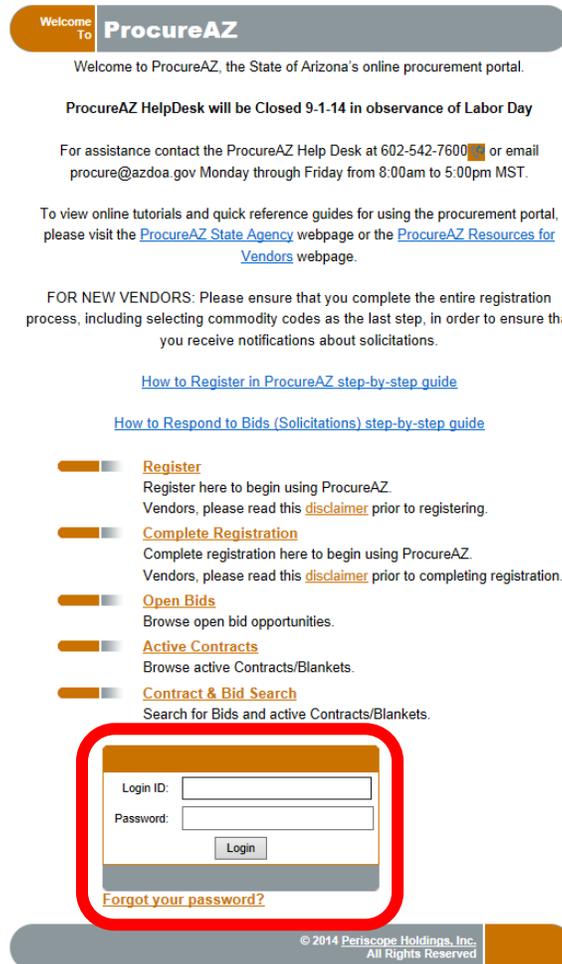


Off-Contract Ordering

Requisition documents in ProcureAZ allow users to place requests for goods and services. The type of Requisition will determine whether the request is for goods and services on- or off-contract, or for a reimbursement for funds already spent. Off-contract requests in ProcureAZ are referred to as "Open Market" Requisitions.

Logging In

Before you can create a new document, you must login to ProcureAZ. To login to ProcureAZ, input your email address into the "Login ID" field and the password you were given by an administrator into the **Password** field. Next, either hit **Enter** on your keyboard or click the **Login** button.



Welcome To **ProcureAZ**

Welcome to ProcureAZ, the State of Arizona's online procurement portal.

ProcureAZ HelpDesk will be Closed 9-1-14 in observance of Labor Day

For assistance contact the ProcureAZ Help Desk at 602-542-7600 or email procure@azdoa.gov Monday through Friday from 8:00am to 5:00pm MST.

To view online tutorials and quick reference guides for using the procurement portal, please visit the [ProcureAZ State Agency](#) webpage or the [ProcureAZ Resources for Vendors](#) webpage.

FOR NEW VENDORS: Please ensure that you complete the entire registration process, including selecting commodity codes as the last step, in order to ensure that you receive notifications about solicitations.

[How to Register in ProcureAZ step-by-step guide](#)

[How to Respond to Bids \(Solicitations\) step-by-step guide](#)

- Register**
Register here to begin using ProcureAZ.
Vendors, please read this [disclaimer](#) prior to registering.
- Complete Registration**
Complete registration here to begin using ProcureAZ.
Vendors, please read this [disclaimer](#) prior to completing registration.
- Open Bids**
Browse open bid opportunities.
- Active Contracts**
Browse active Contracts/Blankets.
- Contract & Bid Search**
Search for Bids and active Contracts/Blankets.

Login ID:

Password:

[Forgot your password?](#)

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Once logged in, if you have access to multiple roles, ensure that the Department Access or Basic Purchasing role is currently selected in order to enable the creation of a Requisition.



Procure.AZ.gov
Arizona's Procurement Solution

Basic Purchasing | Department Access | Inquiry | Internal Administrator | Organization Administrator

NIGP Code Browse | My Account | Customer Service | About

April 9, 2010 10:16:27 AM MST

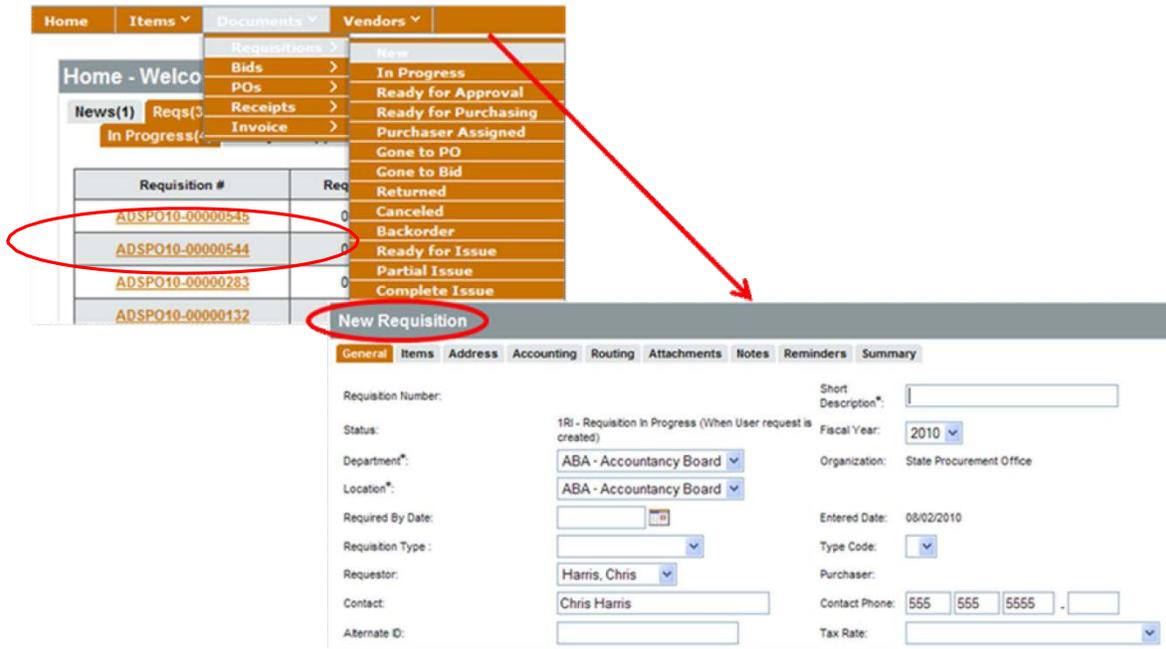
Home | Items | Documents | Vendors

Chris Harris

Off-Contract Ordering

Creating a New Release Requisition

To start a new Requisition from scratch, hover your mouse over the Documents dropdown in the colored Navigation Bar along the top of the screen. Then, hover your mouse over **Requisitions** and select **New**. The General tab of your blank new Requisition document will display.



The screenshot shows the ProcureAZ interface. At the top, there is a navigation bar with tabs: Home, Items, Documents, and Vendors. The 'Documents' dropdown menu is open, showing a list of document types: Requisitions, Bids, POs, Receipts, Invoice, New, In Progress, Ready for Approval, Ready for Purchasing, Purchaser Assigned, Gone to PO, Gone to Bid, Returned, Canceled, Backorder, Ready for Issue, Partial Issue, and Complete Issue. The 'New Requisition' option is highlighted with a red circle. A red arrow points from this option to the 'New Requisition' form below. The form has several tabs: General, Items, Address, Accounting, Routing, Attachments, Notes, Reminders, and Summary. The 'General' tab is active, showing various fields for creating a requisition. Fields include Requisition Number, Status (with a note: '1RI - Requisition in Progress (When User request is created)'), Department (ABA - Accountancy Board), Location (ABA - Accountancy Board), Required By Date, Requisition Type, Requestor (Harris, Chris), Contact (Chris Harris), Alternate ID, Short Description, Fiscal Year (2010), Organization (State Procurement Office), Entered Date (08/02/2010), Type Code, Purchaser, Contact Phone (555 555 5555), and Tax Rate.

The process for completing all documents in ProcureAZ is the same - work through the tabs along the top of the document from left to right, starting with the General tab. As you go, complete all required fields, which are marked with an asterisk, save your work on each tab, then review and submit the document for approval via the Summary tab on the far right.

The General tab of the Requisition document Items is where you describe the Requisition, note which units in your agency the goods or services are for, and select the type of Requisition it signifies. If your default Department and Location are accurate, all you will need to input on this tab are a **Short Description** of what you will be requesting, and to select "Open Market" in the **Requisition Type** field. Click **Save & Continue** once complete.



If your agency will be using MAXIMO for inventory and warehouse management or Tririga for facilities management, then you will need to provide either the MAXIMO PO Number or the Tririga Task Number by selecting the document type from the External Document Type field and entering the PO or Task number into the field provided for that document. These fields are located on the General tab of a new requisition.

Off-Contract Ordering

Requisition ADSP015-00254236 Status: 1RI - In Progress

General | **Items** | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Confirmation Messages
 • Changes saved successfully.

Requisition Number: ADSP015-00254236 Short Description*: ASW maximo 062215

Status: 1RI - In Progress

Department*: ADSP0 - State Procurement Office

Location*: SPO - State Procurement Office

Requested By Date: Requisition Type: [dropdown]

P-Card Enabled:

Requestor: Aynesley Wilson

Contact: Aynesley Wilson

Alternate ID: [text box]

Estimated Cost: \$0.00

Print Format*: Requisition

Project No.: [text box]

Building Code: [text box]

Cost Code: [text box]

Special Purchase Types: [dropdown]

PIJ Number: [text box]

External Document Type*: MAXIMO

MAXIMO PO Number*: [text box]

Date Last Updated: 06/22/2015 12:32:22 PM User Last Updated: Aynesley Wilson

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Adding Items

Next, select the Items tab to add the Items you are requesting. From the Items tab, select the **Add Open Market Item** button.

Requisition ADSP010-00000545 Status: 1RI - In Progress

General | **Items** | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

There are no items. Please click 'Search Items' or 'Add Open Market Item' or 'Add RPA Item' below to add an item.

Add Open Market Item

Selecting **Add Open Market Item** from the Items tab will display a screen within the Items tab that allows you to define every aspect of a new Item. To successfully add a new Normal Item to ProcureAZ, you must provide at least a **Description**, **Quantity**, an estimated **Unit Cost**, a **Unit of Measure**, and a 3-digit **NIGP Class** and 2-digit **NIGP Class Item**.



Freight field on the item has been removed. 7.

The NIGP code assigned to freight needs to be **962-86**.

TIP: It is recommended that an equal quantity for freight and Items is entered to enable receipt of Items and freight in the same quantity.

Note: The Property number field is provided for tracking of fixed assets and capital inventory. If you have this number you may enter it here now or if a number will be assigned at a later date, then the property number can be added at the time of invoicing.

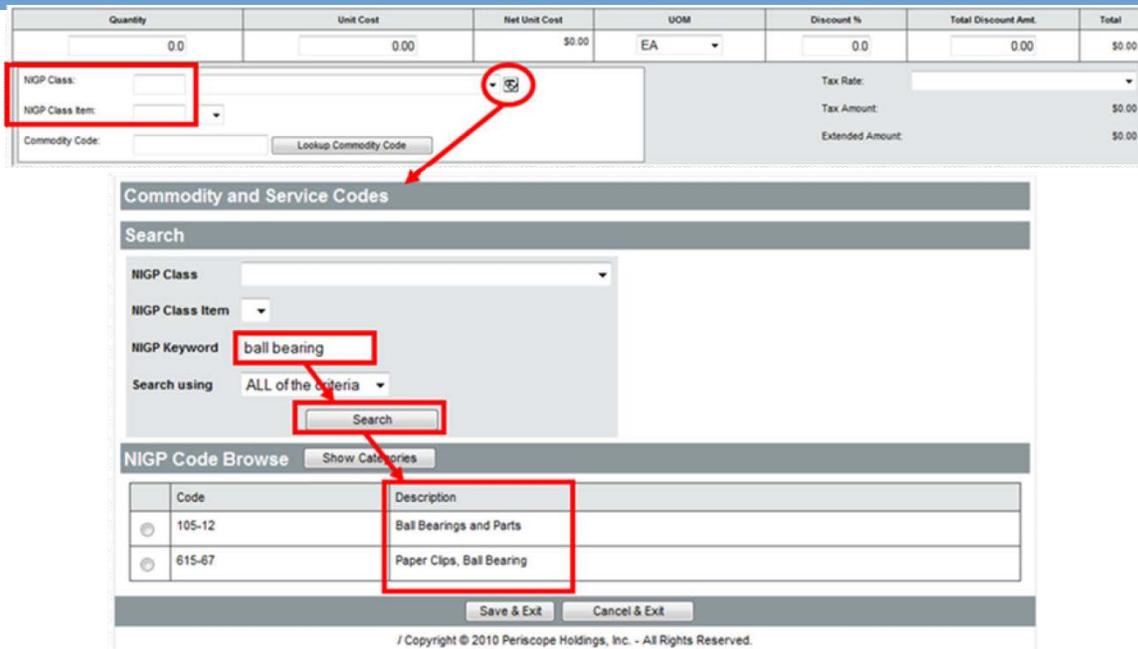
Off-Contract Ordering

The left screenshot displays the 'Open Market Purchase Order ADSP015-086598' form. It includes fields for Item # (1), Print Sequence # (1.0), Item Type (Normal), and Item Status (IRI - In Progress). A table shows a quantity of 50.0 at a unit cost of 8.00, resulting in a net unit cost of 30.00. The NIGP Class is 553 (553 - MANUFACTURING COMPONENTS AND S...) and the NIGP Class Item is 30 (30 - Components, Manufacturing (Sta...)). A blue starburst labeled 'New' points to the 'Commodity Code' field. The right screenshot shows the 'Open Market Requisition ADSP015-00032642' form. It has a similar layout but the 'Commodity Code' field contains a red 'X' and a yellow highlight with the text 'XXXXXXXXXXXXXXXXXXXX', indicating an error or invalid entry.

When creating an Item, there are 2 ways to select a commodity code:

- If you already know the code you wish to use, you can simply type it into the **NIGP Class** and **NIGP Class Item** fields or you can select it from their associated dropdown boxes.
- If you do not know the appropriate code for the item, you can conduct a search by selecting the eyeglass icon next to the **NIGP Class** dropdown. Selecting this will open a pop-up window displaying the **Commodity and Service Codes** screen. You can conduct a search by typing information into the **NIGP Keyword** field and clicking **Search**. All commodity code descriptions containing the word(s) you've entered will appear. Once you select a code and click **Save & Exit**, the pop-up window will close and the selected code will automatically populate the **NIGP Class** and **Class Item** fields.

Off-Contract Ordering



Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
0.0	0.00	\$0.00	EA	0.0	0.00	\$0.00

NIGP Class:

NIGP Class Item:

Commodity Code:

Tax Rate:

Tax Amount: \$0.00

Extended Amount: \$0.00

Commodity and Service Codes

Search

NIGP Class:

NIGP Class Item:

NIGP Keyword:

Search using:

NIGP Code Browse

Code	Description
105-12	Ball Bearings and Parts
615-67	Paper Clips, Ball Bearing

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Once you've entered data in the desired Item fields, including all required fields, you may select from the standard button options below, as well as a **Save & Add New** button. This button allows you to save the Item you've just created then refreshes this screen to allow you to define another new Item.

If there are any issues regarding the data you've entered, a pop-up window will let you know what needs to be corrected before you will be allowed to save. Once you've concluded adding Items and selected either the **Save & Exit** or **Cancel & Exit** button, the Items tab will display, listing each of the Items on your Requisition.

Once you have Items on your Requisition, from the Items tab you can edit the **Quantity** of each Normal Item, access each Item's details in order to edit them, delete Items, and change the **Print Sequence** of Items. If changes are made to an Item from the Items tab, select the **Save & Continue** button along the bottom of the screen. To view an Item's detail screen and be able to edit all aspects of an Item, click the link next to the Item in the **Item #** column on the far left.



The number of single line items allowed on requisitions, purchase orders (except Master Blanket POs), and invoices is 25 items. Additionally, the total number of accounting lines on a document is limited to 75 separate accounting strings.

Off-Contract Ordering

Open Market Requisition ADSP010-00000546 Status: 1RI - In Progress

General **Items** Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Sort by Column: Print Sequence Sort Descending

Item #	Print Sequence	Item Description							Total Cost	Delete	
		Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount			Freight
1	1.0	10.0	\$15.00	\$15.00	EA - Each	\$0.00		\$0.00	\$0.00	\$150.00	<input type="checkbox"/>
Total										\$150.00	

Please save your changes before sorting. Other

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Recommending Vendors

Once you have finished adding Items, proceed to the Vendors tab. When requesting off-contract goods/services, you are able to search for and select vendors for your Requisition Items. If your Organization has enabled Informal Quotes, you will also be able to solicit price quotes from vendors for your Items through ProcureAZ.

If you are completing a Requisition for Items that are not on-contract, the Vendors tab will allow you to choose any vendor to associate with the Items you're requesting. If it is an Open Market Requisition, you can recommend the vendor(s) you select for the Items being requested, however a Basic Purchasing user will ultimately decide whether to use your recommended vendor, to choose an alternate vendor, or to competitively solicit the Items. You may also choose to not recommend a vendor. While you will receive a yellow Validation Warning about this – you can ignore this if desired.

Open Market Requisition ADSP010-00000132 Status: 1RI - In Progress

General **Item** **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor Validation Warnings

- No recommended vendor.
- Item # 1: No vendor, and there is no recommended vendor at header level.

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit to Address	Recommended	Informal Quote
<input type="text"/>						

Publish Informal Bid On Web

Show Unit Prices to Vendors

Allow Vendor to Change Quantity

Allow Vendor to Change UOM

Select bidder participation

Unrestricted informal bid, all vendors can view and respond

Restricted informal bid, only selected vendors can view and respond

Informal Bid Date Section

Bid Ending Date: (MM/DD/YYYY HH:MM:SS AM or PM)

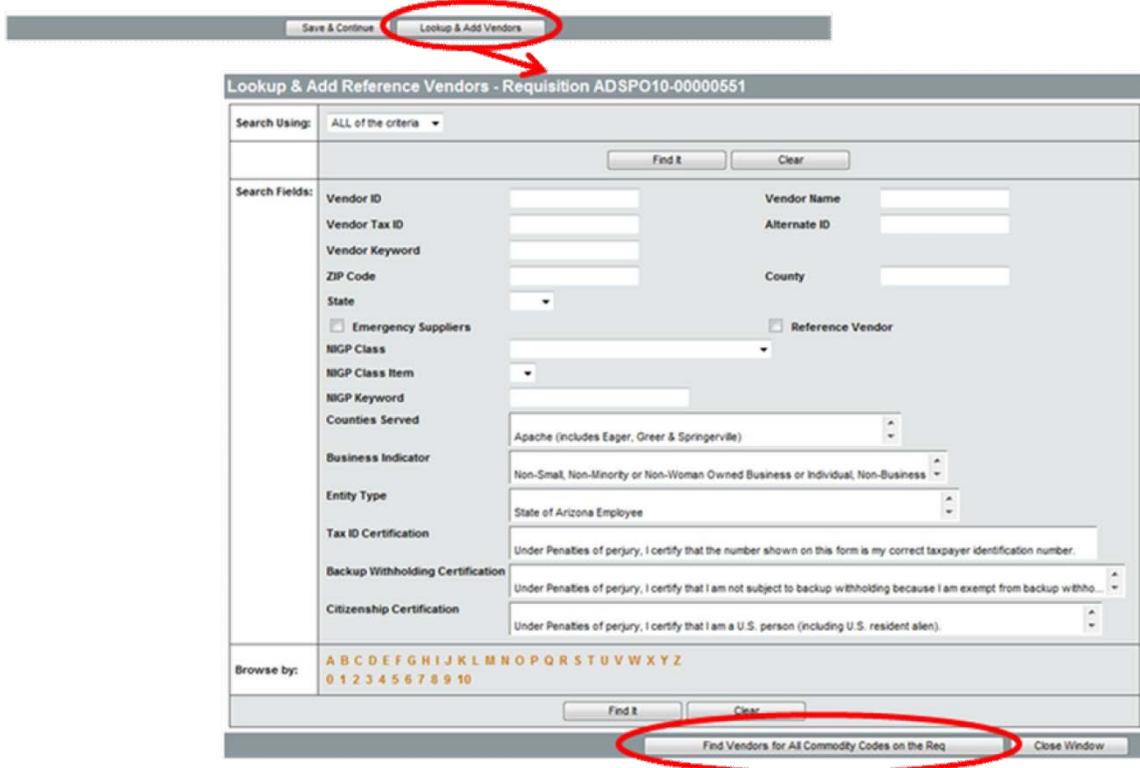
Bid Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date: (MM/DD/YYYY)

Off-Contract Ordering

To recommend a vendor, from the Header-level Vendors tab, select the **Lookup & Add Vendors** button along the bottom of the screen to display **Lookup & Add Reference Vendors** pop-up window.

From here, you can search for a specific vendor by name or ID, or you can search for all vendors that are registered with specific commodity codes. The easiest approach is to use the **Find Vendors for All Commodity Codes on the Req** button along the bottom of the screen. Selecting this button will return a list of all vendors registered with the commodity codes associated with your Requisition Items.



Upon conducting your vendor search, any vendors matching your search criteria will appear below. To recommend a vendor, you will first need to click the check box in the **Select** column next to the vendor. If you wish to recommend different vendors for different Items on your Requisition, you will need to select each of the vendors you want to recommend. Selecting multiple vendors here will also have the effect of giving procurement the opportunity to easily choose amongst any of them. If necessary, you can conduct as many vendor searches as needed by returning to the top of the screen, changing your search criteria and clicking **Find It** again.

Off-Contract Ordering

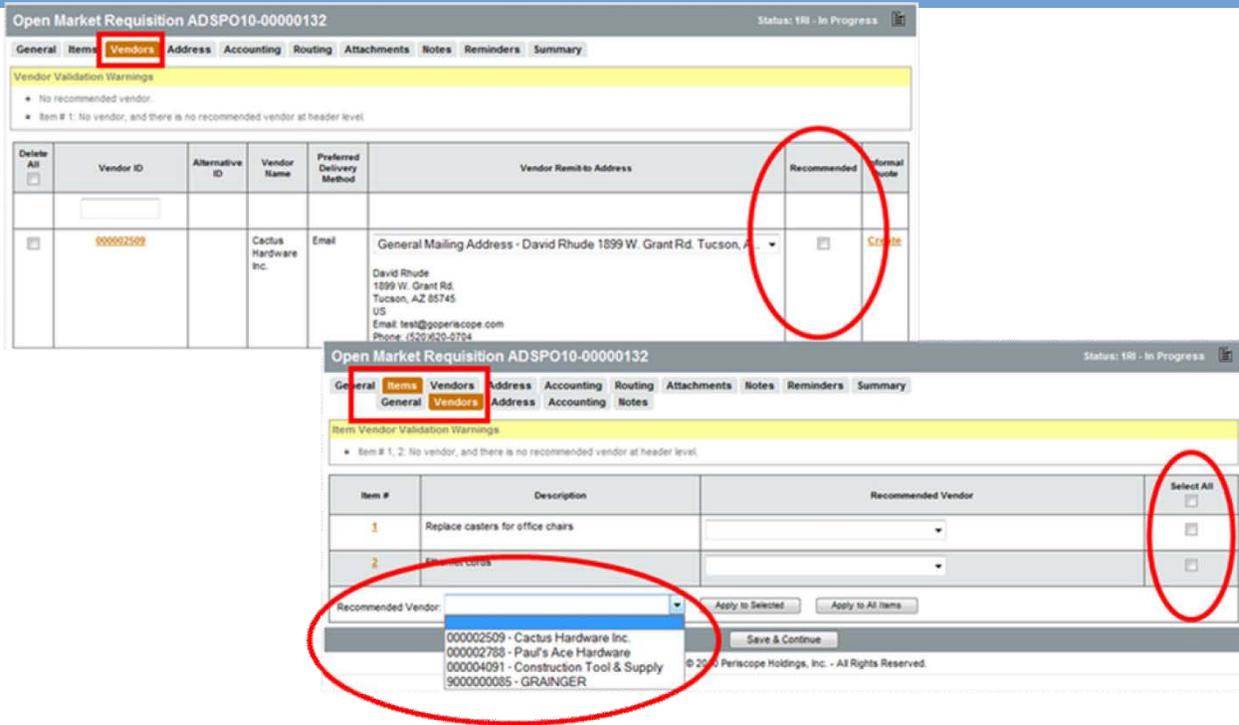
Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="checkbox"/>	9000000930	AL'S ACE HARDWARE				4010 E 29TH STREET	TUCSON	AZ	Micah Thomas	(520) 747-8144	No
<input type="checkbox"/>	9000003646	Bingham Equipment Company				1655 S. Country Club Dr.	Mesa	AZ	Brant Bingham	(480) 969-5516	No
<input type="checkbox"/>	000002509	Cactus Hardware Inc.				1899 W. Grant Rd.	Tucson	AZ	David Rhude	(520) 620-0704	No
<input type="checkbox"/>	000004091	Construction Tool & Supply				5213 S. 30th St #C300	Phoenix	AZ	Brian Hill	(602) 323-2807	No
<input type="checkbox"/>	9000000085	GRANGER				4465 E. Broadway Road	Phoenix	AZ	Alex Rodriguez	(520) 275-0519	No
<input type="checkbox"/>	000002788	Pau's Ace Hardware				2845 n scottsdale rd	scottsdale	AZ	Ron Buchtel	(480) 947-7281	No
<input type="checkbox"/>	000000235	SWABS-Az, Inc				3517 e indian school road	phoenix	AZ	marcy kostewa	(602) 522-2010	No
<input type="checkbox"/>	9000019557	TRIGGLEDIGGER ENTERPRISES, LLC				516 W. HOPI	HOLBROOK	AZ	AMBER HILL	(928) 524-6946	No
<input type="checkbox"/>	000002218	six points hardware				1409 n. 19th ave	phoenix	AZ	chad christison	(602) 252-6157	No

Save & Exit Save & Continue Find Vendors for All Commodity Codes on the Req Close Window

Once you've selected a vendor or vendors and returned to the Header-level Vendors tab, you can recommend a vendor for all Items on the Requisition by clicking the check box in the **Recommended** column next to the vendor, followed by **Save & Continue** along the bottom of the screen.

If you wish to recommend different vendors for different Items on the Requisition, you will need to navigate to the Items-level Vendors tab. Each of the Items on your Requisition will be listed. You can recommend a vendor for each Item individually by selecting a vendor in the **Recommended Vendor** column next to that Item. All vendors that were added on the Header-level Vendors tab will display in the dropdown box. To recommend a vendor for multiple Items, select the vendor to be recommended in the **Recommended Vendor** dropdown along the bottom of the screen, then click the check box in the **Select All** column next to each Item you will be recommending that vendor for. Finally, click the **Apply to Selected** button along the bottom of the screen.

Off-Contract Ordering



Open Market Requisition ADSP010-00000132 Status: 1RI - In Progress

General | **Vendors** | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Vendor Validation Warnings

- No recommended vendor
- Item # 1: No vendor, and there is no recommended vendor at header level.

Delete All	Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit to Address	Recommended	Formal Note
<input type="checkbox"/>	000002509		Cactus Hardware Inc.	Email	General Mailing Address - David Rhude 1899 W. Grant Rd. Tucson, AZ 85745 David Rhude 1899 W. Grant Rd. Tucson, AZ 85745 US Email: test@goperiscope.com Phone: (520)420-3704	<input type="checkbox"/>	Create

Open Market Requisition ADSP010-00000132 Status: 1RI - In Progress

General | **Items** | Vendors | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

General | **Vendors** | Address | Accounting | Notes

Item Vendor Validation Warnings

- Item # 1, 2: No vendor, and there is no recommended vendor at header level.

Item #	Description	Recommended Vendor	Select All
1	Replace casters for office chairs		<input type="checkbox"/>
2	Printer cords		<input type="checkbox"/>

Recommended Vendor: Apply to Selected Apply to All Items

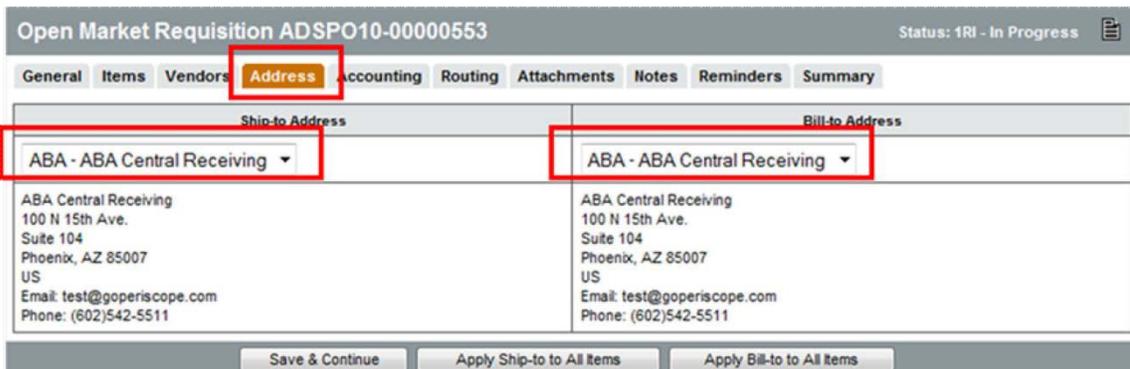
Save & Continue

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Adding Ship-to and Bill-to Addresses

The next tab to view and select is the Address tab. From the Header-level Address tab, you can apply one ship-to address and one bill-to address to all Items. If you have been assigned default addresses, they will already appear on this tab. If you intend to use your default addresses for all Items on your Requisition, then you do not need to visit this tab.

If you need to change the addresses that will apply to all Items, then you can select from the addresses you have access to in the dropdown boxes within the **Ship-to Address** and **Bill-to Address** columns. If you have access to many addresses, then you will be able to search by selecting an eyeglass icon. After selecting a new address, you will need to first select **Save & Continue**. Then, if you changed the ship-to address, you will need to select **Apply Ship-to to All Items**. If you changed the bill-to address, then you will need to select **Apply Bill-to to All Items**.



Open Market Requisition ADSP010-00000553 Status: 1RI - In Progress

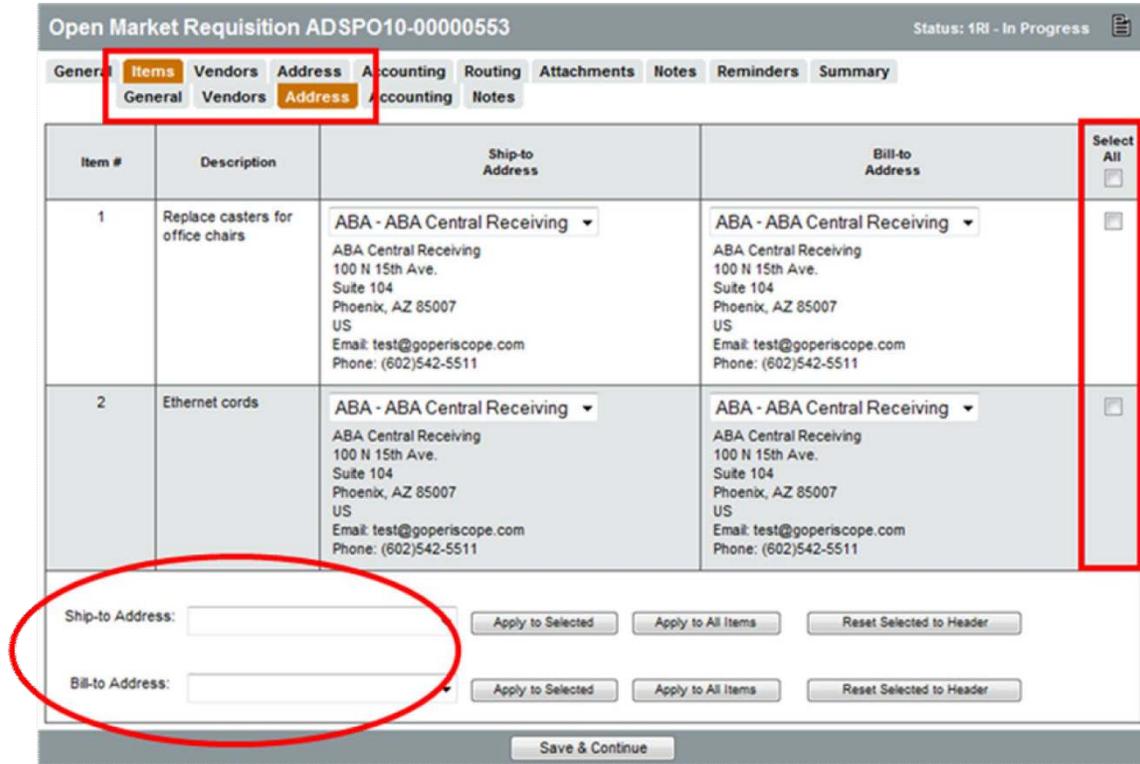
General | Items | Vendors | **Address** | Accounting | Routing | Attachments | Notes | Reminders | Summary

Ship-to Address	Bill-to Address
ABA - ABA Central Receiving	ABA - ABA Central Receiving
ABA Central Receiving 100 N 15th Ave. Suite 104 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-5511	ABA Central Receiving 100 N 15th Ave. Suite 104 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-5511

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

Off-Contract Ordering

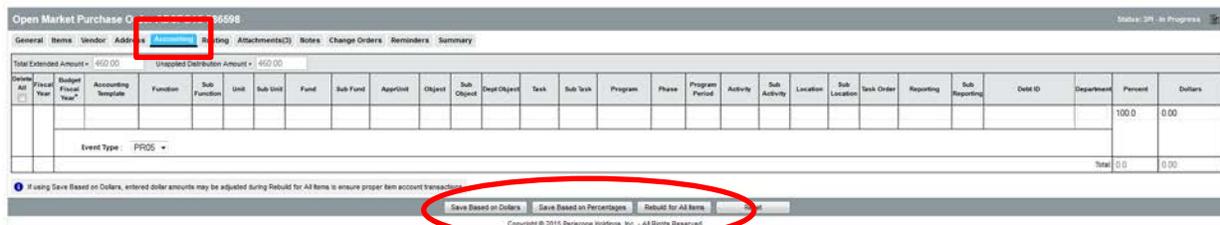
From the Items-level Address tab, you can pick different addresses for each Item on your Requisition. If you need to ship different Items to different addresses, or have vendors send invoices to different addresses for different items, then you will need to use the Items-level Address tab. Upon selecting the Items-level Address tab, you will see each of your Requisition items listed. Within the **Ship-to Address** and **Bill-to Address** columns, you can select different addresses for each Item.



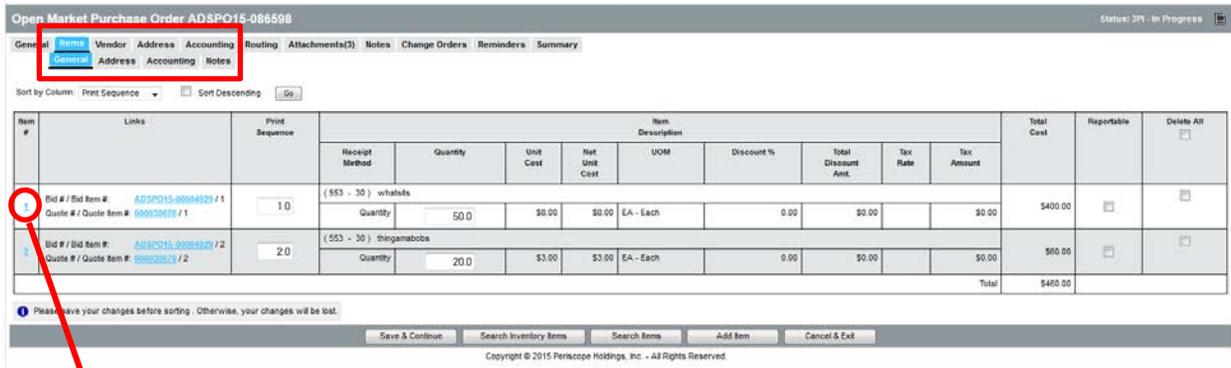
Indicating Funding Sources

All State agency Requisitions require that all items be charged to an account code consisting of at least a Budget Fiscal Year and Function or Template, or Fund. You may be assigned default accounting that will automatically populate your new Requisitions, so that if you don't know the appropriate accounting, you will not need to worry about entering it. **However, even if you will not change your default accounting, you will still need to visit the Accounting tab and select "Rebuild for All Items."**

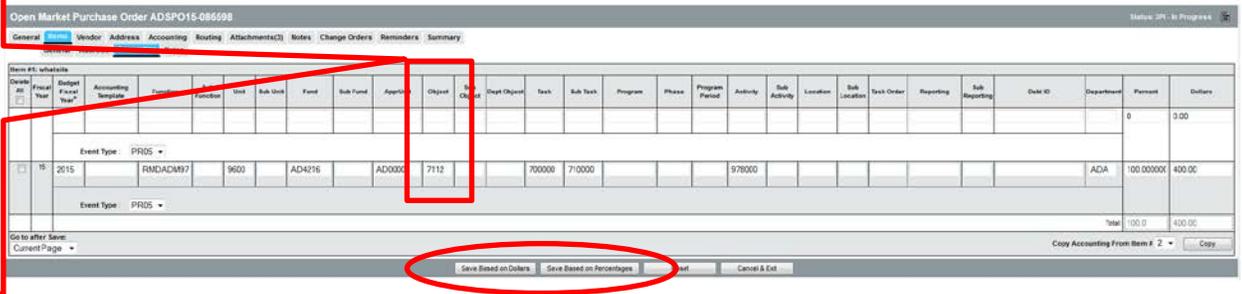
The Header-level Accounting tab allows you to provide the account code(s) that will apply to all Items on your Requisition. If you have default accounting setup, an account code will already appear on this tab when you select it. To add or change accounting, simply click into a field for the account segment you would like to add or change (e.g. Fund, Function or Template) and type in the proper code. Once you've entered the desired codes, in the two far right fields, enter either the percentage of the total cost of the Requisition to charge this account string, or a dollar amount to charge to this account string.



Off-Contract Ordering



Object Code will be inferred from the item commodity code if the field is left blank and a Function Code or Accounting Template is used.



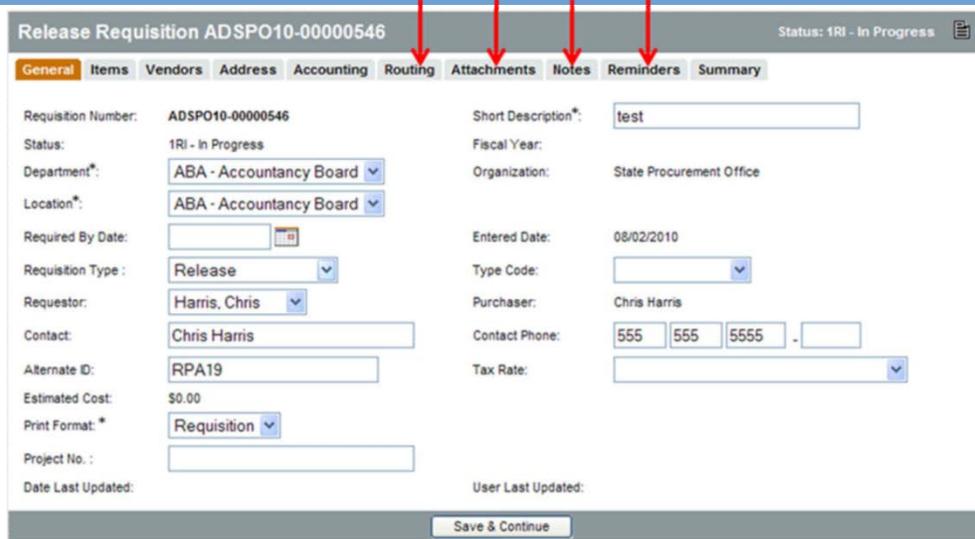
! Please Note: If you use object code inference, check the Item Accounting Tab to see if the object code inferred on each item.

Optional Tabs

Once you've added your items, addresses, and accounting information, you have completed all the required information for a Requisition to be submitted within ProcureAZ. The remaining tabs allow you to input additional information about the Requisition if desired. These tabs include:

- **Routing** – displays the approval path information for the Requisition, but not until the document has been submitted for approval.
- **Attachments** – enables attaching any additional documentation needed for the Requisition.
- **Notes** – enables you to note something about the document that is visible only to users from your agency.
- **Reminders** – enables you to setup an alert for someone from your agency regarding the document.

Off-Contract Ordering



Submitting for Approval

Once you have completed each of the necessary tabs and are ready to submit the Requisition for approval, you'll first want to review all of the information you've entered on the Summary tab. If there are any issues with the information you've provided, validation warnings and/or errors will display along the top of the Summary tab. Yellow warnings do not require action on your part, but red errors require that you fix the issue before you are allowed to submit the Requisition for approval.

Once you have corrected any issues and completed your review, clicking the **Submit for Approval** button on the bottom of the Summary tab will trigger approval of the document.



Upon clicking **Submit for Approval**, the approval path that's been triggered by the document will appear. This displays the users that must approve the document and in what order. Upon clicking **Continue**, the approvers will be notified once it is their turn to approve.

If no approval path is triggered by the document, you can manually add approvers to the document by selecting a user in the **Approver** dropdown and clicking the **Add Approver** button. Once you are ready to notify the approvers, click **Save & Continue**. You will also be given the option to select **Automatic Approval**. Selecting this option automatically approves the document.

Off-Contract Ordering

Open Market Requisition ADSP010-00000553 Status: 1RI - In Progress

Only one approval path "SPOBDGT" matches the document's criteria.

Approval Path	Description	Dollar Range	Approvers		
			User	Level	Type
SPOBDGT	SPO Approvals	\$0.00-\$99,999,999,999.00	James Scarboro	1	Primary
			Jean Clark	1	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel the document submission and go back to the document.

Open Market Requisition ADSP010-00000553 Status: 1RI - In Progress

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver

Once you submit your Open Market Requisition for approval, it will automatically route to procurement following approval to manage going forward. Your off-contract ordering is now complete!