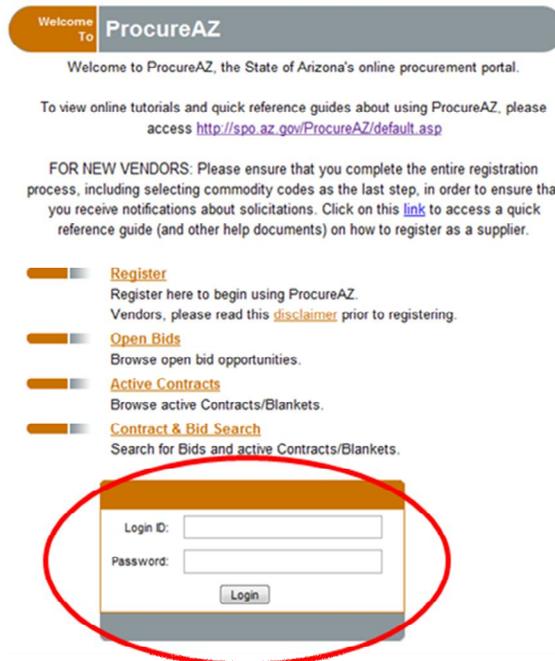


On-Contract Ordering

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. On-contract requests in ProcureAZ are referred to as “Release” 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.



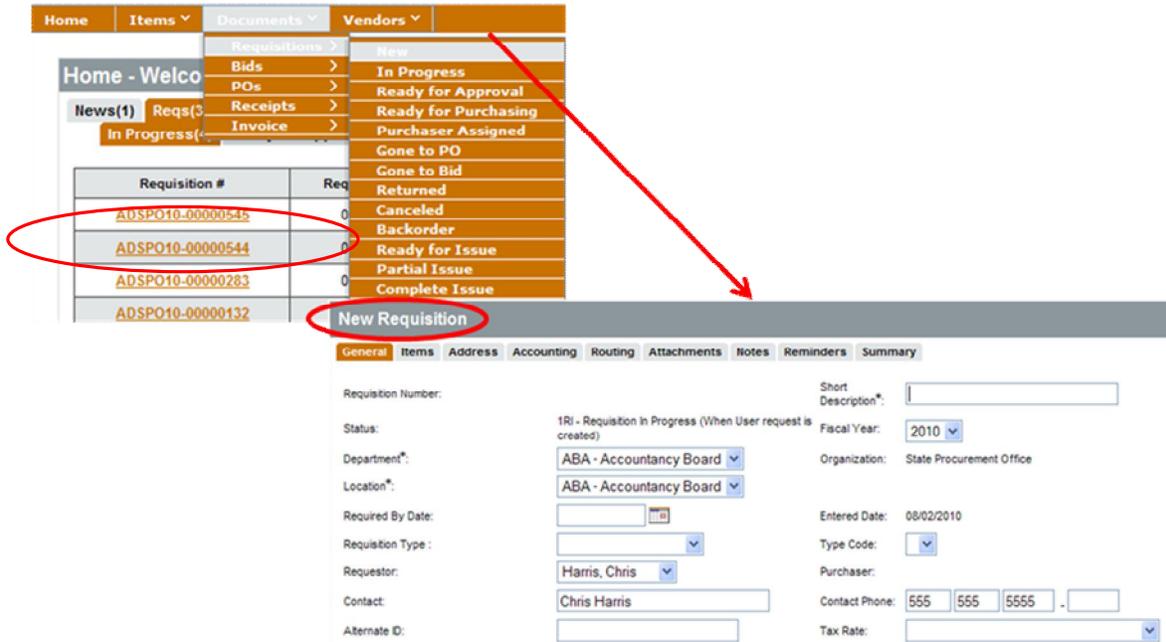
Once logged in, if you have access to multiple roles, ensure that the Department Access or Basic Purchasing role is currently selected in order to enable the creation of a Requisition.



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.

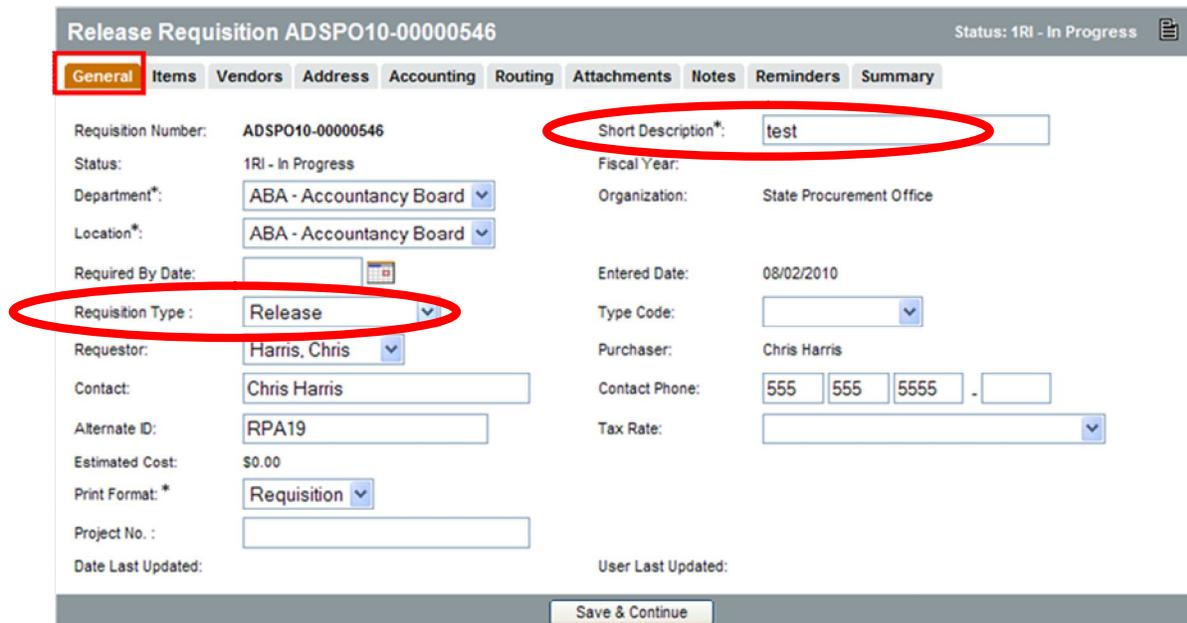
On-Contract Ordering



The screenshot shows the Procure.AZ.gov interface. At the top, there are navigation tabs: Home, Items, Documents, and Vendors. A dropdown menu is open under 'Documents', showing options like Requisitions, Bids, POs, Receipts, Invoice, In Progress, 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. A red arrow points from the 'New Requisition' option in the dropdown to the 'New Requisition' button in the main content area. Below this, a table lists requisitions with IDs like ADSP010-00000546, ADSP010-00000544, ADSP010-00000283, and ADSP010-00000132. The 'New Requisition' form is open, showing fields for Requisition Number, Status, Department, Location, Required By Date, Requisition Type, Requestor, Contact, Alternate ID, Short Description, Fiscal Year, Organization, Entered Date, Type Code, Purchaser, Contact Phone, 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 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 "Release" in the **Requisition Type** field. Click **Save & Continue** once complete.

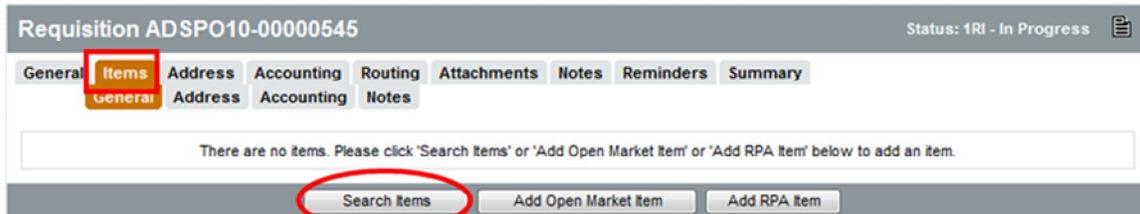


The screenshot shows the 'Release Requisition ADSP010-00000546' form. The status is '1RI - In Progress'. The 'General' tab is selected. The form fields are: Requisition Number: ADSP010-00000546; Status: 1RI - In Progress; Department*: ABA - Accountancy Board; Location*: ABA - Accountancy Board; Required By Date: [calendar icon]; Requisition Type: Release; Requestor: Harris, Chris; Contact: Chris Harris; Alternate ID: RPA19; Estimated Cost: \$0.00; Print Format*: Requisition; Project No.: [empty]; Date Last Updated: [empty]; Short Description*: test; Fiscal Year: 2010; Organization: State Procurement Office; Entered Date: 08/02/2010; Type Code: [dropdown]; Purchaser: Chris Harris; Contact Phone: 555 555 5555; Tax Rate: [dropdown]; User Last Updated: [empty]. A 'Save & Continue' button is at the bottom.

On-Contract Ordering

Finding Items

Next, select the Items tab to find and copy the line-items setup on contracts in ProcureAZ over to your Requisition. From the Items tab, select the **Search Items** button to search for on-contract Items.



Requisition ADSP010-00000545 Status: 1RI - In Progress

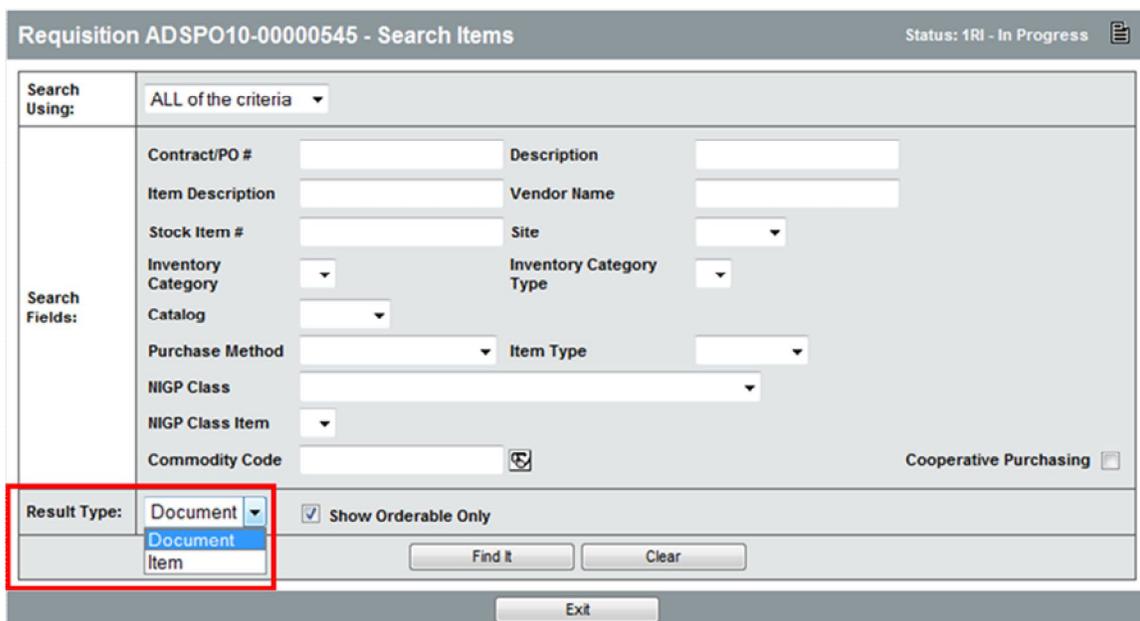
General **Items** Address Accounting Routing Attachments Notes Reminders Summary

General Address Accounting Notes

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

Search Items Add Open Market Item Add RPA Item

Selecting the **Search Items** button on the Items tab will display a screen that enables you to search for and add on-contract Items. To conduct a search, enter your search criteria in the available **Search Fields** and click **Find It** to have the system return the matching results. Note the **Result Type** field along the bottom of screen. Selecting "Item" in this field will return a list of Items that you can directly copy to your Requisition. Selecting "Document" will return a list of contracts, which you can select to view its specific line-items.



Requisition ADSP010-00000545 - Search Items Status: 1RI - In Progress

Search Using: ALL of the criteria

Search Fields:

Contract/PO # Description
Item Description Vendor Name
Stock Item # Site
Inventory Category Inventory Category Type
Catalog
Purchase Method Item Type
MIGP Class
MIGP Class Item
Commodity Code Cooperative Purchasing

Result Type: Document
Document
Item

Show Orderable Only

Find It Clear

Exit

Once you've conducted your search, your results will appear below under the heading **Blanket Results**. If you decide to copy Items to your Requisition from the current screen, once you've indicated the desired quantity, along the bottom of the screen you'll want to select one of the "Save" buttons.

On-Contract Ordering

Blanket Results

Release Open Market RPA

1-25 of 12374
1 2 3 4 5 6 7 8 9 10 ▶▶

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Class Class Item	Commodity Code	Discount %	Master Blanket # / Line #	Direct Release Allowed
<input type="checkbox"/>	0	0.0	Digital Microwave Equipment - Contract is expiring in the Fall of 2009. New contracts, now in evaluation, will replace ...	\$0.00	EA - Each	839 - TELEPHONE EQUIPMENT, ACCESSORIES AND SUPPLIES 51 - Microwave Equipment (See Class 045 for Household Ovens)		0.0%	AD010220-005-A11 / 8	Yes
<input type="checkbox"/>	0	0.0	INSIDE PLANT- Horizontal station cable runs, copper, voice, data & video (pricing with universal workstation outlets and ...	\$45.02	EA - Each	204 - COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS 13 - Cables: Printer, Disk, Network, etc.		0.0%	AD020193-018-A10 / 1	Yes
<input type="checkbox"/>	0	0.0	INSIDE PLANT- Horizontal station cable runs, copper, voice, data & video (pricing with universal workstation outlets and ...	\$90.05	EA - Each	204 - COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS 13 - Cables: Printer, Disk, Network, etc.		0.0%	AD020193-018-A10 / 2	Yes

1-25 of 12374
1 2 3 4 5 6 7 8 9 10 ▶▶

Save & Exit Save & Continue Save & Next Page Cancel & Exit

If you selected “Document” as your **Result Type**, you’ll need to select the document you’d like to add Items from before you’ll see a list of items and be able to either select them or indicate a quantity to copy to your Requisition. Once you are done viewing the Items on that contract and have selected either **Save & Exit** or **Cancel & Exit** along the bottom of the screen, you will be returned to your original “Document” search results list. From here, you can conduct another search, or click **Cancel & Exit** along the bottom of the screen to return to the Items tab of your Requisition. This will NOT delete or cancel any Items you have copied to your Requisition.

Blanket Results

Release Open Market RPA

1-25 of 153
1 2 3 4 5 6 7

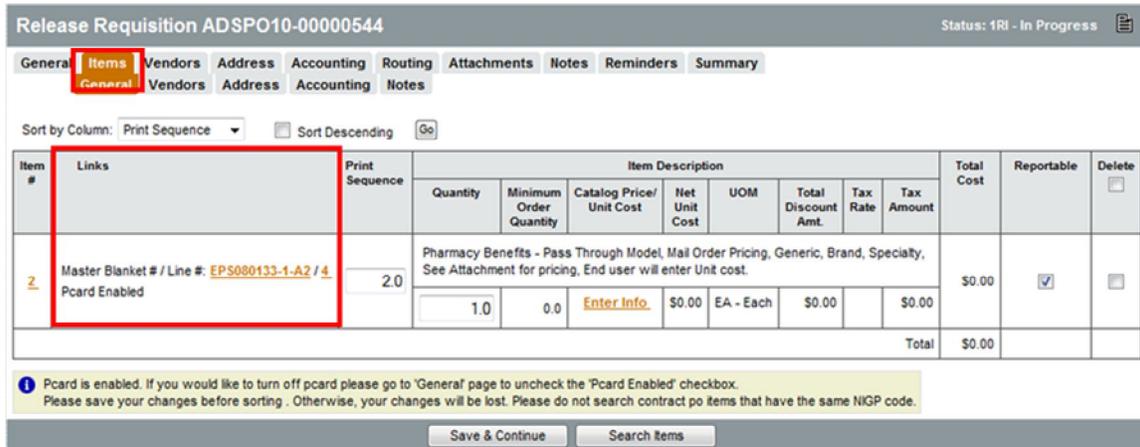
Master Blanket #	Effective Date	Expiration Date	Description	Vendor Name	Department	Direct Release Allowed
AD010220-005-A11	05/01/2009	10/31/2010	Digital Microwave Radio Equipment	Microwave Networks Incorporated	AGY	Yes
AD020193-018-A10	04/01/2009	10/29/2010	Cabling Communication Systems	COMPEL	AGY	Yes
AD040038-001-A8	01/03/2009	01/02/2011	Electronic Monitoring Services (WSCA Contract No. 14600)	Pro Tech Monitoring, Inc.	AGY	Yes
AD040504-A3-4-AZ	06/01/2009	12/31/2010	Envelopes, Plain and Printed (Statewide)	MeadWestvaco	AGY	Yes
AD040506-A1-1-A11	02/01/2009	10/30/2010	Office Supplies and Equipment (Statewide)	OfficeMax - A Boise Company	AGY	Yes

1-25 of 153
1 2 3 4 5 6 7

Cancel & Exit

On-Contract Ordering

Once you've added on-contract items to your Requisition and returned to the Items tab, the items you selected will appear. A column labeled **Links** will appear containing links to the contract that the item is associated with, and the detail screen for that item on the contract. It is advised that you review a contract for Narrative Items that may provide you with further instruction before requesting Items off of it, and the links in this column provide you with an opportunity to do so.



Release Requisition ADSP010-00000544 Status: 1RI - In Progress

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

Sort by Column: Print Sequence Sort Descending

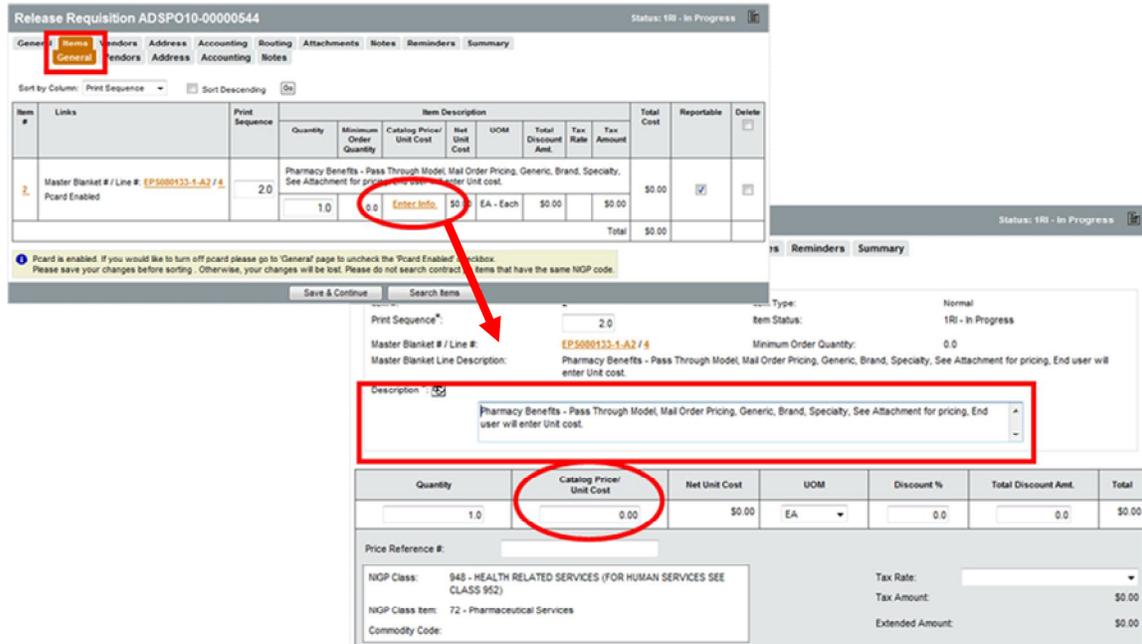
Item #	Links	Print Sequence	Item Description							Total Cost	Reportable	Delete
			Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate			
2	Master Blanket # / Line #: EPS080133-1-A2 / 4 Pcard Enabled	2.0	1.0	0.0	Enter Info.	\$0.00	EA - Each	\$0.00		\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Total										\$0.00		

i Pcard is enabled. If you would like to turn off pcard please go to 'General' page to uncheck the 'Pcard Enabled' checkbox. Please save your changes before sorting. Otherwise, your changes will be lost. Please do not search contract po items that have the same NIGP code.

If you added an on-contract Item that does not have a **Unit Price**, you will see a link labeled **Enter Info** in the **Catalog Price/Unit Cost** field on the Items tab. You must provide the **Unit Cost** for the item. For Items without a unit cost, read the Item Description for additional information about how to order the Item. The pricing may be contained in a Price Sheet attached to the contract, in a separate catalog, or it may require that you contact the vendor to determine the pricing. Generally, it will also be necessary for you to provide more descriptive information about what you are actually intending to request.

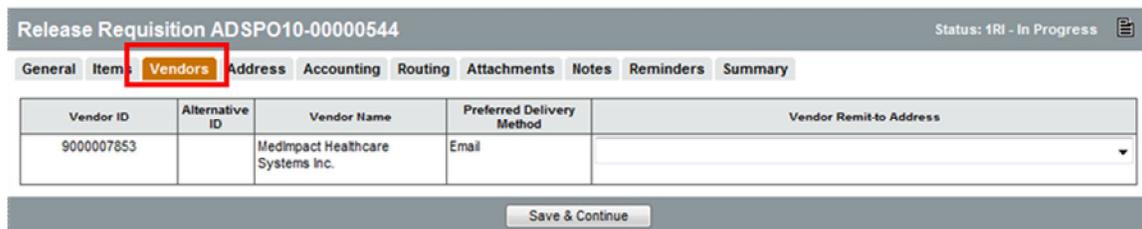
Upon selecting the **Enter Info** link, the screen displaying all of the information about the Item will appear. The **Description** field is open to editing to permit you to add more information about what the Item is meant to represent. Any description you provide will appear on the resulting PO in addition to the description of the item as it appears on the contract in ProcureAZ. The **Catalog Price/Unit Cost** field is also open to editing to permit you to enter in the price. An additional field labeled **Price Reference #** also appears on this screen enabling you to document your reference # for the unit cost you enter. Once complete, select the **Save & Exit** button along the bottom of the screen to return to the Items tab.

On-Contract Ordering



Reviewing the Vendors Tab

Once you are done adding items to your Requisition, proceed to the Vendors tab. This tab will display the contractor(s) whose contracts you chose items from. You will not need to do anything on this tab.



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**.

On-Contract Ordering

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

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

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.

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

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

General Vendors **Address** Accounting Notes

Item #	Description	Ship-to Address	Bill-to Address	Select All
1	Replace casters for office chairs	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 - ABA Central Receiving ABA Central Receiving 100 N 15th Ave. Suite 104 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-5511	<input type="checkbox"/>
2	Ethernet cords	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 - ABA Central Receiving ABA Central Receiving 100 N 15th Ave. Suite 104 Phoenix, AZ 85007 US Email: test@goperiscope.com Phone: (602)542-5511	<input type="checkbox"/>

Ship-to Address: Apply to Selected Apply to All Items Reset Selected to Header

Bill-to Address: Apply to Selected Apply to All Items Reset Selected to Header

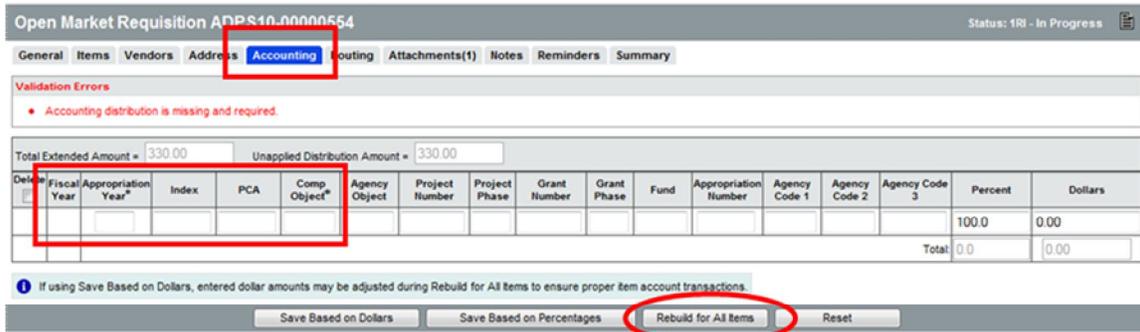
Save & Continue

Indicating Funding Sources

All State agency Requisitions require that all items be charged to an account code consisting of at least an Appropriation Year, Index or PCA, and Comp Object. 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."**

On-Contract Ordering

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. PCA, Index, etc.) 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.



Open Market Requisition APPR40.00000554 Status: 1RI - In Progress

General Items Vendors Address **Accounting** Routing Attachments(1) Notes Reminders Summary

Validation Errors

- Accounting distribution is missing and required.

Total Extended Amount = 330.00 Unapplied Distribution Amount = 330.00

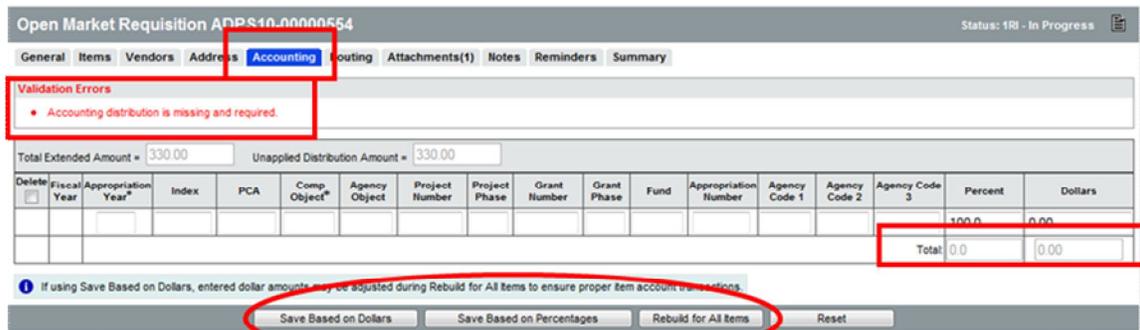
Delete	Fiscal Year	Appropriation Year*	Index	PCA	Comp Object*	Agency Object	Project Number	Project Phase	Grant Number	Grant Phase	Fund	Appropriation Number	Agency Code 1	Agency Code 2	Agency Code 3	Percent	Dollars	
																100.0	0.00	
																Total:	0.0	0.00

! If using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.

Save Based on Dollars Save Based on Percentages **Rebuild for All Items** Reset

Next, you'll need to save the account string you've entered. If you entered a percent to charge to the account string, select **Save Based on Percentages** button along the bottom of the screen. If you entered a dollar amount to charge to the account string, select **Save Based on Dollars** button along the bottom of the screen.

Once you've got 100% of the Requisition accounted for, you must click **Rebuild for All Items** to have the accounting applied to the Requisition. You'll continue to see the red Validation Error along the top of the screen until you do so.



Open Market Requisition APPR40.00000554 Status: 1RI - In Progress

General Items Vendors Address **Accounting** Routing Attachments(1) Notes Reminders Summary

Validation Errors

- Accounting distribution is missing and required.

Total Extended Amount = 330.00 Unapplied Distribution Amount = 330.00

Delete	Fiscal Year	Appropriation Year*	Index	PCA	Comp Object*	Agency Object	Project Number	Project Phase	Grant Number	Grant Phase	Fund	Appropriation Number	Agency Code 1	Agency Code 2	Agency Code 3	Percent	Dollars	
																100.0	0.00	
																Total:	0.0	0.00

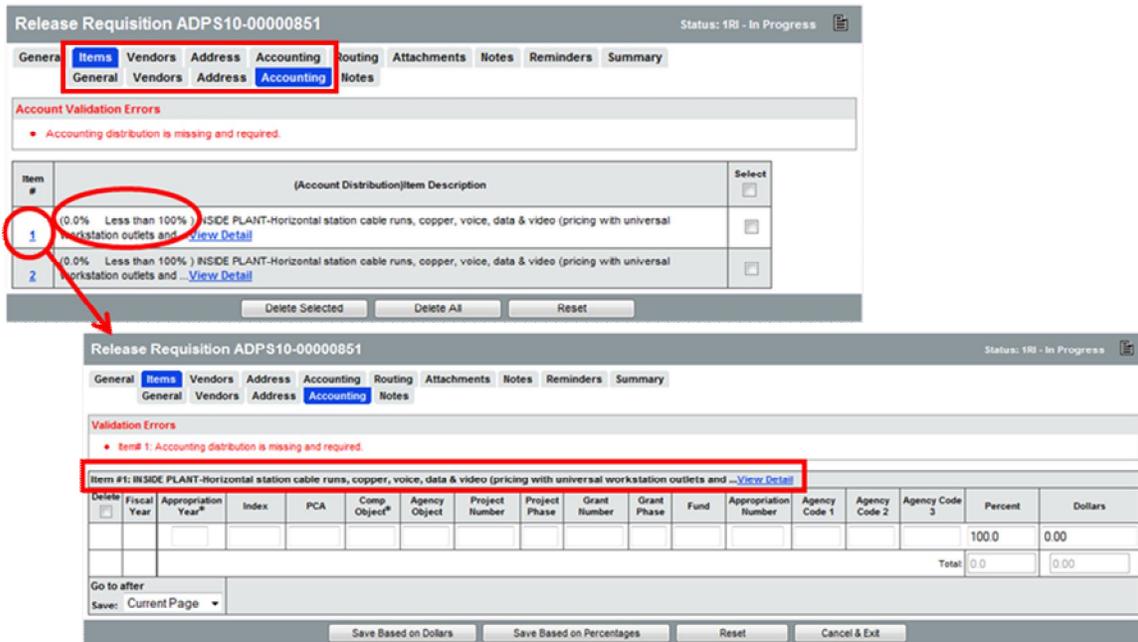
! If using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.

Save Based on Dollars Save Based on Percentages **Rebuild for All Items** Reset

If you need to enter different accounting information for each item on the Requisition, proceed to the Items-level Accounting tab. Selecting this tab will display a screen listing each Item on your Requisition. Within the **(Account Distribution) Item Description** column, the percentage of each Item that has been charged to an account string displays. All Items must be 100% accounted for before you are able to submit the Requisition.

To enter accounting information for an Item, select the link in the **Item #** column for that Item. The same screen that appears on the Header-level Accounting tab will display, however the accounting entered here will apply only to the Item selected. The Item description appears directly above the row of account segments.

On-Contract Ordering



Release Requisition ADPS10-0000851 Status: 1RI - In Progress

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

Account Validation Errors

- Accounting distribution is missing and required.

Item #	(Account Distribution)Item Description	Select
1	(0.0% Less than 100%) INSIDE PLANT-Horizontal station cable runs, copper, voice, data & video (pricing with universal workstation outlets and ... View Detail)	<input type="checkbox"/>
2	(0.0% Less than 100%) INSIDE PLANT-Horizontal station cable runs, copper, voice, data & video (pricing with universal workstation outlets and ... View Detail)	<input type="checkbox"/>

Validation Errors

- Item #1: Accounting distribution is missing and required.

Delete	Fiscal Year	Appropriation Year*	Index	PCA	Comp Object*	Agency Object	Project Number	Project Phase	Grant Number	Grant Phase	Fund	Appropriation Number	Agency Code 1	Agency Code 2	Agency Code 3	Percent	Dollars
<input type="checkbox"/>																100.0	0.00
Total:																0.0	0.00

Go to after
Save: Current Page

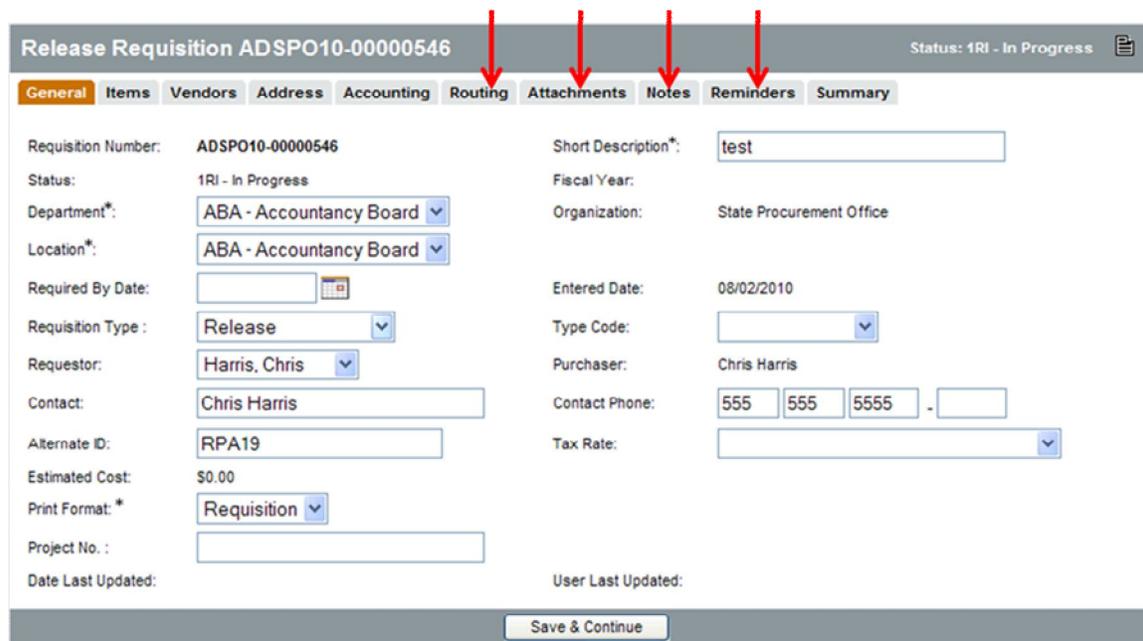
Save Based on Dollars Save Based on Percentages Reset Cancel & Exit

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.

On-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.

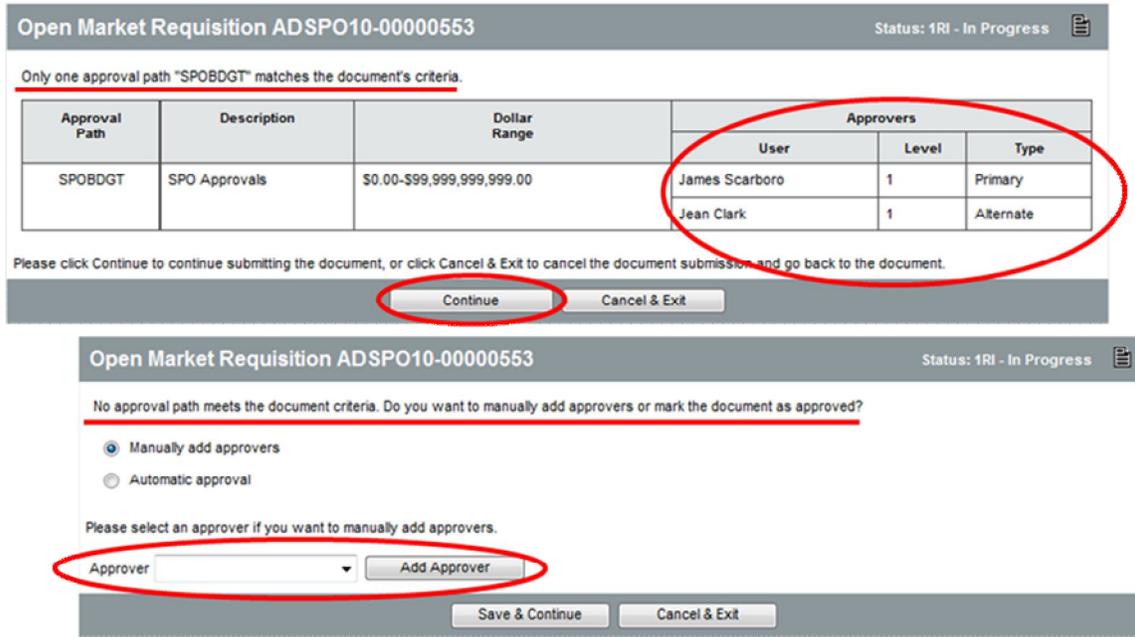


Upon clicking **Submit for Approval**, the approval path that's been triggered by the document will appear. This displays the users that must approve the document and in what order. Upon clicking **Continue**, the approvers will be notified once it is their turn to approve.

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

On-Contract Ordering

approvers, click **Save & Continue**. You will also be given the option to select **Automatic Approval**. Selecting this option automatically approves the document.



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.

Continue **Cancel & Exit**

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

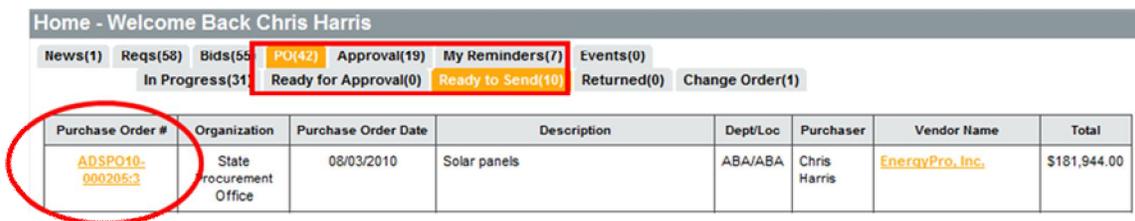
Please select an approver if you want to manually add approvers.

Approver: **Add Approver**

Save & Continue **Cancel & Exit**

Sending a Release Requisition

After an on-contract Requisition (Release) has been approved, if it was a Standard Release, it will route to procurement to send the corresponding PO. If it was a Direct Release, you will be notified upon final approval to send the corresponding PO in "Ready to Send" status. You can access your "Ready to Send" POs from the Home page by selecting the PO tab, then the "Ready to Send" tab underneath it.



Home - Welcome Back Chris Harris

News(1) Reqs(58) Bids(55) **PO(42)** Approval(19) My Reminders(7) Events(0)
 In Progress(31) Ready for Approval(0) **Ready to Send(10)** Returned(0) Change Order(1)

Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total
ADSP010-000205:3	State Procurement Office	08/03/2010	Solar panels	ABA/ABA	Chris Harris	EnergyPro, Inc.	\$181,944.00

The Summary tab of the PO will initially display. Scroll to the bottom of the screen, where you will see two options to submit your order to the vendor. You can select either "Send Email and Notify Vendor" to send an email to the vendor to notify them that they can login to ProcureAZ to retrieve the PO, or you can also select "Set to Printed Status," and the PO will not be transmitted to the vendor.

Once you have made your selection click "Save & Continue". The PO will then be converted to "Sent" status. Your contract ordering is now complete!

On-Contract Ordering

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disapproved/canceled by	Comment View
There are no approval paths found for this Purchase Order.									

Vendor Notification Actions

Option(s) Send Email and Notify Vendor Set to Printed Status

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