

Agency Procurement Manual

This document details Edison Procurement processes for State Agencies, using the authority granted by the Department of General Services, Purchasing Division (DGS Purchasing). It is designed to give step-by-step instructions on how to fulfill many types of procurement needs, including:

- Contract Release Orders
 - Ordering APCAT Items by "Lot"
- Ordering Asset Items from Contract
- Placing a Local Purchase Order for items not on Contract (within \$0 and \$25000)
 - Direct-Entry Purchase Orders under \$5000
- Placing an order for a One-time purchase over \$25000 through DGS Purchasing
- Requesting a New Contract or Reprocurring an existing Contract through DGS
- Requesting Delegated Purchase Authority
 - Using Delegated Purchase Authority

Each of these sections is designed to be self-contained and to walk you through the procurement process from start to finish. As such, most of the information between sections may be repeated, as the basic principle for nearly every type of purchase is the same. The difference is in the details and this document attempts to map out all the details that go into making a certain type of purchase.

Instructions on use:

- Begin with the first section, **Contract Release Orders**. Purchasing Policies dictate that agencies must always buy from an existing Term Contract, if one is available, before going off-contract. This section details how to determine whether an item is on contract, and proceeds through how to complete the order if the item is found to be on contract. If the item is not on contract, you will be directed to additional sections, in the order shown below.
- If the item is on contract, but must be tagged as an "Asset", it requires several unique steps. Use the **Asset Contract Releases** section for further information.
- If the item is not on contract and a suitable contract item cannot be found, it will be entered as a One-Time Purchase.
 - If the total dollar amount of the One-Time Purchase is under \$25000, it will be done using the **Local Purchases** section. If the total dollar amount of the One-Time Purchase is under \$5000, you can use a Direct-Entry Purchase Order, detailed in that sub-section.

- If the total dollar amount of the One-Time Purchase is \$25000.01 or greater, it must be sent to DGS Purchasing to be bid out. The **One-Time Purchase to DGS** section covers this process.
- If an agency has determined that a Contract is necessary or desirable to purchase a given item, they must request the contract from DGS Purchasing. Instructions on this process, as well as how to "reprocure" an existing Agency Term Contract that is due to expire can be found in the **Contract Requests** section.

Things to remember:

- This document contains screenshots, generally located after a section of text that describes the process or step. While every effort has been made to make them applicable to the step they follow, some screenshots may not accurately reflect what the text instructs the user to do. In that case, **the text overrules the image.**
- This document is not intended to be printed. It *can* be printed, but a large portion of the functionality will be lost, as it includes many hyperlinks to aid navigation between sections.
- This document is designed as a "per use" set of instructions. It is intended to be used by the individual user in the course of their job responsibilities, and is written to allow even a user with no prior system experience the ability to follow it from start to finish and complete their job. As such, *it needs to be distributed to every Agency User,* and it **must** be read by each user on an individual basis.
- Edison is a vastly complex system, but a few basic principles apply to every section. The best way to learn these "basic principles" is via direct, first-hand system experience. **Users should attempt to use the system with this documentation to get as far as they can.**
- If an error is encountered, record the error and contact the Supervisor or Power User in the division. Some problems may be User-Profile-setup related, and must be resolved through the Edison Help Desk. However, not every problem is a system problem. Attempt to resolve issues internally using the documentation before contacting the Edison Help Desk.

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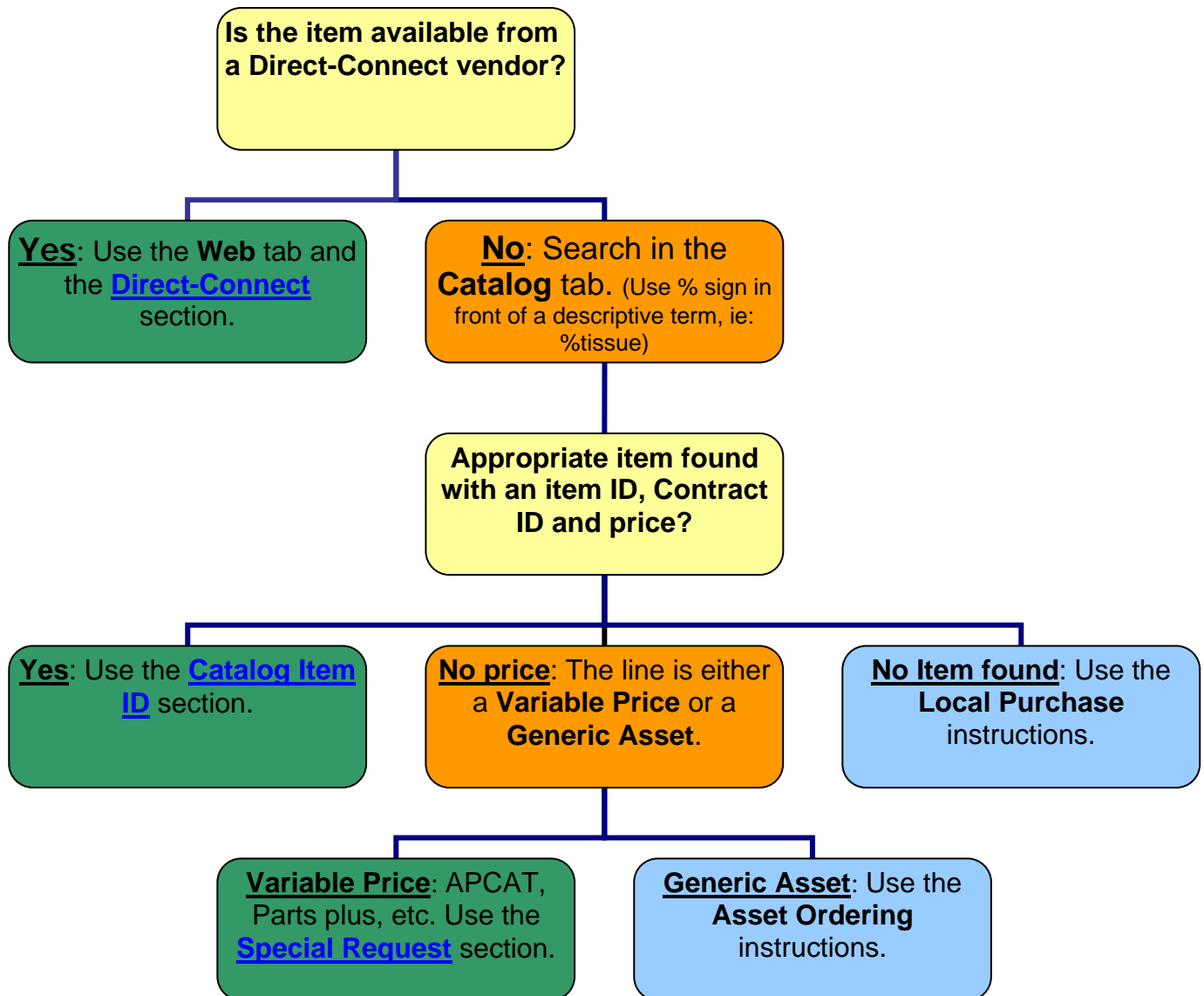
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Agency Procurement: Contract Release Orders

Contract Release Orders

Procurement requests to order from an *Existing* Term Contract are processed through the eProcurement Requisition method. Contracts must be set up prior to having releases processed. There are several different subtypes of Contract Release Orders, but the only difference is where the Line Items are entered in ePro.

- Contract Lines with existing Item IDs that are not assets are pulled through the **Catalog** tab.
- Contract Lines bought through Direct-Connect contracts are pulled from the **Web** tab. Current Direct-Connect vendors are viewable on the Web tab.
- Contract Lines without a set price must be done through the **Special Request** tab. This includes "generic" Assets, "parts plus" lines, "APCAT" lines, "Time and Labor" lines and *any other contract item or service that cannot have one pre-set, unchanging price.*



Agency Procurement: Contract Release Orders

Creating Requests

Contract Release Orders

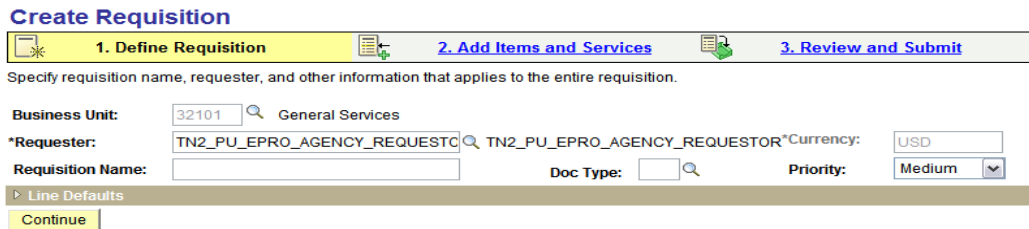
- 1) You must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



- 2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



- 3) Clicking on **Create Requisition** will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.



Step 1: Define Requisition



- 4) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.
 - a. **Requisition Name:** Click in the **Requisition Name** field and then type in the name. The name must include a brief description of the item ordered.

Agency Procurement: Contract Release Orders

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

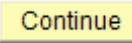
Business Unit: 32101 General Services

*Requester: robej0811001 Robert J Hamblin *Currency: USD

Requisition Name: HVAC Repair Doc Type: Priority: Medium

Line Defaults

Continue

5) After naming your Requisition, click the **Continue** Button. 

Step 2: Add Items and Services

2. Add Items and Services

6) The next step is to search for Items to add to the Requisition. The way you will add items to the Requisition depends on if you are able to find an appropriate Item ID, and how the Item ID is set up to be used.

Searching for Items

The results of your item search will determine the method you use to finish the Contract Release order.

1) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For Contract Requests, you will begin with the **Catalog** tab, unless you know your item is carried by a Direct-Connect vendor. If the item is carried by a Direct-Connect vendor, it **must be ordered using the [Direct-Connect](#) instructions later in this document.**

To search for items:

- First, click on the **Catalog** tab under the Search bar.

Create Requisition

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: DO NOT USE THIS SEARCH BAR Search

Catalog Favorites Templates Services Forms Web Special Request

- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu. This should show as the default option when the Catalog tab is selected.

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- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. **This is the ONLY search field that should be used, NOT the one that's at the top of the screen.**
- Type a description into the **Description** field. Include a percent sign (%) before and after each word in the description, and then press the **Search** button. An example would be %red% %hat% when searching for a “Red hat”. *Pressing the Enter key does not return any search results!*

- 2) If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns.

Quantity	Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	Vendor
<input type="checkbox"/> 1.0000	1000003827	SOFTWARE LICENSE FEES AND SUPPORT: EXSU271-LAOH EXTENSIONS PACK FOR LINUX EXSU279-LAOH RED HAT ENT AS3 FOR ITAN 2 DBDC105-0000 DBSP-OA CLIENT MODE ACCESS		2829.000	MO	1.0000		Bull Hn Information Systems Inc

Select All / Deselect All

Add to favorites Compare

- 3) Depending on the results returned, you will do one of several different things. First, you must determine whether the results you received fit what you need, and how to use the results you received.

If no item IDs were returned at all, refine your Search criteria. Remember that "less is more" and that you are not searching by what an item "is", but by what it is "listed" as. For

Agency Procurement: Contract Release Orders

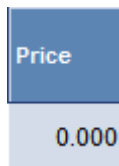
example, "Toilet Paper" may be listed as "Tissue, Toilet". If, after refining your search, you are still unable to find any items, consult with your supervisor or Power User. The item may not be on contract, and thus will need to be requested as a Local Purchase. Further information can be found in the **Local Purchases** instructions, located separately.

If an item ID was returned that matches what you need, you must verify that it does not have a Variable Price and that it is indeed a contract item.

Checking Variable Price: Look at the Price column.



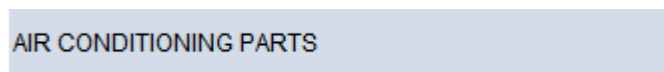
If it has a zero listed (0), this means that the item does not have a defined price.



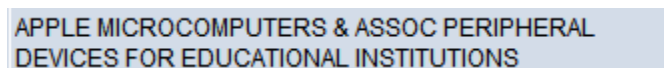
There are two possible causes for this. From here, look at the Item Description.



If the item is any type of "Service" or "Parts for maintenance" or anything that would normally be ordered under the "APCAT" principle, it is likely a **Variable Price** item. These are items that are either a set discount from a catalog or a generic listing for "parts" that will be purchased along with a service request. **These must be ordered using the [Special Request](#) instructions later in this document.**




If the item is "sensitive" (Weapons, Computer equipment, etc), it is likely a **Generic Asset** item. These item IDs are created by the Content Team to cover a wide category of "sensitive" items, and the description will usually end with GENERIC ASSET. Further instructions can be found in **Asset Ordering**, separate from this document.



If the item has a **Price** listed and the **Description** matches what you need, you must verify that it is on an active Contract. Scroll over to the right and look at the **Contract ID** column.

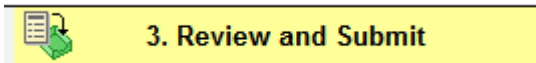
Agency Procurement: Contract Release Orders

- 2) After inputting the desired quantity, click the Add () button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.

Requisition Summary	
Description	Qty UOM
GUARD, SERVICE - REGULAR H...	1 HR
Total Lines:	1
Total Amount (USD):	8.50




Repeat this process for all additional lines that must be on the contract release order. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.


Step 3: Review and Submit



Reviewing and Submitting Requisitions:

The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type. For Contract Release Orders, use **DCR**.

Business Unit:	<input type="text" value="32101"/>	General Services			
*Requester:	<input type="text" value="robej0811001"/>	 Robert J Hamblin		*Currency:	<input type="text" value="USD"/>
Requisition Name:	<input type="text" value="Guard Services"/>	Doc Type:	<input type="text" value="DCR"/> 	Priority:	<input type="text" value="Medium"/> 

- 1) You can now add any additional information to the **Line Comments** section to provide DGS with the necessary information to process the Contract Request. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon () to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments.

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Line Comments

Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK **Cancel**

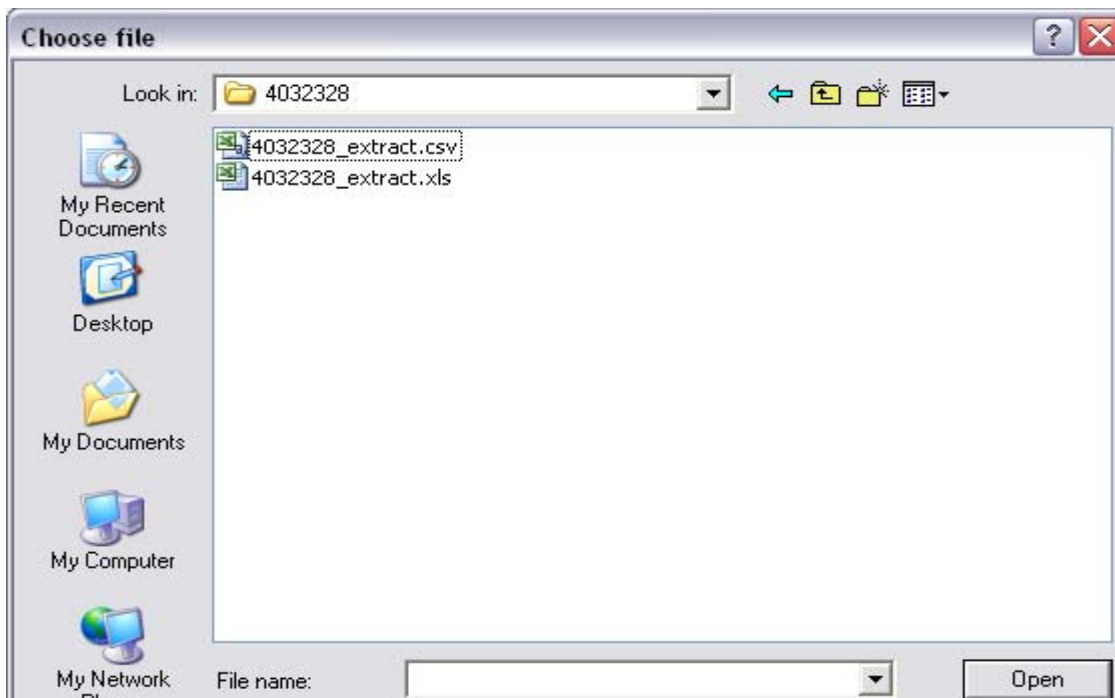
To attach any supplemental information that is contained in a separate Word, PDF or Excel document:

1. Click the **Add Attachment** button. (**Add Attachment**) This takes you to the Add Attachment page.


Browse...

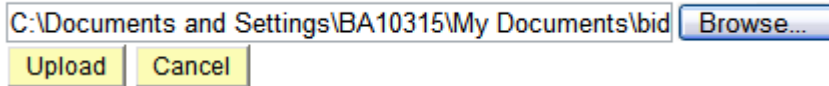
Upload **Cancel**

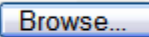
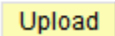
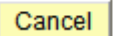
2. Click the **Browse** button (**Browse...**). This opens up a window to let you search for files on your computer.

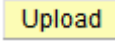


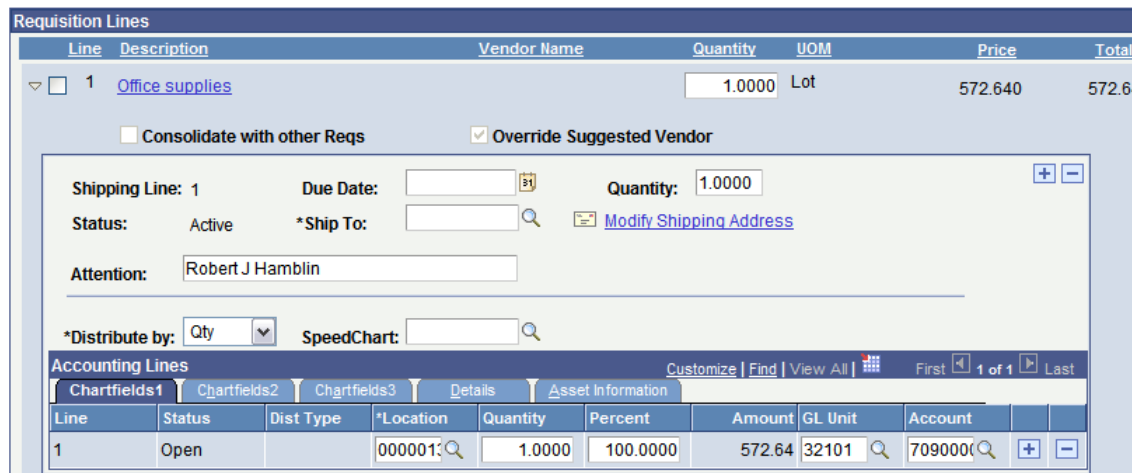
Agency Procurement: Contract Release Orders

3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.



C:\Documents and Settings\BA10315\My Documents\bid 
 

4. Click the **Upload** button () once the file is found.
 5. Repeat for all necessary files on that line.
- 2) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.



Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000
Status: Active *Ship To: [Modify Shipping Address](#)
Attention:

*Distribute by: Qty SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

- 3) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**


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Sections to Review/Modify:

Shipping Addresses:

To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFM SHIPTO, both of which must be changed.

*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

Search Results

View All First  1-7 of 7  Last

Ship To Location	Description
0000000019	BLUE BIRD TOWER_395 FIRE TOWE
0000000020	BLUE BIRD TOWER_395 FIRE TOWE
0000000021	BLUE BIRD TOWER_395 FIRE TOWE
0000000014	LAUREL GROVE TOWER_WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Agency Procurement: Contract Release Orders

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

Address	
Country:	<input type="text" value="USA"/> <input type="text" value="United States"/>
Address 1:	<input type="text" value="312 ROSA L PARKS BLVD"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
Room #:	<input type="text"/> Room Quadrant: <input type="text"/>
City:	<input type="text" value="NASHVILLE"/>
County:	<input type="text" value="DAVIDSON"/>
State:	<input type="text" value="TN"/> <input type="text" value="Tennessee"/>
Prefix:	<input type="text"/>
Phone:	<input type="text"/>
Ext:	<input type="text"/>
Fax:	<input type="text"/>
Postal:	<input type="text" value="37243"/>

Verify that the information is correct. If it is not, choose a different Ship-To location.

From here, you can continue on with the Requisition.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

Agency Procurement: Contract Release Orders

Repeat as necessary for all lines

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.




Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

You must include:

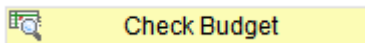
- "Submitting Contract Release Order." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like "This is an order from Contract for Security Guard Services".
- Your contact information, including name and phone number.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button ().

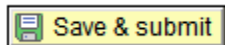
After the justification section is completed, you must Budget Check the document.

Budget Check

- 1) To Budget Check the Requisition, press the "Check Budget" button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- 2) After Budget Check, press the "Save and Submit" button to send the Requisition for Approvals.



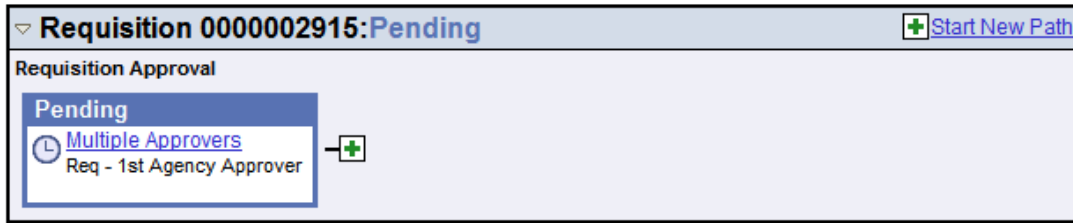
- 3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

- a) To view more information on the approvers, click on the "Multiple Approvers" ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Agency Procurement: Contract Release Orders

Stage 1 - Agency Req Approvals



- b) To add additional approvers, click the Insert Approver button. (+) This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button (🔍) next to the User ID field, then selecting the User ID from the list. *The Approver you wish to add must be in the system as an Approver before you can select them.*
- i. Use the Radio Buttons below the User ID Field (🔴) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.



- ii. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all commodity approvals.

★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



Agency Procurement: Contract Release Orders

Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:** ).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▾ 0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action... ▾ Go
▾ 0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action... ▾ Go
▾ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action... ▾ Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

▼ Review/Edit Approvers

Requisition Approval

▼ greg:Approved

Requisition Approval

Approved

✓ [TN P1 BUB CT1 SV DT1](#)

Req - 1st Agency Approver

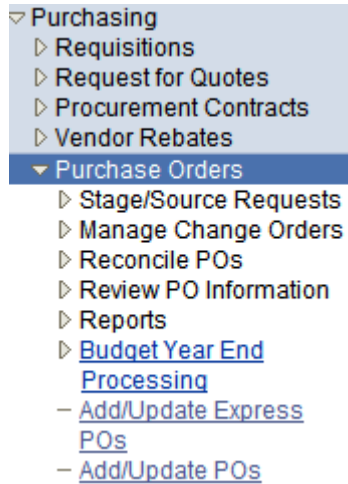
11/25/2008 - 2:50 PM

When the Requisition is approved, you are ready to proceed.

Agency Procurement: Contract Release Orders

Creating Purchase Orders

- 1) **Contract Release Orders:** Navigate to the Purchase Order page by clicking the **Purchasing** link from the menu, then clicking the **Add/Update POs** link.



- 2) This will bring up the Search page. Click the **Add New Value** tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the **Add** button.

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit:

PO ID:

Maintain Purchase Order


Purchase Order

Unit: 32101	PO Status: Initial
PO ID: NEXT	Budget Status: Not Chk'd
Copy From: <input type="text"/>	<input type="checkbox"/> Hold From Further Processing
Header	
*PO Date: <input type="text" value="12/12/2008"/> <input type="button" value="🔍"/>	Vendor Search Sub Contractor
Vendor: <input type="text"/> <input type="button" value="🔍"/>	Vendor Details Insur/Bond/Cert
*Vendor ID: <input type="text"/> <input type="button" value="🔍"/>	Doc Tol Status: Valid
*Buyer: <input type="text"/> <input type="button" value="🔍"/>	Receipt Status: Not Recvd
PO Reference: <input type="text"/>	*Dispatch Method: <input type="text"/> <input type="button" value="Dispatch"/>
Amount Summary	
Header Details PO Activities Add ShipTo Comments	Merchandise: 0.00
PO Defaults	Freight/Tax/Misc.: 0.00 <input type="button" value="Calculate"/>
Add Comments	Total Amount: 0.00 USD
Add Items From	
Purchasing Kit Catalog Item Search	

- 3) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Contract Release Orders, this will be found by looking at the Requisition lines for the contract Vendor assigned to the item.

Agency Procurement: Contract Release Orders

*Vendor ID:

- 4) Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon () located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.
- 5) For Contract Releases, you will be copying from a Requisition created by your Agency Requester. To do so, click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.

Copy From:

▼ Header


*PO Date:

Vendor

Contract

Purchase Order

Requisition

- 6) This takes you to the **Copy Purchase Order from Requisition** page. It is shown on the first picture below. Click the Lookup Icon () by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the second picture below. Type in your Business Unit if it did not default and press the Search button to bring up a list of Requisition IDs. Find the Requisition you were assigned and click the **Requisition ID** link.

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:	<input type="text" value="32101"/>	Origin:	<input type="text"/>
Buyer:	<input type="text"/>	Max Rows:	<input type="text" value="20"/>
Vendor ID:	<input type="text"/>	<input checked="" type="checkbox"/> Include Reqs With No Vendor	
Category:	<input type="text"/>	<input checked="" type="checkbox"/> Include Inventory Items	
Requisition ID:	<input type="text"/>	<input type="checkbox"/> Stockless Item	
Contract ID:	<input type="text"/>	<input type="checkbox"/> Exclude Auto Source Item	
<input type="button" value="Search"/>			

Agency Procurement: Contract Release Orders

Look Up Requisition ID

Business Unit: 32101
Requisition ID: begins with

[Basic Lookup](#)

Search Results

View All First 1-4 of 4 Last

Requisition ID	Requester
000000073	TN2 PU EPRO AGENCY REQUESTOR
000000072	TN2 PU EPRO AGENCY REQUESTOR
000000071	TN2 PU EPRO AGENCY REQUESTOR
000000061	tn_gross

- 7) Clicking the correct Requisition ID will bring you back to the **Copy Purchase Order from Requisition** page. Click the **Select All** ([Select All](#)) link to select all the lines for copying. Then click the **Copy to PO** () button to copy the requisition lines over to the PO.

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY-001
*Location: [Vendor Information](#)
*Address: Terms: Net 30
Contact: Basis Dt Type:
Salesperson:

Vendor Details Message

Country: USA United States Prefix:
Address 1: Fax:
Address 2: Prefix:
Address 3: Phone:
Room #: Room Quadrant:
City:
County: Postal:
State: Tennessee

- 8) This should default in all the information from the Requisition, and return you to the main Purchase Order page. Click the **Vendor Details** ([Vendor Details](#)) link, which takes you to the Vendor Details page.

Agency Procurement: Contract Release Orders

- Click the Lookup Icon (🔍) next to the **Terms** field, and select the appropriate set of Payment Terms. This can be obtained from the Vendor's quote or the Contract. The default is Net 30.

Terms: 🔍 Net 30

- Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon (🔍) next to the **Location** field to select a different location and use the Lookup Icon (🔍) next to the **Address** field to select a different address.

Maintain Purchase Order

Vendor Details -- Machinery Sales Co Inc

Unit:	32101	PO ID:	NEXT	Vendor:	MACHINERY -001
*Location:	<input type="text" value="MAIN"/> 🔍			Vendor Information	
*Address:	<input type="text" value="1"/> 🔍	<input type="button" value="Show Address Details"/>		Terms:	<input type="text" value="30"/> 🔍 Net 30
Contact:	<input type="text"/> 🔍	<input type="button" value="Show Contact Details"/>		Basis Dt Type:	<input type="text" value="Acct Date"/> ▼
Salesperson:	<input type="text"/> 🔍	<input type="button" value="Show Salesperson Details"/>			

Look Up Location

Vendor SetID: SHARE
Vendor ID: 0000085887
Vendor Location: ▼

[Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Vendor Location Description

MAIN	MEMPHIS
----------------------	-------------------------



- Once the correct address is entered, press the **OK** button at the bottom of the page to return to the main **Purchase Order** screen.
- After reviewing all the information on the PO, return to the main **Purchase Order** page and click the **Save** button, located at the bottom of the screen.
- At this point, there are several other options that can be changed, but they should all default to the correct values. The defaults take information from your Buyer Profile and the copied Requisition and insert it automatically into the Purchase Order.
- When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check** (🔍) icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. An example is shown at the top of the next page.

Agency Procurement: Contract Release Orders




Express Purchase Order

Purchase Order

Unit: 32101

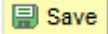
PO Status: Open  

PO ID: 0000000186

Budget Status: Not Chk'd   

Copy From:

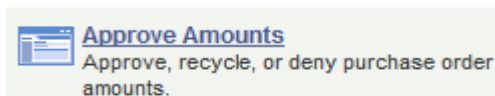
Hold From Further Processing

15) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page. 

16) You must now submit the PO into Workflow. To do so, click the **Purchasing** link on the left-hand menu. Then click **Purchase Orders**.

- Purchasing
- Requisitions
- Procurement Contracts
- Purchase Orders

17) Click the **Approve Amounts** link under the Purchase Order section.




18) Use the Search screen that appears to find your Purchase Order by typing the PO number into the **PO Number** field and changing the drop-down box from **Begins** to **Contains**, as shown below. Then press **Search**.


Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: = 

PO Number: contains


SetID: begins with 

Contract ID: begins with

Release Number: =

Purchase Order Reference: begins with

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

19) Click the link for the PO that appears.

Search Results

View All

First 1 of 1 Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

Agency Procurement: Contract Release Orders

20) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to **Approve**, then press the **Save** button. It defaults at **Approve**.

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: Approval Status: Initial

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

▶ Lines

Once all approvals are met, the Purchase Order can be dispatched.

Dispatching Purchase Orders

1) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

*Dispatch Method:

Amount Summary

Merchandise:

Freight/Tax/Misc.:

Print

EDX

Email

Fax

Phone

Print

- 2) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then click **OK**.
- 3) A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
- 4) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right, to open a list of files. Click the one ending in .PDF to open the finalized Purchase Order to be printed, e-mailed, or faxed to the vendor.

[Your Catalog ID Contract Release is now complete.](#)

Agency Procurement: Contract Release Orders

Special Request

This section assumes that you do not have a valid Edison Item ID that is associated to a contract and has a set price!

- 1) To enter a Special Request, click the “Special Request” tab, then click the “Special Item” link.

The screenshot shows the 'Special Item' form with the following fields and options:

- *Item Description: [Text Input]
- *Price: [Text Input]
- *Quantity: [Text Input]
- *Category: [Text Input with Search Icon]
- Vendor ID: [Text Input with Search Icon]
- Vendor Item ID: [Text Input]
- Mfg ID: [Text Input with Search Icon]
- Mfg Item ID: [Text Input]
- *Currency: [Dropdown Menu, currently showing USD]
- *Unit of Measure: [Text Input with Search Icon]
- Due Date: [Text Input with Calendar Icon]
- [Suggest New Vendor](#)

Additional Information section:

- Send to Vendor
- Show at Receipt
- Show at Voucher

Buttons: Add Item, Cancel, Add or Start New Type

The Special Request tab has several required information fields, listed below.

All the fields marked with an asterisk (*) must be completed.

- **Item Description:** This is used to enter a detailed description of the item. Begin with a noun and follow with descriptive terms. **If five or more items of the same type and on the same "APCAT" line are to be purchased, combine all potential lines into one and use a general description that would cover all the items.** Example would be “Fishing Equipment” if one were buying fishing poles, tackle boxes, fishing hooks, fishing line and fishing nets. **Please note: This cannot be used for items kept in inventory or tagged as “assets”.**
- **Price:** This is the estimated price for the item.
- **Quantity:** This is the quantity needed.
- **Unit of Measure:** This is used to select a Unit of Measure. Press the Lookup Button to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list. **(If multiple items, unit of measure will be “Lot”. If request is for a job, use "EA" for Each.)**
- **Category:** This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button to pull up the NIGP search screen, shown below.

Agency Procurement: Contract Release Orders

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Catalog	Category	Description	Find in Tree
1 PROCUREMENT ITEMS	610-00	OFFICE SUPPLIES: CARBON PAPER AND RIBBONS, ALL TYPES	
2 PROCUREMENT ITEMS	615-00	OFFICE SUPPLIES, GENERAL	
3 PROCUREMENT ITEMS	615-60	Office Supplies, General (Not Otherwise Classified)	

- Start off by changing the drop-down box from **Description** to **Category**. Type “-00” into the Search field, without quotes, then press the **Find** button. This will bring up a listing of the generic NIGP Category codes at the header level. A “header” NIGP code has the format **xxx-00** with the “xxx” replaced by a three-digit number. Pick a generic header from this list and write it down.
- Type the first three digits of the Header into the Category field and press the Find button. This will return a list of all the valid NIGP codes within that header.
- Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen.
- After entering in all the required fields (listed above), press the Add Item button. After all the requested items are entered, click the **Review and Submit** tab located at the top right. An example of a completed Special Request is shown below.

Catalog Favorites Templates Services Forms Web **Special Request**

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

Vendor ID: [Suggest New Vendor](#)


Vendor Item ID:

Mfg ID:

Mfg Item ID:

- 2) After entering in all the required fields press the Add Item button ()

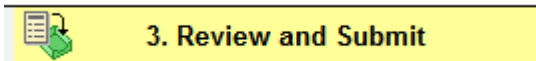
Agency Procurement: Contract Release Orders

- 3) After inputting the desired quantity, click the Add () button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.




Requisition Summary	
Description	Qty UOM
Air-conditioning, installa...	1 EA
Total Lines: 1	
Total Amount (USD): 30,000.00	


Repeat this process for all additional lines that must be on the contract release order. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions: The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type. For Contract Release Orders, use **DCR**.

Business Unit:	<input type="text" value="32101"/>	General Services			
*Requester:	<input type="text" value="robej0811001"/>	 Robert J Hamblin	*Currency:	<input type="text" value="USD"/>	
Requisition Name:	<input type="text" value="Guard Services"/>	Doc Type:	<input type="text" value="DCR"/> 	Priority:	<input type="text" value="Medium"/> 

- 1) You must now add any additional information to the **Line Comments** section. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon () to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments.

Agency Procurement: Contract Release Orders

Line Comments

Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD

Send to Vendor Show at Receipt Show at Voucher

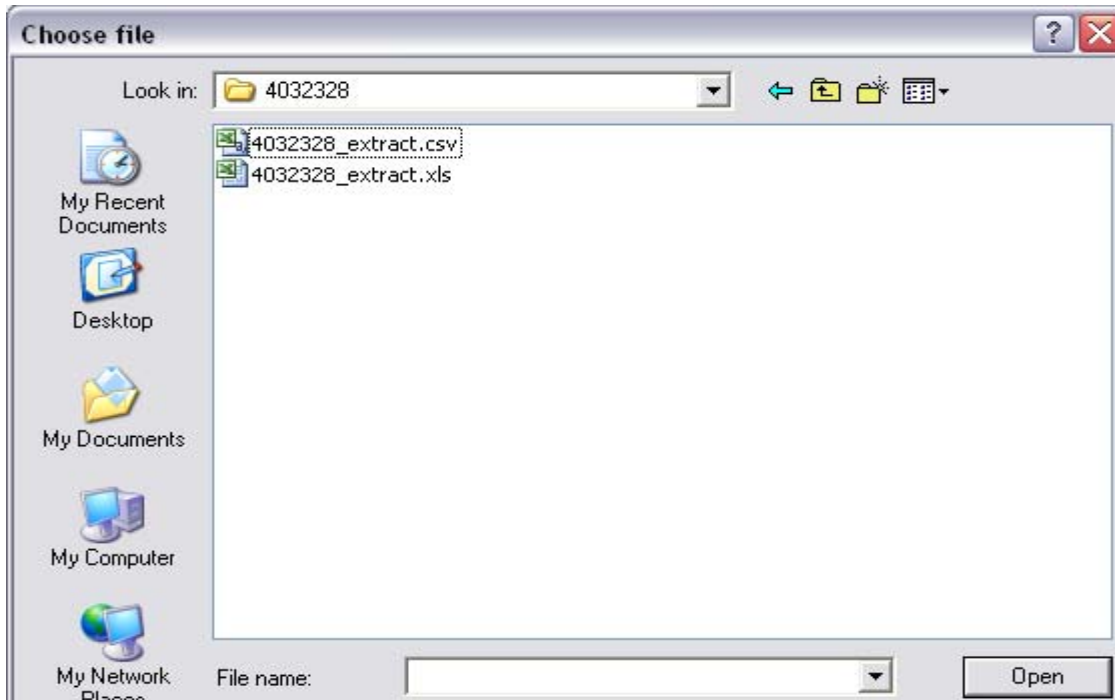
Note for orders combining multiple items off of one APCAT Line: You *must* use the **Line Comments** section to attach a listing of what items are included in the "Lot" you are ordering. This is generally done by attaching a scanned copy of the invoice received from the vendor.


To attach any supplemental information that is contained in a separate Word, PDF or Excel document:

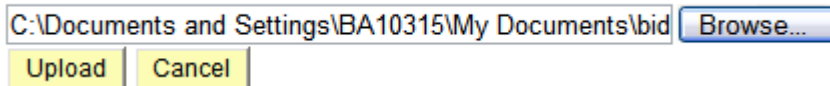
1. Click the **Add Attachment** button. () This takes you to the Add Attachment page.

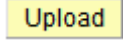
2. Click the **Browse** button (). This opens up a window to let you search for files on your computer.

Agency Procurement: Contract Release Orders



3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.



4. Click the **Upload** button () once the file is found.
 5. Repeat for all necessary files on that line.
- 2) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000

Status: Active *Ship To: [Modify Shipping Address](#)


Attention: Robert J Hamblin

*Distribute by: Qty SpeedChart:




Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

Agency Procurement: Contract Release Orders

APCAT Contract IDs:

Important! Each APCAT line on the Requisition must have the Contract ID associated with it. To do so, scroll to the right of the screen and click on the **Line Details** icon.  This is located next to the Total (shown below as 250.00).

Create Requisition

 [1. Define Requisition](#)  [2. Add Items and Services](#)  [3. Review and Submit](#)

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: General Services
*Requester: Robert J Hamblin *Currency:
Requisition Name: Doc Type: Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Staplers	American Paper And Twine	50.0000	Each	5.000	250.00
Total Amount:						250.00 USD

Justification/Comments

 Send to Vendor Show at Receipt Show at Voucher

Clicking the **Line Details** icon will bring you to the **Line Details** page.


Line Details

Line: 1 [Staplers](#)

Item Details

Amount: 250.00 USD
Category: 615-60 Office Supplies, General (Not) [View Hierarchy](#)
Buyer: robej0811001 [Buyer Information](#)
Vendor: 0000000895 American Paper And Twine [Suggest New Vendor](#)
Vendor Location: MAIN NASHVILLE
Vendor's Catalog:
Vendor Item ID: 12345
Manufacturer ID: UPN ID:
Manufacturer's Item ID:
Physical Nature: Goods
 RFQ Required Zero Price Indicator Inspection Required
 Device Tracking Stockless Item

Configuration Info

Click the Expand button () next to the **Contract** section.

Agency Procurement: Contract Release Orders

*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:
Ship To Location:
Description:


[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID:
Ship To Location:
Description:

[Basic Lookup](#)

Search Results

View All First  1-7 of 7  Last

Ship To Location	Description
000000019	BLUE BIRD TOWER 395 FIRE TOWE
000000020	BLUE BIRD TOWER 395 FIRE TOWE
000000021	BLUE BIRD TOWER 395 FIRE TOWE
000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Agency Procurement: Contract Release Orders

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

Address

Country: United States Prefix:

Address 1: Phone:

Address 2: Ext:

Address 3: Fax:

Room #: Room Quadrant:

City:

County: Postal:

State: Tennessee

Verify that the information is correct. If it is not, choose a different Ship-To location. From here, you can continue on with the Requisition.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

Agency Procurement: Contract Release Orders

Repeat as necessary for all lines


Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.



You must include:

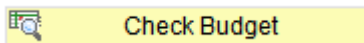
- "Submitting Contract Release Order." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like "This is an order from Contract for Security Guard Services".
- Your contact information, including name and phone number.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button (.

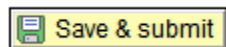
After the justification section is completed, you must Budget Check the document.

Budget Check

- 1) To Budget Check the Requisition, press the "Check Budget" button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- 2) After Budget Check, press the "Save and Submit" button to send the Requisition for Approvals.



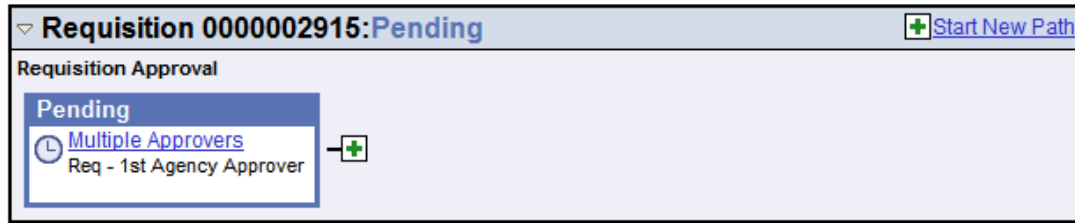
- 3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

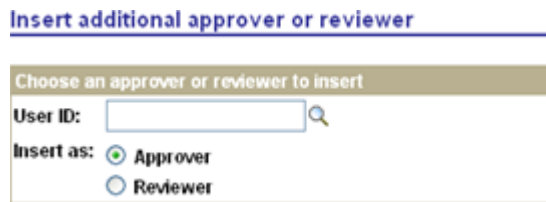
- a) To view more information on the approvers, click on the "Multiple Approvers" ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Agency Procurement: Contract Release Orders

Stage 1 - Agency Req Approvals



- b) To add additional approvers, click the Insert Approver button. (+) This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button (🔍) next to the User ID field, then selecting the User ID from the list. *The Approver you wish to add must be in the system as an Approver before you can select them.*
 - i. Use the Radio Buttons below the User ID Field (🔴) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers must approve to continue the process.



- ii. After selecting the Approver’s User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item’s NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all commodity approvals.

★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



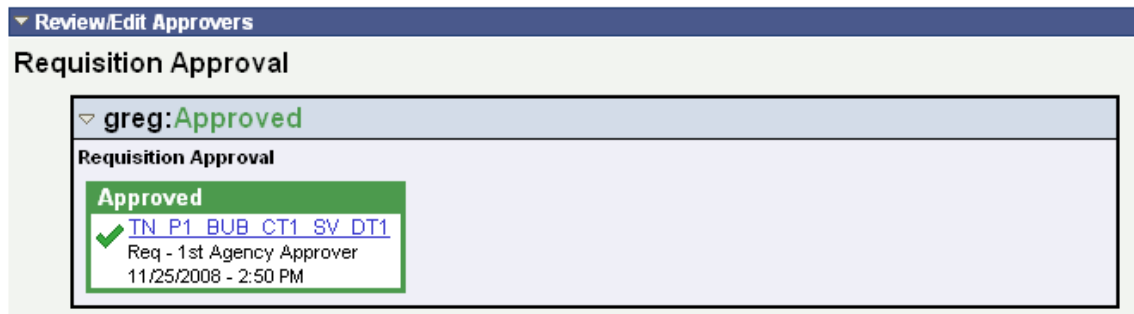
Agency Procurement: Contract Release Orders

Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:** ).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action...> Go
0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action...> Go
0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action...> Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

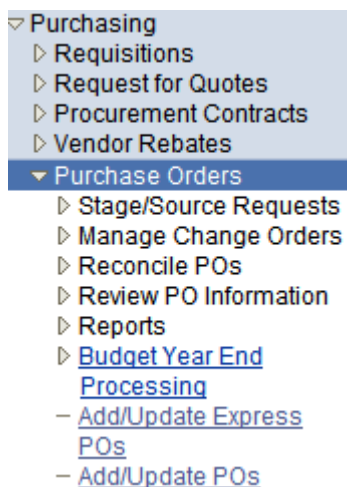


The screenshot shows a 'Review/Edit Approvers' section with a 'Requisition Approval' sub-section. A dropdown menu is open, showing 'greg:Approved'. Below this, a 'Requisition Approval' box contains a green 'Approved' status with a checkmark, and a list of approvers: 'TN P1 BUB CT1 SV DT1', 'Req - 1st Agency Approver', and '11/25/2008 - 2:50 PM'.

When the Requisition is approved, you are ready to proceed.

Creating Purchase Orders

- 1) **Contract Release Orders:** Navigate to the Purchase Order page by clicking the **Purchasing** link from the menu, then clicking the **Add/Update POs** link.




The screenshot shows a 'Purchasing' menu with the following items: Requisitions, Request for Quotes, Procurement Contracts, Vendor Rebates, Purchase Orders (expanded), Stage/Source Requests, Manage Change Orders, Reconcile POs, Review PO Information, Reports, Budget Year End Processing, Add/Update Express POs, and Add/Update POs.

Agency Procurement: Contract Release Orders

- This will bring up the Search page. Click the **Add New Value** tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the **Add** button.

Purchase Order

Business Unit: 





PO ID:

Maintain Purchase Order

Purchase Order

Unit: 32101	PO Status: Initial
PO ID: NEXT	Budget Status: Not Chk'd
Copy From: <input type="text"/>	<input type="checkbox"/> Hold From Further Processing

Header


*PO Date: <input type="text" value="12/12/2008"/> 	Vendor Search	Sub Contractor	Doc Tol Status: Valid
Vendor: <input type="text"/> 	Vendor Details	Insur/Bond/Cert	Receipt Status: Not Recvd
*Vendor ID: <input type="text"/> 			*Dispatch Method: <input type="text"/> <input type="button" value="Dispatch"/>
*Buyer: <input type="text"/> 			Amount Summary
PO Reference: <input type="text"/>			Merchandise: 0.00
Header Details	PO Activities	Add Ship To Comments	Freight/Tax/Misc.: 0.00 <input type="button" value="Calculate"/>
PO Defaults			Total Amount: 0.00 USD
Add Comments			

Add Items From

[Purchasing Kit](#)
[Catalog](#)
[Item Search](#)

- Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Contract Release Orders, this will be found by looking at the Requisition lines for the contract Vendor assigned to the item.


***Vendor ID:** 

- Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon () located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.
- For Contract Releases, you will be copying from a Requisition created by your Agency Requester. To do so, click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.

Copy From:

Header

***PO Date:** Contract
 Purchase Order
Vendor Requisition

- This takes you to the **Copy Purchase Order from Requisition** page. It is shown on the first picture below. Click the Lookup Icon () by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the second picture below. Type in your Business Unit if it did not

Agency Procurement: Contract Release Orders

default and press the Search button to bring up a list of Requisition IDs. Find the Requisition you were assigned and click the **Requisition ID** link.

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:	<input type="text" value="32101"/>	Origin:	<input type="text"/>
Buyer:	<input type="text"/>	Max Rows:	<input type="text" value="20"/>
Vendor ID:	<input type="text"/>	<input checked="" type="checkbox"/> Include Reqs With No Vendor	
Category:	<input type="text"/>	<input checked="" type="checkbox"/> Include Inventory Items	
Requisition ID:	<input type="text"/>	<input type="checkbox"/> Stockless Item	
Contract ID:	<input type="text"/>	<input type="checkbox"/> Exclude Auto Source Item	

Look Up Requisition ID

Business Unit:

Requisition ID:

[Basic Lookup](#)

Search Results

[View All](#) First 1-4 of 4 Last

Requisition ID	Requester
000000073	TN2 PU EPRO AGENCY REQUESTOR
000000072	TN2 PU EPRO AGENCY REQUESTOR
000000071	TN2 PU EPRO AGENCY REQUESTOR
000000061	tn_gross

- 7) Clicking the correct Requisition ID will bring you back to the **Copy Purchase Order from Requisition** page. Click the **Select All** ([Select All](#)) link to select all the lines for copying. Then click the **Copy to PO** () button to copy the requisition lines over to the PO.

Agency Procurement: Contract Release Orders

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY -001

*Location:

*Address: [Show Address Details](#)

Contact: [Show Contact Details](#)

Salesperson: [Show Salesperson Details](#)

[Vendor Information](#)

Terms: Net 30

Basis Dt Type:

Vendor Details Message

Country: USA United States Prefix:

Address 1: Fax:

Address 2: Prefix:

Address 3: Phone:

Room #: Room Quadrant:

City:

County: Postal:

State: Tennessee

8) This should default in all the information from the Requisition, and return you to the main Purchase Order page. Click the **Vendor Details** ([Vendor Details](#)) link, which takes you to the Vendor Details page.

9) Click the Lookup Icon () next to the **Terms** field, and select the appropriate set of Payment Terms. This can be obtained from the Vendor's quote or the Contract. The default is Net 30.

Terms: Net 30

10) Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon () next to the **Location** field to select a different location and use the Lookup Icon () next to the **Address** field to select a different address.

Maintain Purchase Order

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY -001

*Location:

*Address: [Show Address Details](#)

Contact: [Show Contact Details](#)

Salesperson: [Show Salesperson Details](#)

[Vendor Information](#)

Terms: Net 30

Basis Dt Type:

Agency Procurement: Contract Release Orders

Look Up Location

Vendor SetID: SHARE
Vendor ID: 0000085887
Vendor Location: begins with

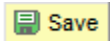
[Basic Lookup](#)


Search Results

View All First 1 of 1 Last

Vendor Location	Description
MAIN	MEMPHIS

- 11) Once the correct address is entered, press the **OK** button at the bottom of the page to return to the main **Purchase Order** screen.
- 12) After reviewing all the information on the PO, return to the main **Purchase Order** page and click the **Save** button, located at the bottom of the screen.



- 13) When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. An example is shown at the top of the next page.

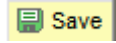
Express Purchase Order

Purchase Order

Unit: 32101 PO Status: Open

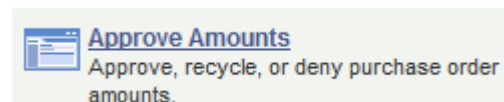
PO ID: 0000000186 Budget Status: Not Chk'd

Copy From: Hold From Further Processing

- 14) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page. 
- 15) You must now submit the PO into Workflow. To do so, click the **Purchasing** link on the left-hand menu. Then click **Purchase Orders**.

- Purchasing
- Requisitions
- Procurement Contracts
- Purchase Orders

- 16) Click the **Approve Amounts** link under the Purchase Order section.



Agency Procurement: Contract Release Orders

17) Use the Search screen that appears to find your Purchase Order by typing the PO number into the **PO Number** field and changing the drop-down box from **Begins** to **Contains**, as shown below. Then press **Search**.

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit:	=	32101
PO Number:	contains	166
SetID:	begins with	SHARE
Contract ID:	begins with	
Release Number:	=	
Purchase Order Reference:	begins with	

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

18) Click the link for the PO that appears.

Search Results

View All First ◀ 1 of 1 ▶ Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

19) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to **Approve**, then press the **Save** button. It defaults at **Approve**.

Agency Procurement: Contract Release Orders

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: Approval Status: Initial

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

▶ Lines

Once all approvals are met, the Purchase Order can be dispatched.

Dispatching Purchase Orders

- 1) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

*Dispatch Method:

Amount Summary

Merchandise:

Freight/Tax/Misc.:

Print

EDX

Email

Fax

Phone

Print

- 2) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.
- 3) A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
- 4) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right, to open a list of files. Click the one ending in .PDF to open the finalized Purchase Order to be printed, e-mailed, or faxed to the vendor.

[Your Special Request Contract Release is now complete.](#)

Agency Procurement: Contract Release Orders

Direct Connect

This section assumes that you are ordering an item that is on a contract that is set up with a Direct-Connect vendor!

Orders from Direct-Connect contracts are done through the **Web** tab. To enter an order from a Direct-Connect contract, click the **Web** tab. This brings you to the Direct-Connect page, shown below.

The screenshot shows a navigation bar with tabs: Catalog, Favorites, Templates, Services, Forms, Web, and Special Request. Below the tabs is a header area with the Grainger logo and the slogan "FOR THE ONES WHO GET IT DONE". To the right, under the "Merchant" column, there are two links: "Grainger Direct Connect" and "VWR Direct Connect". Below the header is a banner for VWR with the slogan "Supplier Partnerships for Customer Solutions" and three small images: a hand holding a microscope, a woman in a headset, and a beaker.

- 1) Click the link under the **Merchant** column that corresponds to the vendor from which you are attempting to purchase. For example, to browse Grainger's Direct-Connect catalog, click the **Grainger Direct Connect** link. If you are unable to see the **Merchant** column, scroll to the right of the screen.

[Grainger Direct Connect](#)

- 2) Clicking the **Direct** Connect link will take you to the vendor's catalog site. Exact navigation procedures will differ according to the site, and a step-by-step walkthrough of how to use each Direct Connect vendor's website is beyond the scope of this document.

The screenshot shows the Grainger catalog website interface. It features the Grainger logo and slogan "FOR THE ONES WHO GET IT DONE" on the left. In the center, there is a "Browse Catalog #400" link. On the right, there is a search bar with the text "Search Custom Catalog Products" and a "Search" button. Below the search bar is a navigation bar with links: Home, Resources, Contact Us, Find A Branch, Requisition Form, and Help.

- 3) Use the vendor's site to select your items. Once you click "Checkout" or "Finish Shopping" or the vendor's equivalent "pay for your items" message, you will be returned to the **Add Items and Services** tab with your selected items listed in the Requisition Summary box.

Requisition Summary		
Description	Qty	UOM
Plug, Diameter 2 Inches, M...	10	EA
Total Lines:	1	
Total Amount (USD):	80.60	

Agency Procurement: Contract Release Orders

After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions: The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type. For Contract Release Orders, use **DCR**.

Business Unit: General Services
*Requester: Robert J Hamblin *Currency:
Requisition Name: Doc Type: Priority:

- 4) You must now add any additional information to the **Line Comments** section. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon (🗨️) to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments.

Line Comments

Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD

Send to Vendor Show at Receipt Show at Voucher

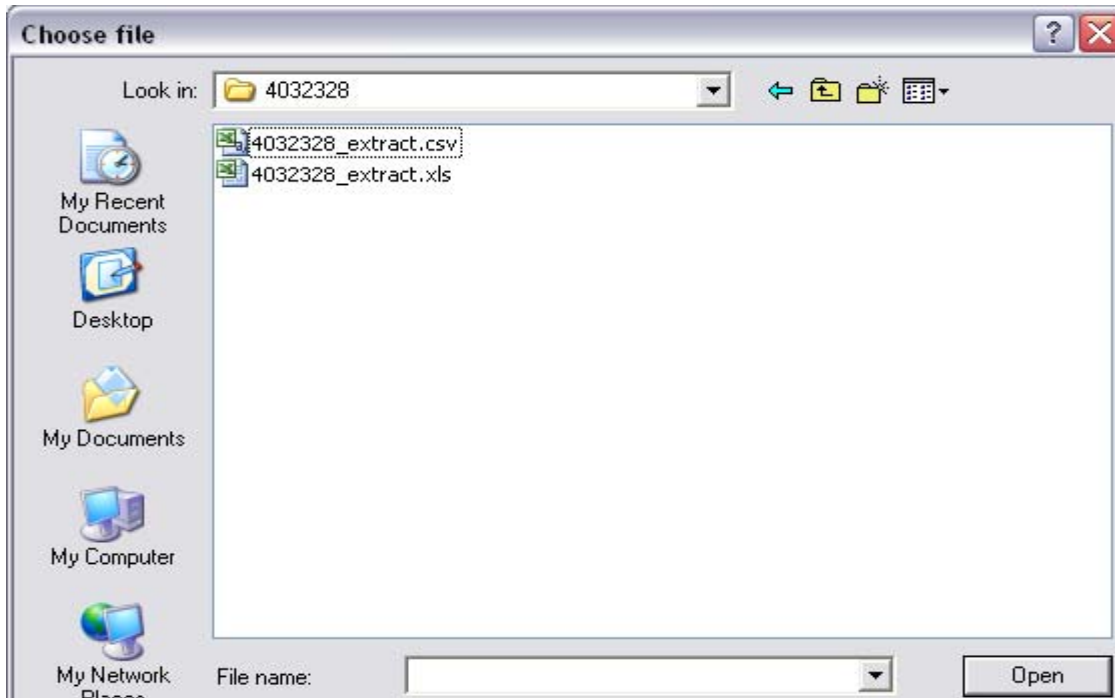
To attach any supplemental information that is contained in a separate Word, PDF or Excel document:


1. Click the **Add Attachment** button. () This takes you to the Add Attachment page.

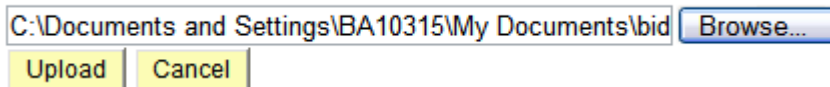
2. Click the **Browse** button (). This opens up a window to let you search for

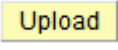
Agency Procurement: Contract Release Orders

files on your computer.



3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.



4. Click the **Upload** button () once the file is found.
 5. Repeat for all necessary files on that line.
- 5) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.

Agency Procurement: Contract Release Orders

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

- 6) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Sections to Review/Modify:

Shipping Addresses:

To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFM SHIPTO, both of which must be changed.

*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Agency Procurement: Contract Release Orders

Look Up Ship To

SetID: SHARE

Ship To Location: begins with

Description: begins with

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID: SHARE

Ship To Location: begins with

Description: contains

[Basic Lookup](#)

Search Results

View All First 1-7 of 7 Last

Ship To Location	Description
000000019	BLUE BIRD TOWER_395 FIRE TOWE
000000020	BLUE BIRD TOWER_395 FIRE TOWE
000000021	BLUE BIRD TOWER_395 FIRE TOWE
000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

▼ Address

Country:	<input type="text" value="USA"/> <input type="text" value="United States"/>	Prefix:	<input type="text"/>
Address 1:	<input type="text" value="312 ROSA L PARKS BLVD"/>	Phone:	<input type="text"/>
Address 2:	<input type="text"/>	Ext:	<input type="text"/>
Address 3:	<input type="text"/>	Fax:	<input type="text"/>
Room #:	<input type="text"/> Room Quadrant: <input type="text"/>		
City:	<input type="text" value="NASHVILLE"/>		
County:	<input type="text" value="DAVIDSON"/>	Postal:	<input type="text" value="37243"/>
State:	<input type="text" value="TN"/> <input type="text" value="Tennessee"/>		

Agency Procurement: Contract Release Orders

Verify that the information is correct. If it is not, choose a different Ship-To location

From here, you can continue on with the Requisition.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

Repeat as necessary for all lines

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.




Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

You must include:

Agency Procurement: Contract Release Orders

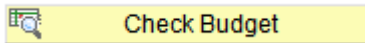
- "Submitting Contract Release Order." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like "This is an order from Contract for Security Guard Services".
- Your contact information, including name and phone number.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button (.

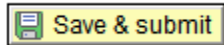
After the justification section is completed, you must Budget Check the document.

Budget Check

- c) To Budget Check the Requisition, press the "Check Budget" button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- d) After Budget Check, press the "Save and Submit" button to send the Requisition for Approvals.

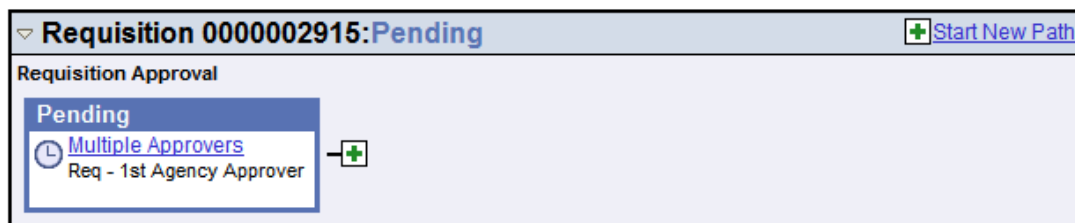




- e) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals


- 20) To view more information on the approvers, click on the "Multiple Approvers" ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Stage 1 - Agency Req Approvals



- 21) To add additional approvers, click the Insert Approver button () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the list. *The Approver you wish to add must be in the system as an Approver before you can select them.*

Agency Procurement: Contract Release Orders


- a. Use the Radio Buttons below the User ID Field () to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: 

Insert as: Approver
 Reviewer

- b. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert () button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all **commodity approvals**.

★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



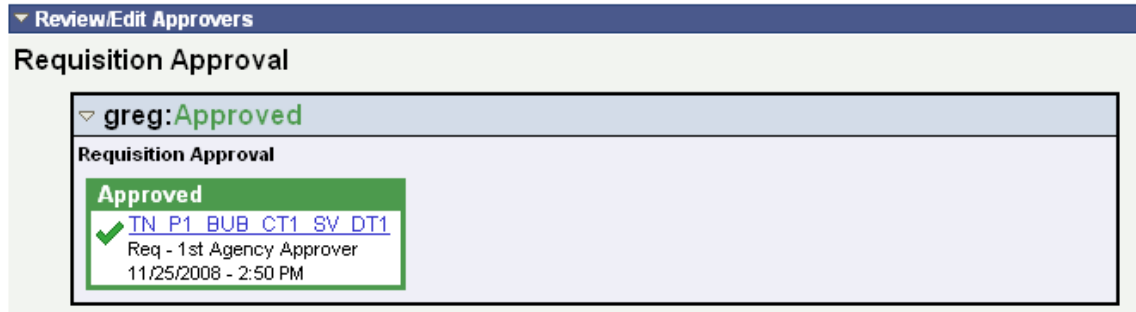
Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:** )

The Approval Status and Budget Check status of the Requisition are listed in this table.

Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▶							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▶ 0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39,50USD	<Select Action.. Go
▶ 0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. Go
▶ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. Go

Agency Procurement: Contract Release Orders

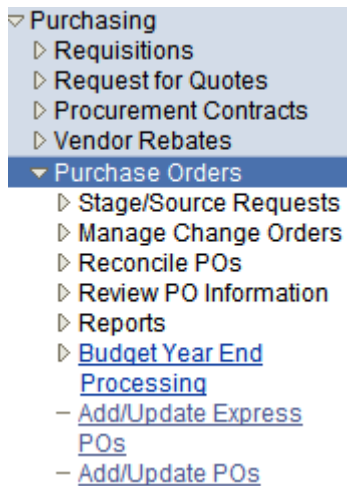
- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.



When the Requisition is approved, you are ready to proceed.

Creating Purchase Orders

- 1) **Contract Release Orders:** Navigate to the Purchase Order page by clicking the **Purchasing** link from the menu, then clicking the **Add/Update POs** link.



- 2) This will bring up the Search page. Click the **Add New Value** tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the **Add** button.

Purchase Order

Business Unit:

PO ID:

Agency Procurement: Contract Release Orders

Maintain Purchase Order

Purchase Order

Unit:	32101	PO Status:	Initial
PO ID:	NEXT	Budget Status:	Not Chk'd
Copy From:	<input type="text"/>	<input type="checkbox"/>	Hold From Further Processing
Header			
*PO Date:	<input type="text" value="12/12/2008"/>	Vendor Search	Sub Contractor
Vendor:	<input type="text"/>	Vendor Details	Insur/Bond/Cert
*Vendor ID:	<input type="text"/>	Receipt Status:	Not Recvd
*Buyer:	<input type="text"/>	*Dispatch Method:	<input type="text"/> <input type="button" value="Dispatch"/>
PO Reference:	<input type="text"/>	Amount Summary	
Header Details	PO Activities	Add Ship To Comments	Merchandise:
PO Defaults			0.00
Add Comments			Freight/Tax/Misc.:
			0.00 <input type="button" value="Calculate"/>
			Total Amount:
			0.00 USD
Add Items From			
Purchasing Kit	Catalog	Item Search	

- 3) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Contract Release Orders, this will be found by looking at the Requisition lines for the contract Vendor assigned to the item.

*Vendor ID:

- 4) Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon () located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.
- 5) For Contract Releases, you will be copying from a Requisition created by your Agency Requester. To do so, click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.

Copy From:

Header

*PO Date:

Vendor

- Contract
- Purchase Order
- Requisition**

- 6) This takes you to the **Copy Purchase Order from Requisition** page. It is shown on the first picture below. Click the Lookup Icon () by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the second picture below. Type in your Business Unit if it did not default and press the Search button to bring up a list of Requisition IDs. Find the Requisition you were assigned and click the **Requisition ID** link.

Agency Procurement: Contract Release Orders

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:	<input type="text" value="32101"/>	Origin:	<input type="text"/>
Buyer:	<input type="text"/>	Max Rows:	<input type="text" value="20"/>
Vendor ID:	<input type="text"/>	<input checked="" type="checkbox"/> Include Reqs With No Vendor	
Category:	<input type="text"/>	<input checked="" type="checkbox"/> Include Inventory Items	
Requisition ID:	<input type="text"/>	<input type="checkbox"/> Stockless Item	
Contract ID:	<input type="text"/>	<input type="checkbox"/> Exclude Auto Source Item	

Look Up Requisition ID

Business Unit:

Requisition ID:

[Basic Lookup](#)

Search Results

View All First ◀ 1-4 of 4 ▶ Last

Requisition ID	Requester
000000073	TN2 PU EPRO AGENCY REQUESTOR
000000072	TN2 PU EPRO AGENCY REQUESTOR
000000071	TN2 PU EPRO AGENCY REQUESTOR
000000061	tn_gross

- 7) Clicking the correct Requisition ID will bring you back to the **Copy Purchase Order from Requisition** page. Click the **Select All** ([Select All](#)) link to select all the lines for copying. Then click the **Copy to PO** () button to copy the requisition lines over to the PO.

Agency Procurement: Contract Release Orders

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY -001

*Location:

*Address: [Show Address Details](#)

Contact: [Show Contact Details](#)

Salesperson: [Show Salesperson Details](#)

[Vendor Information](#)

Terms: Net 30

Basis Dt Type:

Vendor Details Message

Country: USA United States Prefix:

Address 1: Fax:

Address 2: Prefix:

Address 3: Phone:

Room #: Room Quadrant:

City:

County: Postal:

State: Tennessee

- This should default in all the information from the Requisition, and return you to the main Purchase Order page. Click the **Vendor Details** ([Vendor Details](#)) link, which takes you to the Vendor Details page.
- Click the Lookup Icon () next to the **Terms** field, and select the appropriate set of Payment Terms. This can be obtained from the Vendor's quote or the Contract. The default is Net 30.

Terms: Net 30

- Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon () next to the **Location** field to select a different location and use the Lookup Icon () next to the **Address** field to select a different address.

Maintain Purchase Order

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY -001

*Location:

*Address: [Show Address Details](#)

Contact: [Show Contact Details](#)

Salesperson: [Show Salesperson Details](#)

[Vendor Information](#)

Terms: Net 30

Basis Dt Type:

Agency Procurement: Contract Release Orders

Look Up Location

Vendor SetID: SHARE
Vendor ID: 0000085887
Vendor Location: begins with

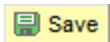
[Basic Lookup](#)


Search Results

View All First 1 of 1 Last

Vendor Location	Description
MAIN	MEMPHIS

- 1) Once the correct address is entered, press the **OK** button at the bottom of the page to return to the main **Purchase Order** screen.
- 12) After reviewing all the information on the PO, return to the main **Purchase Order** page and click the **Save** button, located at the bottom of the screen.



- 13) When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. An example is shown at the top of the next page.



Express Purchase Order




Purchase Order

Unit: 32101

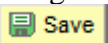
PO ID: 0000000186

Copy From:

PO Status: Open  

Budget Status: Not Chk'd   

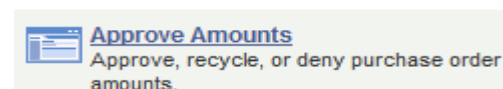
Hold From Further Processing

- 14) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page. 

- 15) You must now submit the PO into Workflow. To do so, click the **Purchasing** link on the left-hand menu. Then click **Purchase Orders**.

- Purchasing
 - Requisitions
 - Procurement Contracts
 - Purchase Orders

- 16) Click the **Approve Amounts** link under the Purchase Order section.



Agency Procurement: Contract Release Orders

- 17) Use the Search screen that appears to find your Purchase Order by typing the PO number into the **PO Number** field and changing the drop-down box from **Begins** to **Contains**, as shown below. Then press **Search**.

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit:	=	32101
PO Number:	contains	166
SetID:	begins with	SHARE
Contract ID:	begins with	
Release Number:	=	
Purchase Order Reference:	begins with	

Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

- 18) Click the link for the PO that appears.

Search Results

View All First 1 of 1 Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

- 19) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to **Approve**, then press the **Save** button. It defaults at **Approve**.

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: Approve Approval Status: Initial **View Printable PO**

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

Lines

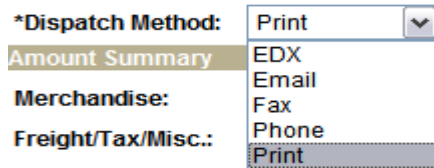
Save **Return to Search** **Notify**

Once all approvals are met, the Purchase Order can be dispatched.

Agency Procurement: Contract Release Orders

Dispatching Purchase Orders

- 1) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.



The screenshot shows a web form with the following fields and a dropdown menu:

- *Dispatch Method: [Print] (dropdown menu)
- Amount Summary
- Merchandise:
- Freight/Tax/Misc.:

The dropdown menu for *Dispatch Method is open, showing the following options: Print, EDX, Email, Fax, Phone, and Print. The first 'Print' option is selected.

- 2) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.
- 3) A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
- 4) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right, to open a list of files. Click the one ending in .PDF to open the finalized Purchase Order to be printed, e-mailed, or faxed to the vendor.

[Your Direct-Connect Contract Release is now complete.](#)

Agency Procurement: APCAT by Lot

APCAT Contract Release Orders by Lot

Many state contracts are set up according to the "APCAT" principle, where Vendors bid a catalog of items and offer a % discount or markup that applies to every item in that catalog. Instead of 10,000 contract lines for a 10,000 item contract, there would be one "APCAT" line that can be used to buy any item in that catalog at the stated discount/markup.

This process does not translate into Edison very well. However, it can still be done. Items that are included in an "APCAT" line on a contract will be ordered by doing an eProcurement Requisition, Special Request Type (to describe the item). For items that are all included on the same line of the contract, they can be bundled together as one "Special Request" line.

Two restrictions:

- Items that must be tagged as "Sensitive" in the Assets module (items that need a State Tag #) CANNOT be ordered through the standard Special Request method that will be listed below. They must have their own separate Edison ID number. **This applies even if they are covered under a pre-existing APCAT contract line.**
- Items from the same APCAT Contract Line can be bundled together on one Special Request line, but items from different Contract Lines must be put on separate lines in the eProcurement Requisition.

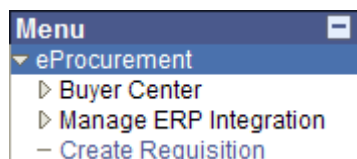
Creating New Requisitions

Agency Level- Requester

- 1) To create a Requisition, you must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



- 2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below this paragraph, on the left. This can also be accessed by using the eProcurement link in the Main Menu at the center of the page. A picture of this is on the right.



Agency Procurement: APCAT by Lot

- 3) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition** in blue at the top. This is the main page for creating a Requisition, and has links to 3 tabs that need to be completed. The tab that is currently shown will be highlighted in yellow. See the picture below for an example.

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 32101 General Services

*Requester: TN2_PU_EPRO_AGENCY_REQUESTOR TN2_PU_EPRO_AGENCY_REQUESTOR *Currency: USD

Requisition Name: Doc Type: Priority: Medium

Line Defaults

Continue

Step 1: Define Requisition



- 1) The Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure that your **Business Unit** and **Requester** defaulted in correctly. Now you must assign a Requisition Name.

Requisition Name: Click in the **Requisition Name** field and then type in a name for the Requisition. The name needs to describe the items being purchased on the Requisition, in enough detail to be able to identify what the Requisition is being used for. When buying off of an APCAT contract and grouping your items, use a name that describes everything being bought.

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

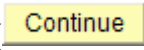
Business Unit: 32101 General Services

*Requester: robej0811001 Robert J Hamblin *Currency: USD

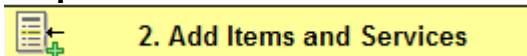
Requisition Name: Office Supplies Doc Type: Priority: Medium

Line Defaults

Continue

- 2) After naming your Requisition, click the Continue Button () located at the bottom to move to the next step in the Requisition Process.

Step 2: Add Items and Services



Agency Procurement: APCAT by Lot

- 1) The next step is to add items to the requisition. The main **Add Items and Services** page has 7 tabs at the top. Each of these tabs contains a different way to create Item Lines on a Requisition. A picture of the main Add Items and Services page is shown below.

Create Requisition

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Services](#) [Forms](#) [Web](#) [Special Request](#)

- 2) When ordering off an APCAT contract for non-Asset items, you will be using the **Special Request** tab, at the far right.
 - **Special Request-** The Special Request tab can be thought of as a kind of “catch-all” tab. It allows you to type descriptions for items that are not in the Item Master, including contract items that are selected on the “As Per Catalog” (APCAT) principle.
- 3) To enter a Special Request for APCAT, click the “Special Request” tab, highlighted in the example below. Then click the **Special Item** ([Special Item](#)) link. It will take you to the screen shown below.

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#)

Special Item

*Item Description:

*Price:

*Quantity:

*Category:

Vendor ID:

Vendor Item ID:

Mfg ID:

Mfg Item ID:

*Currency:

*Unit of Measure:

Due Date:

[Suggest New Vendor](#)

Additional Information

Send to Vendor Show at Receipt Show at Voucher

The Special Request tab has several fields where information must be entered. The bulleted listed below lists these fields.

All the fields marked with an asterisk (*) must be completed.

Agency Procurement: APCAT by Lot

- a) **Item Description:** This is used to enter a description that includes all the APCAT items on the line. For example, "Office Supplies" could cover Pens, Tape, Staples, a Stapler and White-out.
- b) **Price:** This is the estimated price for the item.
- c) **Quantity:** This is the quantity needed. For Grouped APCAT items, this will always be 1.
- d) **Unit of Measure:** This is used to select a Unit of Measure. For Grouped APCAT items, this will always be **LO** for "Lot".
- e) **Category:** This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button (🔍) to pull up the NIGP search screen. Type a description in the Description field and press the Find button. This will display a list of valid NIGP codes. Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen.

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Categories			
Customize Find View All First 1-5 of 5 Last			
Catalog	Category	Description	Find in Tree
1 PROCUREMENT ITEMS	610-00	OFFICE SUPPLIES: CARBON PAPER AND RIBBONS, ALL TYPES	
2 PROCUREMENT ITEMS	615-00	OFFICE SUPPLIES, GENERAL	
3 PROCUREMENT ITEMS	615-60	Office Supplies, General (Not Otherwise Classified)	

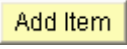
- f) On the Special Request page, click in the Additional Information field and type in a brief description of the order. Specific items bought will be on the invoice, which should be scanned and added as an attachment.

Agency Procurement: APCAT by Lot

The screenshot shows the 'Special Item' form with the following data entered:

- *Item Description: Office supplies
- *Price: 572.64000
- *Quantity: 1.0000
- *Category: 615-60
- *Currency: USD
- *Unit of Measure: LO
- Vendor ID: (empty)
- Vendor Item ID: (empty)
- Mfg ID: (empty)
- Mfg Item ID: (empty)
- Due Date: (empty)

The 'Additional Information' section contains the text: "This requisition is for a grouped lot of generic office supplies off of the Office supply contract, from American Paper and Twine. See the attached document for details." Below this are three unchecked checkboxes: "Send to Vendor", "Show at Receipt", and "Show at Voucher".

g) The picture above shows an example of what all should be included on the Special Item tab. After entering in all the required fields press the Add Item button ().

- **Repeat this process if items from a different APCAT line from the same contract need to be added.** After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions: The final step in the Requisition process is the **Review and Submit** page. It contains a summary of the Requisition information. The first thing you must do on this page is enter your Document Type, **DCR**, for Contract Release Order.

Create Requisition



Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 32101 General Services

*Requester: robej0811001 Robert J Hamblin

Requisition Name: Office supplies


Doc Type: DCR

*Currency: USD

Priority: Medium

- 1) For grouped APCAT lines, you must attach a scanned list of the items, or a copy of the invoice received. To do so, scroll over to the right on the Review and Submit tab, and

Agency Procurement: APCAT by Lot


click on the Comments icon (). This takes you to the **Line Comments** page, shown below.


Line Comments

Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD


Send to Vendor Show at Receipt Show at Voucher

- 2) Click the Add Attachment button, find the file on your PC by using the Browse button, and then click Upload. This attaches the file and returns you to the Line Comments page. Click OK to return to the main Review and Submit page.

Important: Each APCAT line on the Requisition must have the Contract ID associated with it. To do so, scroll to the right of the screen and click on the “Line Details” icon. 

 3. Review and Submit

*Currency:
Priority:

Qty	UOM	Price	Total	
100	Each	5.000	250.00	
Total Amount:		250.00	USD	

Clicking the Line Details icon will bring you to the Line Details page.

Agency Procurement: APCAT by Lot

- 3) You can now review the line information. Use the "Expand Section" button (⏷) to view the entire line table, scrolling to the right using the scrollbar at the bottom of the screen if necessary. Below are some sections that may need to be reviewed.

The screenshot displays the 'Requisition Lines' interface. At the top, a table lists the requisition line with columns: Line, Description, Vendor Name, Quantity, UOM, Price, and Total. Line 1 is expanded, showing details for 'Office supplies' with a quantity of 1.0000 and a price of 572.64. Below this, there are checkboxes for 'Consolidate with other Reqs' and 'Override Suggested Vendor'. A shipping section includes fields for 'Shipping Line: 1', 'Due Date', 'Quantity: 1.0000', 'Status: Active', and '*Ship To'. An 'Attention' field is populated with 'Robert J Hamblin'. There are also fields for '*Distribute by: Qty' and 'SpeedChart'. At the bottom, an 'Accounting Lines' table is visible with columns: Line, Status, Dist Type, *Location, Quantity, Percent, Amount, GL Unit, and Account. The accounting line for line 1 shows a status of 'Open', a location of '000001', a quantity of 1.0000, a percent of 100.0000, an amount of 572.64, and a GL unit of 32101.

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Shipping Addresses:


To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFMSHIPTO, both of which must be changed.


*Ship To: 

- Click the Lookup Icon (🔍) next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:

Ship To Location: 

Description: 

[Basic Lookup](#)

Agency Procurement: APCAT by Lot

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID:

Ship To Location:


Description:

[Basic Lookup](#)

Search Results

View All First 1-7 of 7 Last

Ship To Location	Description
000000019	BLUE BIRD TOWER 395 FIRE TOWE
000000020	BLUE BIRD TOWER 395 FIRE TOWE
000000021	BLUE BIRD TOWER 395 FIRE TOWE
000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.  [Modify Shipping Address](#)

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

▼ Address

Country: United States Prefix:

Address 1: Phone:

Address 2: Ext:

Address 3: Fax:

Room #: Room Quadrant:

City:

County: Postal:

State: Tennessee

Verify that the information is correct. If it is not, choose a different Ship-To location.

Agency Procurement: APCAT by Lot

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

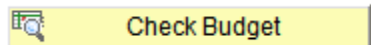
If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, and they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

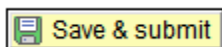
DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

❖ Repeat as necessary for all lines

- 4) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds.



- 5) After Budget Check, press the “Save and Submit” button to send the Requisition for Approvals.



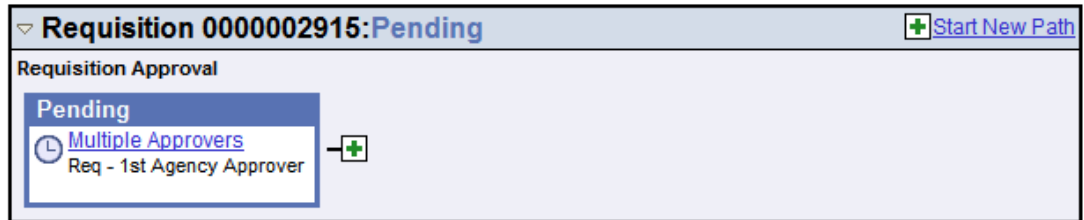
- 6) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.




Agency Procurement: APCAT by Lot

Approvals

- c) To view more information on the approvers, click on the “Multiple Approvers” ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.


Stage 1 - Agency Req Approvals



- d) To add additional approvers, click the Insert Approver button. () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the list. **The Approver you wish to add must be in the system as an Approver before you can select them.**
- i. Use the Radio Buttons below the User ID Field () to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer

A dialog box titled 'Choose an approver or reviewer to insert'. It contains a 'User ID' input field with a magnifying glass icon to its right. Below the input field, there are two radio buttons: 'Approver' (which is selected) and 'Reviewer'.

- ii. After selecting the Approver’s User ID and their function (Approver or Reviewer), click the Insert () button. This returns you to the main approval screen.


Requisitions must pass all approvals before being sent on to create a Purchase Order.

- ★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item’s NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all ***commodity approvals***.
- ★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

Agency Procurement: APCAT by Lot

- **To view the status of the Requisition**, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.

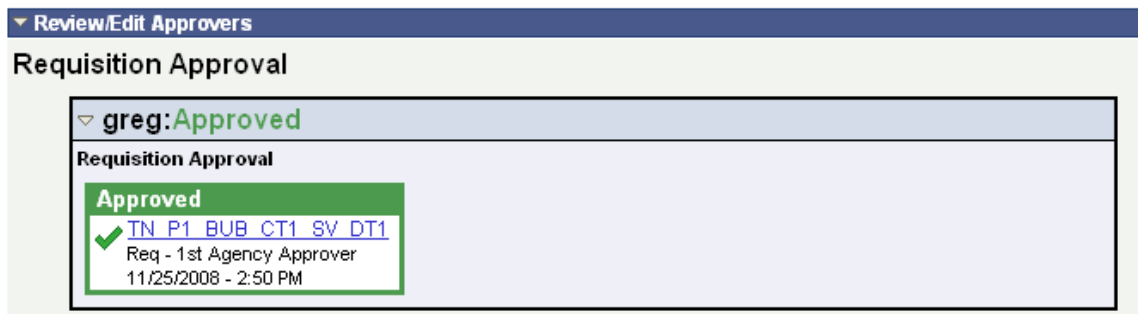


Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:** ).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action..> Go
0000000144	DGS T)ENV, REG #10/24#...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action..> Go
0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action..> Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.



When the Requisition is approved, you are ready to proceed.

Creating Purchase Orders

- 20) Navigate to the Purchase Order page by clicking the Purchasing link from the menu, then clicking the Add/Update POs link.

Agency Procurement: APCAT by Lot

- ▽ Purchasing
 - ▷ Requisitions
 - ▷ Request for Quotes
 - ▷ Procurement Contracts
 - ▷ Vendor Rebates
 - ▼ Purchase Orders
 - ▷ Stage/Source Requests
 - ▷ Manage Change Orders
 - ▷ Reconcile POs
 - ▷ Review PO Information
 - ▷ Reports
 - ▷ [Budget Year End Processing](#)
 - [Add/Update Express POs](#)
 - [Add/Update POs](#)

21) This will bring up the Search page. Click the Add New Value tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the Add button.

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit:

PO ID:

Maintain Purchase Order

Purchase Order

Unit:	32101	PO Status:	Initial	
PO ID:	NEXT	Budget Status:	Not Chk'd	
Copy From:	<input type="text"/>	<input type="checkbox"/>	Hold From Further Processing	
▼ Header				
*PO Date:	<input type="text" value="12/12/2008"/> <input type="button" value="B"/>	Vendor Search	Sub Contractor	
Vendor:	<input type="text"/> <input type="button" value="Q"/>	Vendor Details	Insur/Bond/Cert	
*Vendor ID:	<input type="text"/> <input type="button" value="Q"/>	Doc Tol Status:	Valid	
*Buyer:	<input type="text"/> <input type="button" value="Q"/>	Receipt Status:	Not Recvd	
PO Reference:	<input type="text"/>	*Dispatch Method:	<input type="text"/> <input type="button" value="Dispatch"/>	
Header Details	PO Activities	Add ShipTo Comments	Amount Summary	
PO Defaults			Merchandise:	0.00
Add Comments			Freight/Tax/Misc.:	0.00 <input type="button" value="Calculate"/>
Add Items From			Total Amount:	0.00 USD
Purchasing Kit	Catalog	Item Search		

22) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For contract releases, this will be the vendor on the contract.

*Vendor ID:

Agency Procurement: APCAT by Lot

23) For Contract Releases, you will be copying from a Requisition. Click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.

Copy From:
▼ Header
*PO Date: Contract
Vendor: Purchase Order
Requisition

24) This takes you to the **Copy Purchase Order from Requisition** page. It is shown below.

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:	<input type="text" value="32101"/>	Origin:	<input type="text"/>
Buyer:	<input type="text"/>	Max Rows:	<input type="text" value="20"/>
Vendor ID:	<input type="text"/>	<input checked="" type="checkbox"/> Include Reqs With No Vendor	
Category:	<input type="text"/>	<input checked="" type="checkbox"/> Include Inventory Items	
Requisition ID:	<input type="text"/>	<input type="checkbox"/> Stockless Item	
Contract ID:	<input type="text"/>	<input type="checkbox"/> Exclude Auto Source Item	

Click the Lookup Icon (🔍) by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the picture below. Then, type in your Business Unit if it did not default and press the Search button to bring up a list of Requisition IDs.

Look Up Requisition ID

Business Unit:

Requisition ID:

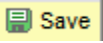
[Basic Lookup](#)

Search Results

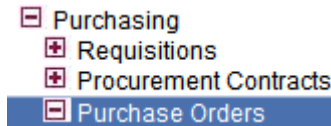
View All 1-4 of 4

Requisition ID Requester
000000073 TN2 PU EPRO AGENCY REQUESTOR
000000072 TN2 PU EPRO AGENCY REQUESTOR
000000071 TN2 PU EPRO AGENCY REQUESTOR
000000061 tn_gross

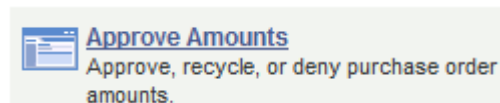
Agency Procurement: APCAT by Lot

31) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page. 

32) You must now submit the PO into Workflow. To do so, click the “Purchasing” link on the left-hand menu. Then click “Purchase Orders”.



33) Click the “Approve Amounts” link under the Purchase Order section.




34) Use the Search screen that appears to find your Purchase Order by typing the PO number into the “PO Number” field and changing the drop-down box from Begins to Contains, as shown below. Then press Search.


Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: = 

PO Number: contains


SetID: begins with 

Contract ID: begins with

Release Number: =



Purchase Order Reference: begins with

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

35) Click the link for the PO that appears.

Search Results

View All First  1 of 1  Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	000000166	SHARE	(blank)	0	8658588

36) This will take you to the Approve Order Amounts screen, shown below. Enter any necessary approval comments into the Comment field.

37) Make sure the drop-down box is set to “Approve” (the default). After comments are entered, press the Save button.

Agency Procurement: APCAT by Lot

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: Approval Status: Initial

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

▶ Lines

38) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

*Dispatch Method:

Amount Summary

Merchandise:

Freight/Tax/Misc.:

EDX

Email

Fax

Phone

Print

39) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button

40) A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.

41) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right.

This will open up a list of files. Click the one ending in .PDF. This will open up the finalized Purchase Order as a .PDF document, which can then be printed or e-mailed, or printed and faxed to the vendor.

Agency Procurement: Asset Ordering (Contract Release)

Asset Item Contract Orders

Procurement requests to order any item that must be tagged as "Sensitive" (meaning it has a State Tag number, hereafter referred to as an "Asset") are handled differently from other kinds of orders. The main reason for this is because **any item that must be tagged in the Assets module has to have an Edison Item ID that is properly set up as an Asset Item.** This causes problems for any items that would previously have been ordered under the "As Per Catalog" (APCAT) principle, along with any one-time Purchase that would normally be entered as a Special Request.

To determine whether or not an item is likely to be an Asset, please consult the section of the POST User Manual beginning on page 96. This manual is accessible through the following link. (<http://www.intranet.state.tn.us/generalserv/fiscal/documents/postuserman.pdf>) The main page for the Assets Division is located at the Office of Administrative Services Property of the State of Tennessee website, <http://www.intranet.state.tn.us/generalserv/fiscal/ofmpost.html> .

The section below is a brief summary of the asset guidelines. However, **this information is subject to change**, and it would be best to consult the OAS POST website prior to ordering.

Asset Guidelines (as of 5/26/2009)

Requirements for an item being marked as an Asset

- A. All equipment purchases with a cost of \$5,000.00 or more including freight and set up costs (labor) should be a "716" account code.
- B. All equipment purchases with a cost between \$100.00 and \$4,999. to include freight and set up costs (labor) and listed here should be an account code 70999000 (sensitive minor equipment) or 72299000 (sensitive computer equipment). These are classified as sensitive items and are determined by Asset Management.

Sensitive Item Listing:

****Subject to change**

BAR CODE SCANNERS
BOAT MOTORS
BOAT TRAILERS
BOATS
CAMERA BODIES (35mm & DIGITAL)
CAMERA LENS (200MM OR LARGER)
CANOES
COMPUTERS, ALL TYPES
DIGITAL VOICE RECORDERS
PDA
COMPUTER PERIPHERALS (EXTERNAL)
GLOBAL POSITIONING SYSTEMS
GEOGRAPHIC INFORMATION SYSTEM
COLOR BAR GENERATORS
DVD PLAYERS/RECORDERS
FAX MACHINES
HAM BAND TRANS/REC (HAND HELD)
LCD/MULTIMEDIA PROJECTORS

Agency Procurement: Asset Ordering (Contract Release)

MARINE BAND TRANS/REC
NIGHT VISION SYSTEM
OSCILLOSCOPE
POWER SUPPLIES
RADIO SCANNERS
SPECTRUM ANALYZER
TELEVISIONS
TWO/WAY RADIO TRANS/REC
VECTOR SCOPES
VIDEO CAMERAS
VIDEO RECORDERS & PLAYERS
WAVEFORM MONITORS

- C. All weapons are to be tagged and added to POST regardless of cost. Weapons less than \$5,000.00 should be coded to 70999000 as sensitive; weapons \$5,000.00 or more are coded as 71617000. Examples are:

PISTOLS (NOT PELLET or AIR)	STUN GUNS (TASER)
RIFLES (NOT PELLET or AIR)	TEARGAS GUNS
SHOTGUNS	

- D. **Computer Systems** comprised of a monitor, keyboard and central processing unit are to be tagged as one unit.

- E. External computer peripherals with a cost between \$100.00 and \$5,000.00 are to be tagged individually. Examples are:

EXTERNAL STORAGE DEVICES	PRINTERS
EXTERNAL TAPE DRIVES	SCANNERS
EXTERNAL MODEMS	CD WRITERS
POWER SUPPLIES	DOCKING STATIONS

- F. Additional purchases for existing equipment totaling \$5,000 or more including labor is classified as an upgrade having a “716” account code and the dollar value added to the asset. Additional purchases for existing equipment totaling less than \$5,000 will not have the dollar value added.

- G. Software will be tagged if the cost is \$5,000.00 or above and is mainframe or mid-level based (including server-based). Software that is PC-based will not be tagged.

- H. Donated equipment items that meet the above criteria should be added based upon estimated fair market value at the date of donation.

- I. Equipment manufactured for use within the department that meets the other requirements should be added. Cost must include labor and materials.

- J. Items purchased not meeting the above criteria may be entered by Asset Management upon request at the discretion of your department.

Agency Procurement: Asset Ordering (Contract Release)

K. Equipment purchased from the State and Federal surplus warehouse that meet the above criteria should be tagged.

L. Examples of items *NOT* to record

ALARM SYSTEMS WHERE THE WIRING IS BUILT-IN
ATTACHED MIRRORS, CHALKBOARDS AND BULLETIN BOARDS
ATTACHED SHELVING, CABINETS AND COUNTERS
AWNINGS AND BLINDS
BOWLING EQUIPMENT
CARPET
DOORS OF ALL KINDS
DRAPERIES AND CURTAINS
STAGE LIGHTING, RIGGING AND TRACKS
FIXED AUDITORIUM SEATS
FOLDING BLEACHERS WHEN ATTACHED TO THE WALL
GRILLS GAS AND CHARCOAL THAT ARE PERMANENT
HANDICAP RAMPS AND LIFTS
REPEATER STATIONS THAT ARE PERMANENT
IN-GROUND LIFTS
IN-WALL FOLDING CAFETERIA TABLES AND BENCHES
LANDSCAPE FURNITURE PERMANENT
PLAY GROUND EQUIPMENT THAT IS PERMANENT
PUBLIC ADDRESS SYSTEMS WHERE WIRING IS “BUILT-IN”
RADIO TOWERS THAT ARE PERMANENTLY ATTACHED
SPRINKLER SYSTEMS THAT ARE “BUILT-IN”
WATER AND FUEL TANKS, IN-OR ABOVE GROUND, THAT ARE PERMANENT
WATER FOUNTAINS
GARBAGE DISPOSALS
WATER HEATERS
CENTRAL HEAT AND AIR UNITS

Requesting Item IDs for Asset Items

Item IDs must be requested from the Content Group. To request an Item ID, you must send a request to get Asset Items created. Content will send you a copy of the **Spreadsheet Guide for Agencies** along with a copy of the **TN CG Item Only Layout** spreadsheet. This spreadsheet must be completed according to the guidelines and returned to the Content Group to have your Item IDs created. **This is the only acceptable format.**

The Content Tool in Edison is used to create Item IDs, and the *only* format it can read is the exact format included in the **TN CG Item Only Layout** spreadsheet. Due to the volume of requests, it is not possible for Content to take PDF scans, Word document specifications or any other file-type and create a Spreadsheet out of them. **Completion of the spreadsheet is the sole responsibility of the agency requester, not Content. Content can and will assist, but it is necessary for the agency requester to complete the spreadsheet.**

Identifying Asset Item IDs

Agency Procurement: Asset Ordering (Contract Release)

After the Content Team has created Asset Item IDs, they can be used to create Purchase Orders. There are two types of "Asset" Item IDs that are created, **Specific Assets** and **Generic Assets**.

- **Specific Assets** are used for specific items that have one set price. These can either be from lines on a contract (similar to non-Asset Contract lines) or from One-time Purchase requests. If the item is only going to be used once, it will be inactivated after usage, but **it still must be requested and set up in the same way.**
- **Generic Assets** are a generic description that covers a broad category of possible items. Specific details on the item must be attached separately. They are used to handle the problem of items from "APCAT" contracts that must be tagged.

The Content Team will e-mail your Asset Item IDs to you after they have been completed. Depending on whether the Asset created is a **Specific Asset** or a **Generic Asset**, the ordering process will be slightly different.

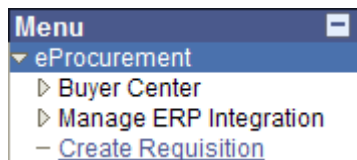
Ordering Assets

*This section is for use **ONLY** with Edison Item IDs provided by the Content Team!*

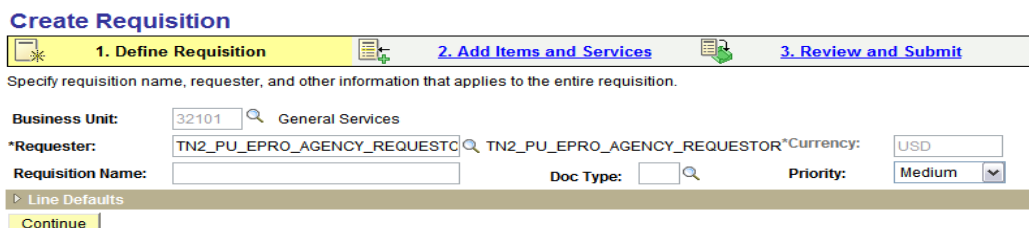
- 1) You must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



- 2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



- 3) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.

A screenshot of the "Create Requisition" page. At the top, there are three tabs: "1. Define Requisition" (highlighted in yellow), "2. Add Items and Services", and "3. Review and Submit". Below the tabs is a text box for "Specify requisition name, requester, and other information that applies to the entire requisition." The form fields include: "Business Unit:" with a dropdown set to "32101" and "General Services"; "*Requester:" with a dropdown set to "TN2_PU_EPRO_AGENCY_REQUESTC" and "TN2_PU_EPRO_AGENCY_REQUESTOR"; "Currency:" with a dropdown set to "USD"; "Requisition Name:" with an empty text box; "Doc Type:" with an empty dropdown; and "Priority:" with a dropdown set to "Medium". At the bottom, there is a "Line Defaults" section with a "Continue" button.

Agency Procurement: Asset Ordering (Contract Release)

Step 1: Define Requisition



- 4) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.
 - a. **Requisition Name** Click in the **Requisition Name** field and then type in the name. The name must include "Contract Request".

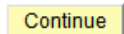
Create Requisition

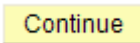


Specify requisition name, requester, and other information that applies to the entire requisition.

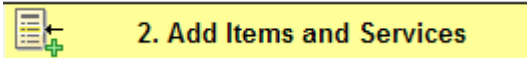
Business Unit:	<input type="text" value="32101"/> <input type="button" value="Search"/> General Services		
*Requester:	<input type="text" value="robej0811001"/> <input type="button" value="Search"/> Robert J Hamblin	*Currency:	<input type="text" value="USD"/>
Requisition Name:	<input type="text" value="Contract Request: HVAC Repair"/>	Doc Type:	<input type="text" value=""/> <input type="button" value="Search"/>
		Priority:	<input type="text" value="Medium"/> <input type="button" value="v"/>

Line Defaults



- 5) After naming your Requisition, click the Continue Button. 

Step 2: Add Items and Services

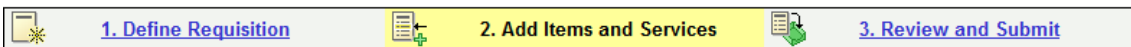


- 6) The next step is to add items to the requisition.
- 7) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For Contract Requests, you will use the **Catalog** tab.

To search for items:

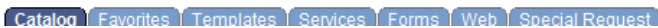
- First, click on the Catalog tab under the Search bar.

Create Requisition



Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:



- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu. This should show as the default option when the Catalog tab is selected.

Agency Procurement: Asset Ordering (Contract Release)

Browse Catalog

Catalog Favorites Templates Services Forms Web Special Request

*Select a catalog:

Left | Right [All Procurement Items](#)

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. **This is the ONLY search field that should be used, NOT the one that's at the top of the screen.**
- Type the first Item ID (obtained from the Content Team) into the **Item ID** field, then press the Search button. An example is shown below.

Search Catalog

Search contains all of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

[Search Settings](#)

- If you are ordering a "Generic Asset" item, search for "%Generic% %Asset%" with no quotes.

Search Catalog

Search contains all of the following search fields entered:

Description:

[Search Settings](#)

Details									
Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	
<input type="checkbox"/>	1.0000	Add	1000106932	Microwave Radio Equipment, Initial Purchase. GENERIC ASSET		0.000			

- 8) If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns.

Agency Procurement: Asset Ordering (Contract Release)

1 Results

Sort Items: [Show Images](#)

Item Description First 1 - 1 of 1 Last

Details

	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY
<input type="checkbox"/>	1.0000		1000007457	HVAC ANNUAL SERVICE INSPECTION AND PREVENTIVE MAINTENANCE		8698.000	EA	1.0000

[Select All / Deselect All](#)

Add to favorites Compare

If the item you need was located by the search, check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field.

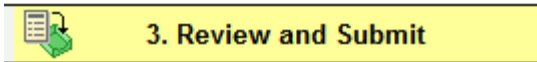
	Quantity		Item ID
<input type="checkbox"/>	4.0000		1000007457

- 9) After inputting the desired quantity, click the Add (Add) button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.

Requisition Summary	
Description	Qty UOM
HVAC ANNUAL SERVICE INSPEC...	4 EA
Total Lines:	1
Total Amount (USD):	34,792.00

- 10) Repeat this process for all additional lines that must be on the contract. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions:

The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type. For Contract Release Orders, use **DCR**. If this is a One-Time Purchase of an Asset, use **LPA**.

Agency Procurement: Asset Ordering (Contract Release)

Business Unit: General Services

*Requester: Robert J Hamblin

Requisition Name: Doc Type: *Currency: Priority:

- 4) You can now add any additional information to the **Line Comments** section. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon (🗨️) to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments.

Line Comments

Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD

Send to Vendor Show at Receipt Show at Voucher

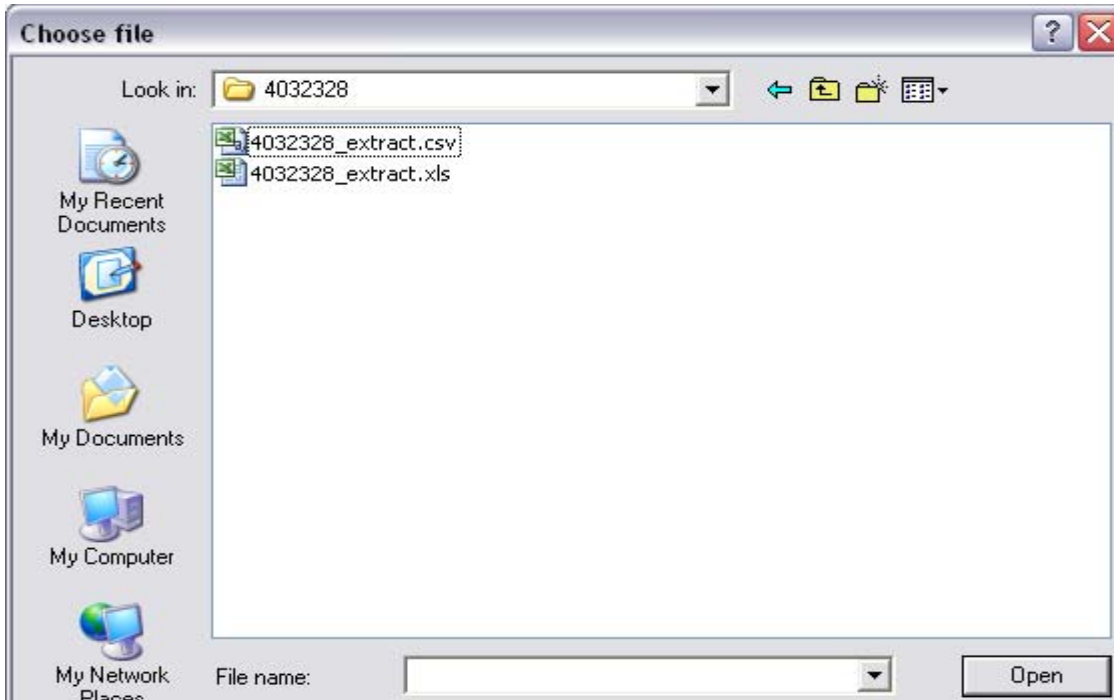
Note: If you are ordering a **Generic Asset**, you must include a full description of the item in the **Line Comments** section.


To attach any supplemental information that is contained in a separate Word, PDF or Excel document:

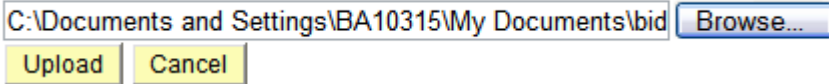
1. Click the **Add Attachment** button. () This takes you to the Add Attachment page.

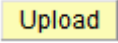
2. Click the **Browse** button (). This opens up a window to let you search for files on your computer.

Agency Procurement: Asset Ordering (Contract Release)



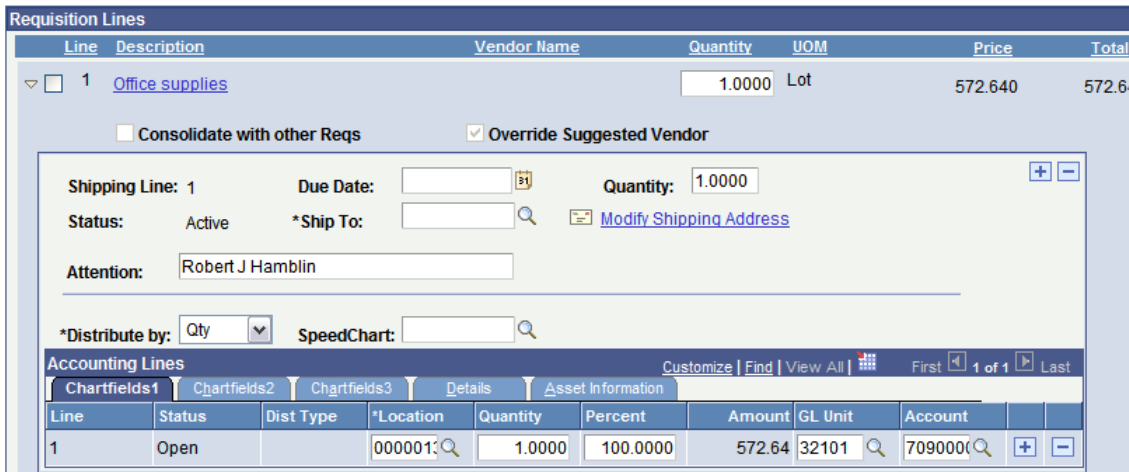
3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.



4. Click the **Upload** button () once the file is found.

5. Repeat for all necessary files on that line.


5) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.






Note: Ordering Generic Asset Items

Agency Procurement: Asset Ordering (Contract Release)

You must enter supplemental information on the Line Details screen to be able to process the order.


On the main Review and Submit page, scroll to the right of the screen and click on the **Line Details** icon.  This is located next to the Total (shown below as 250.00).

Create Requisition

 [1. Define Requisition](#)  [2. Add Items and Services](#)  **3. Review and Submit**

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: General Services
***Requester:** ***Currency:**
Requisition Name: **Doc Type:** **Priority:**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	Staplers	American Paper And Twine	50.0000	Each	5.000	250.00 
<input type="checkbox"/> Select All / Deselect All						
<input type="checkbox"/> Add to favorites						
<input type="button" value="Modify Line / Shipping / Accounting"/>						
<input type="button" value="Delete"/>						
Total Amount:						250.00 USD

Justification/Comments

[Send to Vendor](#) [Show at Receipt](#) [Show at Voucher](#)

Clicking the **Line Details** icon will bring you to the **Line Details** page.

Agency Procurement: Asset Ordering (Contract Release)

Line Details

Line: 1 [ALL BUNDLED DESKTOP SYSTEMS](#)

▼ Item Details

Amount:	0.00	USD	Price:	<input type="text" value="0.00000"/>
Category:	204-53	Microcomputers, Desktop or Tow	View Hierarchy	
Buyer:	<input type="text" value="robej0811001"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor:	<input type="text" value="0000001370"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor Location:	<input type="text" value="MAIN"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor's Catalog:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor Item ID:	<input type="text" value="ZZ:30136"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Manufacturer ID:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Manufacturer's Item ID:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Physical Nature	<input type="text" value="Goods"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> RFQ Required	<input checked="" type="checkbox"/> Zero Price Indicator	<input type="checkbox"/> Inspection Required		
<input type="checkbox"/> Device Tracking	<input type="checkbox"/> Stockless Item			

[Configuration Info](#)

▶ Contract

▶ Sourcing Controls

*Note: If you cannot see the "Price" field, you will need to contact the Content Team to see if the item is set up properly. If the item is set up properly (as confirmed by the Content Team), you will need to contact the Edison Help Desk to have the correct Requester Setup added to your access.

- **Price:** Change the price to reflect the vendor's true price.
 - **Vendor:** Select the vendor to be used.
 - **Vendor Location:** Select the correct Vendor Location.
 - **Vendor Item Number:** Enter the correct Vendor Item Number.
- 6) Then press the OK button at the bottom of the page to return to the main Review and Submit page.
- 7) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Agency Procurement: Asset Ordering (Contract Release)

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Sections to Review/Modify:

Shipping Addresses:

To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFMSHIPTO, both of which must be changed.

*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

Search Results

View All 1-7 of 7

Ship To Location	Description
000000019	BLUE BIRD TOWER 395 FIRE TOWE
000000020	BLUE BIRD TOWER 395 FIRE TOWE
000000021	BLUE BIRD TOWER 395 FIRE TOWE
000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC-10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled

Agency Procurement: Asset Ordering (Contract Release)

address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

Address

Country:	<input type="text" value="USA"/>  United States	Prefix:	<input type="text"/>
Address 1:	<input type="text" value="312 ROSA L PARKS BLVD"/>	Phone:	<input type="text"/>
Address 2:	<input type="text"/>	Ext:	<input type="text"/>
Address 3:	<input type="text"/>	Fax:	<input type="text"/>
Room #:	<input type="text"/> Room Quadrant: <input type="text"/>		
City:	<input type="text" value="NASHVILLE"/>		
County:	<input type="text" value="DAVIDSON"/>	Postal:	<input type="text" value="37243"/>
State:	<input type="text" value="TN"/>  Tennessee		

Verify that the information is correct. If it is not, choose a different Ship-To location. From here, you can continue on with the Requisition.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, and they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

Agency Procurement: Asset Ordering (Contract Release)

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

Repeat as necessary for all lines


Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.



You must include:

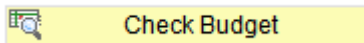
- "Submitting Order for Asset Item." (This must be at the beginning of the comment)
- A detailed explanation of what the request is for. This would be something like “This is an order from Contract for Security Guard Services”.
- Your contact information, including name and phone number.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button ().

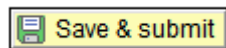
After the justification section is completed, you must Budget Check the document.

Budget Check

- 7) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- 8) After Budget Check, press the “Save and Submit” button to send the Requisition for Approvals.



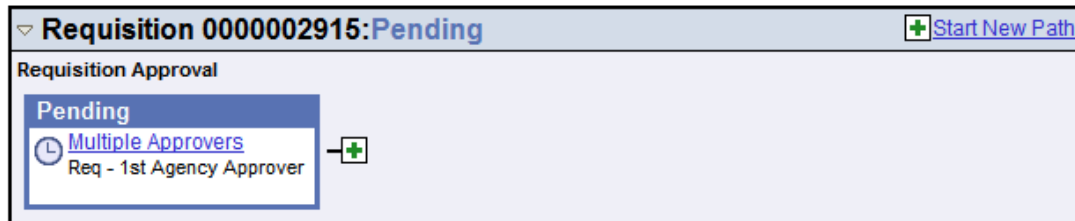
- 9) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

Agency Procurement: Asset Ordering (Contract Release)

- e) To view more information on the approvers, click on the “Multiple Approvers” ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Stage 1 - Agency Req Approvals



- f) To add additional approvers, click the Insert Approver button. (+) This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button (🔍) next to the User ID field, then selecting the User ID from the list. *The Approver you wish to add must be in the system as an Approver before you can select them.*
- i. Use the Radio Buttons below the User ID Field (📻) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.



- ii. After selecting the Approver’s User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

- ★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item’s NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all commodity approvals.

- ★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.

Agency Procurement: Asset Ordering (Contract Release)

- ▼ eProcurement
 - ▷ Buyer Center
 - [Create Requisition](#)
 - [Manage Requisitions](#)

Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:**).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Reg ID	Requisition Name	BU	Date	Status	Budget	Total	
▷ 0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. ▾ Go
▷ 0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. ▾ Go
▷ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. ▾ Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

The screenshot shows a 'Review/Edit Approvers' section with a 'Requisition Approval' sub-section. A dropdown menu is open, showing 'greg:Approved' in green. Below this, a 'Requisition Approval' box contains a green 'Approved' label, a green checkmark, and the text 'TN P1 BUB CT1 SV DT1', 'Req - 1st Agency Approver', and '11/25/2008 - 2:50 PM'.

When the Requisition is approved, you are ready to proceed with creating the Purchase Order.

Creating Purchase Orders

- 42) Navigate to the Purchase Order page by clicking the **Purchasing** link from the menu, then clicking the **Add/Update POs** link.


Agency Procurement: Asset Ordering (Contract Release)

- ▼ Purchasing
 - ▷ Requisitions
 - ▷ Request for Quotes
 - ▷ Procurement Contracts
 - ▷ Vendor Rebates
 - ▼ Purchase Orders
 - ▷ Stage/Source Requests
 - ▷ Manage Change Orders
 - ▷ Reconcile POs
 - ▷ Review PO Information
 - ▷ Reports
 - ▷ [Budget Year End Processing](#)
 - [Add/Update Express POs](#)
 - [Add/Update POs](#)

43) This will bring up the Search page. Click the **Add New Value** tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the **Add** button.

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: 





PO ID:

Maintain Purchase Order

Purchase Order

Unit: 32101	PO Status: Initial
PO ID: NEXT	Budget Status: Not Chk'd
Copy From: <input type="text"/>	<input type="checkbox"/> Hold From Further Processing

▼ **Header**


*PO Date: <input type="text" value="12/12/2008"/>  Vendor Search Sub Contractor	Doc Tol Status: Valid
Vendor: <input type="text"/>  Vendor Details Insur/Bond/Cert	Receipt Status: Not Recvd
*Vendor ID: <input type="text"/> 	*Dispatch Method: <input type="text"/> <input type="button" value="Dispatch"/>
*Buyer: <input type="text"/> 	Amount Summary
PO Reference: <input type="text"/>	Merchandise: 0.00
Header Details PO Activities Add ShipTo Comments	Freight/Tax/Misc.: 0.00 <input type="button" value="Calculate"/>
PO Defaults	Total Amount: 0.00 USD
Add Comments	

Add Items From

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

44) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Contract Release Orders, this will be found by looking at the Requisition lines for the contract Vendor assigned to the item.

*Vendor ID: 

45) Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon () located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.

Agency Procurement: Asset Ordering (Contract Release)

- 46) For Contract Releases, you will be copying from a Requisition created by your Agency Requester. To do so, click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.

Copy From:
▼ Header
Contract
*PO Date: Purchase Order
Vendor: Requisition

- 47) This takes you to the **Copy Purchase Order from Requisition** page. It is shown on the first picture below. Click the Lookup Icon (🔍) by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the second picture below. Type in your Business Unit if it did not default and press the Search button to bring up a list of Requisition IDs. Find the Requisition you were assigned and click the **Requisition ID** link.

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:	<input type="text" value="32101"/>	Origin:	<input type="text" value=""/> 🔍
Buyer:	<input type="text"/> 🔍	Max Rows:	<input type="text" value="20"/>
Vendor ID:	<input type="text"/> 🔍	<input checked="" type="checkbox"/> Include Reqs With No Vendor	
Category:	<input type="text"/> 🔍	<input checked="" type="checkbox"/> Include Inventory Items	
Requisition ID:	<input type="text"/> 🔍	<input type="checkbox"/> Stockless Item	
Contract ID:	<input type="text"/> 🔍	<input type="checkbox"/> Exclude Auto Source Item	
<input type="button" value="Search"/>			

Look Up Requisition ID

Business Unit:
Requisition ID: 🔍

[Basic Lookup](#)

Search Results

View All 1-4 of 4

Requisition ID	Requester
000000073	TN2 PU EPRO AGENCY REQUESTOR
000000072	TN2 PU EPRO AGENCY REQUESTOR
000000071	TN2 PU EPRO AGENCY REQUESTOR
000000061	tn_gross

Agency Procurement: Asset Ordering (Contract Release)

- 48) Clicking the correct Requisition ID will bring you back to the **Copy Purchase Order from Requisition** page. Click the **Select All** ([Select All](#)) link to select all the lines for copying. Then click the **Copy to PO** ([Copy To PO](#)) button to copy the requisition lines over to the PO.

Vendor Details -- Machinery Sales Co Inc

Unit:	32101	PO ID:	NEXT	Vendor:	MACHINERY -001
*Location:	<input type="text" value="MAIN"/>			Vendor Information	
*Address:	<input type="text" value="1"/>	Show Address Details		Terms:	<input type="text" value="30"/> Net 30
Contact:	<input type="text"/>	Show Contact Details		Basis Dt Type:	<input type="text" value="Acct Date"/>
Salesperson:	<input type="text"/>	Show Salesperson Details			

Vendor Details Message

Country:	USA	United States	Prefix:	
Address 1:	<input type="text" value="PO Box 2098"/>		Fax:	
Address 2:	<input type="text"/>		Prefix:	
Address 3:	<input type="text"/>		Phone:	
Room #:	<input type="text"/>	Room Quadrant:	<input type="text"/>	
City:	<input type="text" value="Memphis"/>			
County:	<input type="text" value="79"/>	Postal:	<input type="text" value="38101"/>	
State:	<input type="text" value="TN"/>	Tennessee		
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/>				

- 49) This should default in all the information from the Requisition, and return you to the main Purchase Order page. Click the **Vendor Details** ([Vendor Details](#)) link, which takes you to the Vendor Details page.
- 50) Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon () next to the **Location** field to select a different location and use the Lookup Icon () next to the **Address** field to select a different address.

Maintain Purchase Order

Vendor Details -- Machinery Sales Co Inc

Unit:	32101	PO ID:	NEXT	Vendor:	MACHINERY -001
*Location:	<input type="text" value="MAIN"/>			Vendor Information	
*Address:	<input type="text" value="1"/>	Show Address Details		Terms:	<input type="text" value="30"/> Net 30
Contact:	<input type="text"/>	Show Contact Details		Basis Dt Type:	<input type="text" value="Acct Date"/>
Salesperson:	<input type="text"/>	Show Salesperson Details			

Agency Procurement: Asset Ordering (Contract Release)

Look Up Location

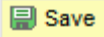

Vendor SetID: SHARE
Vendor ID: 0000085887
Vendor Location: begins with

[Basic Lookup](#)

Search Results

View All First 1 of 1 Last

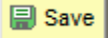
Vendor Location	Description
MAIN	MEMPHIS

- 51) Once the correct address is entered, press the **OK** button at the bottom of the page to return to the main **Purchase Order** screen.
- 52) After reviewing all the information on the PO, return to the main **Purchase Order** page and click the **Save** button, located at the bottom of the screen.

- 53) At this point, there are several other options that can be changed, but they should all default to the correct values. The defaults take information from your Buyer Profile and the copied Requisition and insert it automatically into the Purchase Order.
- 54) When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. An example is shown at the top of the next page.

Express Purchase Order

Purchase Order

Unit: 32101	PO Status: Open  
PO ID: 0000000186	Budget Status: Not Chk'd   
Copy From: <input type="text"/>	<input type="checkbox"/> Hold From Further Processing

- 55) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page. 
- 56) You must now submit the PO into Workflow. To do so, click the **Purchasing** link on the left-hand menu. Then click **Purchase Orders**.

- Purchasing
- Requisitions
- Procurement Contracts
- Purchase Orders

- 57) Click the **Approve Amounts** link under the Purchase Order section.

Agency Procurement: Asset Ordering (Contract Release)



Approve Amounts

Approve, recycle, or deny purchase order amounts.

- 58) Use the Search screen that appears to find your Purchase Order by typing the PO number into the **PO Number** field and changing the drop-down box from **Begins** to **Contains**, as shown below. Then press **Search**.

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: =

PO Number: contains

SetID: begins with

Contract ID: begins with

Release Number: =

Purchase Order Reference: begins with

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

- 59) Click the link for the PO that appears.

Search Results

View All

First 1 of 1 Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

- 60) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to **Approve**, then press the **Save** button. It defaults at **Approve**.

Agency Procurement: Asset Ordering (Contract Release)

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: Approval Status: Initial

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

▶ Lines

Once all approvals are met, the Purchase Order can be dispatched.

Dispatching Purchase Orders

- 1) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

*Dispatch Method:

Amount Summary

Merchandise:

Freight/Tax/Misc.:

Print

EDX

Email

Fax

Phone

Print

- 2) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.
- 3) A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
- 4) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right.
- 5) This will open up a list of files. Click the one ending in .PDF. This will open up the finalized Purchase Order as a .PDF document, which can then be printed or e-mailed, or printed and faxed to the vendor.

Agency Procurement: Local Purchases less than \$25000

Local Purchases less than \$25000

To make one-time Purchases of non-contract items with a total of \$25000 or less, you will begin with the basic eProcurement Requisition process.

- 1) For Purchases from \$0.01 to \$5000, you will go straight from the ePro Requisition to a Purchase Order. *Additionally, if cleared, you can use the Direct Entry Purchase Order instructions.*
- 2) For Purchases from \$5000 to \$25000 that require Bids, you must use the Sourcing module to bid out and record your Bids.

Creating Requests

Local Purchase Orders

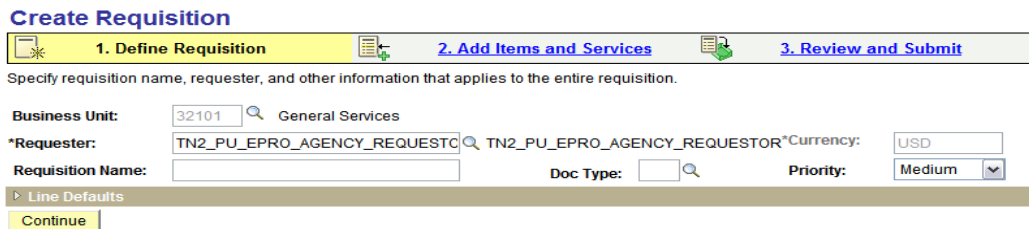
1. To create a Requisition, you must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



2. The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



3. Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.



Step 1: Define Requisition

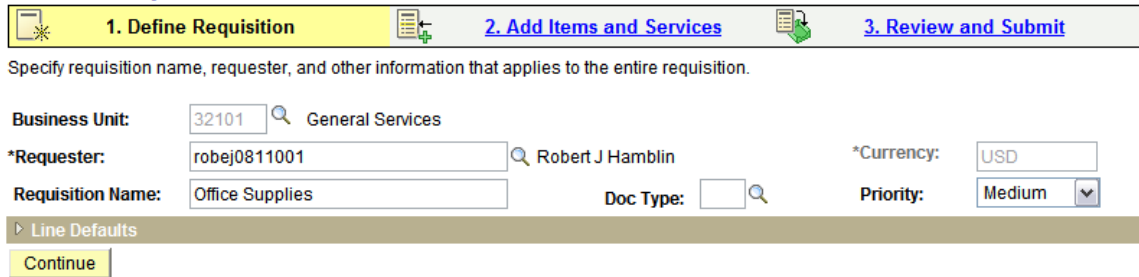
Agency Procurement: Local Purchases less than \$25000

1. Define Requisition

1. To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.

Requisition Name Click in the **Requisition Name** field and then type in the name. Name the Requisition after the items being requested.

Create Requisition



Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: General Services

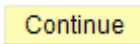
*Requester: Robert J Hamblin

*Currency:

Requisition Name: Doc Type: Priority:

Line Defaults

[Continue](#)

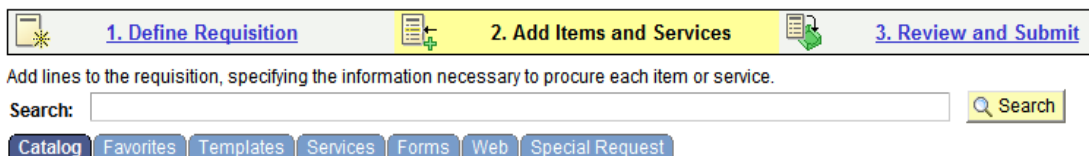
2. After naming your Requisition, click the Continue Button. 

Step 2: Add Items and Services

2. Add Items and Services

1. The next step is to add items to the requisition. One-time Purchases will generally be entered as a Special Request, unless the item needs to be tagged as an Asset. **Agencies are required to first make sure the items are not available from an active contract.**
2. The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. The purchase type and Doc Type you've chosen determine the Item Selection tabs you will use to create your Requisition.

Create Requisition



Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: [Search](#)

[Catalog](#) [Favorites](#) [Templates](#) [Services](#) [Forms](#) [Web](#) [Special Request](#)

3. Requests for all items not on contract, from \$0.01 to \$25,000 are done under “Local Purchase Authority”. Local Purchases are divided into two ranges by dollar amount, but both are done as Special Requests. The only difference between the two ranges is that Purchases under \$5,000 do not require bids. Purchases from \$5,000-\$25,000 require Agency Buyers to solicit and record bids.

Special Request Tab

4. To enter a Special Request for Local Purchase in either dollar amount category, click the

Agency Procurement: Local Purchases less than \$25000

“Special Request” tab. Then click the “Special Item” link.

The screenshot shows the 'Special Item' form with the following fields and options:

- *Item Description: [Text Input]
- *Price: [Text Input]
- *Quantity: [Text Input]
- *Category: [Text Input with Search Icon]
- Vendor ID: [Text Input with Search Icon]
- Vendor Item ID: [Text Input]
- Mfg ID: [Text Input with Search Icon]
- Mfg Item ID: [Text Input]
- *Currency: [Text Input with 'USD' selected]
- *Unit of Measure: [Text Input with Search Icon]
- Due Date: [Text Input with Calendar Icon]
- [Suggest New Vendor](#)
- Additional Information: [Text Area]
- Send to Vendor
- Show at Receipt
- Show at Voucher
-
-
-

5. The Special Request tab has several required information fields, listed below.

All the fields marked with an asterisk (*) must be completed.

- **Item Description:** This is used to enter a detailed description of the item. Begin with a noun and follow with descriptive terms. **If five or more items of the same type and on the same "APCAT" line are to be purchased, combine all potential lines into one and use a general description that would cover all the items.** Example would be “Fishing Equipment” if one were buying fishing poles, tackle boxes, fishing hooks, fishing line and fishing nets. **Please note: This cannot be used for items kept in inventory or tagged as “assets”.**
- **Price:** This is the estimated price for the item.
- **Quantity:** This is the quantity needed.
- **Unit of Measure:** This is used to select a Unit of Measure. Press the Lookup Button to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list. **(If multiple items, unit of measure will be “Lot”. If request is for a job, use "EA" for Each.)**
- **Category:** This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button to pull up the NIGP search screen, shown below.

Agency Procurement: Local Purchases less than \$25000

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Categories	Customize	Find	View All	First	1-5 of 5	Last
Catalog	Category	Description	Find in Tree			
1 PROCUREMENT ITEMS	610-00	OFFICE SUPPLIES: CARBON PAPER AND RIBBONS, ALL TYPES				
2 PROCUREMENT ITEMS	615-00	OFFICE SUPPLIES, GENERAL				
3 PROCUREMENT ITEMS	615-60	Office Supplies, General (Not Otherwise Classified)				

- Start off by changing the drop-down box from **Description** to **Category**. Type “-00” into the Search field, without quotes, then press the **Find** button. This will bring up a listing of the generic NIGP Category codes at the header level. A “header” NIGP code has the format **xxx-00** with the “xxx” replaced by a three-digit number. Pick a generic header from this list and write it down.
- Type the first three digits of the Header into the Category field and press the Find button. This will return a list of all the valid NIGP codes within that header.
- Select the appropriate code from the list by clicking the link in the Category column. This will return you to the Special Item screen.
- After entering in all the required fields (listed above), press the Add Item button. After all the requested items are entered, click the **Review and Submit** tab located at the top right. An example of a completed Special Request is shown below.

Catalog Favorites Templates Services Forms Web **Special Request**

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

Vendor ID: [Suggest New Vendor](#)

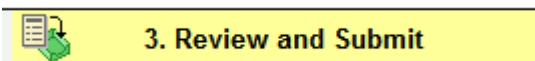
Vendor Item ID:

Mfg ID:

Mfg Item ID:

After entering in all the required fields press the Add Item button ().

Step 3: Review and Submit



Agency Procurement: Local Purchases less than \$25000

- 1) **Reviewing and Submitting Requisitions:** The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. Enter your Document Type, **LPA**, for Local Purchases with Agency Authority.

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: General Services
*Requester: Robert J Hamblin *Currency:
Requisition Name: Doc Type: Priority:

Line Comments

- 2) You must now add information to the **Line Comments** section to provide DGS with the necessary information to process the Request. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon (🗨️) to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments. **The Line Comments are used to attach specifications and instructions.**

Line Comments

Line	Description	Quantity	Unit	Price
1	Air-conditioning, installat	1.0000	Each	30000.000 USD

<< This is a one-time purchase for installation of a replacement air-conditioning system for a new location. >>

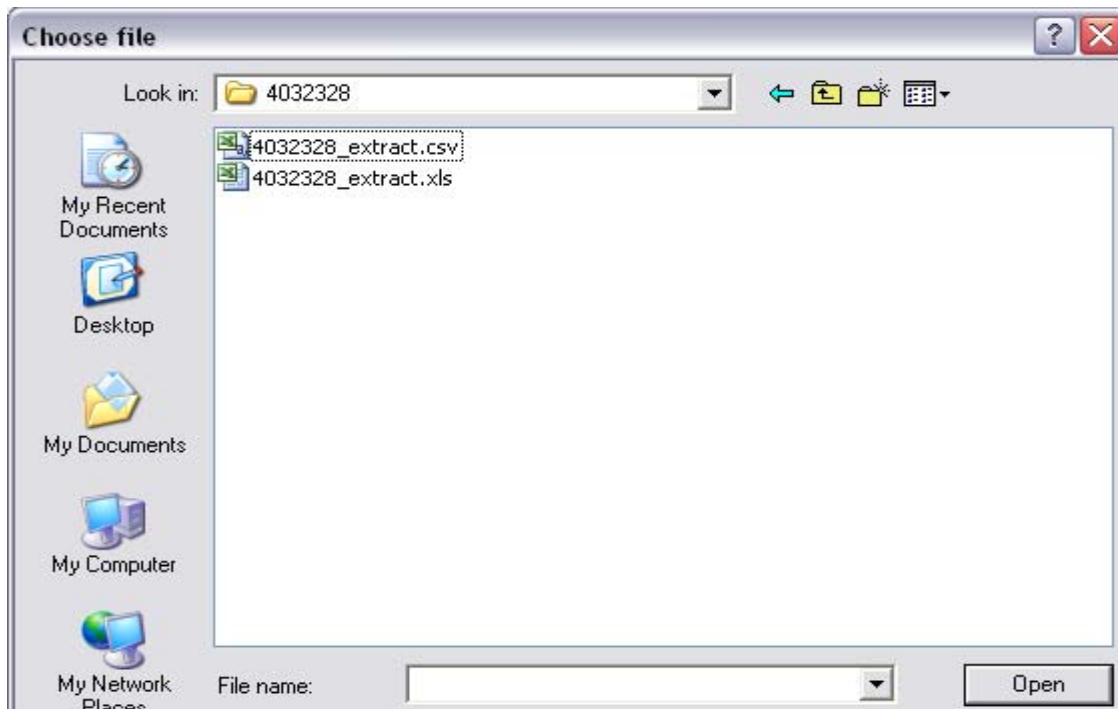
Send to Vendor Show at Receipt Show at Voucher


- 3) To attach specifications that are contained in a separate Word, PDF or Excel document:
 - o Click the **Add Attachment** button. () This takes you to the Add Attachment page.

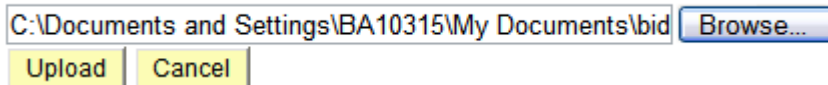
- o Click the **Browse** button (). This opens up a window to let you search for

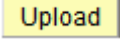
Agency Procurement: Local Purchases less than \$25000

files on your computer.



- Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.



- Click the **Upload** button () once the file is found.
 - Repeat for all necessary files on that line.
 - **If this is a "grouped" Purchase**, attach the scanned invoice to the line.
- 4) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.

Agency Procurement: Local Purchases less than \$25000

The screenshot displays the 'Requisition Lines' interface. At the top, a table shows one line: 'Office supplies' with a quantity of 1.0000, UOM of Lot, and a price of 572.640. Below this, there are checkboxes for 'Consolidate with other Reqs' and 'Override Suggested Vendor'. A shipping section includes fields for 'Shipping Line: 1', 'Due Date', 'Quantity: 1.0000', 'Status: Active', '*Ship To', and 'Attention: Robert J Hamblin'. There are also fields for '*Distribute by: Qty' and 'SpeedChart'. At the bottom, an 'Accounting Lines' table is visible with columns for Line, Status, Dist Type, *Location, Quantity, Percent, Amount, GL Unit, and Account. The table contains one row for line 1 with status 'Open', location '000001', quantity '1.0000', percent '100.0000', amount '572.64', GL unit '32101', and account '709000'.

When all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Sections to Review/Modify:

Shipping Addresses:

To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFMSHIPTO, both of which must be changed.

*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Agency Procurement: Local Purchases less than \$25000

Look Up Ship To

SetID: SHARE
Ship To Location: begins with
Description: begins with

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID: SHARE
Ship To Location: begins with
Description: contains

[Basic Lookup](#)

Search Results

View All First 1-7 of 7 Last

Ship To Location	Description
000000019	BLUE BIRD TOWER_395 FIRE TOWE
000000020	BLUE BIRD TOWER_395 FIRE TOWE
000000021	BLUE BIRD TOWER_395 FIRE TOWE
000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

Address

Country: United States Prefix:

Address 1: Phone:

Address 2:

Address 3:

Room #: Room Quadrant:

City:

County: Postal:

State: Tennessee

Verify that the information is correct. If it is not, choose a different Ship-To location.

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Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

Repeat as necessary for all lines

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.



The screenshot shows a software interface window titled "Justification/Comments". It features a large text input field with a scroll bar on the right. Below the input field, there are three checkboxes: "Send to Vendor", "Show at Receipt", and "Show at Voucher".


You must include:

- "Submitting Local Purchase Order." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like “This is an

Agency Procurement: Local Purchases less than \$25000

order for Office supplies that are not available from an existing Term Contract”.

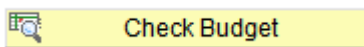
- Your contact information, including name and phone number.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button ().

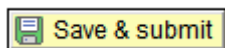
After the justification section is completed, you must Budget Check the document.

Budget Check

10) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



11) After Budget Check, press the “Save and Submit” button to send the Requisition for Approvals.

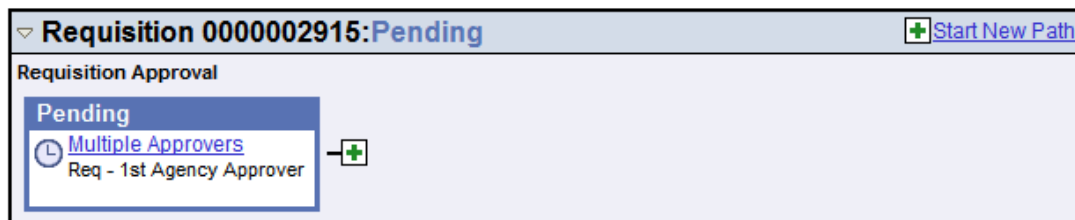




12) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

- g) To view more information on the approvers, click on the “Multiple Approvers” ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Stage 1 - Agency Req Approvals



- h) To add additional approvers, click the Insert Approver button. () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the list. ***The Approver you wish to add must be in the system as an Approver before you can select them.***

- i. Use the Radio Buttons below the User ID Field () to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice

Agency Procurement: Local Purchases less than \$25000

through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer

- ii. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert (**Insert**) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all **commodity approvals**.

★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



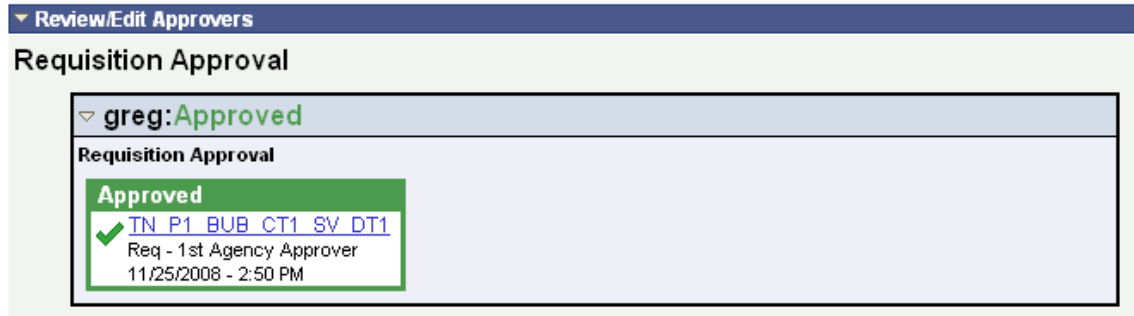
Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:**).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. Go
0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. Go
0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. Go

- o Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

Agency Procurement: Local Purchases less than \$25000



When the Requisition is approved, you are ready to proceed. If your order is under \$5000, go to the [Creating Purchase Orders under \\$5000](#) section. If it is over \$5000, go to the [Sourcing](#) section.

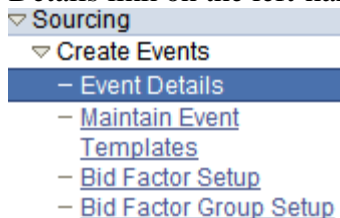
Sourcing

This section is used for Local Purchases that require Bids, those with a total from \$5000.01 to \$25000!

How to Create a New Sourcing Event

Creating a new Sourcing Event begins with the Create Events page, located in the Sourcing module.

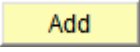
1. Select Sourcing from the main menu. Then click Create Events. From there, click the Event Details link on the left-hand side of the page. A picture is shown below.



2. Clicking Event Details will bring up the **Create Events page**. The Business Unit will default in based on User Preferences. Make sure this is the correct Business Unit. Leave the Event ID as NEXT, so it auto-assigns a new Event ID Number.

Agency Procurement: Local Purchases less than \$25000

3. Select the Event Format and Event Type from the two drop-down menus. Select the **Buy** Event Format. Leave the Event Type as **RFx**.

4. Click the Add button (). This will bring you to the **Create an Event: Event Summary** page.

Create an Event

Event Summary

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy

Required fields reside on pages marked with an asterisk (*) -- you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

- [* Event Settings and Options](#) [Payment Terms and Contact Info](#)
- [Event Comments and Attachments](#) [Event Constraints](#)
- [Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

- [* Line Items](#) [Item Line Defaults](#)

Event Name and Description

5. The first step on the Event Summary page is to create an Event Name and Event Description.

Agency Procurement: Local Purchases less than \$25000

*Event Name:
Description:

- **Event Name:** Use the name that is on the Requisition
- **Event Description:** Enter a brief description of what this Event is being used to buy.

Copying Requisition Lines

6. After filling in the Event Name, information must be copied from the Requisition, using the Requisition ID number. At the “Copy From” drop-down box, select the Requisition option. Then click the Go button.

Copy From:
Contract
Item Master
Planning Order
Purchase Order
Request For Information
Requisition

7. Make sure that the **Copy From** drop-down box has Requisition selected.

[Create an Event](#)

Enter Copy Criteria

Copy Template

Copy From:

Select Criteria

Business Unit:

*Copy Method:

*Select Lines:

Copy Criteria

Req ID:

Buyer:

Vendor SetID: Vendor ID:

SetID:

Item ID:

Category:

Exclude Auto Source Item Stockless Item Copy all Req/RFQ lines
 Include Inventory Items Include Reqs With No Vendor

8. In the **Select Criteria** section, select the appropriate Business Unit either by using the Lookup tool () or typing it directly into the window, as shown below. It does not default.

Select Criteria

Business Unit:

Agency Procurement: Local Purchases less than \$25000

- Select **Copy Method: Append** from the Copy Method drop-down. The Copy Method is used to determine what is done with the copied information. **Append** adds the information to the end of any existing line information. For a One-Time Purchase, choose Append when first copying.

*Copy Method:
 *Select Lines:

- Next, choose the **Req Lines** option from the Select Lines drop-down menu.

*Copy Method:
 *Select Lines:

- In the **Copy Criteria** section, type the Req ID in the **Requisition ID** field, then click the OK button.

Copy Criteria

Req ID:

- It will bring up the lines from the selected Requisition, allowing you to confirm the lines to copy. The Select All link, when pressed, places a checkbox next to all of the lines. This checkbox shows that the line will be copied. If only certain lines are needed, individual lines can be selected by checking the check box beside them.

Requisition Lines to Copy

[Select All](#) [Deselect All](#)

Select Lines							Custom		
Sel	Item SetID	Item	Description	Quantity	UOM	Price	Currency	Due Date	Business Unit
<input type="checkbox"/>	SHARE		Widget	6.0000	EA	500.00000	USD		32101

- Further information on the lines can be found by using the scrollbar at the bottom of the screen to scroll to the right. After all desired lines are selected; click the OK button, located below the lines.

- This brings you to the **Create an Event: Line Items** page to review the Lines copied in the previous steps.

Agency Procurement: Local Purchases less than \$25000

Create an Event

Line Items

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Requisition

Line Items		Customize Find View All First 1 of 1						
Basic Definition		Advanced Definition						
Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Vehicles	060-09	EA	156.0000	100.0000	\$15600.00	0.00000
Event Total: 15600.0000 USD			Line Weighting Total: 0 % Remaining Weight: 100 %					

15. Click the **Save Event Changes** button at the bottom of the page. This saves the event and assigns an Event ID, shown at the top of the **Event Summary** page.

16. Click the **Return to Event Overview** link to return to the main page. [< Return to Event Overview](#)

17. The next step in the Event process is to assign option preferences.

Event Options

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Payment Terms and Contact Info](#)

[Event Comments and Attachments](#)

[Event Constraints](#)

[Event Header Bid Factors](#)

Event Settings and Options:

- Click the **Event Settings and Options** link ([* Event Settings and Options](#)). The list of option checkboxes is shown in the picture below, with bulleted descriptions starting underneath the picture.

Create an Event

Event Settings and Options

Business Unit: 32101 Event ID: 0000000242 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

<input checked="" type="checkbox"/> Allow Bidder XML Downloads	Round/Version Display: <input type="button" value="Display Round and Version"/>
<input checked="" type="checkbox"/> Bid Required On All Lines	<input checked="" type="checkbox"/> Sealed Event
<input type="checkbox"/> Multiple Bids Allowed	<input checked="" type="checkbox"/> Display Bid Factor Weightings
<input checked="" type="checkbox"/> Allow Edit of Posted Bids	
Factor Event Score Into: <input type="button" value="Total Score"/>	Start Price: <input type="button" value="Do Not Display"/>
Header Weighting: <input type="text"/>	

Agency Procurement: Local Purchases less than \$25000

- 1) **Allow Bidder XML Downloads** is checked by default. When checked, it allows the Bidder to download the Solicitation and open it as an Excel form and fill it out electronically. **Leave this checked.**
- 2) **Bid Required on All Lines** is checked by default. When checked, it requires the Bidder to submit a bid for all lines. When unchecked, it allows the Bidder to only bid on the lines they choose. **Leave this checked.**
- 3) **Multiple Bids Allowed** is *not* checked by default. When checked, this allows the same Bidder to enter multiple bids. When unchecked, the Bidder can only enter one bid. **Make sure this is checked.**
- 4) **Allow Edit of Posted Bids** is checked by default. When checked, this allows the Bidder to Edit their Bids that they have already posted. **Leave this checked.**
- 5) **Sealed Event** is checked by default. When checked, Bidders will not be able to see Bids that have been posted other than their own. **Leave this checked.**
- 6) **Display Bid Factor Weightings** is checked by default. When checked, this enables the Bidders to see how much weight is given to each question asked of them. **Leave this checked.**
- 7) **The last three options (Factor Event Score into Total Score, Start Price and Header Weighting) are not used at this time.**

After selecting the desired options, choose the **Return to Event Overview** link. [< Return to Event Overview](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

The **Configure Line Items** section is used to create new Event Lines or edit Event Lines that have been copied in from the Requisition.

1. Click the Line Items link. [* Line Items](#) This will take you to the **Line Items** screen, shown below. The Line Items screen will display the lines copied from the Agency Requisition. Any necessary changes to existing lines can be made by clicking in the field (such as the Qty) and typing in the correct value.

Agency Procurement: Local Purchases less than \$25000

Line Items

Business Unit: 32101 Event ID: 0000000242 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Line Items								Customize	Find	View All	First	1-2 of 2	Last
Basic Definition		Advanced Definition											
Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting					
1	<input type="text" value="1000005112"/>	<input type="text" value="BOATS, PEDAL"/>	<input type="text" value="120-21"/>	<input type="text" value="EA"/>	<input type="text" value="1000.000"/>	<input type="text" value="1450.0000"/>	<input type="text" value="\$1450000.00"/>	<input type="text" value="0.00000"/>					
2	<input type="text" value="1000005112"/>	<input type="text" value="BOATS, PEDAL"/>	<input type="text" value="120-21"/>	<input type="text" value="EA"/>	<input type="text" value="1.0000"/>	<input type="text" value="1708.5400"/>	<input type="text" value="\$1708.54"/>	<input type="text" value="0.00000"/>					
Event Total: 1451708.5400 USD							Line Weighting Total: 0 %		Remaining Weight: 100 %				

- To delete a line, click the blue Minus button on that line (-). To add a Line to the Event without copying it in, use the blue Plus button (+) to add a new row. This adds a row directly below the row where the Plus button was selected. If the blue Plus button is not visible, use the scrollbar to scroll to the right. An example blank row is shown below.

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting					
3	<input type="text" value="1000011656"/>	<input type="text" value="FLAME RESISTANT PANTS, DEPT OF FORESTRY"/>	<input type="text" value="999-99"/>	<input type="text" value="EA"/>	<input type="text" value="20.0000"/>	<input type="text" value="82.0000"/>	<input type="text" value="\$1640.00"/>	<input type="text" value="0.00000"/>					
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00000"/>					

- The blank line will need to have information filled in. The required fields are Description, Unit of Measure (UOM) and Quantity (Qty). The Start Price and Item ID can also be filled in if available.
- To find if an Item ID exists for the requested item, use the Lookup tool (🔍) located by the Item ID field. This allows searching for item IDs that are already in the system. Clicking the Lookup button will pull up a menu to search by Item IDs, as shown below. Items on Agency or Statewide contracts will have Item IDs in the system.

Search by: begins with

[Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to red [View All](#) First 1-100 of 300 Last

Item ID	Description	Category	Category ID	Item Group	Family
1000000001	GROUNDS MTNC, DAYTIME, CMRA DE	999-99	08518	(blank)	(blank)
1000000002	SHIRT, GUARD, SS, GREY, FEM, S	200-85	01246	250	276

- To add Bid Factors to a Line, click the Advanced Definition tab, then the Bid Factor link ([Bid Factors](#)), located to the right of the Details link. If it is not visible, use the scrollbar to scroll to the right. To edit the Bid Factors you must first have entered a Quantity, Unit of Measure and

Agency Procurement: Local Purchases less than \$25000

Start Price for the line, on the Basic Definition tab. After clicking the Bid Factors link, you will be taken to the **Line Bid Factors** screen.

The Price Bid Factor will default on every line, as in the example. Line Bid Factors are entered in the same way as Header Bid Factors. Keep in mind that these only apply to the selected line, not the entire Event.

Create an Event

Line Bid Factors

Line: 1 Bid Factor Weighting Total: 100.00000
Item ID: Remaining Bid Factor Weight: 0.00000
Description:

Bid Factors

Seq Nbr: 1 Bid Factor: PR Type: Monetary Weighting: 100.00000 + -
Question: What is your price unit price? Display Bid Factor
 Bid Factor Response Required
 Ideal Response Required
 Include on Contract
Best: 0.000000 Worst: 9999.000000

6. To add Specifications to a selected line, click the Advanced Definition tab, then the Comments (🗨) icon, located on the far right. If it is not visible, use the scrollbar to scroll to the right. A picture is shown below.

Copy From: Go

Line Items Customize | Find | View All | First 1 of 1 Last

Basic Definition Advanced Definition

Line	Item ID	Description	Item SetID	Details	Bid Factors	Constraints
3		Pencil Holder	SHARE	Details	Bid Factors	No 

7. Clicking the Comments Icon brings up the Line Comments and Attachments screen. This would be where specifications or comments that apply **only** to the **selected line** are attached. Comments can either be typed into the text field or Attached by clicking the Add Attachment button. See the picture below for an example. **For specifications that need to go to the Vendor, be sure to check the “Send to Bidder” checkbox.**

Agency Procurement: Local Purchases less than \$25000

Modify an Event

Line Comments and Attachments

Event ID: 0000000244 Line Number: 3

Enter Comments Find | View All First 1 of 1 Last

Comments:

Send To Bidder Include On Award

[Add Attachment](#)

Once all Lines have either been copied over or manually entered and are confirmed correct, click the Return to Event Overview link.

Then click the Bidder Invitations link, shown under **Step 3: Select Bidders to Invite**, detailed below.

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Bidder Invitations

- 1) Clicking the Bidder Invitations link under Step 3 on the main page goes to the **Invite Bidders** screen.

[Create an Event](#)

Invite Bidders

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

Customize | Find | View All | First 1 of 1 Last

Select	Bidder ID	Bidder Type	Name	Dispatch Method
1	<input type="checkbox"/>			Email

[Search for Bidders](#) Save Bidders as Group Search UDDI Registry

- 2) Click the Search for Bidders link. [Search for Bidders](#) This will bring up the Bidder Search screen.

Agency Procurement: Local Purchases less than \$25000

Bidder Search

Search Criteria

Bidder Type:

Name:
State:
Type:

ID:
City:
SIC Type:

Contact:
Country:
SIC Code:

Group ID:
Postal:
Item ID:

Group Name:

Maximum Rows retrieved:

Enter search criteria and press search to retrieve bidders.

3) Use the Lookup Icon located by the ID Field or Name Field to pull up a list of Vendors by either ID or Name. Click the blue link of the correct vendor name.

Look Up Name

Search by: begins with

[Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and see [View All](#) First 1-100 of 300 [Last](#)

Name 1	Short Vendor Name	Vendor ID
Advanced Electronics Inc	ADVANCED E-003	0000077490
Advanced Electronics Inc	ADVANCED E-010	0000351979

4) After all desired Vendors and Bidders are selected, click the OK Button. This will pull the selected Bidders and Vendors into the **Invite Bidders** screen.

[Select All](#) [Deselect All](#)

Search Results

[Customize](#) | [Find](#) | [View All](#) |
First 1-50 of 50 [Last](#)

Bidder ID	Bidder Type	Location	Name	Invite
1 0000000215	Vendor	<input type="text" value="MAIN"/>	Advanced Prof Generator	<input type="checkbox"/>
2 0000000216	Vendor	<input type="text" value="MAIN"/>	Szy Holdings Llc	<input type="checkbox"/>

5) After all vendors and bidders are selected, click the Return to Event Overview link. [< Return to Event Overview](#)

Review the event one final time for correctness, paying special attention to the Event Lines and the Bidder Invitations. Set the Event Start Date and End Date at the top of the main Event Summary page.

Agency Procurement: Local Purchases less than \$25000

When the final review is complete, press the Post button to route the event for approvals. Once approved, it will be sent to the selected Vendors/Bidders and posted on the web (if Public Event was selected).

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.



Bidding and Entering Bids on Behalf of Vendors

Entering Bids on Behalf of Bidder:

- 1) Select the Sourcing option from the menu, then Event Responses. Click the Create Bidder Response link.



- 2) Select the appropriate Business Unit and Event Id for the Event that was bid on. Press the Search Button, and then scroll through the Events listed until the Event is found. It will display one blue link for every Bidder that was sent an invitation on that event, in order of the event numbers.

Search Criteria

Search: _____

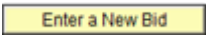
*Business Unit:	32101	Bidder Type:	
Event ID:		Bidder Setid:	
Event Format:		Bidder ID:	
Event Type:		Name:	
Event Name:		Contact Name:	

Search

Event ID:	0000000245	Bidder Setid:	
Event Format:		Bidder ID:	
Event Type:	RFx	Name:	
Event Name:		Contact Name:	

Search

Event ID	Event Name	Round	Version	Name	Bidder Type	Setid	Bidder ID
32101-0000000245	Testing of Bid responses	1	1	Windham Professionals Inc	Vendor	SHARE	0000000080
32101-0000000245	Testing of Bid responses	1	1	AAA Inc.	Vendor	SHARE	0000094116

- 3) Click the blue link for a Bidder on the event to bring up the “Enter Bid on Behalf of...” screen for this Event, for the selected Bidder. It will fill in the name of the selected Bidder at the end of the screen name.
- 4) Press the Enter a New Bid button.  This opens up the Event Details screen, where the information from the bid can be entered on behalf of the Bidder.

Agency Procurement: Local Purchases less than \$25000

Event Details

Event Name: 239.08 Exceptions to Terms
Event ID: 32101-0000000063
Event Format/Type: Sell Event RFX
Event Round: 2
Event Version: 1
Event Start Date: 08/04/2008 5:00PM CDT
Event End Date: Event Completed

Bid ID: New
Bid Date:
Bid Currency: US Dollar

[View/Add General Comments and Attachments](#)
[Hide Additional Event Info](#)

- 5) If the Bidder included supplemental information/comments, click the **View/Add General Comments and Attachments** ([View/Add General Comments and Attachments](#)) link to go to the General Comments and Attachments screen. Comments can be typed in the Comments window, or files can be attached using the Attachment button. After the comments have been entered, click the OK button to return to the main Enter Bid Response page.

General Comments and Attachments

Business Unit: 32101 Event ID: 0000000245

Attachments

Add New Attachments First 1 of 1

Attached File	Attachment Description	Upload	View
		<input type="button" value="Upload"/>	<input type="button" value="View"/>

Comments

Add New Comments

- 6) Enter the Bid Quantity and Bid Price for each line and repeat for all lines, scrolling down the page.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
Lines That Require a Response: 1
Your Total Line Pricing: 3,600.0000 USD

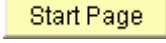
[Hide Line Detail](#)

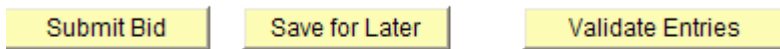
★ Bid Required Line Comments/Files

Previous Lines 1 of 1 Next Lines

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	Your Total Bid Price
1	★ Widget	EA	6.0000	6.0000	<input type="text" value="600.000000"/>	3,600.0000 USD

Agency Procurement: Local Purchases less than \$25000

- 7) If any supplemental information pertains to the lines specifically, click the View/Add Question Comments and Attachments link, located on each line. This takes you to the Line Comments and Attachments page. Enter any comments or attach any files included with the Bid. Click the OK button when finished to go back to the Line Details page.
- 8) After Line Bid Responses are entered, click the Start Page button to return to the Event Details page. 
- 9) Once all information has been entered and verified as correct, press the Submit Bid button to submit the Bid on behalf of the Bidder.



[Return to Create Bidder Response](#)

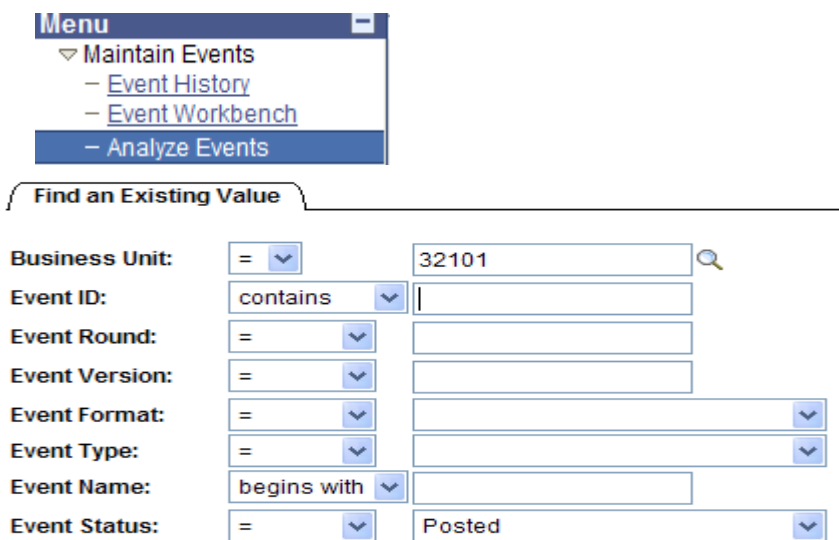
A message will pop up asking if the user is done making changes to the bid. If everything is **completed and correct**, select the Yes button. **Once Yes is selected, no further changes can be made unless the “Allow Edit of Bids” box is checked.**

- 10) Repeat the above steps (1-9) for each Bidder.

Evaluating and Awarding Sourcing Events to selected Bidders

Analyzing Bids and Awarding to Vendor:

1. Select Sourcing from the menu, then the Maintain Events link. Click the Analyze Events link and search for the correct Event ID or type the exact Event ID number into the Event ID field. If it is not known, search by Event status: Posted and Business Unit.



Menu

- ▼ Maintain Events
 - [Event History](#)
 - [Event Workbench](#)
 - [Analyze Events](#)

Find an Existing Value

Business Unit:	=	32101	Q
Event ID:	contains		
Event Round:	=		
Event Version:	=		
Event Format:	=		
Event Type:	=		
Event Name:	begins with		
Event Status:	=	Posted	

2. When the correct Event ID is found, click the blue link with the Event's number under the Event ID column.

Agency Procurement: Local Purchases less than \$25000

Search Results

View All First

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Sealed Event	Event Name	Event Status
32101	0000000298	1	1	Buy	RFX	N	Request for Bid, Widgets	Posted

- Clicking the link will take you to the main Analyze Events page, starting on the Analyze Total tab. At the start, only the first two bids will be visible. By scrolling to the right using the scrollbar at the bottom of the screen, you can see more of the Bids. The Analyze Total page lists information about the bid as a whole.

Analyze Events

Analyze Total [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32101 Event ID: 0000000298 Round: 1 Version: 1 Event Name: Request for Bid, Widgets

Event Format: Buy Event Type: RFX Currency: USD End Date: 12/09/2008 10:25AM CST Status: Pend Award Go To:

▼ Bid Analysis and Display Options

Header Weighting: Sort Bids By: Total Event Score Sort Order: Descending

Display Options: Display Delta Responses Display Disqualified Bids Display Withdrawn Bidders

View Bid Actions: All Bid Actions Award Counter Disallow Reject <No Action>

Analysis			
Bidder Name	Windham Professionals Inc	The Equitable	Delta Management Assoc
Event Version:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	2970.0000	3060.0000	3600.0000
Total Bid Cost:	2970.00	3060.00	3600.00
Total Event Score:	100.0000	85.7000	0.0000
Total Header Cost:	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000

Bid Analysis:

Reviewing a Bid and determining the winning Bidder consists of several steps, including analysis of the **Total Bid Amount**, and any attached documents in the Bids that elaborate on any comments.

Total Bid Amount: You can view the total price Bid by looking at the **Analysis** section on the **Analyze Total** page. The **Total Bid Amount** row shows the combined price the Bidder has bid on all the lines.

Total Bid Amount:	2970.0000	3060.0000	3600.0000
-------------------	-----------	-----------	-----------

- After determining a winner by reviewing the Total Bid Amount and any Comments, the event can be awarded. To Award an event, go back to the main Analyze Total page. Select Award from the Bid Action drop-down menu, located under the bidder's header. Enter 100 in the Award by Percent field, under the column of the winning Bidder.

Bid Action	NA	NA	NA
Reject Reason Code:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award by Percent:	<input type="text"/>	<input type="text"/>	<input type="text"/>

Agency Procurement: Local Purchases less than \$25000

A screenshot of a web interface showing a dropdown menu with the following options: NA, Award, Counter, Disallow, NA (highlighted), and Reject. To the right of the dropdown is a search box containing the text '100'.

- Click the Go-To Drop-down box at the top right of the main Analyze Events page, and select the Event Attachments and Comments option.

A screenshot of the 'Go To:' dropdown menu. The menu is open, showing the following options: ... (selected), ...Analyze Export, Associate Planning Task, Create New Round, Document Status Inquiry, Event Attachments/Comments (highlighted), Invite Collaborators, and Recommend Award.

- This takes you to the **Event Attachments and Comments** page, where you will enter your notes and justification for awarding to the selected Bidder. Type your justification in the Comments text box. For internal comments such as notes, do not check the Send to Bidder or Include on Award boxes. Then press the OK button at the bottom of the screen to return to the main menu.

Analyze Events

Event Header Comments and Attachments

Event ID: 0000000527

Enter Comments First 1 of 1 Last

Comments: + -

Send To Bidder Include On Award [Standard Comments](#)

Add Attachment

First 1 of 2 Last				
Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications
1 nbtest3.xml	Event Bid Package	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 nbtest3.pdf	Event Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Click the Award Details link at the top of the page. Select Award Type from the drop-down menu. To award to a PO, select Purchase Order from the drop-down, though it should default to that.

Agency Procurement: Local Purchases less than \$25000

Show Award Details to Bidders
 Display bids
 Display all bids
 Display bid scores
 Display bid's total bid price
 Display factors

Award Details First 1 of 1

Bidder Name: [Windham Professionals Inc](#) Bidder Type: Vendor Buyer:

Award Type: Award Currency: USD Terms:

PO Business Unit:

Award Number: 1 Total Award: 5001.0000

Award Type:

Award Number:

Award Lines:

8. Once Purchase Order has been selected from the Award Type drop-down, type in the Business Unit the PO is for, if it did not default in.

PO Business Unit:

9. After the Award Type and PO Business Unit have been filled in, click the Submit button at the bottom of the page. This routes the Award for approval.

Award Details First 1 of 1 Last

Bidder Name: [Windham Professionals Inc](#) Bidder Type: Vendor Buyer:

Award Type: Award Currency: USD Terms:

PO Business Unit:

Award Number: 1 Total Award: 495.0000

Award Lines

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	Widget	EA	6.0000	495.0000	2970.0000

Approval Status: Initial

For Approvers:

10. Navigate back to the Analyze Events link. Search for the Event with the Award to be posted, and click the Event ID's link.

11. The approver will press the Approve button on the Award Details page after reviewing the award choice.

Approval Status: In Process

Posting Awards:

Agency Procurement: Local Purchases less than \$25000

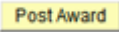
- 1) Navigate back to the Analyze Events link. Search for the Event with the Award to be posted, and click the Event ID's link.

Search Results

View All

First 1-6 of 6 Last

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Sealed Event	Event Name	Event Status	DateTime Finished
32101	0000000482	1	1	Buy	RFx	Y	Pants	Posted	12/11/2008 10:54AM
32101	0000000481	1	1	Buy	RFx	Y	Timbers, Rotary, 3-Pl Hitch	Pend Award	12/11/2008 11:00AM
32101	0000000480	1	2	Buy	RFx	Y	Widgets for Repairs at TN Tower	Pend Award	12/11/2008 1:05PM

- 2) Once the approval process is complete, the Award can be posted. To do so, press the Post Award button, located on the Award Details screen.
- 3) After the Post Award button is pressed, you will be taken to the **Purchase Order** screen, detailed in the next section. 








Creating Purchase Orders from Sourcing Events


You will be automatically taken to the **Add/Update Express POs** page after clicking the Post Award button.

1. All necessary information should default in from the Event and the User Preferences, but can be changed from the **Vendor Details**, **Header Details** and **PO Defaults** links if necessary.
2. After reviewing all the information on the PO, return to the main **Purchase Order** page and click the Save button, located at the bottom of the screen.

Maintain Purchase Order

Purchase Order

Unit:	32101	PO Status:	Initial
PO ID:	NEXT	Budget Status:	Not Chk'd
Copy From:	<input type="text"/>	<input type="checkbox"/>	Hold From Further Processing
Header			
*PO Date:	12/12/2008 	Vendor Search	Sub Contractor
Vendor:	<input type="text"/> 	Vendor Details	Insur/Bond/Cert
*Vendor ID:	<input type="text"/> 	Receipt Status:	Not Recvd
*Buyer:	<input type="text"/> 	*Dispatch Method:	<input type="text"/>  
PO Reference:	<input type="text"/>	Amount Summary	
Header Details	PO Activities	Add ShipTo Comments	Merchandise:
PO Defaults			0.00
Add Comments			Freight/Tax/Misc.:
			0.00 
			Total Amount:
			0.00 USD
Add Items From			
Purchasing Kit	Catalog	Item Search	

3. Now, Budget Check the document and Dispatch it. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. This encumbers funds for the Purchase Order.

Agency Procurement: Local Purchases less than \$25000

Express Purchase Order

Purchase Order

Unit: 32101

PO ID: 0000000186

Copy From:

PO Status: Open

Budget Status: Not Chk'd

Hold From Further Processing

PO Header Comments

Unit: 32101

PO ID: NEXT

Vendor:

*Sort Method:

*Sort Sequence:

Comments

Find | View All First 1 of 1 Last

[Copy Standard Comments](#)

Comment Status: Active

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment

Email

- Click the **Attach** button, find the file on your computer where you saved your Bids, then press the Upload button.

- This will return you back to the main **PO Header Comments** page. Click the OK button, then proceed.


4. After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page.

5. You must now submit the PO into Workflow. **Make sure the PO is saved first.** To do so, click the “Purchasing” link on the left-hand menu. Then click “Purchase Orders”.

- Purchasing
 - Requisitions
 - Procurement Contracts
 - Purchase Orders

6. Click the “Approve Amounts” link under the Purchase Order section.

Agency Procurement: Local Purchases less than \$25000


 **Approve Amounts**
Approve, recycle, or deny purchase order amounts.


- Use the Search screen that appears to find your Purchase Order by typing the PO number into the “PO Number” field, then press Search. Click the link for the PO that appears.

Amount Approval


Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

Business Unit: [=] 32101 

PO Number: [contains] 166 


SetID: [begins with] SHARE 

Contract ID: [begins with] 

Release Number: [=] 

Purchase Order Reference: [begins with]

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Search Results

[View All](#) First  1 of 1  Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

- This will take you to the Approve Order Amounts screen. Enter any necessary approval comments into the Comment field. Make sure the drop-down box is set to “Approve” (the default), then press the Save button.

Purchase Order Amount Approval

Unit: 32101 **PO ID:** 0000000166 **Vendor:** 0000001427

***Approval Action:** [Approve] **Approval Status:** Initial [View Printable PO](#)

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

[▶ Lines](#)

[Save](#) [Return to Search](#) [Notify](#)

- Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

Agency Procurement: Local Purchases less than \$25000

*Dispatch Method:	Print
Amount Summary	EDX
Merchandise:	Email
Freight/Tax/Misc.:	Fax
	Phone
	Print

10. Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.
11. A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
12. Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right.

Creating Purchase Orders for totals under \$5000

- 61) **Local Purchases under \$5000:** Navigate to the Purchase Order page by clicking the **Purchasing** link from the menu, then clicking the **Add/Update POs** link.

- ▼ Purchasing
 - ▷ Requisitions
 - ▷ Request for Quotes
 - ▷ Procurement Contracts
 - ▷ Vendor Rebates
 - ▼ Purchase Orders
 - ▷ Stage/Source Requests
 - ▷ Manage Change Orders
 - ▷ Reconcile POs
 - ▷ Review PO Information
 - ▷ Reports
 - ▷ [Budget Year End Processing](#)
 - [Add/Update Express POs](#)
 - [Add/Update POs](#)

- 62) This will bring up the Search page. Click the **Add New Value** tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the **Add** button.

Purchase Order

Find an Existing Value	Add a New Value
Business Unit:	32101
PO ID:	NEXT
Add	

Agency Procurement: Local Purchases less than \$25000

Maintain Purchase Order

Purchase Order

Unit:	32101	PO Status:	Initial
PO ID:	NEXT	Budget Status:	Not Chk'd
Copy From:	<input type="text"/>	<input type="checkbox"/>	Hold From Further Processing
Header			
*PO Date:	<input type="text" value="12/12/2008"/>	Vendor Search	Sub Contractor
Vendor:	<input type="text"/>	Vendor Details	Insur/Bond/Cert
*Vendor ID:	<input type="text"/>	Doc Tol Status:	Valid
*Buyer:	<input type="text"/>	Receipt Status:	Not Recvd
PO Reference:	<input type="text"/>	*Dispatch Method:	<input type="text"/> <input type="button" value="Dispatch"/>
Header Details	PO Activities	Amount Summary	
PO Defaults	Add ShipTo Comments	Merchandise:	0.00
Add Comments		Freight/Tax/Misc.:	<u>0.00</u> <input type="button" value="Calculate"/>
Add Items From		Total Amount:	0.00 USD
Purchasing Kit	Catalog	Item Search	

63) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Local Purchase Orders, this will be found by entering the ID of the low-bid vendor.

*Vendor ID:

64) Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon () located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.

65) For Local Purchases, you will be copying from a Requisition created by your Agency Requester. To do so, click the **Copy From** drop-down box, and select the **Requisition** option. To do this, you must first have entered the Vendor ID into the Vendor ID field.

Copy From:

Header

*PO Date:

Vendor

- Contract
- Purchase Order
- Requisition**

66) This takes you to the **Copy Purchase Order from Requisition** page. It is shown on the first picture below. Click the Lookup Icon () by the Requisition ID field to bring up the **Look Up Requisition ID** page, shown on the second picture below. Type in your Business Unit if it did not default and press the Search button to bring up a list of Requisition IDs. Find the Requisition you were assigned and click the **Requisition ID** link.

Agency Procurement: Local Purchases less than \$25000

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:	<input type="text" value="32101"/>	Origin:	<input type="text"/>
Buyer:	<input type="text"/>	Max Rows:	<input type="text" value="20"/>
Vendor ID:	<input type="text"/>	<input checked="" type="checkbox"/> Include Reqs With No Vendor	
Category:	<input type="text"/>	<input checked="" type="checkbox"/> Include Inventory Items	
Requisition ID:	<input type="text"/>	<input type="checkbox"/> Stockless Item	
Contract ID:	<input type="text"/>	<input type="checkbox"/> Exclude Auto Source Item	

Look Up Requisition ID

Business Unit:

Requisition ID:

[Basic Lookup](#)

Search Results

View All First ◀ 1-4 of 4 ▶ Last

Requisition ID	Requester
000000073	TN2 PU EPRO AGENCY REQUESTOR
000000072	TN2 PU EPRO AGENCY REQUESTOR
000000071	TN2 PU EPRO AGENCY REQUESTOR
000000061	tn_gross

67) Clicking the correct Requisition ID will bring you back to the **Copy Purchase Order from Requisition** page. Click the **Select All** ([Select All](#)) link to select all the lines for copying. Then click the **Copy to PO** () button to copy the requisition lines over to the PO.

Agency Procurement: Local Purchases less than \$25000

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY -001
*Location: MAIN [Vendor Information](#)
*Address: 1 Terms: 30 Net 30
Contact: Basis Dt Type: Acct Date
Salesperson:

Vendor Details Message

Country: USA United States Prefix:
Address 1: PO Box 2098 Fax:
Address 2: Prefix:
Address 3: Phone:
Room #: Room Quadrant:
City: Memphis
County: 79 Postal: 38101
State: TN Tennessee

- 68) This should default in all the information from the Requisition, and return you to the main Purchase Order page. Click the **Vendor Details** ([Vendor Details](#)) link, which takes you to the Vendor Details page.
- 69) Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon (🔍) next to the **Location** field to select a different location and use the Lookup Icon (🔍) next to the **Address** field to select a different address.

Maintain Purchase Order

Vendor Details -- Machinery Sales Co Inc

Unit: 32101 PO ID: NEXT Vendor: MACHINERY -001
*Location: MAIN [Vendor Information](#)
*Address: 1 Terms: 30 Net 30
Contact: Basis Dt Type: Acct Date
Salesperson:

Agency Procurement: Local Purchases less than \$25000

Look Up Location

Vendor SetID: SHARE
Vendor ID: 0000085887
Vendor Location: begins with

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

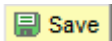
Search Results


View All First 1 of 1 Last

Vendor Location	Description
MAIN	MEMPHIS

70) Once the correct address is entered, press the **OK** button at the bottom of the page to return to the main **Purchase Order** screen.

71) After reviewing all the information on the PO, return to the main **Purchase Order** page and click the **Save** button, located at the bottom of the screen.

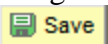


72) When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**.





Express Purchase Order

Purchase Order

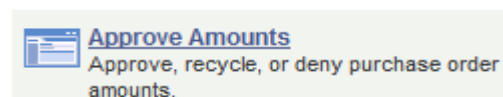
Unit: 32101 PO Status: Open  
PO ID: 0000000186 Budget Status: Not Chk'd   
Copy From: Hold From Further Processing

73) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page. 

74) You must now submit the PO into Workflow. To do so, click the **Purchasing** link on the left-hand menu. Then click **Purchase Orders**.

-  Purchasing
-  Requisitions
-  Procurement Contracts
-  Purchase Orders

75) Click the **Approve Amounts** link under the Purchase Order section.



Agency Procurement: Local Purchases less than \$25000

76) Use the Search screen that appears to find your Purchase Order by typing the PO number into the **PO Number** field and changing the drop-down box from **Begins** to **Contains**, as shown below. Then press **Search**.

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit:	=	32101
PO Number:	contains	166
SetID:	begins with	SHARE
Contract ID:	begins with	
Release Number:	=	
Purchase Order Reference:	begins with	

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

77) Click the link for the PO that appears.

Search Results

View All

First 1 of 1 Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

78) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to **Approve**, then press the **Save** button. It defaults at **Approve**.

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: [Approve](#) Approval Status: Initial [View Printable PO](#)

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

[Lines](#)

[Save](#) [Return to Search](#) [Notify](#)

Once all approvals are met, the Purchase Order can be dispatched.

Agency Procurement: Local Purchases less than \$25000

Dispatching Purchase Orders

- 6) Navigate back to the main Purchase Order page. The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page, choosing either Print or E-mail. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

*Dispatch Method:	Print
Amount Summary	EDX
Merchandise:	Email
Freight/Tax/Misc.:	Fax
	Phone
	Print

- 7) Click the Dispatch button, which will only be highlighted if all approvals have been met. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.
- 8) A prompt will appear asking you if you wish to “Wait for confirmation that the PO Dispatch process is complete?” Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
- 9) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right, to open a list of files. Click the one ending in .PDF to open the finalized Purchase Order to be printed, e-mailed, or faxed to the vendor.

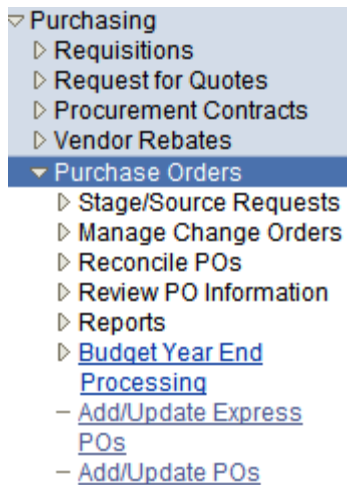
Agency Procurement: Direct-Entry Purchase Orders

Direct-Entry Purchase Orders

- **Direct-Entry Purchase Orders can only be used to purchase items with a total value under \$5000.**
- **They cannot be used to purchase Items that must be tagged as Assets, with Asset IDs.** Items that require Asset IDs must be entered with a dedicated Edison Item ID, and these must be requested through the Content Group.
- **They cannot be used to purchase Items that require Commodity Approvals.** Items of NIGP code types that require Commodity Approvals must be entered through eProcurement Requisitions as "Special Requests", even if they total under \$5000. This would include items like Postal Equipment and Software, among other things.

If the items you are trying to order are not on contract, do not require Asset tags and do not require Commodity Approval, you can use the following process to purchase them, if you do not wish to copy from an eProcurement Requisition. Buying any of the above types of items using the Direct Entry process is a violation of proper purchasing procedure, with the attendant consequences.

- 1) **Orders under \$5,000:** Navigate to the Purchase Order page by clicking the Purchasing link from the menu, then clicking the Add/Update POs link.



- 2) This will bring up the Search page. Click the Add New Value tab and select the desired Business Unit for the PO. The PO ID will default in. Leave the field at NEXT. Click the Add button.

Agency Procurement: Direct-Entry Purchase Orders

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit:

PO ID:

Maintain Purchase Order

Purchase Order

Unit: 32101

PO ID: NEXT

Copy From:

PO Status: Initial

Budget Status: Not Chk'd

Hold From Further Processing

Header

*PO Date:

[Vendor Search](#)

[Sub Contractor](#)

Doc Tol Status: Valid

Vendor:

[Vendor Details](#)

[Insur/Bond/Cert](#)

*Vendor ID:

Receipt Status: Not Recvd

*Buyer:

*Dispatch Method:

PO Reference:

Amount Summary

[Header Details](#)

[PO Activities](#)

[Add ShipTo Comments](#)

Merchandise: 0.00

[PO Defaults](#)

Freight/Tax/Misc.: 0.00

[Add Comments](#)

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#)

[Catalog](#)

[Item Search](#)

- 3) Enter the Vendor ID the Purchase Order is going to in the **Vendor ID** field. For Purchases under \$5,000, this will be found after consulting with the desired Vendors.

*Vendor ID:

- 4) Enter your Buyer ID in the **Buyer ID** field. To do this, click on the Lookup Icon () located by the Buyer ID Field, then scroll through the list until you find your name. Click the link to return to the main page with the Buyer ID field completed.

- 5) For Purchases under \$5,000, you will be entering your needed information directly into the **Lines** section. This is mainly the **Description**, the **PO QTY**, the **UOM**, the **Category** and the **Price**. The financials/Chartfields may need to be altered, but they should properly default in based upon your User setup.

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	

- 6) Type in a Description of the item you are buying into the Description field. This must be sufficient for the vendor to understand what it is you are trying to buy.
- 7) Type the Quantity of items you are buying into the PO QTY field.

Agency Procurement: Direct-Entry Purchase Orders

- 8) Type your Unit of Measure into the UOM field. If you are not sure which Unit of Measure to use, click the Lookup Icon (🔍) next to the UOM field. This will pull up a list of valid Units of Measure. Scroll through the list and click on the most appropriate one to return to the main PO screen. The picture below only shows the first ten or so.

Look Up UOM

Unit of Measure: begins with

[Basic Lookup](#)

Search Results

[View All](#)

First 1-100 of 145 [Last](#)

Unit of Measure	Description	Short Description
02	MILE (Statute Mile)	MILE
03	Second	Second
10	Group	Group
11	Outfit	Outfit
12	Packet	Packet
13	Ration	Ration
14	Shot	Shot
15	Stick	Stick
1J	Ton Mile	Ton Mile
5B	Batch	Batch
5G	Pump	Pump
69	Test Specific Scale	T Spec Scl

- 9) Back on the main PO screen, you will now need to enter the Category code (NIGP code) for the item. Click the Lookup Icon (🔍) next to the Category field. This will take you to the Look Up Category screen.

Look Up Category

SetID:

Category: begins with

Description: begins with

Long Description: begins with

[Basic Lookup](#)

- 10) Change the drop-down menu next to the **Long Description** field to read "Contains", then type in a partial description for a Category Code that may match your item. Less is more. For example, when ordering Snack Cakes, try Food. After your description is in, click the "Look Up" button. This will bring up a list of broad categories. You will need to find a more specific number.

Agency Procurement: Direct-Entry Purchase Orders

Look Up Category

SetID: SHARE

Category: begins with

Description: begins with

Long Description: begins with

[Basic Lookup](#)

Search Results

View All First 1-6 of 6 Last

Category	Long Description
370-00	FOOD PROCESSING AND CANNING EQUIPMENT AND SUPPLIES
385-00	FOODS, FROZEN
375-00	FOODS: BAKERY PRODUCTS (FRESH)
380-00	FOODS: DAIRY PRODUCTS (FRESH)
390-00	FOODS: PERISHABLE
393-00	FOODS: STAPLE GROCERY AND GROCER'S MISCELLANEOUS ITEMS

11) Type one of the Category numbers that appears into the Category field, and clear out the Long Description field. Then press Look Up again.

Look Up Category

SetID: SHARE

Category: begins with

Description: begins with

Long Description: contains

[Basic Lookup](#)

Search Results

View All First 1-7 of 7 Last

Category	Long Description
375-00	FOODS: BAKERY PRODUCTS (FRESH)
375-15	Bread, Rolls, etc. (Including Brown and Serve Items)
375-30	Cakes, Cookies, and Pastries
375-45	Doughnuts, Fried Pies, Bagels, etc.
375-50	Pastry Shells
375-54	Pizzas
375-60	Taco Shells and Tortillas

12) When you have a full five-digit NIGP code (example: 375-30, not 375-00) that seems to match the item you are buying, click the blue link for that item to return to the main PO page.

Agency Procurement: Direct-Entry Purchase Orders

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount
1		Snack Cakes, office	5.0000	BX	375-30	0	

13) Now, enter in the Price into the Price field. This completes all the necessary Line information for the PO Lines. It should look like the picture below when completed.

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		Snack Cakes, office	5.0000	BX	375-30	5.0		Active

14) Now, on the main page, scroll up. Click the Vendor Details ([Vendor Details](#)) link, which takes you to the Vendor Details page.

Maintain Purchase Order

Vendor Details -- American Paper And Twine

Unit: 32101 PO ID: NEXT Vendor: AMERICAN P-001

*Location: MAIN Vendor Business Name American Paper & Twine Co

*Address: 4 [Show Address Details](#) [Vendor Information](#) Terms: 30 Net 30

Contact: [Show Contact Details](#) Basis Dt Type: Acct Date

Salesperson: [Show Salesperson Details](#)

Vendor Details Message

Country: USA United States Prefix:

Address 1: 7400 Cockrill Bend Blvd Fax:

Address 2: Prefix:

Address 3: Phone:

Room #: Room Quadrant: City: Nashville

County: Postal: 37209

State: TN Tennessee

15) Check the Address listed to make sure the Vendor address is correct. If it is incorrect, use the Lookup Icon (🔍) next to the **Location** field to select a different location and use the Lookup Icon (🔍) next to the **Address** field to select a different address.

Agency Procurement: Direct-Entry Purchase Orders

Maintain Purchase Order

Vendor Details -- American Paper And Twine

Unit: 32101 PO ID: NEXT Vendor: AMERICAN P-001

*Location: MAIN Vendor Business Name American Paper & Twine Co

*Address: 4 [Vendor Information](#) Terms: 30 Net 30

Contact: Basis Dt Type: Acct Date

Salesperson:

Vendor Details Message

Look Up Location

Vendor SetID: SHARE

Vendor ID: 0000085887

Vendor Location: begins with


[Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Vendor Location	Description
MAIN	MEMPHIS

- 16) Once the correct address is entered, press the OK button at the bottom of the page to return to the main Purchase Order screen.
- 17) After reviewing all the information on the PO, return to the main **Purchase Order** page and click the Save button, located at the bottom of the screen.

- 18) At this point, there are several other options that can be changed, but they should all be default to the correct values. The defaults take information from your Buyer Profile and the copied Requisition and insert it automatically into the Purchase Order. For more information on these fields, refer to the UPK training, as most users will not have to alter them.
- 19) When all options are confirmed correct, you are now ready to Budget Check. This encumbers funds for the Purchase Order. To Budget Check, click the **Budget Check** () icon located at the top right of the page. It will show as Processing for a few seconds, then it will come back with **Budget Status: Valid**. An example is shown at the top of the next page.

Agency Procurement: Direct-Entry Purchase Orders

Express Purchase Order

Purchase Order

Unit: 32101

PO ID: 0000000186


Copy From:

PO Status: Open

Budget Status: Not Chk'd

Hold From Further Processing

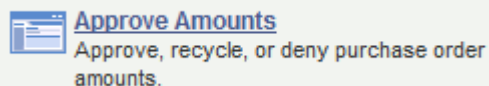


20) After completing the Budget Check, click the Save button, located at the bottom of the main **Purchase Order** page.  Save

21) You must now submit the PO into Workflow. To do so, click the “Purchasing” link on the left-hand menu. Then click “Purchase Orders”.

- Purchasing
- Requisitions
- Procurement Contracts
- Purchase Orders

22) Click the “Approve Amounts” link under the Purchase Order section.



23) Use the Search screen that appears to find your Purchase Order by typing the PO number into the “PO Number” field and changing the drop-down box from Begins to Contains, as shown below. Then press Search.

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit:	=	<input type="text" value="32101"/>	
PO Number:	contains	<input type="text" value="166"/>	
SetID:	begins with	<input type="text" value="SHARE"/>	
Contract ID:	begins with	<input type="text"/>	
Release Number:	=	<input type="text"/>	
Purchase Order Reference:	begins with	<input type="text"/>	

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

24) Click the link for the PO that appears.

Agency Procurement: Direct-Entry Purchase Orders

Search Results

View All

First 1 of 1 Last

Business Unit	PO Number	SetID	Contract ID	Release Number	Purchase Order Reference
32101	0000000166	SHARE	(blank)	0	8658588

25) This will take you to the Approve Order Amounts screen, shown below. Make sure the drop-down box is set to “Approve”, then press the Save button. It defaults at Approve.

Purchase Order Amount Approval

Unit: 32101 PO ID: 0000000166 Vendor: 0000001427

*Approval Action: Approval Status: Initial

Comment

PO Amount

Buyer:	Sandra P Rees		
PO Reference:	8658588		
PO Date:	01/14/2009		
Merchandise Total Amount:	106.20 USD	Merchandise Total Base:	106.20 USD
PO Total Value:	106.20	PO Total Base:	106.20

▶ Lines

26) If the PO needs to be held for further review, check the Hold from Further Processing checkbox to prevent Approval, Unapproval, Dispatch, Cancellation or Closing.

Hold From Further Processing

Dispatching Purchase Orders

The Purchase Order is now ready for Dispatch. Check the **Dispatch** drop-down menu on the main page to make sure the preferred Dispatch Method is selected.

*Dispatch Method:

Amount Summary: EDX

Merchandise: Email

Freight/Tax/Misc.: Fax

Print

If the vendor wants hard-copy Purchase Orders, choose Print, which creates a hard-copy PO similar to the current method. If they prefer e-mail, choose E-mail. If it is set to E-mail, an automatic e-

Agency Procurement: Direct-Entry Purchase Orders

mail with a copy of the Purchase Order attached will be sent to the vendor's listed e-mail address. Do not choose Fax, EDX or Phone methods, as those are not currently supported.

- 1) Once all the information is reviewed and the PO has been Budget Checked, the **Dispatch** button will be highlighted. Click the Dispatch button to finish the Purchase Order process. This will take you to the **Dispatch Options** page. Leave the options at default, then press the **OK** button.
- 2) A prompt will appear asking you if you wish to "Wait for confirmation that the PO Dispatch process is complete?" Click the Yes button. After the PO Dispatch process is ran, a new browser window will open.
- 3) Click the PO Dispatch (listed as **PODISP**) process in the new window. Click the blue link that says **Notify Success**. This takes you to the **Process Detail** page. Click the **View Log/Trace** link, at the bottom right.

This will open up a list of files. Click the one ending in .PDF. This will open up the finalized Purchase Order as a .PDF document, which can then be printed or e-mailed, or printed and faxed to the vendor.

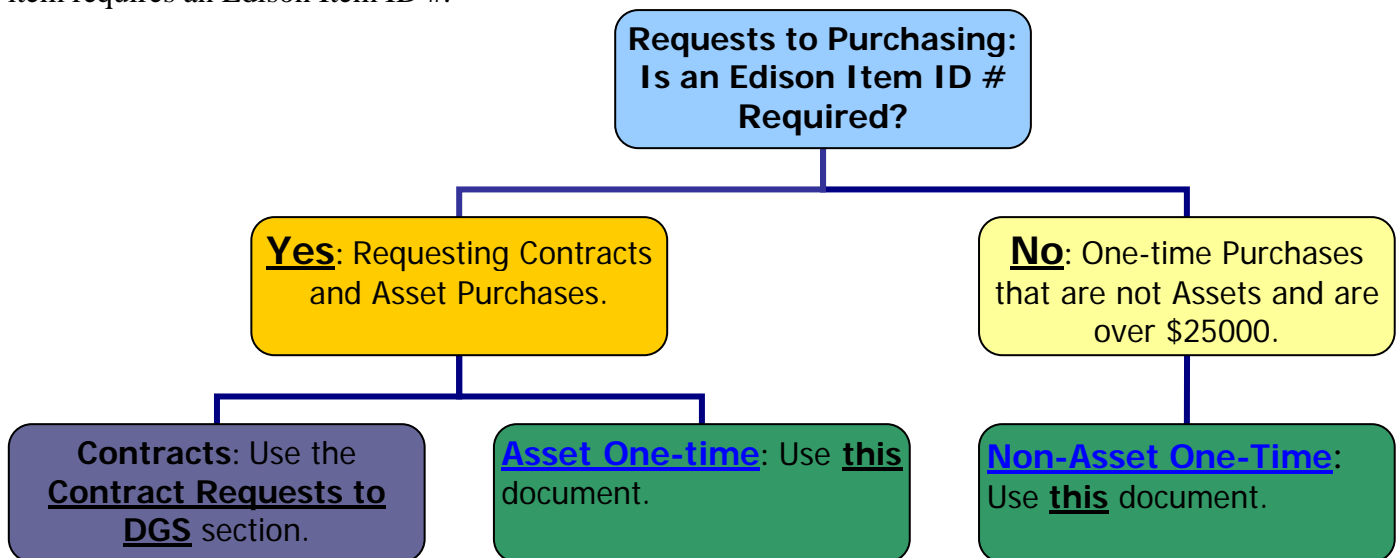
Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

One-Time Purchases from DGS

Several types of procurement requests must be routed to the Department of General Services, Purchasing Division (DGS Purchasing) to be completed. These include:

- Requests for new Agency Term Contracts (**not** DPAs, DPAs are in a separate document)
- Reprocurement requests for existing Agency Term Contracts (Separate Document)
- Requests for One-time Purchases with a total greater than \$25,000.00 (**This document**)
- Requests for One-time Purchases of Asset-tagged items (**This document**)

All of these Request types follow the same basic pattern, but they may need different specific actions taken to get them to DGS Purchasing. The main deciding factor between the paths is whether or not the item requires an Edison Item ID #.



Edison ID # Required: (for all these request types, **do not use** this section)

- All new Contract lines
- All reprocured Contract lines
- Any item that must be tagged as "Sensitive" (Asset), regardless of whether it is for a one-time purchase or not. Guidelines are [here](#)

The Assets division has categories of Assets listed starting on page 96 of the POST manual: <http://www.intranet.state.tn.us/generalserv/fiscal/documents/postuserman.pdf> **This information is subject to change**, and it would be best to consult the OAS POST website prior to ordering.

Edison ID # not Required: (Use this section!)

- Items for one-time purchases that do not need to be tagged as Assets.

If you are creating any type of Request that is in the first group (Edison ID # Required), you *MUST* first have a list of Edison Item ID #s provided by the Content Team. Failure to complete this step first will require you to re-enter your Requisition.

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Edison Item IDs

Edison Item IDs are created by the Content Team in DGS Purchasing. To do so, they require a properly-completed copy of the "TEN CG Item Only Layout v7.4.xls" spreadsheet. A blank copy of this spreadsheet along with the "Spreadsheet Guide for Agencies.doc" instructions can be requested by sending an e-mail to Content.group@tn.gov. This must be submitted back to Content, who will create the item IDs and return them to you in the same spreadsheet format. You must have these Item IDs to continue with your request.

Creating Requests

Requests without Edison Item IDs (Non-Assets)

One-time Purchases over \$25000 that are not Assets

This section is for use ONLY with non-Asset items!

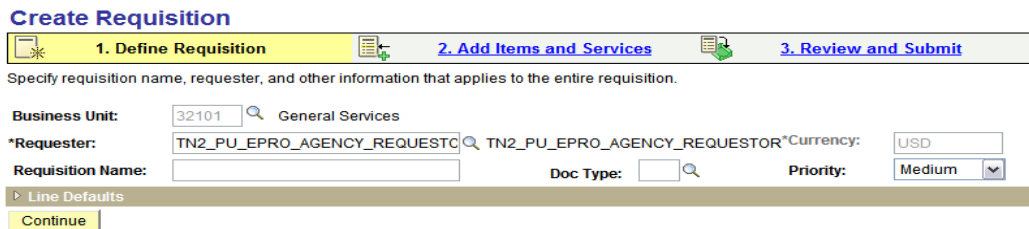
- 11) You must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



- 12) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



- 13) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.



Step 1: Define Requisition

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

1. Define Requisition

14) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.

Requisition Name: Click in the **Requisition Name** field and then type in the name. The name must include a brief description of what you are buying.

Create Requisition

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 32101 General Services

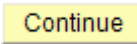
*Requester: robej0811001 Robert J Hamblin

*Currency: USD

Requisition Name: Replacing Bldg Air Chiller, Doc Type: Priority: Medium

Line Defaults

Continue

15) After naming your Requisition, click the Continue Button. 

Step 2: Add Items and Services

2. Add Items and Services

16) The next step is to add items to the requisition. **Requests for One-Time purchases that are not assets will need to be done as Special Requests.**

17) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For One-Time Purchases, you will use the **Special Request** tab. To enter a Special Request, click the “Special Request” tab, then click the “Special Item” link.

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description: *Price: *Quantity: *Category: Vendor ID: Vendor Item ID: Mfg ID: Mfg Item ID:

*Currency: USD *Unit of Measure: Due Date: Suggest New Vendor

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Add Item Cancel Add or Start New Type

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Special Request Tab

All the fields marked with an asterisk (*) must be completed.

- **Item Description:** This is used to enter a detailed description of the item. Begin with a noun and follow with descriptive terms.
- **Price:** This is the estimated price for the item.
- **Quantity:** This is the quantity needed.
- **Unit of Measure:** This is used to select a Unit of Measure. Press the Lookup Button to pull up a list of valid Unit of Measures. Select the appropriate Unit of Measure from the list.
- **Category:** This is the National Institute of Government Purchasing (NIGP) code category. NIGP codes are the standard being used for Edison, replacing the old Tennessee Commodity Code (TCC) system. Press the Lookup Button to pull up the NIGP search screen, shown below.

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Catalog	Category	Description	Find in Tree
1 PROCUREMENT ITEMS	610-00	OFFICE SUPPLIES: CARBON PAPER AND RIBBONS, ALL TYPES	
2 PROCUREMENT ITEMS	615-00	OFFICE SUPPLIES, GENERAL	
3 PROCUREMENT ITEMS	615-60	Office Supplies, General (Not Otherwise Classified)	

- Start off by changing the drop-down box from **Description** to **Category**.

- Type “-00” into the Search field, without quotes, then press the **Find** button.

- This will bring up a listing of the generic NIGP Category codes at the header level. A “header” NIGP code has the format **xxx-00** with the “xxx” replaced by a three-digit number. Pick a generic header from this list and write it down.

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Categories		
Catalog	Category	Description
1 PROCUREMENT ITEMS	005-00	ABRASIVES
2 PROCUREMENT ITEMS	010-00	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES

- Type the first three digits of the Header into the Category field and press the Find button. This will return a list of all the valid NIGP codes within that header.

Search By

- Select the appropriate code from the list by clicking the link in the Category column.

Catalog	Category	Description
1 PROCUREMENT ITEMS	005-00	ABRASIVES
2 PROCUREMENT ITEMS	005-05	Abrasive Equipment and Tools
3 PROCUREMENT ITEMS	005-14	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.

- This will return you to the Special Item screen with the **Category** field completed.

*Category:

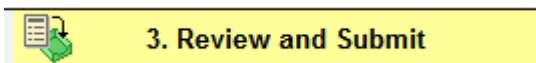
18) After entering in all the required fields press the Add Item button ().

19) Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.

Requisition Summary	
Description	Qty UOM
Air-conditioning, installa...	1 EA
Total Lines:	1
Total Amount (USD):	30,000.00

After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions: The final step in the One-time Purchase process is the **Review and Submit** page. It contains a summary of the Requisition information, along with

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

notes and Justification. The first thing you must do on this page is enter your Document Type, which will be **DOT**, for "Purchasing, One-time Purchase (Non-contract)".

Business Unit: General Services

*Requester: Robert J Hamblin

Requisition Name: Doc Type: *Currency: Priority:

Line Comments

- 8) You must now add information to the **Line Comments** section to provide DGS with the necessary information to process the Request. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon (🗨️) to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments. **The Line Comments are used to attach specifications and instructions.**

Line Comments

Line	Description	Quantity	Unit	Price
1	Air-conditioning, installat	1.0000	Each	30000.000 USD

<< This is a one-time purchase for installation of a replacement air-conditioning system for a new location. >>

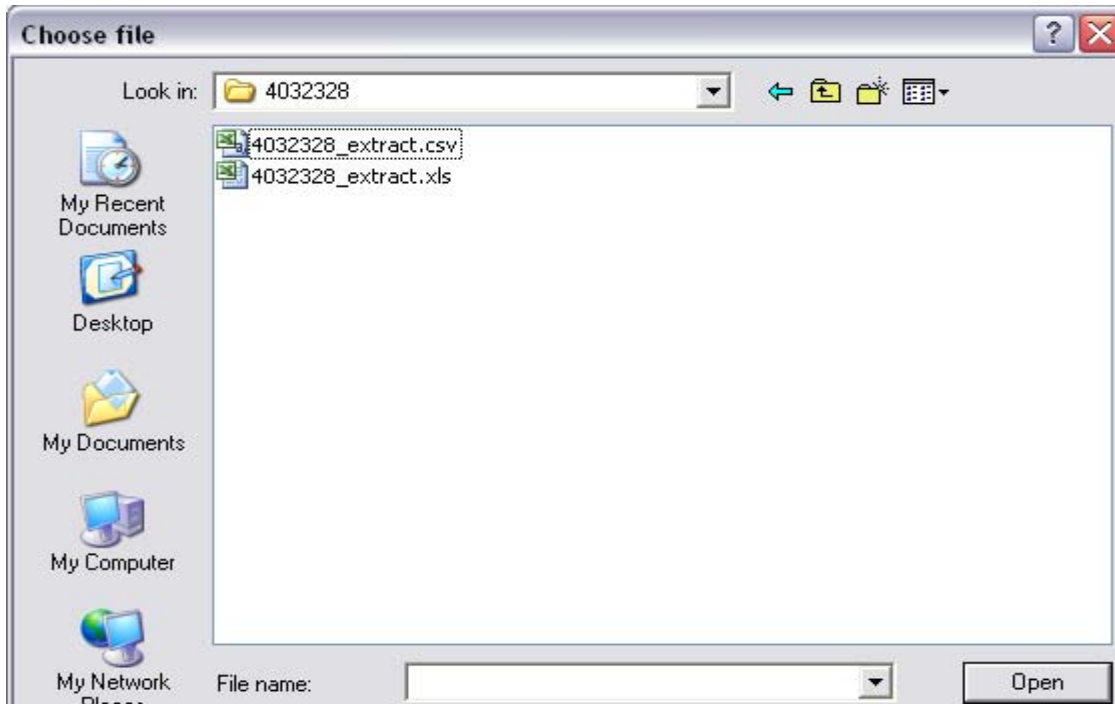
Send to Vendor Show at Receipt Show at Voucher


To attach specifications that are contained in a separate Word, PDF or Excel document:

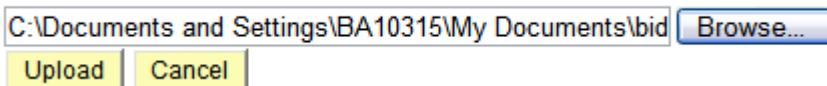
1. Click the **Add Attachment** button. () This takes you to the Add Attachment page.

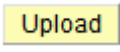
2. Click the **Browse** button (). This opens up a window to let you search for files on your computer.

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3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.



4. Click the **Upload** button () once the file is found.

5. Repeat for all necessary files on that line.

- 9) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000

Status: Active *Ship To: [Modify Shipping Address](#)

Attention: Robert J Hamblin

*Distribute by: Qty SpeedChart:

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

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- 10) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Sections to Review/Modify:

Shipping Addresses:


To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFM ShiPTO, both of which must be changed.


*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:

Ship To Location: 

Description: 

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

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SetID:

Ship To Location:

Description:

[Basic Lookup](#)

Search Results

View All First 1-7 of 7 Last

Ship To Location	Description
0000000019	BLUE BIRD TOWER 395 FIRE TOWE
0000000020	BLUE BIRD TOWER 395 FIRE TOWE
0000000021	BLUE BIRD TOWER 395 FIRE TOWE
0000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

Address

Country: Prefix:

Address 1: Phone:

Address 2: Ext:

Address 3: Fax:

Room #: Room Quadrant:

City:

County: Postal:

State:

Verify that the information is correct. If it is not, choose a different Ship-To location.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.

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- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user's setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the "correct" Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

❖ **Repeat as necessary for all lines**

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for requesting a contract. Click in the field and begin typing.



Justification/Comments

Send to Vendor Show at Receipt Show at Voucher


You must include:

- "Submitting Requisition to Purchasing Division." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like "This is a One-time Purchase of a _____ that is not on contract".
- **If the request is for a one-time service or job:** List the estimated amount of days from the receipt of the purchase order that you want the vendor to start the job and amount of days to complete the job. (i.e. Start = 30 days ARO, Complete = 60 days ARO).
- **If the request needs to be Sole-Source or Proprietary:** Note that you are requesting it to be Sole-Source or Proprietary, if applicable. Provide the supporting reasons behind making it a Sole-Source or Proprietary (i.e compatibility w/existing or unique features).

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For Sole-Source, all the necessary documents must be attached in the Comments section as attachments on the **first line** (including the **Commissioner to Commissioner letter** and **sole source documentation from the manufacturer and/or vendor**).

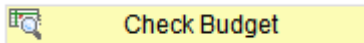
- List any suggested vendors.
- List your contact information.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button (.

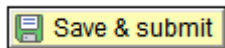
After the justification section is completed, you must Budget Check the document.

Budget Check

- 1) To Budget Check the Requisition, press the "Check Budget" button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- 2) After Budget Check, press the "Save and Submit" button to send the Requisition for Approvals.

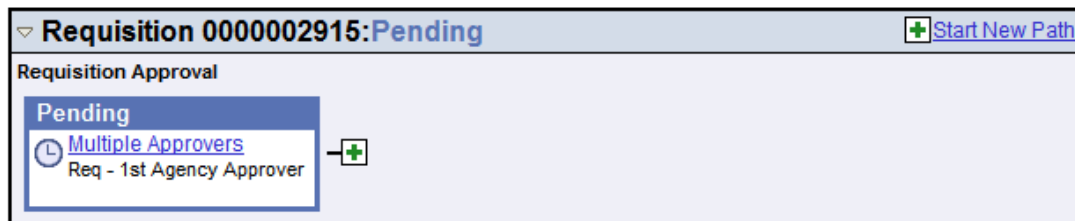




- 3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

- a) To view more information on the approvers, click on the "Multiple Approvers" ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Stage 1 - Agency Req Approvals



- b) To add additional approvers, click the Insert Approver button () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the

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list. *The Approver you wish to add must be in the system as an Approver before you can select them.*

- i. Use the Radio Buttons below the User ID Field (🔍) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: 🔍

Insert as: Approver
 Reviewer

- ii. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

- ★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all commodity approvals.
- ★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



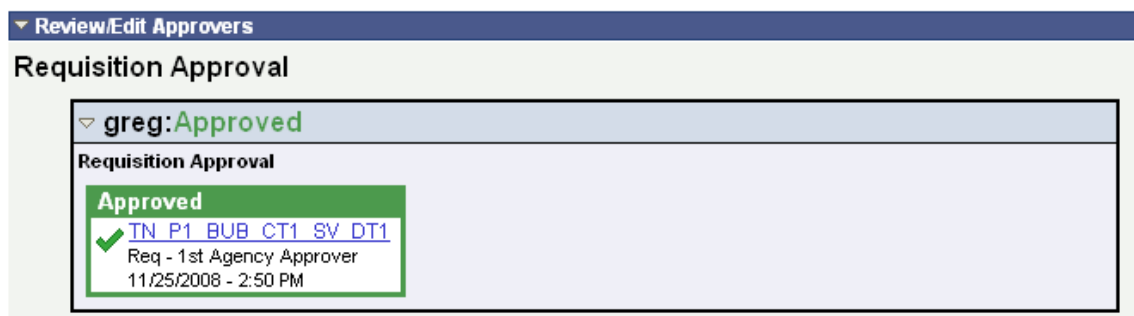
Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (Requisition ID: 🔍).

The Approval Status and Budget Check status of the Requisition are listed in this table.

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Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▾ 0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. ▾ Go
▾ 0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. ▾ Go
▾ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. ▾ Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.



When the Requisition is approved, DGS Purchasing will begin creating the Sourcing Event and start the Bid process. ([Return to Top](#))

Requests with Edison Item IDs (Assets)

One-time Purchases over \$25000 that are Assets

*This section is for use **ONLY** with Asset items!*

Procurement requests to order any item that must be tagged as "Sensitive" (meaning it has a State Tag number, hereafter referred to as an "Asset") are handled differently from other kinds of orders. The main reason for this is because **any item that must be tagged in the Assets module has to have an Edison Item ID that is properly set up as an Asset Item.** This causes problems for any items that would previously have been ordered under the "As Per Catalog" (APCAT) principle, along with any one-time Purchase that would normally be entered as a Special Request.

To determine whether or not an item is likely to be an Asset, please consult the section of the POST User Manual beginning on page 96. This manual is accessible through the following link. (<http://www.intranet.state.tn.us/generalserv/fiscal/documents/postuserman.pdf>) The main page for the Assets Division is located at the Office of Administrative Services Property of the State of Tennessee website, <http://www.intranet.state.tn.us/generalserv/fiscal/ofmpost.html> .

The section below is a brief summary of the asset guidelines. However, **this information is subject to change**, and it would be best to consult the OAS POST website prior to ordering.

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Asset Guidelines (as of 5/26/2009)

A. All equipment purchases with a cost of \$5,000.00 or more including freight and set up costs (labor) should be a “716” account code.

B. All equipment purchases with a cost between \$100.00 and \$4,999. to include freight and set up costs (labor) and listed here should be an account code 70999000 (sensitive minor equipment) or 72299000 (sensitive computer equipment). These are classified as sensitive items and are determined by Asset Management.

Sensitive Item Listing:

****Subject to change**

BAR CODE SCANNERS
BOAT MOTORS
BOAT TRAILERS
BOATS
CAMERA BODIES (35mm & DIGITAL)
CAMERA LENS (200MM OR LARGER)
CANOES
COMPUTERS, ALL TYPES
DIGITAL VOICE RECORDERS
PDA
COMPUTER PERIPHERALS (EXTERNAL)
GLOBAL POSITIONING SYSTEMS
GEOGRAPHIC INFORMATION SYSTEM
COLOR BAR GENERATORS
DVD PLAYERS/RECORDERS
FAX MACHINES
HAM BAND TRANS/REC (HAND HELD)
LCD/MULTIMEDIA PROJECTORS
MARINE BAND TRANS/REC
NIGHT VISION SYSTEM
OSCILLOSCOPE
POWER SUPPLIES
RADIO SCANNERS
SPECTRUM ANALYZER
TELEVISIONS
TWO/WAY RADIO TRANS/REC
VECTOR SCOPES
VIDEO CAMERAS
VIDEO RECORDERS & PLAYERS
WAVEFORM MONITORS

F. All weapons are to be tagged and added to POST regardless of cost. Weapons less than \$5,000.00 should be coded to 70999000 as sensitive; weapons \$5,000.00 or more are coded as 71617000. Examples are:

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PISTOLS (NOT PELLET or AIR)
RIFLES (NOT PELLET or AIR)
SHOTGUNS

STUN GUNS (TASER)
TEARGAS GUNS

G. **Computer Systems** comprised of a monitor, keyboard and central processing unit are to be tagged as one unit.

H. External computer peripherals with a cost between \$100.00 and \$5,000.00 are to be tagged individually. Examples are:

EXTERNAL STORAGE DEVICES
EXTERNAL TAPE DRIVES
EXTERNAL MODEMS
POWER SUPPLIES

PRINTERS
SCANNERS
CD WRITERS
DOCKING STATIONS

F. Additional purchases for existing equipment totaling \$5,000 or more including labor is classified as an upgrade having a "716" account code and the dollar value added to the asset. Additional purchases for existing equipment totaling less than \$5,000 will not have the dollar value added.

G. Software will be tagged if the cost is \$5,000.00 or above and is mainframe or mid-level based (including server-based). Software that is PC-based will not be tagged.

H. Donated equipment items that meet the above criteria should be added based upon estimated fair market value at the date of donation.

II. Equipment manufactured for use within the department that meets the other requirements should be added. Cost must include labor and materials.

K. Items purchased not meeting the above criteria may be entered by Asset Management upon request at the discretion of your department.

K. Equipment purchased from the State and Federal surplus warehouse that meet the above criteria should be tagged.

L. Examples of items **NOT** to record

ALARM SYSTEMS WHERE THE WIRING IS BUILT-IN
ATTACHED MIRRORS, CHALKBOARDS AND BULLETIN BOARDS
ATTACHED SHELVING, CABINETS AND COUNTERS
AWNINGS AND BLINDS
BOWLING EQUIPMENT
CARPET
DOORS OF ALL KINDS
DRAPERIES AND CURTAINS
STAGE LIGHTING, RIGGING AND TRACKS
FIXED AUDITORIUM SEATS
FOLDING BLEACHERS WHEN ATTACHED TO THE WALL

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GRILLS GAS AND CHARCOAL THAT ARE PERMANENT
HANDICAP RAMPS AND LIFTS
REPEATER STATIONS THAT ARE PERMANENT
IN-GROUND LIFTS
IN-WALL FOLDING CAFETERIA TABLES AND BENCHES
LANDSCAPE FURNITURE PERMANENT
PLAY GROUND EQUIPMENT THAT IS PERMANENT
PUBLIC ADDRESS SYSTEMS WHERE WIRING IS “BUILT-IN”
RADIO TOWERS THAT ARE PERMANENTLY ATTACHED
SPRINKLER SYSTEMS THAT ARE “BUILT-IN”
WATER AND FUEL TANKS, IN-OR ABOVE GROUND, THAT ARE PERMANENT
WATER FOUNTAINS
GARBAGE DISPOSALS
WATER HEATERS
CENTRAL HEAT AND AIR UNITS

Requesting Item IDs for Asset Items

Item IDs must be requested from the Content Group. To request an Item ID, you must send a request to get Asset Items created. Content will send you a copy of the **Spreadsheet Guide for Agencies** along with a copy of the **TN CG Item Only Layout** spreadsheet. This spreadsheet must be completed according to the guidelines and returned to the Content Group to have your Item IDs created. **This is the only acceptable format.**

The Content Tool in Edison is used to create Item IDs, and the *only* format it can read is the exact format included in the **TN CG Item Only Layout** spreadsheet. Due to the volume of requests, it is not possible for Content to take PDF scans, Word document specifications or any other file-type and create a Spreadsheet out of them. **Completion of the spreadsheet is the sole responsibility of the agency requester, not Content. Content can and will assist, but it is necessary for the agency requester to complete the spreadsheet.**

Identifying Asset Item IDs

After the Content Team has created Asset Item IDs, they can be used to create Purchase Orders. There are two types of "Asset" Item IDs that are created, **Specific Assets** and **Generic Assets**.

- **Specific Assets:**
Used for specific items that have one set price. These can either be from lines on a contract (similar to non-Asset Contract lines) or from One-time Purchase requests. If the item is only going to be used once, it will be inactivated after usage, but **it still must be requested and set up in the same way.**

- **Generic Assets:**
Are a generic description that covers a broad category of possible items. Specific details on the item must be attached separately. They are used to handle the problem of items from "APCAT" contracts that must be tagged. Generic Assets' descriptions will end with GENERIC ASSET.

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

The Content Team will e-mail your Asset Item IDs to you after they have been completed. Depending on whether the Asset created is a **Specific Asset** or a **Generic Asset**, the ordering process will be slightly different.

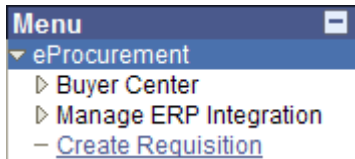
One-Time Requests for Assets

This section is for use ONLY with Edison Item IDs provided by the Content Team!

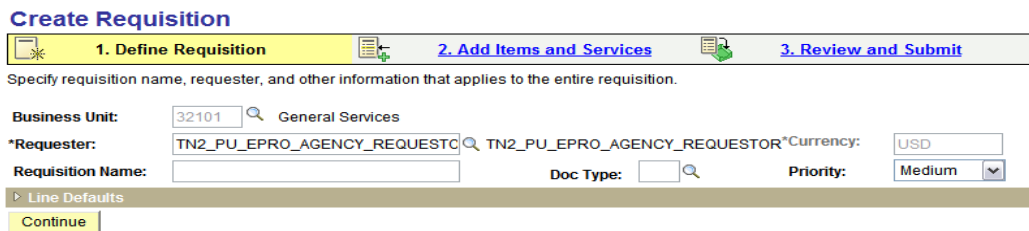
- 1) You must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



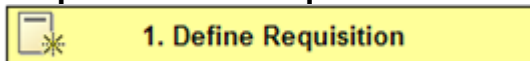
- 2) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



- 3) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.

A screenshot of the 'Create Requisition' page. At the top, there are three tabs: '1. Define Requisition' (highlighted in yellow), '2. Add Items and Services', and '3. Review and Submit'. Below the tabs is a form with the following fields: 'Business Unit' (32101), 'Requester' (TN2_PU_EPRO_AGENCY_REQUESTOR), 'Currency' (USD), 'Requisition Name' (empty), 'Doc Type' (empty), and 'Priority' (Medium). A 'Continue' button is located at the bottom left.

Step 1: Define Requisition



- 1) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.

Requisition Name Click in the **Requisition Name** field and then type in the name.

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Create Requisition



Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: General Services

*Requester: Robert J Hamblin *Currency:

Requisition Name: Doc Type: Priority:

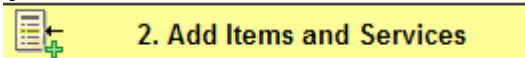
Line Defaults

[Continue](#)

2) After naming your Requisition, click the Continue Button.

[Continue](#)

Step 2: Add Items and Services



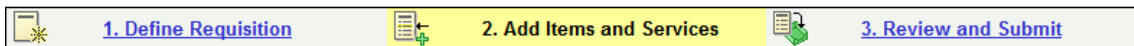
3) The next step is to add items to the requisition.

4) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For Asset Items, you will use the **Catalog** tab.

Catalog Search

- To search for items, click on the Catalog tab under the Search bar.

Create Requisition

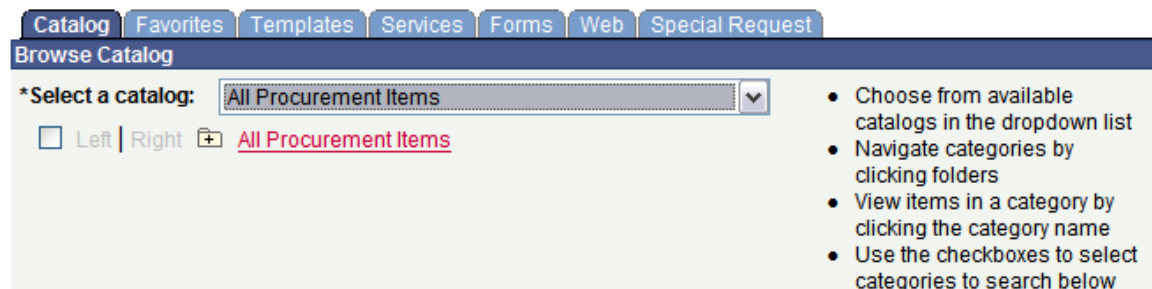


Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: [Search](#)

[Catalog](#) [Favorites](#) [Templates](#) [Services](#) [Forms](#) [Web](#) [Special Request](#)

- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu. This should show as the default option when the Catalog tab is selected.



- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. **This is the ONLY search field that should be used, NOT the one that's at the top of the screen.**

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

- Type the first Item ID (obtained from the Content Team) into the **Item ID** field, then press the Search button. An example is shown below.

Search Catalog

Search contains all of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

[Search](#) [Search Settings](#)

- If you are ordering a "Generic Asset" item, search for "%Generic% %Asset%" with no quotes.

Search Catalog

Search contains all of the following search fields entered:

Description:

[Search](#) [Search Settings](#)

Details									
Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	
<input type="checkbox"/>	1.0000	Add	1000106932	Microwave Radio Equipment, Initial Purchase. GENERIC ASSET		0.000			

- 5) If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns.

1 Results

Sort Items: [Show Images](#)

Item Description [First](#) 1 - 1 of 1 [Last](#)

Details									
Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY		
<input type="checkbox"/>	1.0000	Add	1000007457	HVAC ANNUAL SERVICE INSPECTION AND PREVENTIVE MAINTENANCE		8698.000	EA	1.0000	

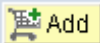
[Select All / Deselect All](#)

[Add](#) [Add to favorites](#) [Compare](#)

- 6) If the item you need was located by the search, check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field.

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Quantity	Item ID
<input type="checkbox"/> 4.0000 	1000007457

- 7) After inputting the desired quantity, click the Add () button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.




Requisition Summary	
Description	Qty UOM
HVAC ANNUAL SERVICE INSPEC...	4 EA
Total Lines: 1	
Total Amount (USD): 34,792.00	


Repeat this process for all additional lines that must be on the contract. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions: The final step in the One-time Purchase process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type, which will be **DOT**, for "Purchasing, One-time Purchase (Non-contract)".

Business Unit:	<input type="text" value="32101"/> General Services		
*Requester:	<input type="text" value="robej0811001"/>  Robert J Hamblin	*Currency:	<input type="text" value="USD"/>
Requisition Name:	<input type="text" value="Air-conditioning installation"/>	Doc Type:	<input type="text" value="DOT"/> 
		Priority:	<input type="text" value="Medium"/> 

- 11) You must now add information to the **Line Comments** section to provide DGS with the necessary information to process the Request. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon () to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments. **The Line Comments are used to attach specifications and instructions.**

Line Comments

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Line Comments

Line	Description	Quantity	Unit	Price
1	Air-conditioning, installat	1.0000	Each	30000.000 USD

<< This is a one-time purchase for installation of a replacement air-conditioning system for a new location. >>

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK **Cancel**

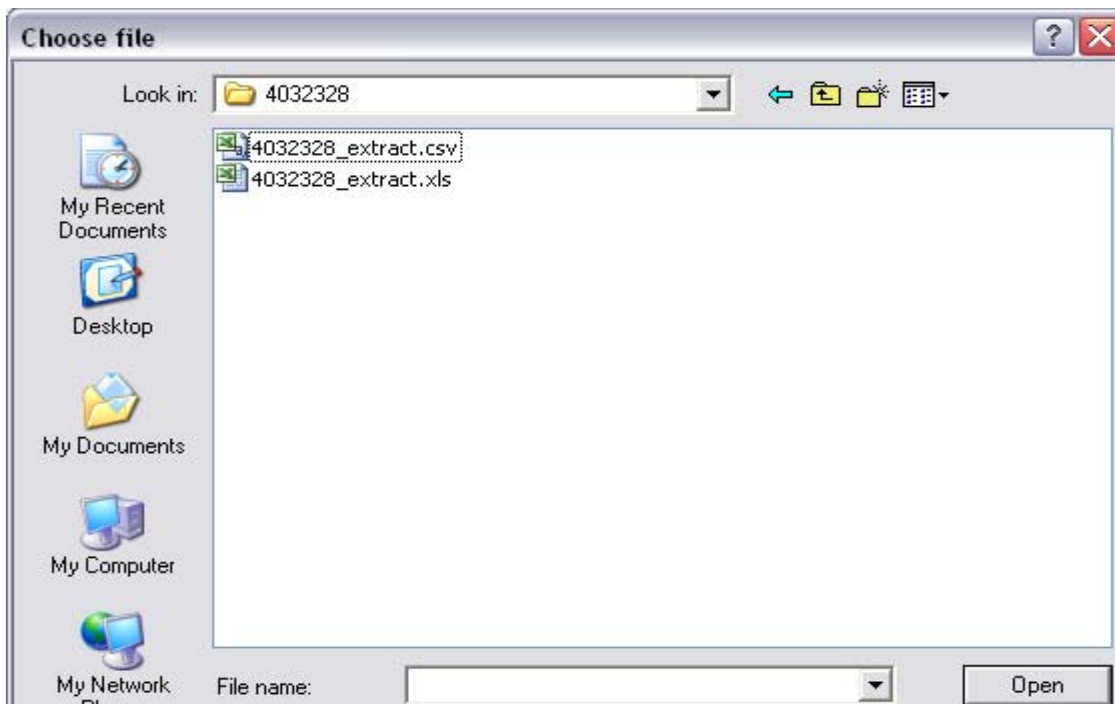
To attach specifications that are contained in a separate Word, PDF or Excel document:

1. Click the **Add Attachment** button. (**Add Attachment**) This takes you to the Add Attachment page.


Browse...

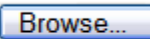
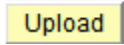

Upload **Cancel**

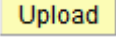
2. Click the **Browse** button (**Browse...**). This opens up a window to let you search for files on your computer.



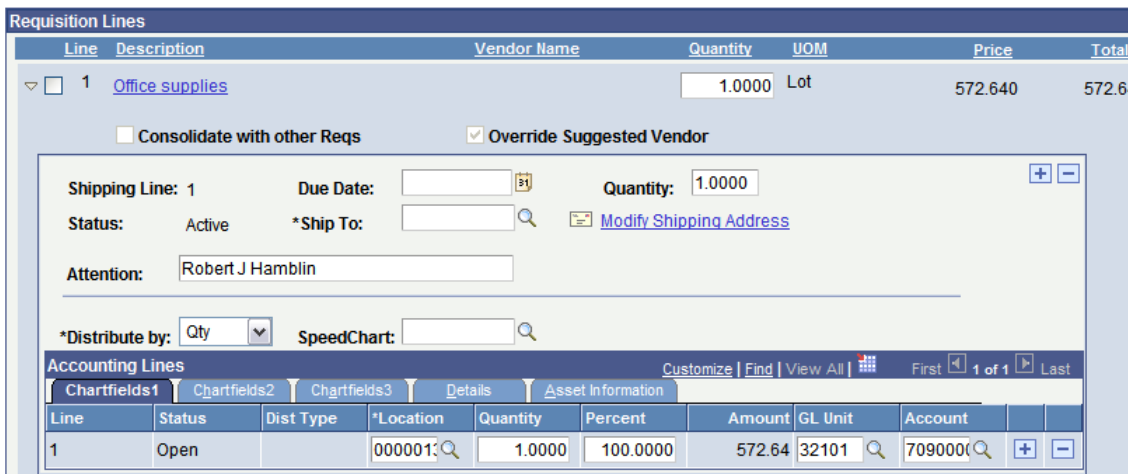
Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.

C:\Documents and Settings\BA10315\My Documents\bid 
 

4. Click the **Upload** button () once the file is found.
5. Repeat for all necessary files on that line.

12) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.



Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

Consolidate with other Reqs Override Suggested Vendor


Shipping Line: 1 Due Date: Quantity: 1.0000
 Status: Active *Ship To: [Modify Shipping Address](#)
 Attention: Robert J Hamblin

*Distribute by: Qty SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

Supplemental Information for Generic Assets

You must enter supplemental information on the Line Details screen to be able to process the order. On the main Review and Submit page, scroll to the right of the screen and click on the **Line Details** icon.  This is located next to the Total (shown below as 250.00).

Create Requisition

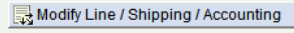

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 32101 General Services
 *Requester: robej0811001 Robert J Hamblin *Currency: USD
 Requisition Name: Doc Type: Priority: Medium

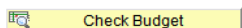
Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Staplers	American Paper And Twine	50.0000	Each	5.000	250.00

Select All / Deselect All   **Total Amount:** 250.00 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher



Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Clicking the **Line Details** icon will bring you to the **Line Details** page.

Line Details

Line: 1 [ALL BUNDLED DESKTOP SYSTEMS](#)

Item Details

Amount:	0.00	USD	Price:	<input type="text" value="0.00000"/>
Category:	204-53	Microcomputers, Desktop or Tow	View Hierarchy	
Buyer:	<input type="text" value="robej0811001"/>	<input type="text"/>	Buyer Information	
Vendor:	<input type="text" value="0000001370"/>	<input type="text"/>	Dell Marketing LP	
Vendor Location:	<input type="text" value="MAIN"/>	<input type="text"/>	ROUND ROCK	
Vendor's Catalog:	<input type="text"/>	<input type="text"/>		
Vendor Item ID:	<input type="text" value="ZZ:30136"/>	<input type="text"/>		
Manufacturer ID:	<input type="text"/>	<input type="text"/>	UPN ID:	
Manufacturer's Item ID:	<input type="text"/>	<input type="text"/>		
Physical Nature	<input type="text" value="Goods"/>	<input type="text"/>		
<input type="checkbox"/> RFQ Required	<input checked="" type="checkbox"/> Zero Price Indicator	<input type="checkbox"/> Inspection Required		
<input type="checkbox"/> Device Tracking	<input type="checkbox"/> Stockless Item			

[Configuration Info](#)

Contract

Sourcing Controls

OK

Cancel

*Note: If you cannot see the "Price" field, you will need to contact the Content Team to see if the item is set up properly. If the item is set up properly (as confirmed by the Content Team), you will need to contact the Edison Help Desk to have the correct Requester Setup added to your access.

- **Price:** Change the price to reflect the vendor's true price.
- **Vendor:** Select the vendor to be used.
- **Vendor Location:** Select the correct Vendor Location.
- **Vendor Item Number:** Enter the correct Vendor Item Number.

13) Then press the OK button at the bottom of the page to return to the main Review and Submit page.

14) Once all attachments and supplemental information is included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:


If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**

Sections to Review/Modify:

Shipping Addresses:


To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFM SHIPTO, both of which must be changed.


*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:

Ship To Location: 

Description: 

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

Search Results

View All First ◀ 1-7 of 7 ▶ Last

Ship To Location	Description
0000000019	BLUE BIRD TOWER 395 FIRE TOWE
0000000020	BLUE BIRD TOWER 395 FIRE TOWE
0000000021	BLUE BIRD TOWER 395 FIRE TOWE
0000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

▼ Address

Country:	<input type="text" value="USA"/> <input type="text" value="United States"/>	Prefix:	<input type="text"/>
Address 1:	<input type="text" value="312 ROSA L PARKS BLVD"/>	Phone:	<input type="text"/>
Address 2:	<input type="text"/>	Ext:	<input type="text"/>
Address 3:	<input type="text"/>	Fax:	<input type="text"/>
Room #:	<input type="text"/> Room Quadrant: <input type="text"/>		
City:	<input type="text" value="NASHVILLE"/>		
County:	<input type="text" value="DAVIDSON"/>	Postal:	<input type="text" value="37243"/>
State:	<input type="text" value="TN"/> <input type="text" value="Tennessee"/>		

Verify that the information is correct. If it is not, choose a different Ship-To location.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.

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- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user's setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the "correct" Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

❖ **Repeat as necessary for all lines**

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for requesting a contract. Click in the field and begin typing.



Justification/Comments

Send to Vendor Show at Receipt Show at Voucher


You must include:

- "Submitting Requisition to Purchasing Division." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like "This is a One-time Purchase of a _____ that is not on contract".
- **If the request is for a one-time service or job:** List the estimated amount of days from the receipt of the purchase order that you want the vendor to start the job and amount of days to complete the job. (i.e. Start = 30 days ARO, Complete = 60 days ARO).
- **If the request needs to be Sole-Source or Proprietary:** Note that you are requesting it to be Sole-Source or Proprietary, if applicable. Provide the supporting reasons behind making it a Sole-Source or Proprietary (i.e compatibility w/existing or unique features).

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

For Sole-Source, all the necessary documents must be attached in the Comments section as attachments on the **first line** (including the **Commissioner to Commissioner letter** and **sole source documentation from the manufacturer and/or vendor**).

- List any suggested vendors.
- List your contact information.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button (.

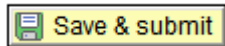
After the justification section is completed, you must Budget Check the document.

Budget Check

- 1) To Budget Check the Requisition, press the "Check Budget" button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- 2) After Budget Check, press the "Save and Submit" button to send the Requisition for Approvals.

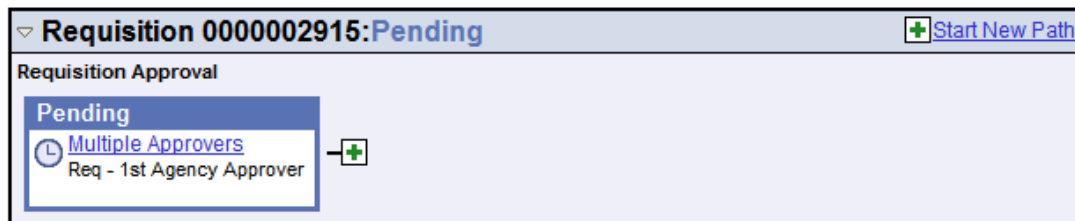




- 3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

- a) To view more information on the approvers, click on the "Multiple Approvers" ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.

Stage 1 - Agency Req Approvals



- b) To add additional approvers, click the Insert Approver button () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

list. *The Approver you wish to add must be in the system as an Approver before you can select them.*

- i. Use the Radio Buttons below the User ID Field (🔍) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: 🔍

Insert as: Approver
 Reviewer

- ii. After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

- ★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all commodity approvals.
- ★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (Requisition ID: 🔍).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Agency Procurement: Requesting One-Time Purchases from DGS Purchasing

Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▾ 0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. ▾ Go
▾ 0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. ▾ Go
▾ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. ▾ Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

▾ Review/Edit Approvers

Requisition Approval

▾ greg:Approved

Requisition Approval

Approved

✓ [TN P1 BUB CT1 SV DT1](#)

Req - 1st Agency Approver

11/25/2008 - 2:50 PM

When the Requisition is approved, DGS Purchasing will begin creating the Sourcing Event and start the Bid process. ([Return to Top](#))

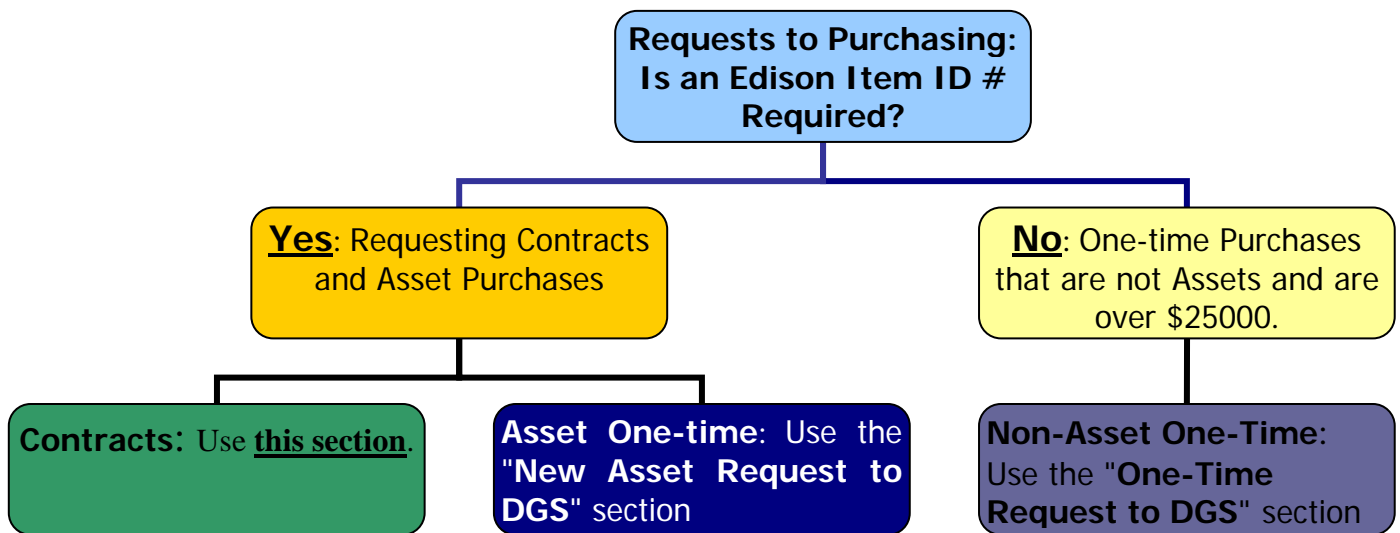
Agency Procurement: Requesting Contracts from DGS Purchasing

Contract Requests to DGS Purchasing

Several types of procurement requests must be routed to the Department of General Services, Purchasing Division (DGS Purchasing) to be completed. These include:

- Requests for new Agency Term Contracts (**not** DPAs, DPAs are in a separate document)
- Reprocurement requests for existing Agency Term Contracts
- Requests for One-time Purchases with a total greater than \$25,000.00 (separate document)
- Requests for One-time Purchases of Asset-tagged items

All of these Request types follow the same basic pattern, but they may need different specific actions taken to get them to DGS Purchasing. The main deciding factor between the paths is whether or not the item requires an Edison Item ID #.



Edison ID # Required: (for all these request types, go to "Requests with Edison Item IDs")

- All new Contract lines
- All reprocedured Contract lines
- Any item that must be tagged as "Sensitive" (Asset), regardless of whether it is for a one-time purchase or not. Further information on what counts as an Asset can be found in the **Asset Ordering** guide.

Edison ID # not Required: (for this request type, go to "Requests without Edison Item IDs")

- Items for one-time purchases that do not need to be tagged as Assets.

If you are creating any type of Request that is in the first group (Edison ID # Required), you *MUST* first have a list of Edison Item ID #s provided by the Content Team. Failure to complete this step first will require you to re-enter your Requisition.

Agency Procurement: Requesting Contracts from DGS Purchasing

★ Edison Item IDs

Edison Item IDs are created by the Content Team in DGS Purchasing. To do so, they require a properly-completed copy of the "**TEN CG Item Only Layout v7.4.xls**" spreadsheet. A blank copy of this spreadsheet along with the "**Spreadsheet Guide for Agencies.doc**" instructions can be requested by sending an e-mail to Content.group@tn.gov. This must be submitted back to Content, who will create the item IDs and return them to you in the same spreadsheet format. You *must* have these Item IDs to continue with your request.

Creating Requests

Requests with Edison Item IDs-

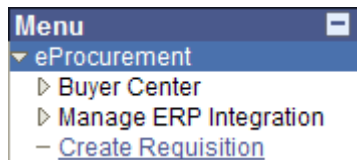
New and Reprocured Contract Requests

This section is for use ONLY with Edison Item IDs provided by the Content Team!

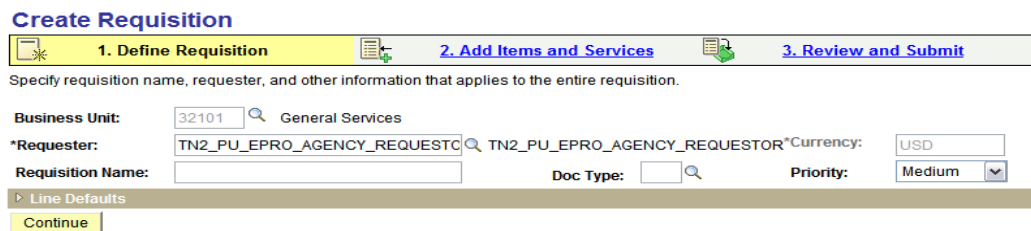
20) You must first be logged in to Edison. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.



21) The next step is to navigate to the **Create Requisition** page. Click on **eProcurement** from the left-hand menu. Then click **Create Requisition**, as shown in the picture below.



22) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.

A screenshot of the "Create Requisition" page. At the top, there are three tabs: "1. Define Requisition" (highlighted in yellow), "2. Add Items and Services", and "3. Review and Submit". Below the tabs is a text prompt: "Specify requisition name, requester, and other information that applies to the entire requisition." The form contains several fields: "Business Unit" (32101), "Requester" (TN2_PU_EPRO_AGENCY_REQUESTOR), "Currency" (USD), "Requisition Name" (empty), "Doc Type" (empty), and "Priority" (Medium). A "Continue" button is at the bottom left.

Step 1: Define Requisition

Agency Procurement: Requesting Contracts from DGS Purchasing

1. Define Requisition

- 1) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.
 - a. **Requisition Name** Click in the **Requisition Name** field and then type in the name. The name must include "Contract Request".

Create Requisition



Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: General Services

*Requester: Robert J Hamblin *Currency:

Requisition Name: Doc Type: Priority:

Line Defaults

[Continue](#)

- 2) After naming your Requisition, click the Continue Button. [Continue](#)

Step 2: Add Items and Services

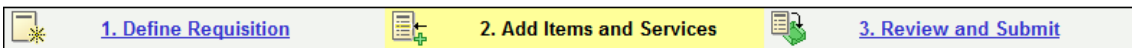
2. Add Items and Services

- 3) The next step is to add items to the requisition. **Requests for Contracts will use a list of Item IDs provided by the Content Team to search and find the items in the Catalog.**
- 4) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For Contract Requests, you will use the **Catalog** tab.

To search for items:

- First, click on the Catalog tab under the Search bar.

Create Requisition



Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: [Search](#)

[Catalog](#) [Favorites](#) [Templates](#) [Services](#) [Forms](#) [Web](#) [Special Request](#)

- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu. This should show as the default option when the Catalog tab is selected.

Agency Procurement: Requesting Contracts from DGS Purchasing

Browse Catalog

*Select a catalog:

Left | Right [All Procurement Items](#)

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. **This is the ONLY search field that should be used, NOT the one that's at the top of the screen.**
- Type the first Item ID (obtained from the Content Team) into the **Item ID** field, then press the Search button. An example is shown below.

Search Catalog

Search contains all of the following search fields entered:

[Search Settings](#)

- 5) If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns.

1 Results

Sort Items: [Show Images](#)

Item Description 1 - 1 of 1

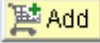
	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY
<input type="checkbox"/>	1.0000	<input type="button" value="Add"/>	1000007457	HVAC ANNUAL SERVICE INSPECTION AND PREVENTIVE MAINTENANCE	<input type="button" value="Details"/>	8698.000	EA	1.0000

[Select All / Deselect All](#)

- 6) If the item you need was located by the search, check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field. **The quantity must reflect how many times the service will be used over the course of the contract.** An example is shown below with a Quantity of 4.0000. It's an annual inspection, so this would be for four yearly inspections, as on a four-year maintenance contract.

Agency Procurement: Requesting Contracts from DGS Purchasing

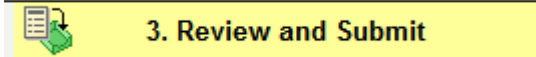
	Quantity		Item ID
<input type="checkbox"/>	4.0000	 Add	1000007457

- 7) After inputting the desired quantity, click the Add () button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.




Requisition Summary		
Description	Qty	UOM
HVAC ANNUAL SERVICE INSPEC...	4	EA
Total Lines:	1	
Total Amount (USD):	34,792.00	


Repeat this process for all additional lines that must be on the contract. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit



Reviewing and Submitting Requisitions: The final step in the Contract Requisition process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type, either **DCM** or **DCO**. **DCM** is for requesting a multi-year Agency Term Contract, while **DCO** is for requesting a single-year Agency Term Contract.

Business Unit:	<input type="text" value="32101"/>	General Services			
*Requester:	<input type="text" value="rofej0811001"/>	 Robert J Hamblin	*Currency:	<input type="text" value="USD"/>	
Requisition Name:	<input type="text" value="Contract Request HVAC Repair"/>	Doc Type:	<input type="text" value="DCM"/> 	Priority:	<input type="text" value="Medium"/> 

- 1) You must now add information to the **Line Comments** section to provide DGS with the necessary information to process the Contract Request. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon () to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments. **The Line Comments are used to attach specifications and instructions.**

Agency Procurement: Requesting Contracts from DGS Purchasing

Line Comments

Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK **Cancel**

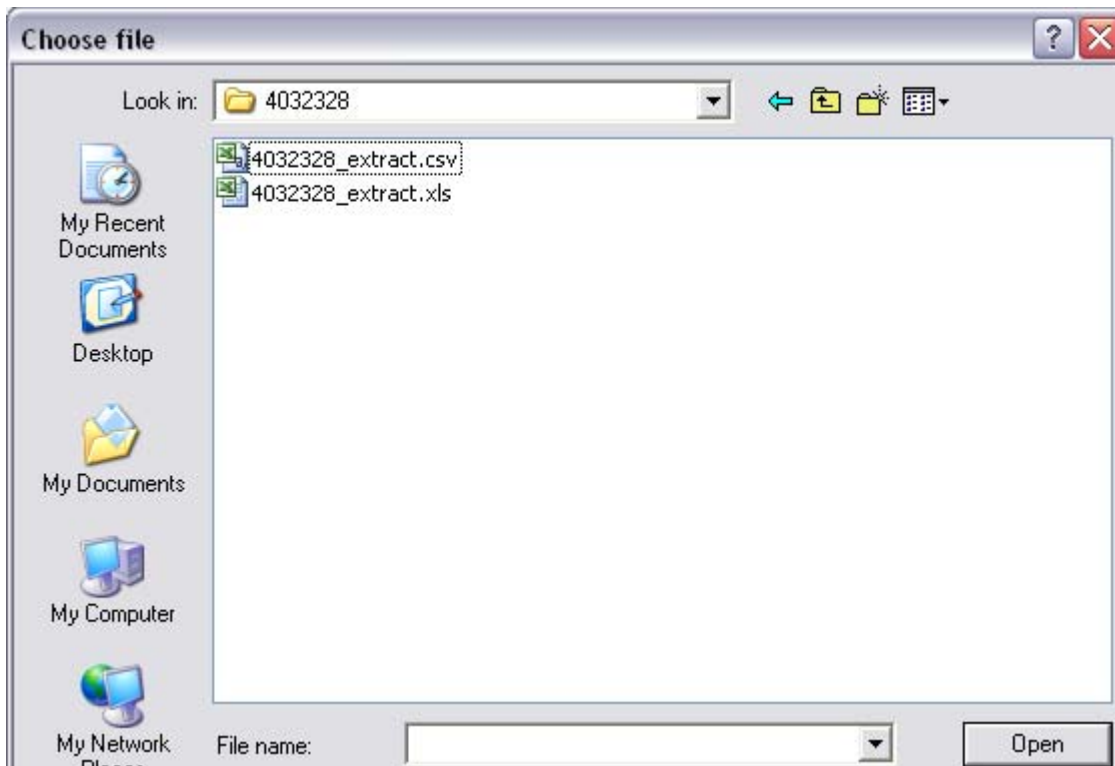
To attach specifications that are contained in a separate Word, PDF or Excel document:

1. Click the **Add Attachment** button. (**Add Attachment**) This takes you to the Add Attachment page.


Browse...

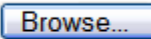
Upload **Cancel**

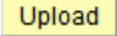
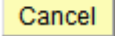
2. Click the **Browse** button (**Browse...**). This opens up a window to let you search for files on your computer.

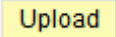


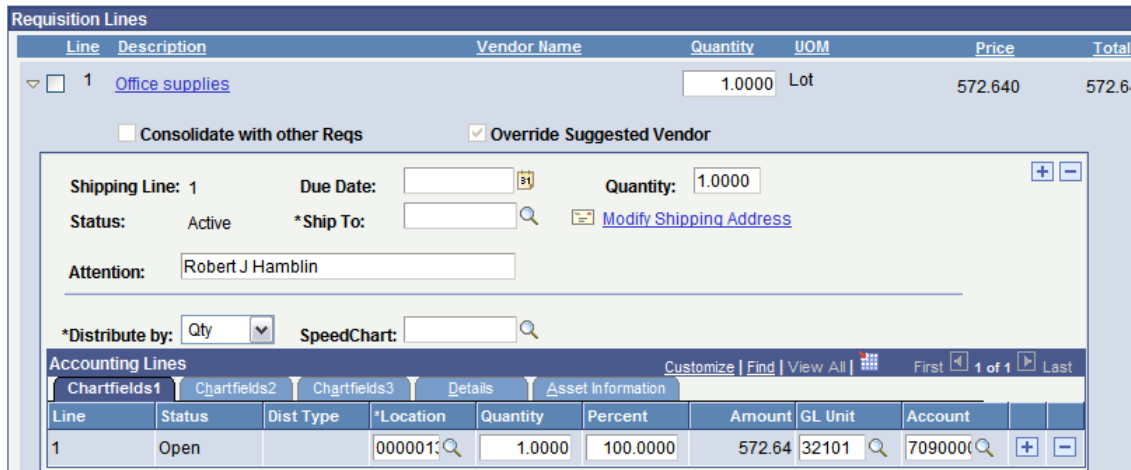
Agency Procurement: Requesting Contracts from DGS Purchasing

3. Select the file, then click the **Open** button (). This takes you back to the Attachment page, with your filename located in the window.

C:\Documents and Settings\BA10315\My Documents\bid 

4. Click the **Upload** button () once the file is found.
 5. Repeat for all necessary files on that line.
- 2) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.



Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000

Status: Active *Ship To: [Modify Shipping Address](#)

Attention:

*Distribute by: Qty SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

- 3) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines:

If a line needs to be deleted, click the check box next to the line, then press the Delete button. This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it.**


Agency Procurement: Requesting Contracts from DGS Purchasing

Sections to Review/Modify:

Shipping Addresses:

To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFMSHIPTO, both of which must be changed.

*Ship To: 

- Click the Lookup Icon () next to the Ship-To field. This brings you to the Look Up Ship To page.

Look Up Ship To

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

- Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

Search Results

View All First  1-7 of 7  Last

Ship To Location	Description
0000000019	BLUE BIRD TOWER 395 FIRE TOWE
0000000020	BLUE BIRD TOWER 395 FIRE TOWE
0000000021	BLUE BIRD TOWER 395 FIRE TOWE
0000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC-10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.

 [Modify Shipping Address](#)

Agency Procurement: Requesting Contracts from DGS Purchasing

Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

▼ Address

Country: Prefix:

Address 1: Phone:

Address 2: Ext:

Address 3: Fax:

Room #: Room Quadrant:

City:

County: Postal:

State:

Verify that the information is correct. If it is not, choose a different Ship-To location.

Chartfields:

All Chartfield (“Accounting”) information should default in based on the User’s Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

- If the user’s setup is incorrect, they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
- If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

DGS Purchasing is not able to view, access, change or review individual Account Preferences, and does not have access to what the “correct” Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

Agency Procurement: Requesting Contracts from DGS Purchasing

❖ Repeat as necessary for all lines

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for requesting a contract. Click in the field and begin typing.



You must include:

- "Submitting Requisition to Purchasing Division." (This must be at the beginning of the comment)
- An explanation of what the request is for. This would be something like "This is a Multi-year (2 year) Agency Term Contract" for a **DCM**, with the "2-year" replaced with the duration of the contract. Or for DCO requests, "This is a 1-Year Agency Term Contract".
- **If the contract will be a Multi-year:** Include justification as to why it must be a multi-year contract (i.e. to maintain continuity of service or product availability and to stabilize pricing).
- **If the Contract needs to be Sole-Source or Proprietary:** Note that you are requesting it to be Sole-source or Proprietary, if applicable. Provide the supporting reasons behind making it a Sole-source or Proprietary (i.e compatibility w/existing or unique features).

For Sole-Source, all the necessary documents must be attached in the Comments section as attachments on the **first line** (including the **Commissioner to Commissioner letter** and **sole source documentation from the manufacturer and/or vendor**).

- **If this is a contract Reprocurement:** List the previous TOPS requisition and contract number, if any.


If there was a current or previous contract, list the dollar amount spent during the last 12 months.

If the previous contract was a time & material, list the amount spent on parts during the last 12 months.

- List the start date that you are requesting to have the contract start. If the end date is be different than a full 12 months, please specify the end date.
- List the Estimated Dollar Amounts per fiscal year. The following is an **EXAMPLE:**

Agency Procurement: Requesting Contracts from DGS Purchasing

This a 3 year contract to start 05/01/09. The following is the estimated funding:
FY-09, May to June = \$5,000.00
FY-10, July to June = \$30,000.00
FY-10, July to June = \$30,000.00
FY-11, July to April = \$25,000.00

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button ()

Justification / Comments

Submitting Request to Purchasing Division for a Multi-year (3-year) Agency Term contract for HVAC repair. This contract needs to be a multi-year to maintain consistency of pricing and availability. This is a brand new contract for a new location. The requested start date is 6/01/09.

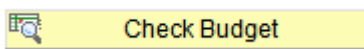
The following is the estimated funding:
FY-10, July to June = \$30,000.00
FY-10, July to June = \$30,000.00
FY-11, July to April = \$25,000.00



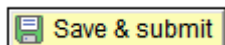
After the justification section is completed, you must Budget Check the document.

Budget Check

- 1) To Budget Check the Requisition, press the "Check Budget" button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.



- 2) After Budget Check, press the "Save and Submit" button to send the Requisition for Approvals.



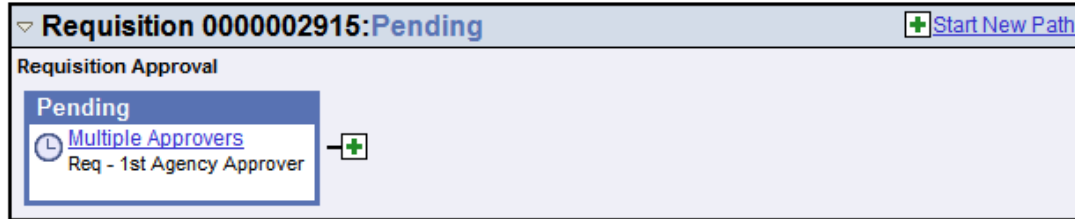
- 3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.




Approvals

Agency Procurement: Requesting Contracts from DGS Purchasing

- a) To view more information on the approvers, click on the “Multiple Approvers” ([Multiple Approvers](#)) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.


Stage 1 - Agency Req Approvals



- b) To add additional approvers, click the Insert Approver button. () This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button () next to the User ID field, then selecting the User ID from the list. *The Approver you wish to add must be in the system as an Approver before you can select them.*
 - i. Use the Radio Buttons below the User ID Field () to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.

Insert additional approver or reviewer

A dialog box titled 'Insert additional approver or reviewer'. It has a header 'Choose an approver or reviewer to insert'. Below that is a 'User ID:' label followed by a text input field and a magnifying glass icon. Underneath is 'Insert as:' with two radio buttons: 'Approver' (which is selected) and 'Reviewer'.

- ii. After selecting the Approver’s User ID and their function (Approver or Reviewer), click the Insert () button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent to Purchasing for further processing.

- ★ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item’s NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all **commodity approvals**.

- ★ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.

Agency Procurement: Requesting Contracts from DGS Purchasing

- ▼ eProcurement
 - ▷ Buyer Center
 - [Create Requisition](#)
 - [Manage Requisitions](#)

Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:** ).

The Approval Status and Budget Check status of the Requisition are listed in this table.

Requisitions							
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▷ 0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. ▾ Go
▷ 0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. ▾ Go
▷ 0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. ▾ Go

- Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.

▼ **Review/Edit Approvers**

Requisition Approval

▼ **greg:Approved**

Requisition Approval

Approved

✓ [TN P1 BUB CT1 SV DT1](#)

Req - 1st Agency Approver

11/25/2008 - 2:50 PM

When the Requisition is approved, it will be processed by Purchasing and the Purchasing Buyer will contact you with further information.

Agency Procurement: Requesting Delegated Purchasing Authority

DPA Request Setup

- Log in to Edison and go to **FSCM**, then click on **eProcurement**. Then click **Create Requisition**.



- Create an ePro Requisition with a name that includes “DPA” and a brief description. Select the **DDA** Doc Type. Then press the Continue button at the bottom of the page.

Create Requisition



Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: General Services

***Requester:** Robert J Hamblin ***Currency:**

Requisition Name: **Doc Type:** **Priority:**

Line Defaults

- Go to the **Special Request Tab, Special Item** link.



- Enter a valid description into the **Item Description** field. "Valid" meaning that any approver can look at the description and have at least a basic idea of what it is they are being asked to approve.

***Item Description:**

- Enter one dollar (\$1.00) into the **Price** field.


***Price:**


- Enter the total dollar amount into the **Quantity** field. For example, on a \$100,000 DPA, enter 100000 into the Quantity field.

***Quantity:**

Agency Procurement: Requesting Delegated Purchasing Authority

- Set the **Unit of Measure** as DO (Dollar)

*Unit of Measure: 

- Enter a valid, applicable NIGP code into the **Category** field (first picture below). If you are not sure what code to use, click the Lookup Icon () to bring up the Category search page (second picture below).


*Category: 


Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Categories [Customize](#) | [Find](#) | [View All](#) |  First 1 of 1 Last

<u>Catalog</u>	<u>Category</u>	<u>Description</u>	<u>Find in Tree</u>
1			

Browse Category Tree

On the **Look Up Category** page, type a partial description of the Category Code you think you'll need, then click the Find button (). This will bring a up a list of Category Codes that match the description you entered. Scroll through the list until you find a likely candidate.


Search By

Categories [Customize](#) | [Find](#) | [View All](#) |  First 1-93 of 93

<u>Catalog</u>	<u>Category</u>	<u>Description</u>
1 PROCUREMENT ITEMS	060-21	Brakes, Repairs, and Replacements (Not Electric Controller)
2 PROCUREMENT ITEMS	060-87	Tire and Tube Repair Items and Vulcanizers
3 PROCUREMENT ITEMS	120-65	Nets and Repair Supplies, Marine
23 PROCUREMENT ITEMS	909-63	Maintenance and Repair, Commercial and Institutional Building

Click the blue link of the Category you want to return to the main page with the Category field completed.

Agency Procurement: Requesting Delegated Purchasing Authority

*Category: 

- Include the Maximum Number of Delegations, the Begin Date and the End Date into the **Additional Information** field.

Additional Information

This is a DPA for Emergency Repairs at the Governor's Residence. There is no maximum amount of Delegations. The Begin Date on this DPA is 7/01/2009 and the End Date is 6/31/2010.


- Examples of what a sample DPA Special Item section “should” look like are shown in the next picture.



Catalog Favorites Templates Services Forms Web **Special Request**


Special Item

*Item Description:


*Price: *Currency:

*Quantity: *Unit of Measure: 

*Category:  Due Date: 

Vendor ID:  [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID: 


Mfg Item ID:

Additional Information

This is a DPA for Emergency Repairs at the Governor's Residence. There is no maximum amount of Delegations. The Begin Date on this DPA is 7/01/2009 and the End Date is 6/31/2010.

Send to Vendor Show at Receipt Show at Voucher

- After all the information on the DPA is completed, press the “Add Item” button ().

Then go to the third tab at the top, Review and Submit 

[3. Review and Submit](#)

Agency Procurement: Requesting Delegated Purchasing Authority

Requisition Name: Doc Type: Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	DPA for Emergency Repairs		100,000.00	Dollar	1.000	100,000.00
					Total Amount:	100,000.00 USD

- o Expand the Requisition Lines, using the “Expand Section” button (▶).

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	DPA for Emergency Repairs		100,000.00	Dollar	1.000	100,000.00
<input type="checkbox"/> Consolidate with other Reqs <input checked="" type="checkbox"/> Override Suggested Vendor						
Shipping Line: 1 Due Date: <input type="text"/> Quantity: 100,000 Status: Active *Ship To: <input type="text"/> Modify Shipping Address Attention: <input type="text" value="Your Name Defaults Here"/>						
*Distribute by: Qty SpeedChart: <input type="text"/>						
Accounting Lines						
Line	Status	Dist Type	*Location	Quantity	Percent	Amount
1	Open		000001	100,000.00	100.0000	100,000.00
GL Unit: 32101 Account: 707060						
					Total Amount:	100,000.00 USD

- o Enter a default Ship-To into the **Ship To** field, if one is not defaulted in.

*Ship To:

This will be for a generic address that will be overwritten at the PO level when the agency orders off of the DPA.

- o Scroll down to the **Accounting Lines** section. This needs to be set up on a Non-Budgetary account at the Requisition level, so as to not encumber funds. Then the correct accounting information will be entered at the Purchase Order level.

- o To do so, click on the LookUp icon (🔍) next to the **Account** Chartfield, on the **Chartfields1** tab.

Account
707060

- o Then search on the number 8451000. This is the Non-encumbered contract Account number. Click on the blue link to return to the main page with the Account field changed to 84510000.

Agency Procurement: Requesting Delegated Purchasing Authority

Look Up Account

SetID: SHARE
Account: begins with 8451000

Search Results
View All First 1 of 1 Last

Account	Description	Account Type
84510000	Non-encumbered contract	N

Look Up Clear Cancel Basic Lookup

Look Up Account

SetID: SHARE
Account: begins with 8451

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1 of 1 Last

Account	Description	Account Type
84510000	Non-encumbered contract	N


Account
8451000

- Go down to the **Justification/Comments** section, and enter a Justification for the DPA. This must list that you are "Requesting DPA Authorization from Bid for 1 year" and then include the Agency Name, what it is you are requesting DPA Authority for, when it will be used, why it needs to be used and who will authorize purchases from it within your agency. The dollar amount and total duration should also be included.

Justification/Comments

when time is of the essence and does not permit use of regular Purchasing procedures. The total amount of this DPA will be \$100000, and the DPA period will be from 7/1/2009 to 6/31/2010. All orders that use this DPA must be approved by the Agency

Send to Vendor Show at Receipt Show at Voucher

- You can use the "View Expanded" () button to see a larger version of the Justification field to type information into.

Agency Procurement: Requesting Delegated Purchasing Authority

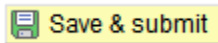
Justification / Comments

This requisition is for DPA/bid authorization for one (1) yr, and provides GS/PSM/FSS with the ability to affect repairs as needed when time is of the essence and does not permit use of regular Purchasing procedures. The total amount of this DPA will be \$100000, and the DPA period will be from 7/1/2009 to 6/31/2010. All orders that use this DPA must be approved by the Agency Director.

-Requested by



- After entering your Justification, scroll down. Press the “Save and Submit” button after all information is entered correctly.

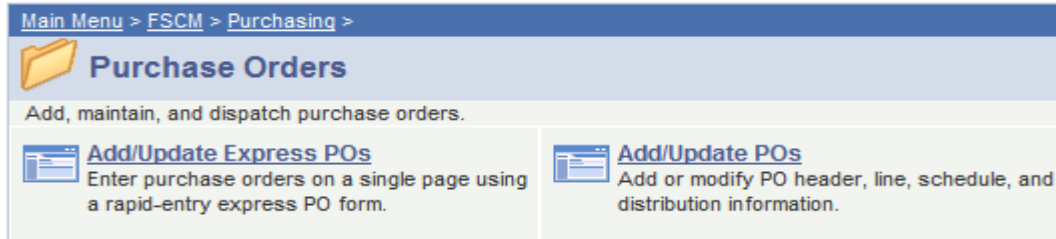


- Saving and submitting will get you a **Requisition ID** number. **Write this number down or save it in a readily accessible file!** You will need the Requisition ID to be able to create Purchase Orders.
- After approvals are met, the DPA can be used.

Agency Procurement: Requesting Delegated Purchasing Authority

Agency Usage

1. Agencies will use the DPA by doing Direct-Entry Purchase orders. Go to **Purchasing** -> **Purchase Orders** -> **Add/Update POs**.




2. Choose the **Add a New Value** tab, which is the default. Select the appropriate Business Unit.

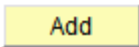
Leave the PO ID as "Next". Press the Add button. 

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: 

PO ID:





3. Select the **Vendor ID** by using the LookUp icon next to the Vendor ID field. This must be done **before** copying from the Requisition.

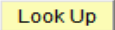
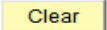
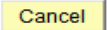
*Vendor ID: 

Look Up Vendor ID

SetID:

Vendor ID: 

Short Vendor Name: 

   [Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results. [View All](#)

First [Last](#)

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000	MARJORIE A-004	Mariorie A Sleeman	(blank)	(blank)	(blank)
0000000001	LAWRENCE C-001	Lawrence County	(blank)	(blank)	C260053791
0000000002	DECATUR CO-001	Decatur County Government	(blank)	(blank)	C620674507

4. Find the selected vendor using the search function and click its link. For example, Lawrence County. This returns to the main page and fills in the vendor's information.

Agency Procurement: Requesting Delegated Purchasing Authority

*PO Date: [Vendor Search](#) [Sub Contractor](#)
 Vendor: [Vendor Details](#) [Insur/Bond/Cert](#)
 *Vendor ID: Dillingham & Smith Mechanical And Sheet

5. Next, select “Requisition” in the **Copy-From** drop-down box at the top of the page.

Maintain Purchase Order

Purchase Order

Unit: 32101
 PO ID: NEXT
 Copy From:
 *PO Date:
 Vendor:

6. Type in the Requisition ID of the DPA Requisition created above, then press Search.

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit: Origin:
 Buyer: Max Rows:
 Vendor ID: Include Reqs With No Vendor
 Category: Include Inventory Items
 Requisition ID: Stockless Item
 Contract ID: Exclude Auto Source Item


7. Check the box for the desired Requisition lines, then press the Copy to PO button.

Select	PO Qty	PO UOM	Item	Description	Req ID	Line #	Procurement Card	Schedule Split
<input type="checkbox"/>	400.0000	EA	8000014229	WIPING CLOTHS, 18 INCH X 36 IN	0000000606	1		

[Select All](#) [Clear All](#)

8. This returns to the main screen with the DPA Requisition’s line copied over. Change the Quantity on the line to the amount of dollars the order is for. Leave the Unit of Measure and Price the same as the default.

Agency Procurement: Requesting Delegated Purchasing Authority

9. Click the “Schedule” button at the far right of the line. ().

10. Click the Distributions/Chartfields icon (). This goes to the Distributions page.

Maintain Purchase Order

Distributions for Schedule 1

Unit:	32101	Vendor:	LAWRENCE C-001
PO ID:	NEXT	Item:	Description
Line:	1	Status:	Active
Sched:	1	Schedule Qty:	
*Distribute by:	<input type="text" value="Quantity"/>	Merchandise Amt:	
SpeedChart:	<input type="text"/> Multi-SpeedCharts	Doc. Base Amount:	0.000

Distribution											
Chartfields											
Details/Tax											
Asset Information											
Req Detail											
Statuses											
Dist	Status	Percent	PO Qty	Amount	Currency	*GL Unit	Fund	Dept	*Account	Location CF	Program
1	Open					32101					

11. Enter the correct Chartfield information for the Purchase Order in the fields. This can be obtained from your agency Fiscal Department. **DGS Purchasing does not have this information.** Then press the OK button.

12. Return to the Main Page, then press Save to generate a PO ID.

13. Budget Check the PO and use the Approve Amounts screen to route the PO for approval.

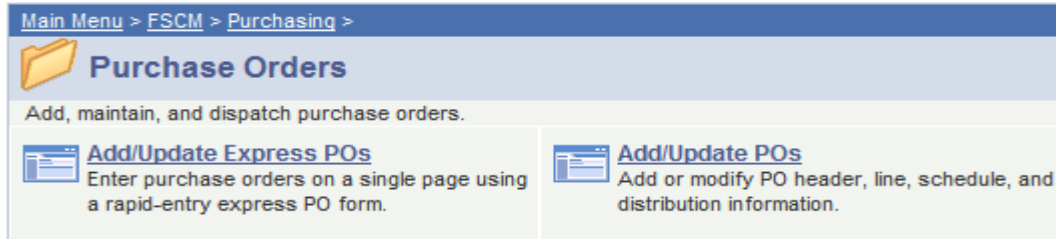
14. Select the Dispatch method from the drop-down, then press the Dispatch button. This goes to the Dispatch Options page. Click the OK button.

15. When the prompt saying “Would you like to wait for confirmation that the PO Dispatch process has completed?” click Yes. This will return you to the updated PO page after the dispatch is complete.

Agency Procurement: Delegated Purchasing Authority

Issuing Release Orders against DPAs

1. Agencies will use the DPA by doing Direct-Entry Purchase orders. Go to **Purchasing** -> **Purchase Orders** -> **Add/Update POs**.




2. Choose the **Add a New Value** tab, which is the default. Select the appropriate Business Unit.

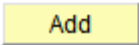
Leave the PO ID as "Next". Press the Add button. 

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: 

PO ID:





3. Select the **Vendor ID** by using the LookUp icon next to the Vendor ID field. This must be done **before** copying from the Requisition.

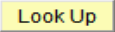

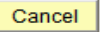
*Vendor ID: 

Look Up Vendor ID

SetID:

Vendor ID: 

Short Vendor Name: 

   [Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search [View All](#)

First [Last](#)

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000	MARJORIE A-004	Mariorie A Sleeman	(blank)	(blank)	(blank)
0000000001	LAWRENCE C-001	Lawrence County	(blank)	(blank)	C260053791
0000000002	DECATUR CO-001	Decatur County Government	(blank)	(blank)	C620674507

4. Find the selected vendor using the search function and click its link. For example, Lawrence County. This returns to the main page and fills in the vendor's information.

Agency Procurement: Delegated Purchasing Authority

*PO Date: [Vendor Search](#) [Sub Contractor](#)
 Vendor: [Vendor Details](#) [Insur/Bond/Cert](#)
 *Vendor ID: Dillingham & Smith Mechanical And Sheet

5. Next, select “Requisition” in the **Copy-From** drop-down box at the top of the page.

Maintain Purchase Order

Purchase Order

Unit: 32101
 PO ID: NEXT
 Copy From:
 ▼ Header
 *PO Date:
 Vendor:

6. Type in the Requisition ID of the DPA Requisition created above, then press Search.

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

▼ Requisition Selection Criteria

Business Unit:
 Buyer:
 Vendor ID:
 Category:
 Requisition ID:
 Contract ID:
 Origin:
 Max Rows:
 Include Reqs With No Vendor
 Include Inventory Items
 Stockless Item
 Exclude Auto Source Item


7. Check the box for the desired Requisition lines, then press the Copy to PO button.

Select Requisition Lines							Customize	Find	View All	First	1 of 1	Last
Select	PO Qty	PO UOM	Item	Description	Req ID	Line #	Procurement Card	Schedule Split				
<input type="checkbox"/>	400.0000	EA	8000014229	WIPING CLOTHS, 18 INCH X 36 IN	0000000606	1						

[Select All](#) [Clear All](#)

8. This returns to the main screen with the DPA Requisition’s line copied over. Change the Quantity on the line to the amount of dollars the order is for. Leave the Unit of Measure and Price the same as the default.

Agency Procurement: Delegated Purchasing Authority

9. Click the “Schedule” button at the far right of the line. ().

10. Click the Distributions/Chartfields icon (). This goes to the Distributions page.

Maintain Purchase Order

Distributions for Schedule 1

Unit:	32101	Vendor:	LAWRENCE C-001
PO ID:	NEXT	Item:	Description
Line:	1	Status:	Active
Sched:	1	Schedule Qty:	
*Distribute by:	<input type="text" value="Quantity"/>	Merchandise Amt:	
SpeedChart:	<input type="text"/> Multi-SpeedCharts	Doc. Base Amount:	0.000

Distribution											
Chartfields											
Details/Tax											
Asset Information											
Req Detail											
Statuses											
Dist	Status	Percent	PO Qty	Amount	Currency	*GL Unit	Fund	Dept	*Account	Location CF	Program
1	Open					32101					

11. Enter the correct Chartfield information for the Purchase Order in the fields. This can be obtained from your agency Fiscal Department. **DGS Purchasing does not have this information.** Then press the OK button.

12. Return to the Main Page, then press Save to generate a PO ID.

13. Budget Check the PO and use the Approve Amounts screen to route the PO for approval.

14. Select the Dispatch method from the drop-down, then press the Dispatch button. This goes to the Dispatch Options page. Click the OK button.

15. When the prompt saying “Would you like to wait for confirmation that the PO Dispatch process has completed?” click Yes. This will return you to the updated PO page after the dispatch is complete.