

Contract Ordering

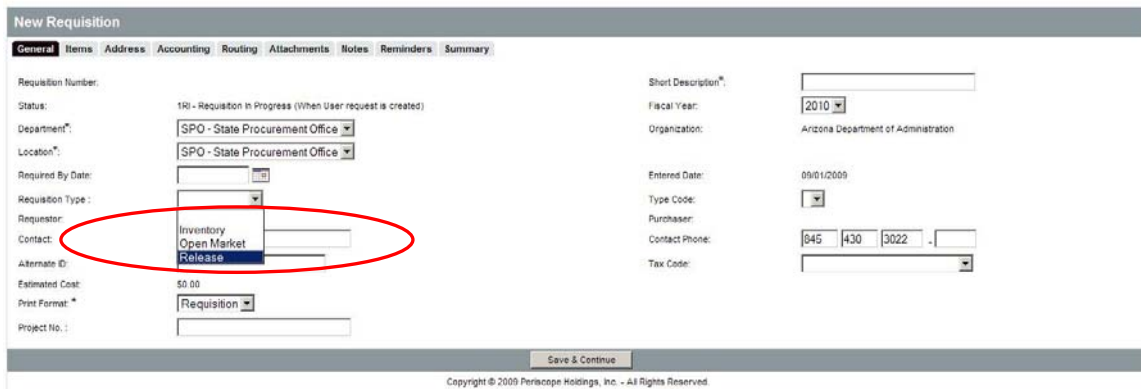
This quick reference guide is designed to assist you in understanding how to create orders in Procure.AZ for items off of an existing Contract or Master Blanket.

Key Terms

Release Requisition – Document used in Procure.AZ to build your “shopping cart” of contract items
Purchase Order – Document used in Procure.AZ to record the final order and transmit the order to the vendor electronically

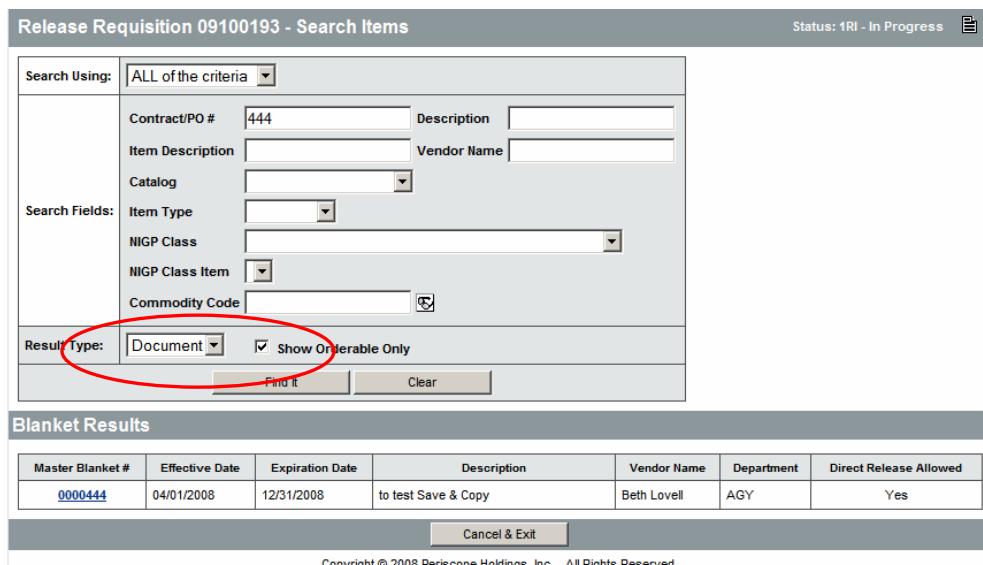
Creating a Release Requisition

To create a Release Requisition, first start a new Requisition by selecting Documents>Requisitions>New and choose “Release” as the Requisition Type.



Complete the remaining required fields and select “Save & Continue.”

Then, click on the **Items** tab, select “Search Items,” and enter your criteria for the items you would like to add to the Requisition and select “Find It”. If you want to view all applicable contracts, select **Document** on the Result Type dropdown. You can then access the contract by clicking on the Master Blanket # link. If you want to view only the relevant items, select **Item** on the Result Type dropdown. Procure.AZ will then return your results.



Master Blanket #	Effective Date	Expiration Date	Description	Vendor Name	Department	Direct Release Allowed
0000444	04/01/2008	12/31/2008	to test Save & Copy	Beth Lovell	AGY	Yes

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Once you locate the items you want to order, enter quantities for the selected items and click either “Save & Continue” or “Save & Exit.” This will add the items to your shopping cart.

Release Requisition 1000011 - Search Items Status: 1RI - In Progress

Search Using: ALL of the criteria

Contract/PO # Description

Item Description Vendor Name

Catalog

Search Fields:

Item Type

NIGP Class

NIGP Class Item

Cooperative Purchasing

Result Type: Show Orderable Only

Find It Clear

Blanket Results

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Class Class Item	Commodity Code	Discount %	Master Blanket # / Line #	Direct Release Allowed
<input type="checkbox"/>	<input style="border: 2px solid red;" type="text" value="0"/>	0.0	Dell Laptop with 4GB ram, USB mouse and carrying case.	\$999.00	EA - Each	204 - COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS 54 - Microcomputers, Handheld, Laptop, and Notebook		0.0%	0000020 / 2	Yes
<input type="checkbox"/>	<input style="border: 2px solid red;" type="text" value="0"/>	0.0	Dell laptop (gray) with 4GB RAM, 17 inch LCD screen, and Bluetooth enabled.	\$999.00	EA - Each	204 - COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS 54 - Microcomputers, Handheld, Laptop, and Notebook		0.0%	0000075 / 4	Yes
<input type="checkbox"/>	<input style="border: 2px solid red;" type="text" value="0"/>	0.0	Dell Laptop with 4GB RAM, 17 inch LCD screen, bluetooth enabled and Windows Vista Professional loaded. MS Office loaded.	\$1,199.99	EA - Each	204 - COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS 54 - Microcomputers, Handheld, Laptop, and Notebook		0.0%	0000078 / 4	Yes

Save & Exit Save & Continue Cancel & Exit

You will not need to type the description or pick the vendor as this information has already been pulled from the contract by Procure.AZ. You can also combine items from separate contracts onto a single shopping cart. Procure.AZ will split these into separate orders and route them to the appropriate vendor when you are ready to submit your order.

Release Requisition ADG SPO10-75 Status: 1RI - In Progress

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

If necessary, you can go to the **Address** tab and change the “Ship To” and “Bill To” addresses as long as you have permission to do so; otherwise this information is automatically populated by Procure.AZ.

You can also go to the **Attachments** tab and add attachments to your requisition, such as Terms and Conditions or other internal documentation.

Once you have completed the Requisition select “Submit for Approval” on the **Summary** tab.

Sending a Release Requisition

After submitting the Requisition, if an applicable approval path is found, it will be displayed for your selection. If no Approval Path is displayed you will have the choice to either “Manually add an Approver” or to select “Automatic Approval”. If an Approval Path is triggered by the Requisition, it must be approved before the PO is created.

Contract Ordering

Release Requisition 1000011 Status: 1RI - In Progress

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

Manually add approvers
 Automatic approval

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

Approver:

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Once the final approval has been received, you will be notified via email and a PO in “Ready to Send” status (3PRS) will immediately be created.

Release Requisition 09100202 - Purchase Order(s) Created Status: 1RGP - Gone to PO

The following Purchase Order(s) were created:

PO #	Vendor	Total	Date Created	Status
0000444: 5	Beth Lovell	\$25.00	10/09/2008	3PRS - Ready to Send

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Transmitting a PO to the Vendor

To send the order, open the PO, and you'll be taken to the **Summary** tab.

Scroll to the bottom of the screen, where you will see two options to submit your order to the vendor. You can select “Send Email and Notify Vendor” and an email will be sent automatically to the vendor, who can then login to Procure.AZ to retrieve the PO. Or you can also select “Set to Printed Status”, and the PO will *not* be automatically transmitted to the vendor. You will then need to follow your Organizations normal process in submitting POs to the vendor.

Once you have made your selection click “Save & Continue”. The PO will then be converted to “Sent” status. You can then print your order for your records or you can select, “Print Vendor Copy” and send to the vendor. Your contract ordering is now complete!

Approval Path:

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

Vendor Notification Actions

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

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