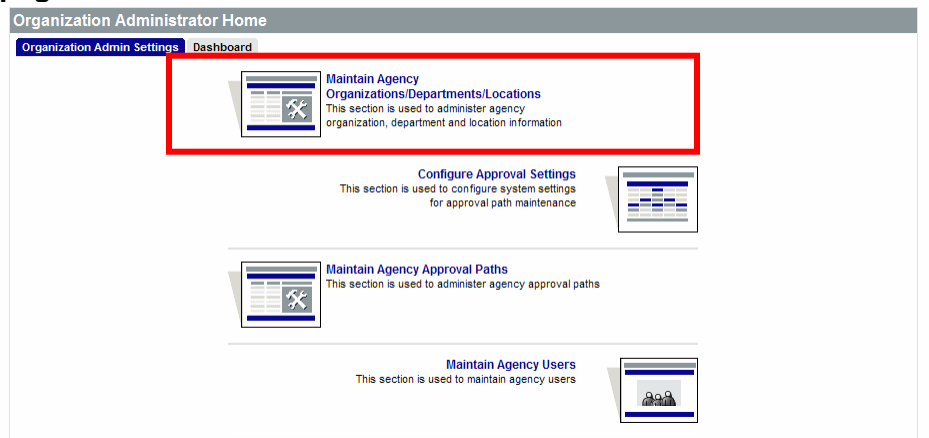


## Maintain Organizations

Agency organization structures can be created and maintained in Procure.AZ by users with the role of Organization Administrator. If you are an Organization Administrator for more than one organization, you can select which organization to maintain by clicking the eyeglass lookup at the top of the screen.

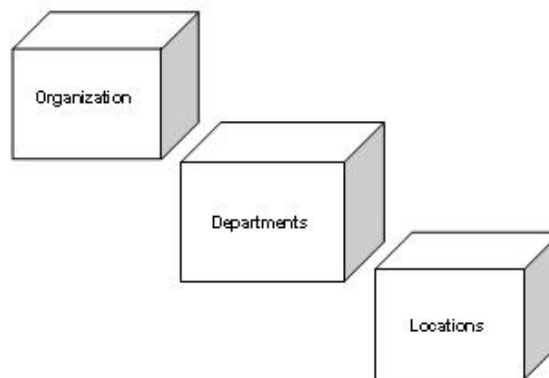


Upon logging into Procure.AZ with your unique Login ID and Password, you can add or maintain organizational data by clicking on the **Maintain Agency Organizations/Departments/Locations** link from your Organization Administrator **Homepage**.



### Maintain Organizations

There are three levels to maintain organization.




The organization is the highest organizational level in Procure.AZ. For most state agencies, the organization will be set to your agency name (example: Arizona Department of Transportation). For political subdivisions, the organization will be your jurisdiction name (example: City of Tempe).


## Maintain Organizations

You must complete the following fields:

Organization ID\*:


Organization Name\*:

Fiscal Year Start (MM/DD/YYYY)\*:  

Fiscal Year End (MM/DD/YYYY)\*:  

Fiscal Year Roll Days:

Print Logo:

Status:  

Address 1\*:

Address 2:

Address 3:

Address 4:

City\*:  State:  Zip:

Agency Phone:

Agency FAX:

Agency URL:

Agency URL Example: "http://www.buyspeed.com"

- **Organization ID** – Up to 5 character ID. Once saved, this information cannot be changed
- **Organization Name** – Name of the Organization
- **Fiscal Year Start and End** – The dates for the Fiscal Year which will affect documents and accounting
- **FY Roll Days** – The number of days, users may start to build documents for the next fiscal year and the amount of time after FY roll to complete the previous year.
- **Address Fields** – Address of the Organization

**Also Relevant for Phase I: Limit Document Access for Department Access (DA) Users** – If checked, the DA user can only see documents for their department.

Agency URL Example: "http://www.buyspeed.com"

Limit account access for Department Access users (If checked, Department Access users can only access accounts based on department/location privileges.)

Limit document access for Department Access users (If checked, Department Access users can only access documents based on department/location privileges.)

Restrict Department Access users from publishing Informal Bids to Web.

Restrict Inventory users from publishing Informal Quotes to Web.

P-Card Bill-to Address  

 You are not allowed to deactivate an organization if there are active departments associated with it.

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## Maintain Organizations

### Maintain Departments

Within each Organization, you can maintain a number of **Departments**, which are the second tier of the organization structure in Procure.AZ. Departments are used to restrict how users can access certain information, including:

- What bill-to/ship-to addresses they can use
- What documents they can see (if you restrict document access as described above)

To add or edit a department, click **Maintain Organization Departments**. Select the **Add Department** button at the bottom of the list, or click on the department you want to edit. The following fields are required:

- **Department ID** – Up to 25 characters. Please create your ID with the first 4 characters the same as your Organization ID
- **Organization** – The organization that the department belongs to
- **Department name** – Official name for the department

Department Information			
Department ID*	<input type="text"/>	Organization*	AGENCY - Arizona Department of Administration <input type="button" value="v"/>
Department Name*	<input type="text"/>	Status	Active <input type="button" value="v"/>
Allow Manual Override Encumbrance #	<input type="checkbox"/>	Auto Encumbrance # Prefix	<input type="text"/>
Alternate ID	<input type="text"/>		

### Maintain Addresses

Within each Department, you can maintain multiple **Addresses**, which can be selected by users for both billing and shipping. These addresses can be selected by users when building requisitions, bids, or POs.

You can type address information, or use existing address information by clicking on the lookup (eyeglass) button. Enter all valid information for that address, and save as appropriate.

Maintain Department Address			
Department:	CD - Community Development Division		
Department Suffix ID:	1	Department Suffix Name:	Community Development Division
Status:	Active <input type="button" value="v"/>		
<b>Address Information ( Copy from a Department Address )</b>			
Contact Name*	<input type="text"/>		
Address Line 1*	John H Mulroy Civic Center 11th Floor		
Address Line 2	421 Montgomery Street		
Address Line 3	<input type="text"/>		
Address Line 4	<input type="text"/>		
Country*	<input type="text"/>		
City*	Syracuse	State/Province*	NY
Zip*	13202		
County	<input type="text"/>		
Phone*	315	435	3558 Ext <input type="text"/>
FAX	315	435	3794 Email <input type="text"/>
Toll Free	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Save &amp; Exit"/> <input type="button" value="Save &amp; Continue"/> <input type="button" value="Reset"/> <input type="button" value="Cancel &amp; Exit"/>			

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## Maintain Organizations

### Maintain Locations

**Locations** are the lowest level of the organization structure in Procure.AZ. Locations are typically used for managing approval paths, default addresses, and Purchaser assignment.

If you are using Procure.AZ only for contract shopping, you should only complete the following fields:

- **Location ID** - Abbreviation for the location
- **Location Name** - Label that displays for location
- **Location Type** - Select Department Access (defaults to this value)
- **Ship-To Department Address** - Sets default for location
- **Bill-To Department Address** - Sets default for location

Maintain Location			
Location ID:	145	Department:	CD - Community Development Division
Location Name:	Community Dev.	Status:	Active
Location Type:	Department Access	Purchaser:	
Ship-to Department Address:	CD - Community Development Division / 1 - Community Development D John H Mulroy Civic Center 11th Floor 421 Montgomery Street Syracuse, NY 13202 Phone: (315)435-3558 FAX: (315)435-3794		
Bill-to Department Address:	CD - Community Development Division / 1 - Community Development D John H Mulroy Civic Center 11th Floor 421 Montgomery Street Syracuse, NY 13202 Phone: (315)435-3558 FAX: (315)435-3794		

NOTE: A location must be assigned prior to adding agency users. If your organization does not have a location please duplicate your Department information in this area.