

12 Release Requisition Instructor Guide

Review Training Management Guide

Handouts

- ✓ Introduction
 - Name tents
 - BidBuy General Overview
- ✓ Release Requisitions
 - 12 Release Training Presentation – QuickBuy (print 3-slides per page)
 - 12 BidBuy Example Release Fire Extinguishers
 - 12 BidBuy Example Release Janitorial Services
- ✓ Post Training Distribution
 - 12 PROCESS Release - Direct
 - 12 BidBuy Release Requisition Manual

Pre-Training Setup

Document Type	Action
Practice	Practice Exercise: 12 BidBuy Example Release Fire Extinguishers
Practice	Practice Exercise: 12 BidBuy Example Release Janitorial Services
Master Blanket Purchase Order	Confirm a Master Blanket Purchase Order is available with Items as described in the Examples
Print Document	Print Presentation: 12 Release Training Presentation - Quick Buy
Print Document	Print Exercise: 12 BidBuy Example Release Fire Extinguishers
Print Document	Print Exercise: 12 BidBuy Example Release Janitorial Services

Timeline

Session I	5 min.	Introduction
	15 min	Release Requisition Presentation
	20 min.	Direct Release Requisition Using Quick Buy Demo
	15 min.	Direct Release Requisition Using Quick Buy Hands-On
	10 min.	Direct Release Requisition Not Using Quick Buy Demo / Hands-On
	5 min.	Release Presentation Review and Recap

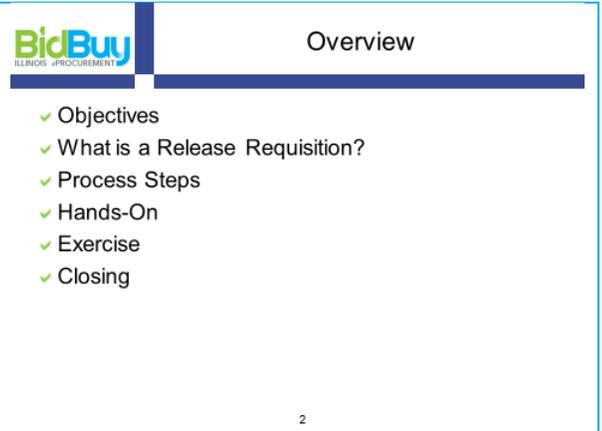
Presentation - Release Requisition

A Release Requisition enables an order to be placed against an existing Master Blanket Purchase Order.



Overview

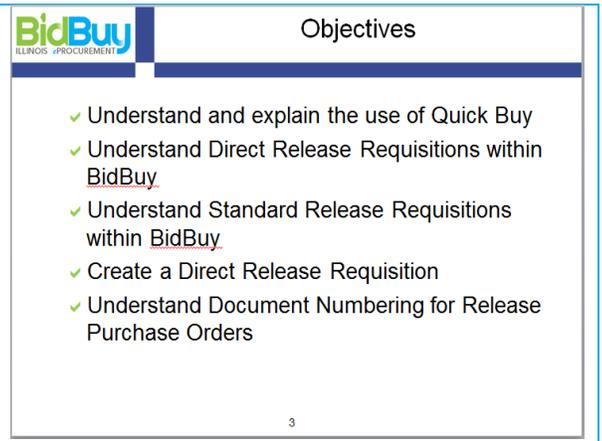
The Overview provides a very brief highlight of what is to be covered in the power point presentation and the BidBuy Demo.



Objectives

As a result of attending the Release Requisition training, the attendees will have an understanding of the Release Requisition process in BidBuy.

- ✓ Understand the Quick Buy search functionality
- ✓ Understand Direct Release - Purchase Order is sent directly to the vendor
- ✓ Understand Standard Release - Purchase Order requires BP user action prior to sending to the vendor
- ✓ Understand how the Release Purchase Order number is assigned



What is a Release?

A Release Requisition is the request for good and/or services from Master Blanket Purchase Orders within BidBuy.

- ✓ The Release process is used when an existing contract is in place for a good and/or Service and there is a request

What is a Release?

- ✓ Requests for goods and/or services from Master Blanket Purchase Orders within BidBuy.

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Release Types

There are two types of Releases:

- ✓ Direct Release: Upon approval of a Direct Release Requisition, BidBuy auto-generates the Release Purchase Order and sends to the vendor.
- ✓ Standard Release: Upon approval of a Standard Release Requisition, BidBuy auto-generates an in-progress Release Purchase Order for processing by the Basic Purchasing user.
- ✓ Direct or Standard Release is determined by the Basic Purchasing user on the Master Blanket Purchase Order.

Release Types

- ✓ Direct Release
 - Upon approval of a Direct Release Requisition, BidBuy auto-generates the Release Purchase Order and sends to the vendor.
- ✓ Standard Release
 - Upon approval of a Standard Release Requisition, BidBuy auto-generates an in-progress Release Purchase Order for processing by the Basic Purchasing user.
- ✓ Direct or Standard Release is determined by the Basic Purchasing user on the Master Blanket Purchase Order.

Process Steps

There are two Process Flow types in the Presentation

- ✓ Green arrows that show an operation and the activities to complete in BidBuy
- ✓ A traditional flow diagram that shows activities and the roles that accomplish them.

Process Steps

Direct Release Requisition Scenario

The BidBuy Demonstration is for Fire Extinguishers. Attendees also attending the IFB training will learn how to create the Master Blanket Purchase Order in this example.

The hand-on example is to be handed out prior to the Demo.

Request the class follow along first to gain understanding.

The demo includes:

- ✓ Use of Quick Buy to search Fire Extinguishers
- ✓ Creating the Release Requisition
- ✓ Release Purchase Order auto-generated and sent to Vendor



Direct Release Scenario

- ✓ The State of Illinois has a Master Blanket PO for Fire Extinguishers and Maintenance. The user has a need to procure Fire Extinguishers from the Blanket PO.
 - See handout for details

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Log Into BidBuy

The login process is the first step when entering BidBuy

Select Department Access role on Login



Log Into BidBuy

1. Go to BidBuy at <https://train.bidbuy.illinois.gov/bsol>
2. To login, enter your **Login ID** and your **Password**
3. Click **Login**

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Create Release Requisition

The following details steps to create the Release Requisition using Quick Buy

- ✓ Quick Buy search – Found in the middle of the Navigation header - “less is more” when doing initial search (e.g. Fire Extinguishers)
 - The Master Blanket PO’s Item to release in the example has the words “**Training – Fire Extinguishers**” to enable a quick find for the Release example.
 - Master Blanket PO #: **17-999TRAIN-TRAIN-P-495**
- ✓ Selected items are added to a new Requisition to process
- ✓ The Requisition is completed and approved



Create Release Requisition Using Quick Buy

- Step 1:** Search Items in Quick Buy, Select Items
- Step 2:** Add to New Req & Exit
- Step 3:** Update Requisition Tabs
- Step 4:** Submit Requisition for Approval
- Step 5:** System auto-generates Release Purchase Order Document and Sends to Vendor

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Instructor Online - Create Release Requisition (Quick Buy)

Create Release Requisition

- ✓ Demo Steps for Creating the Release Requisition using Quick Buy

Instructor does the following and then turns over to user to do.

- ✓ Log Into BidBuy
- ✓ Select Department Access Role

Quick Buy Process

Current Organization: BidBuy Training Agency ↔

Quick Buy Find It

Enter and select Find It

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM
<input type="checkbox"/> ☆	<input style="width: 40px;" type="text" value="0"/>	0	Training - Fire Extinguisher	\$125.00	EA - Each

Enter Quantity

Add to New Req & Exit

Select Add to New Req & Exit Button

- ✓ Enter search criteria **Training – Fire Extinguisher** in the Quick Buy and select Find It
 - Quick Buy searches all Item Descriptions available to your agency and returns items available for Release Requisition on ‘Release’ tab
- ✓ Enter Quantity for Items to return - “Fire Extinguishers”
 - Items that will result in a Direct Release include column “Direct Release Allowed = Yes”
 - Items that will result in a Standard Release include column “Direct Release Allowed = No”
- ✓ Select Add to New Req & Exit

The Release Requisition will be created and open to the Items Tab

General Tab

When using Quick Buy, the Release Requisition will be created and open to the Items tab. Click back to General tab to continue processing.

- ✓ Short Description – What is being requested
- ✓ Department/Location – Defaults to the user creating the document’s default, can be modified based on user’s rights
- ✓ Requisition Type – **Release**
- ✓ Type Code – Select the type code used on Master Blanket Purchase Order

- ✓ Short Description: Fire Extinguishers
- ✓ Department: Default
- ✓ Location: Default
- ✓ Requisition Type: Release
- ✓ Type Code: Competitive Sealed Bid

Items Tab>General Sub-Tab

<ul style="list-style-type: none"> ✓ Review all the Item information ✓ Click Item # link for Item detail ✓ This Item information is populated based on the information from the Master Blanket Purchase Order <ul style="list-style-type: none"> ○ If the Unit Cost was populated on the Master Blanket PO, the Unit Cost field cannot be modified ○ If the Unit Cost was not populated on the Master Blanket PO, the user will enter Catalog Price/Unit Cost based on current pricing and enter reference information in the Price Reference # field 	<ul style="list-style-type: none"> ✓ Review Item Detail, populated from the Master Blanket Purchase Order: <ul style="list-style-type: none"> ○ Description: Training – Fire Extinguisher ○ Quantity: 1 ○ NIGP Class Code: 340 ○ NIGP Item Code: 28
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Vendor Tab

<p>The Vendor is populated based on the Vendor on the Master Blanket Purchase Order.</p>	<ul style="list-style-type: none"> ✓ No Action Required, briefly explain
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Address Tab

<p>The Requisition Address is auto populated by the default for the user's setting on Ship-to Address and Bill to Address.</p>	<ul style="list-style-type: none"> ✓ Address: Use Default
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Accounting Tab

<p>This is accounting information for all items for the Req. We are selecting the main Accounting Tab. To unique account codes for individual items, go to Items tab and select Accounting sub-tab.</p> <p>Accounting will be required on all Release Requisitions, and is important for processing approvals.</p> <p>Stress importance of selecting Save Based on Percentages and then Rebuild for All Items after an Account Code is added to the document.</p>	<p>Account Code:</p> <ul style="list-style-type: none"> ✓ Click the magnifier next to Account Code box ✓ Lookup Account screen opens, select Find It ✓ Select Account Code ✓ Select Save Based on Percentages ✓ Click Rebuild for all Items (code then attaches to the item) ✓ Account Code: Search Accounts ✓ Select Save Based on Percentages ✓ Select Rebuild for All Items
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Routing Tab

<p>The routing that a requisition must follow for approval is determined by the applicable approval paths. The approval path for the requisition is displayed on the Routing Tab.</p> <p>This tab remains blank until an approval path is determined when the requisition is submitted for approval.</p>	<ul style="list-style-type: none"> ✓ No Action, briefly explain
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Attachments Tab

<p>Attaching Files or Forms to BidBuy documents is a useful way to include specifications or other guidelines in the user’s procurement documents.</p> <ul style="list-style-type: none"> ✓ Files = are selected from the user’s computer file directory ✓ Forms = Are created by a BidBuy Administrator that can be added to the document and modified within BidBuy <p><u>Attachments</u> that may be added to a Release Requisition include:</p> <ul style="list-style-type: none"> ○ New Furniture Purchase Form (Surplus Waiver) ○ Service Procurement and Contracting Checklist <p><u>Forms</u> that may be added to the Release Requisition include:</p> <ul style="list-style-type: none"> ○ Non-Usage Fleet Request ○ Usage Fleet Request 	<ul style="list-style-type: none"> ✓ Add a file from the computer directory (can be a picture) to demonstrate how to add an attachment.
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Notes Tab

<p>The Notes tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p> <p>Only the user creating a note <u>may edit</u> their note.</p>	<ul style="list-style-type: none"> ✓ Write brief demo note to show the note function
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Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p> <p>Reminders are sent via email (if option selected) and display on the user’s Reminders Tab.</p>	<ul style="list-style-type: none"> ✓ No Action, describe briefly
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Summary Tab

<p>The Summary Tab allows the user to review the Release Requisition for revisions and updates prior to approval.</p> <p>Automatic Approval - approval paths are not configured in BidBuy Train, so user will automatically approve their document.</p> <p>The Release Purchase Order number created keeps the same number as the Master Blanket PO with a Release Number added. Example:</p> <ul style="list-style-type: none"> ✓ Mater Blanket Purchase Order #: 17-999TRAIN-TRAIN-P-495 ✓ Release Purchase Order Number: 17-999TRAIN-TRAIN-P-495:1 	<ul style="list-style-type: none"> ✓ Review Summary Tab ✓ Submit for Approval ✓ Choose Automatic Approval option ✓ New Purchase Order Release is created and sent to Vendor. <ul style="list-style-type: none"> ○ Release Purchase Order number appears in the system window on the Summary tab.
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User hands-on for Demand Requisition

- ✓ Attendees create Release Requisition for Fire Extinguishers
- ✓ Presenter to have the **Create Release Requisition Using Quick Buy** slide on the overhead and walk around to assist

Presentation - Release Requisition Not Using Quick Buy

After attendees complete the Release Requisition hands-on exercise using Quick Buy, walk them through creating Release Requisitions by selecting Documents > Requisitions > New.

Create Release Requisition

The following details steps to create the Release Requisition not using Quick Buy.

- ✓ Create a new Requisition
- ✓ Select Requisition Type = Release
- ✓ Items Tab – Search Items from Blanket
 - Search is similar to the search using Quick Buy



Create Release Requisition

Step 1: Click Documents > Requisitions > New

Step 2: Select Requisition Type = Release

Step 3: Search Items - Add to Req & Exit

Step 4: Update Tabs

Step 5: Submit Requisition for Approval

Step 6: System auto-generates Release Purchase Order Document and Sends to Vendor

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Direct Release Scenario

A second exercise is handed out to work through the scenario.

- ✓ 12 BidBuy Example Release Janitorial Services



Direct Release Scenario

- ✓ CMS has a Master Blanket PO for Janitorial Services. The user has a need to procure Janitorial Services from the Blanket PO.
 - See handout for details

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Instructor Online - Create Release Requisition

Create Release Requisition

- ✓ Demo Steps for Creating the Release Requisition without using Quick Buy

User hands-on

- ✓ Attendees create Release Requisition for Janitorial Services with the Trainer

It is recommended to walk through this example with the class as they work alongside the instructor. They have gone through most of the steps in the previous example, and this will highlight only the changes between using Quick Buy and not using Quick Buy.

- ✓ Log Into BidBuy
- ✓ Select Department Access Role

New Requisition

<p>Initiate a new Requisition document.</p> <p>On the Navigation Bar:</p> <ul style="list-style-type: none"> ✓ Click Documents ✓ Hover over Requisitions ✓ Select New <p>The following sections guide the instructor through the General tab and Items tab of the Requisition document.</p>	<ul style="list-style-type: none"> ✓ Documents > Requisitions > New
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General Tab

<ul style="list-style-type: none"> ✓ Short Description- Specific and precise description ✓ Department/Location – Defaults to the user creating the document’s default, can be modified ✓ Requisition Type – Must be Release ✓ Type Code – Select same Type Code used on the Master Blanket Purchase Order being released against <ul style="list-style-type: none"> ○ The Type Codes on the Release Requisition match the Type Codes on the Purchase Orders. It is recommended to review the Blanket PO you are ordering against to obtain the correct Type Code prior to submitting the Release Requisition. <p>Once the required information (fields designated with an asterisk “*”) on the General tab has been entered and saved, a requisition number will be automatically assigned and the user may navigate to other tabs.</p>	<ul style="list-style-type: none"> ✓ Short Description: Janitorial Services ✓ Department: Default ✓ Location: Default ✓ Requisition Type: Release ✓ Type Code: Competitive Sealed Bidding
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Items Tab

The only option available on a Release Requisition is to ‘Search Items’. This allows users to search items available to release from Master Blanket POs.

- ✓ After selecting ‘Search Items’, the user is prompted to search by Keyword. The Search is similar to that demonstrated above in the Quick Buy example.
- ✓ Please see below for a reminder on key aspects of the Item Search and Items.

- ✓ Quick Buy searches all Item Descriptions available to your agency and returns items available for Release Requisitions on ‘Release’ tab
- ✓ Items that will result in a Direct Release include column “Direct Release Allowed = Yes”
- ✓ Items that will result in a Standard Release include column “Direct Release Allowed = No”

- ✓ Item information returned to the Requisition is populated based on the information from the Master Blanket Purchase Order
 - If the Unit Cost was populated on the Master Blanket PO, the Unit Cost field cannot be modified
 - If the Unit Cost was not populated on the Master Blanket PO, the user will enter **Catalog Price/Unit Cost** based on current pricing and enter reference information in the **Price Reference #** field

- ✓ Search Items
- ✓ Search Keyword: “Training – Janitorial”
- ✓ Select Item: Training - Janitorial Services
 - Master Blanket #: 17-999TRAIN-TRAIN-P-555
- ✓ Enter Quantity
- ✓ Add to Req & Exit

All remaining tabs are the same as above instruction.

Presentation - Release Review

After attendees complete the Release Requisition hands-on exercise, review and recap.

Release Review

Review what was learned in the Release Request training module

Direct Release Requisition - Will auto-generate and send the Release Purchase Order directly to the Vendor upon approval of the Release Requisition

Standard Release Requisition – Will require Basic Purchasing user to process the Release Purchase Order

BidBuy ILLINOIS PROCUREMENT	Release Review
<ul style="list-style-type: none"> ✓ Direct Release Requisition <ul style="list-style-type: none"> ○ Upon approval of the Requisition, BidBuy auto-generates the Release Purchase Order and sends to the vendor. ✓ Standard Release Requisition <ul style="list-style-type: none"> ○ Upon approval of the Requisition, BidBuy auto-generates an in-progress Release Purchase Order for processing by the Basic Purchasing user. 	
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Closing

Closing – Opportunity for any final comments and ask for questions

BidBuy ILLINOIS PROCUREMENT	Closing
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