State of Illinois

Release Requisition Manual

#12 V1

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The information contained in this document is a general guideline for the processing of procurements using the State of Illinois BidBuy system. State of Illinois procurements must be conducted in accordance with applicable statutes and rules, including the Illinois Procurement Code. For any questions, please contact your Agency Procurement Officer (APO) or State Purchasing Officer (SPO).

BidBuy General Overview

General Overview

User Roles

Department Access (DA)*

Department Access is the role for Agency requestors or end-users. Department Access gives users the ability to be a requisitioner or contract shopper.

A requisitioner is a user who creates Requisitions from scratch, while a contract shopper is able to order from existing blanket contracts only.

Basic Purchaser (BP)*

Basic Purchaser (BP) is the role for Agency purchasing staffs and APOs.

Basic Purchasers can create all documents on the Agency side such as Requisitions, Bid, Purchase Orders and their related documents such as Amendments, Change Orders and revisions.

* An approver may be configured as either a Department Access or Basic Purchaser. In addition, if a user's role is to approve only, they may be setup as a Department Access role with approval rights only, disallowing both requisitioning or contract shopping.

General Document Structure

	Requisition Types: Open Market, Release & Demand	Bid New Public Procurement Bulletin	Purchase Order Types: Purchase Order & Master Blanket
Document Numbering	17-416CMS-BOSS4-R-101	17-416CMS-BOSS4-B-87	17-416CMS-BOSS4-P-200
	Fiscal Year - Organization ID - Department ID - Document Letter - Record Number*		
Document Description	Requisitions are documents that Agencies use to request goods or services. In addition to Agency approvals, CMS Bureau of Strategic Sourcing and the Governor's Office of Management and Budget will provide approval on the Requisition.	A Bid allows you to publish a request for goods and services in BidBuy, and have registered vendors login, view and ultimately quote on those bids. BidBuy can help you to choose the best quote, award the Bid (Bid Tab**) and convert the Bid to a Purchase Order/Contract.	Purchase Orders are used to purchase goods or services. In addition, they communicate details about the purchase both to the public, vendor(s) and the State that need to know about the purchase (i.e. accounting, requestor). Contract amendments may be applied to Purchase Orders via Change Orders.
Legacy System	Procurement Business Case (Remedy), IGPS, Surveys, Procurement File	Illinois Procurement Bulletin for General Services, Procurement File	IGPS, Procurement File

*Record Numbers are generated based on a number wheel exclusive to each of the 3 documents. (i.e. Req, Bid, PO) As a result, a Requisition's record number may be 300, while the associated Purchase Order is 102.

** The Bid Tab is a sub-document of the Bid where Vendor Quotes are tabulated, and where an award is recorded.

Remember! Use the symbol to quickly and easily search for any document available to you.

Terms Crosswalk

Current	Future
Solicitation/Notice	Bid
IPB Registered User	Bidders
Addendum	Amendment
Bid/Offer/Response	Quote
Award Information	Bid Tab
Contract	Purchase Order (PO)
Amendment	Change Order

General Process Workflows

Included below is a high level walkthrough of the most common BidBuy process workflows.
- Each process step affords the opportunity for approvals to occur based on identified criteria, including Agency department, location, procurement amount, NIGP codes, user role and accounting.

Small Purchase – Begins with an Open Market Requisition, then converted to a Purchase Order.

Requisition → Bid ($10,000 to Formal Solicitation Threshold) → Purchase Order

Competitive Solicitation – Begins with an Open Market Requisition, which is converted to a Bid for public solicitation. Once quotes are obtained, the Bid Tab is opened and vendor is awarded. The Bid Tab is then converted to a Purchase Order.

Requisition → Bid → Bid Tab → Purchase Order

Release (Order Against Contract) – Begins with a Release Requisition, then converted to a Purchase Order.

Release Requisition → Purchase Order

Renewal – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the renewal amount(s). Finally, a Change Order is created against the original Purchase Order/Contract for the Renewal terms.

Requisition → Bid → Bid Tab → PO Change Order

Change Order – Begins with an Open Market Requisition referring to the associated Purchase Order/Contact. The Requisition is converted to a Bid and the Bid Tab is completed with the change order amount(s). Finally, a Change Order is created against the original Purchase Order/Contract based on the Change Order terms.

Requisition → Bid → Bid Tab → PO Change Order

Overview & Outcomes

Process Overview

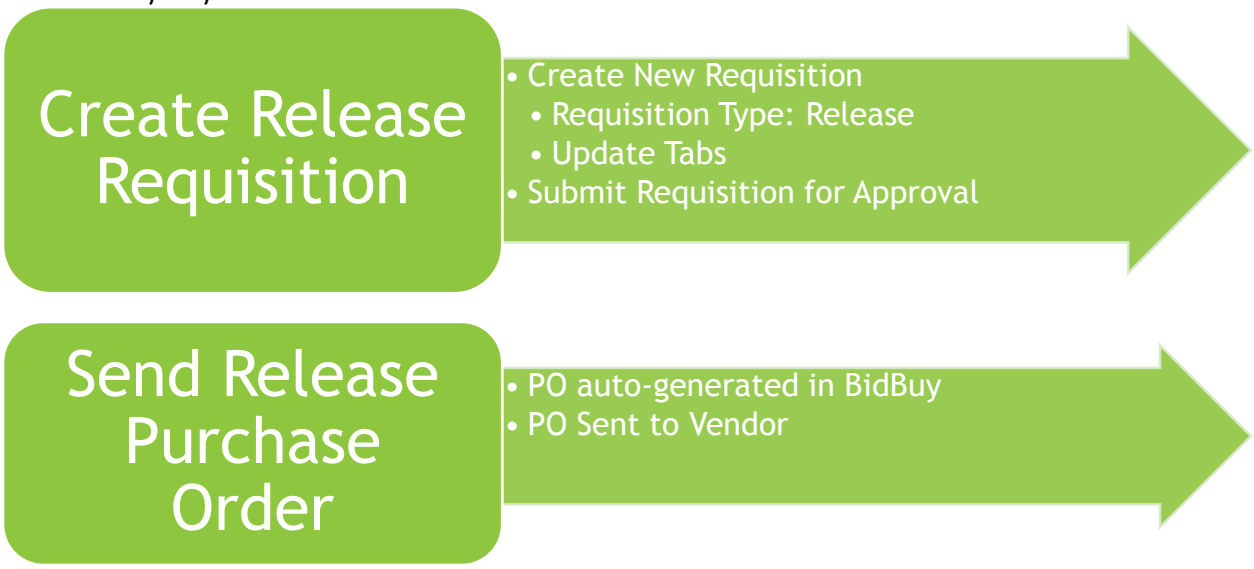
The Release Order process is used when an existing contract is in place for the goods and/or services.

The Release Order uses the Requisition and Purchase Order Documents. There are two types of Releases in BidBuy:

- **Standard Release** – The originator of the document submits the standard release requisition, and when approved, it is routed to a Basic Purchaser, who will process a release Purchase Order. Once approved, the standard release PO is sent to the Vendor.

- **Direct Release** – The originator of the document submits the direct release requisition for approval, and when approved, it generates a PO that goes directly to the vendor to fulfill the order.

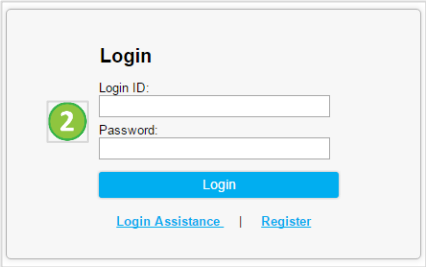
A Release Requisition initiates a release against a current Master Blanket Purchase Order. QuickBuy is a fast and easy way to search for an item on contract.



Log into BidBuy

Access Basic Purchasing Options

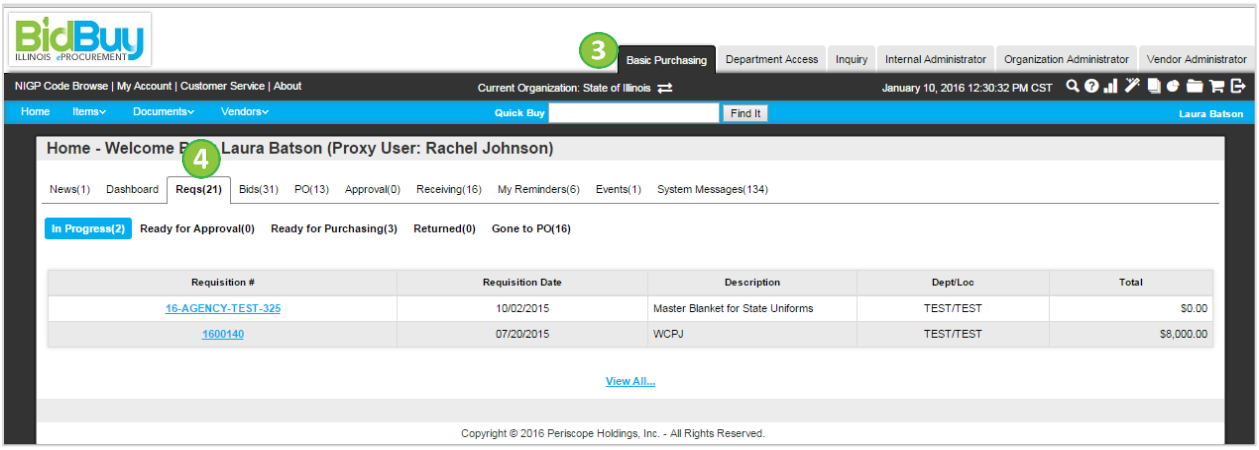
1. Go to BidBuy at https:/bidbuy.illinois.gov/bso/
2. Enter **Username** and **Password**, and click **Login**



3. Select Basic Purchasing Tab from the Roles Tab

> **If you have multiple roles, then each role appears as a different tab.**

4. Select the **Reqs** Tab



Requisition Tabs

- **In Progress** – Requisitions that are in draft form and may not have all required data filled out
- **Ready for Approval** – Requisitions that have completed required data and are not yet approved
- **Ready for Purchasing** – Requisitions that have been approved and are ready to become a PO
- **Returned** – When the Requisition has been disapproved and returned for correction or updates
- **Gone to Bid –** Requisitions that have been processed into a Bid (not release requisitions)
- **Gone to PO –** Requisitions that have been processed into a Purchase Order

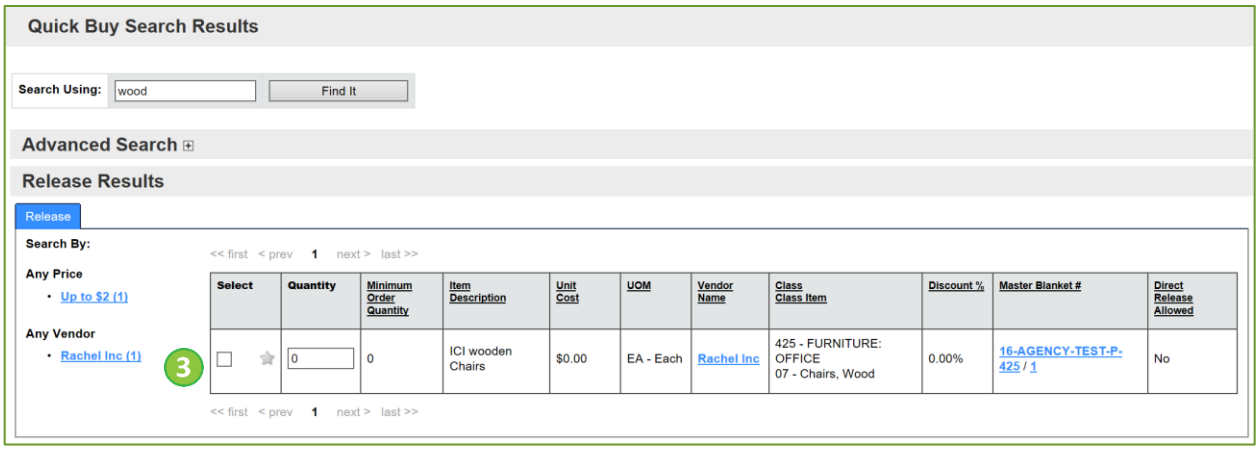
Create Release Requisition

A Release Requisition will be used to initiate a release against an existing Blanket Contract. BidBuy records contract procurement activity against the Blanket.

Use Quick Buy and Update Tabs

From the BidBuy Home screen:

1. Enter item description in **Quick Buy** and click **Find It**
2. Results displayed below



3. Enter Quantity
4. Scroll to the bottom of the screen and click **Add to New Req & Exit**
5. If you have already started a Requisition, then click **Add to Req & Exit**

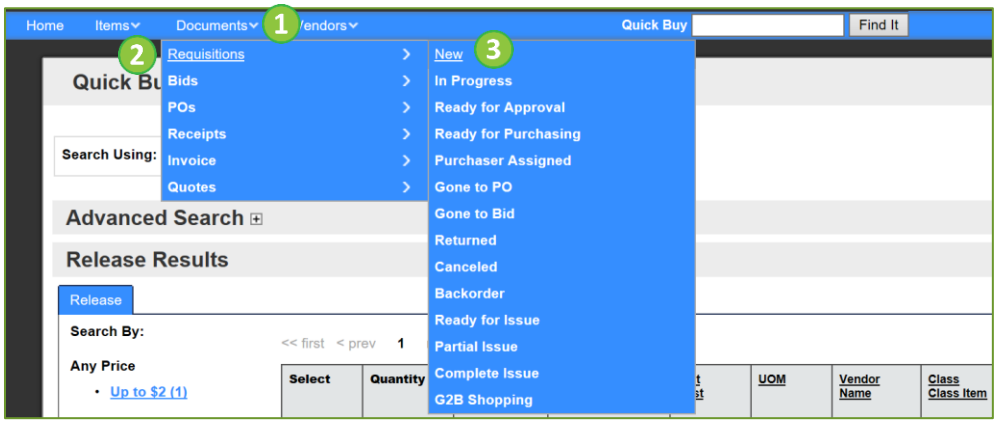
Items are added to a release requisition

For Releases, Quick Buy should be the primary method used, creating a new requisition is used if you do not already have a requisition in progress for this vendor

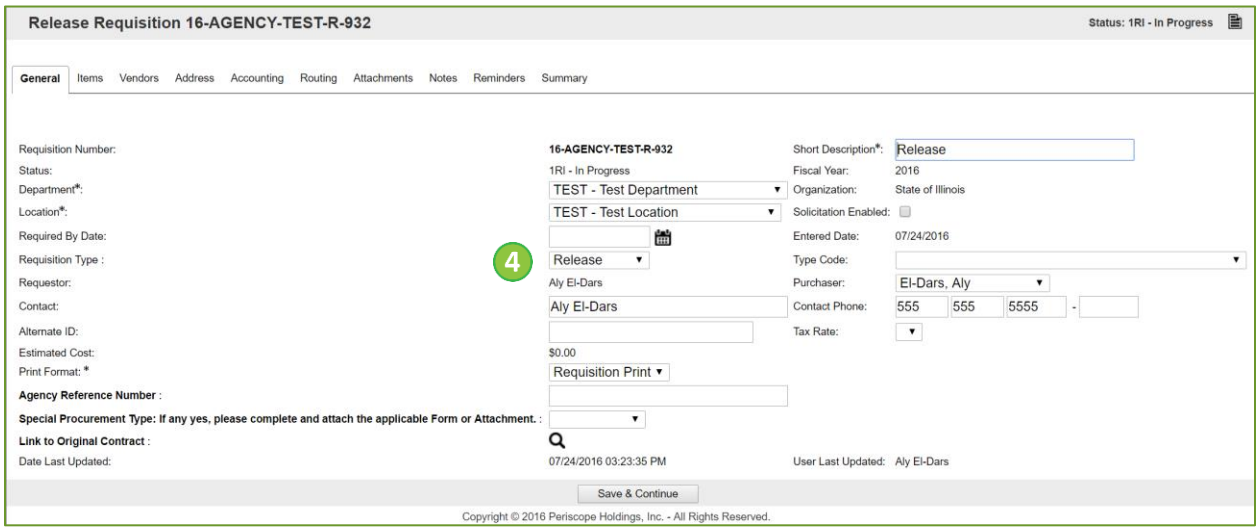
Create a New Release Requistion

From the BidBuy Home screen:

1. Select **Documents**
2. Select **Requisitions**
3. Select **New** for a new requisition



4. General Tab Requisition Type must be Release



Process Release

Review and Update Tabs.

General Tab

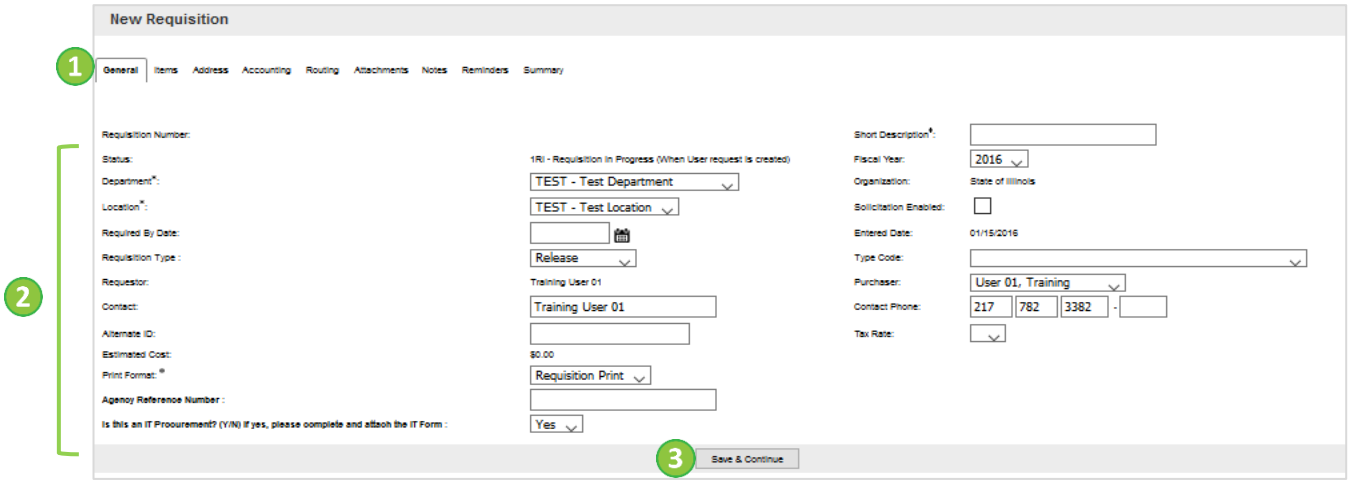
On a requisition the General tab must be completed first. For a Quick Buy the General Tab is filled in for the user and the user needs to review and make changes as needed to the Requisition header information.

Once the required information on the General tab has been reviewed and changes saved, a requisition number will be automatically assigned and the user can Select other tabs.

1. Select **General** tab
2. Enter general information

Requisition Type should be Release

3. Click **Save & Continue** to save information



The Requisition Type is Release. See Requisition General Field Descriptions. All fields with an Asterisk * are required.

Requisition General Fields Descriptions

Field Name	Description
Requisition Number	The requisition ID number. This number is automatically generated when the user selects Save & Continue.
Short Description*	Enter a short description to help identify the requisition. Use complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Use noun, adjectives.
Status	The current status of the requisition. The initial status is set to 1RI – Requisition In Progress. The status will change automatically as the requisition is processed.
Fiscal Year	The fiscal year associated with the requisition. This is only for current fiscal year.
Department*	Using the dropdown menu, select the department this requisition is for if the default department displayed is not the desired department.
Organization	Organization is equivalent to your agency. The organization of the department that the requisition is for. The organization is defaulted to the organization the document is created in and cannot be updated.
Location*	Using the dropdown menu, select the location this requisition is for, if the default location is not desired.
Solicitation Enabled	Not used by the State at this time.
Required By Date	Enter the date the items on this requisition is required or use the calendar icon to select the date.
Entered Date	The date the requisition is created. This field is automatically generated and cannot be edited.
Requisition Type	Using the dropdown menu, select the requisition type – select **Release**. If using Quick Buy, the Requisition Type will be auto-populated.
Type Code	Using the dropdown menu, select the type code. The Type Code is administrator-defined and maintained in BidBuy. This Type Code dropdown will not populate until the requisition type is selected. Type Codes are: 1. Novation 2. Competitive Sealed Bidding 3. Competitive Sealed Proposal 4. Small Purchase 5. Sole Source Procurements 6. Emergency Purchases 7. Construction-Related Professional Services 8. Request for Information - Leasing 9. State Use/Facilities for Persons with Severe Disabilities 10. Lease Holdovers 11. Method of Source Selection 12. Exempt – other governments 13. Exempt – grants 14. Exempt – purchase of real estate 15. Exempt – Other
Requestor	The name of the user who created the requisition. The user cannot edit this information.
Purchaser	Using the dropdown menu, select the purchaser for the requisition if there is no default or the default is not desired.
P-Card Desired	State is not using P-card features.

Field Name	Description
Contact	Enter the contact person's name for the requisition.
Contact Phone	Enter the contact person's phone number for the requisition.
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

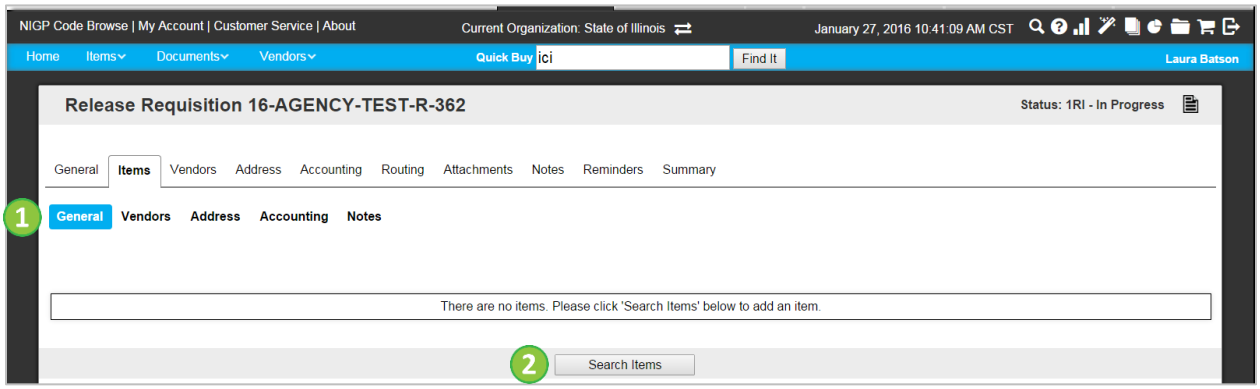
Items Tab

Enter additional items into the requisition by selecting **Search Items.**

1. Click **Save & Continue** to save changes

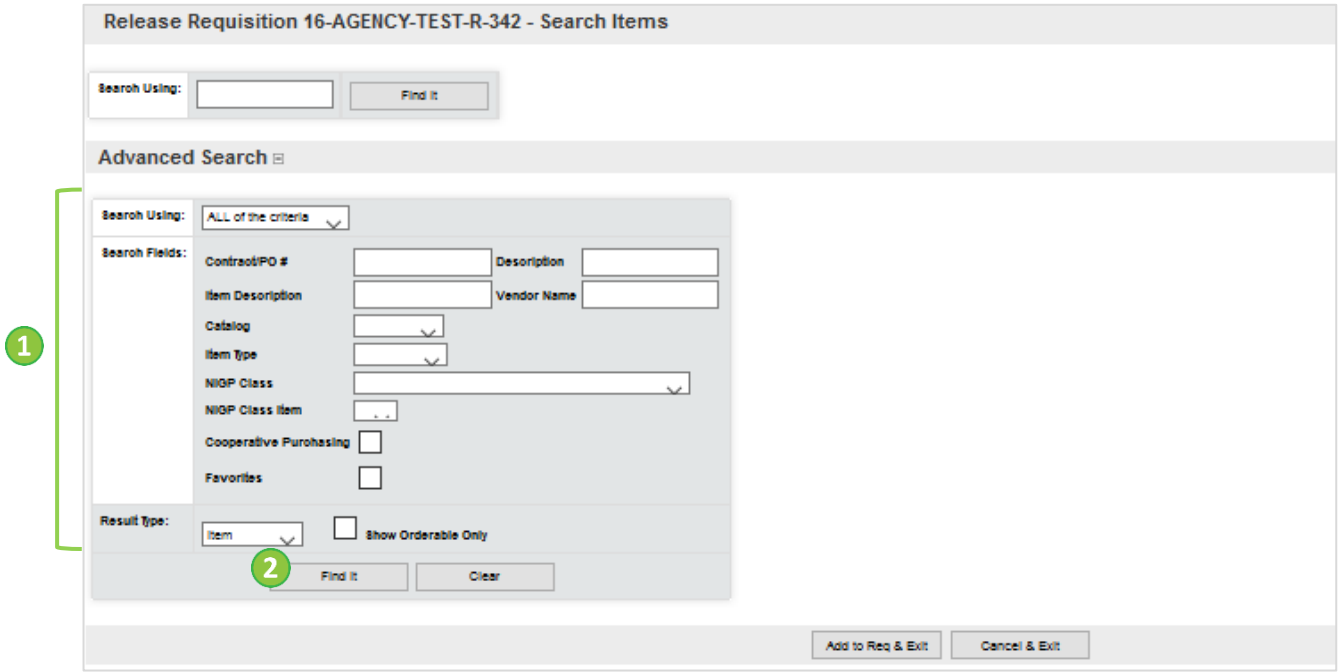
Items Tab: General

1. Select **General** sub-tab
2. Click **Search Items**

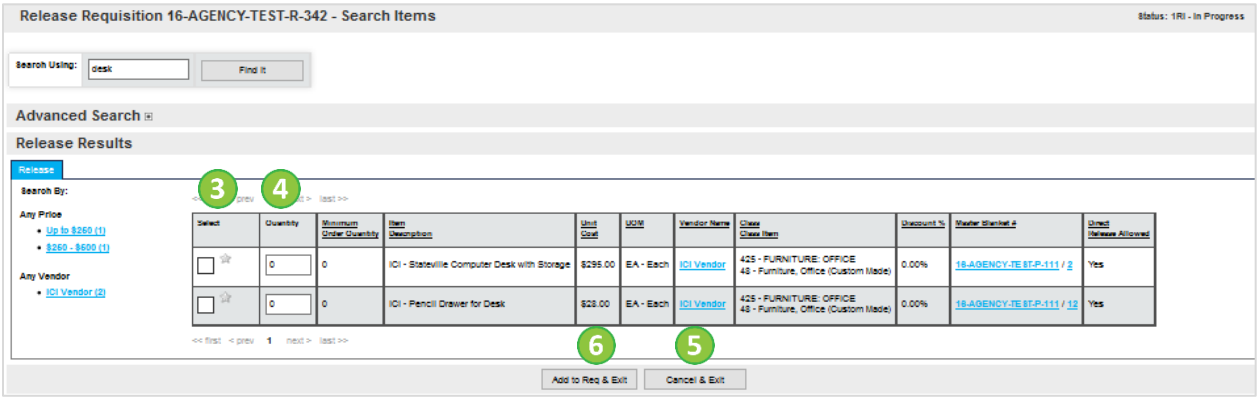


Add Items to Requisition using Search Items with contract pricing

1. Enter search criteria in screen below
2. Click **Find It**



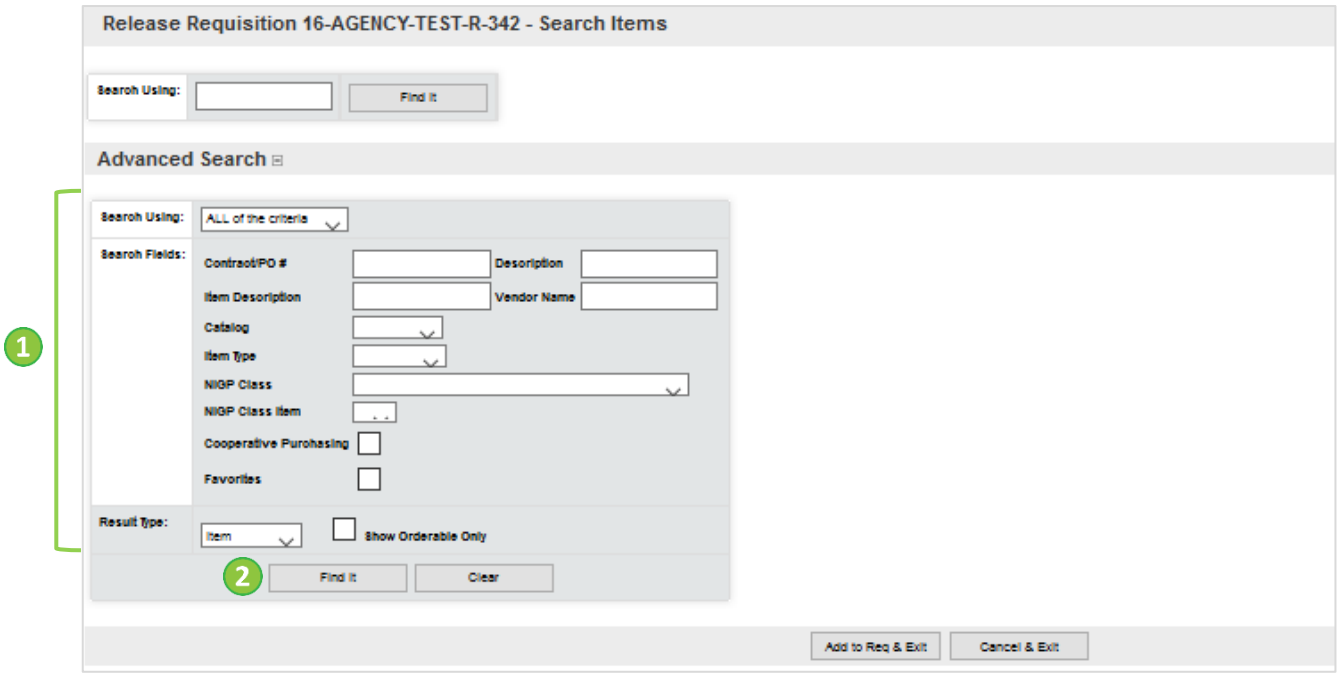
3. Select Item to add
4. Enter a value for **Quantity**
5. Click **Cancel & Exit** to cancel selections
6. Click **Add to Req & Exit** to add item to the Requisition



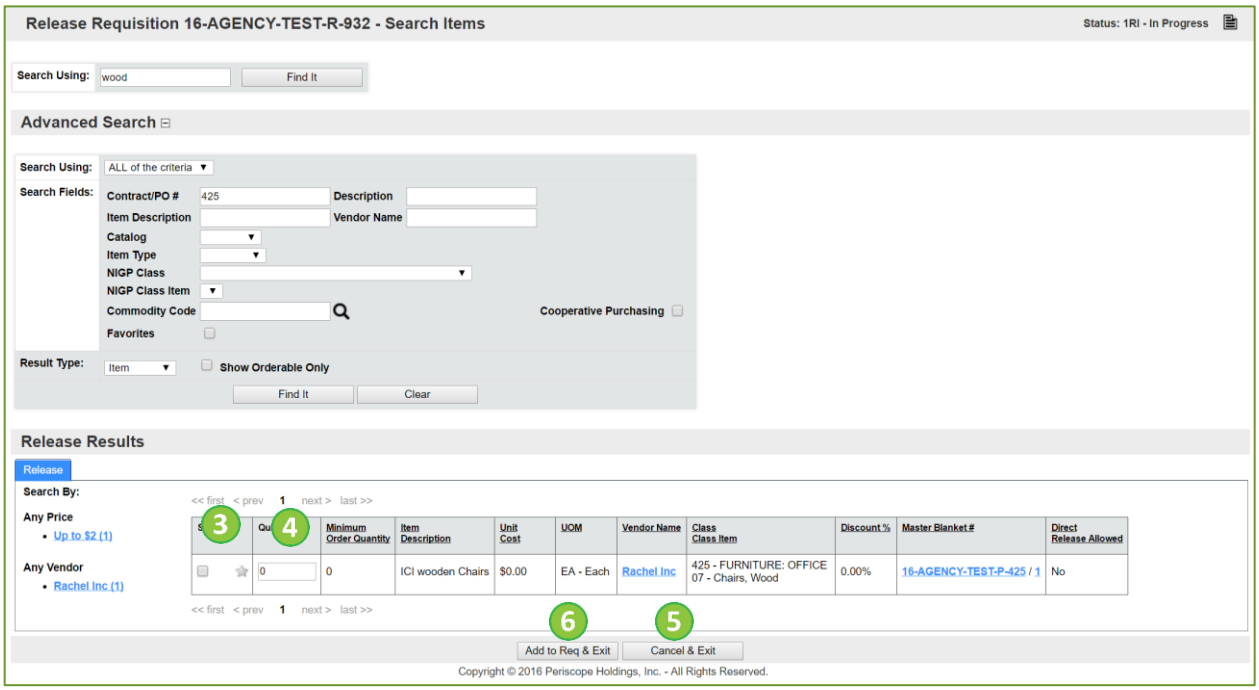
Note Pricing does exist in this blanket so the PO will use this price

Add Items to Requisition using Search Items without contract pricing

1. Enter search criteria in screen below
2. Click **Find It**

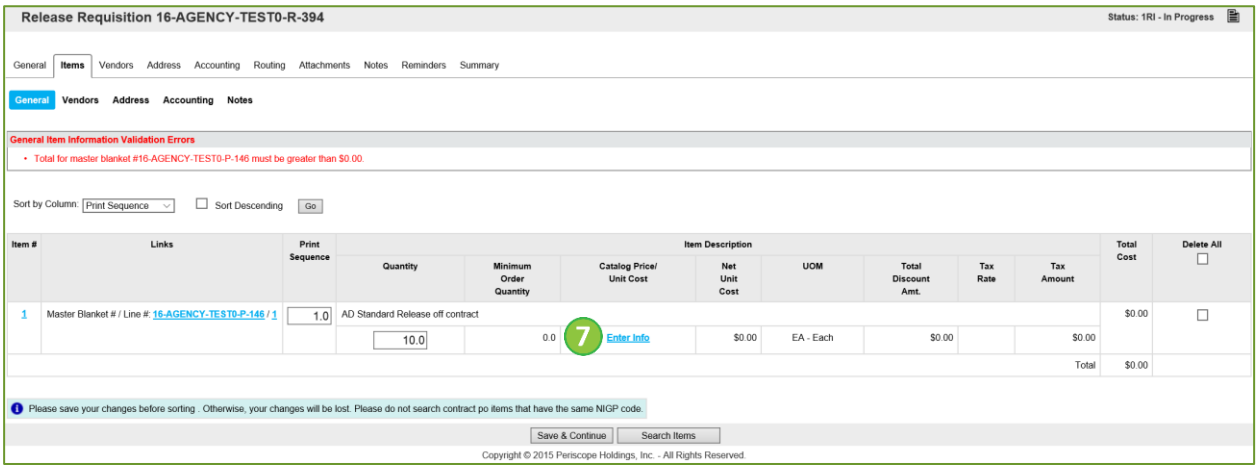


3. Select Item to add
4. Enter a value for **Quantity**



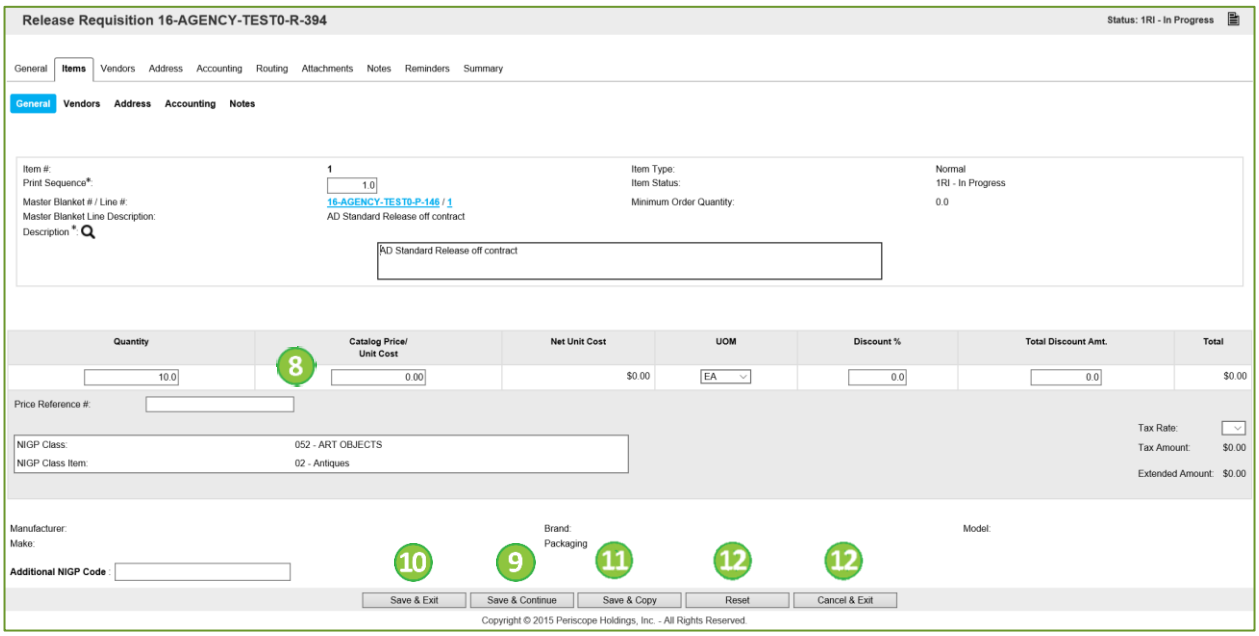
5. Click **Cancel & Exit** to cancel selections

6. Click **Add to Req & Exit** to add item to the Requisition
7. Click **Enter Info**



Note Pricing does not exist in this blanket so the End User Must Enter the Price. Price can be obtained from the Master Blanket PO attachment.

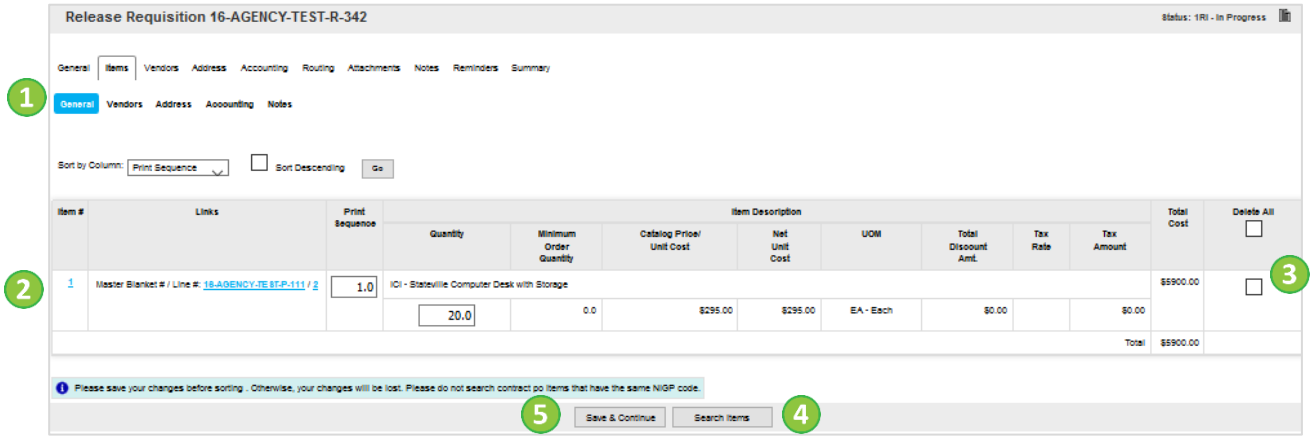
8. Enter **Catalog Price/Unit Cost**
9. Click **Save & Continue** to save changes



10. Click **Save & Exit** to accept changes and exit the screen
11. Click **Save & Copy** to save and copy item pricing
12. Click **Reset** to reset the display or **Cancel & Exit** to exit without saving

Delete an Item from the Release Req

1. Select **General** sub-tab
2. Update item information
3. Click **Delete** to remove
4. Click **Search Items** to look for additional items
5. Click **Save & Continue** to save changes



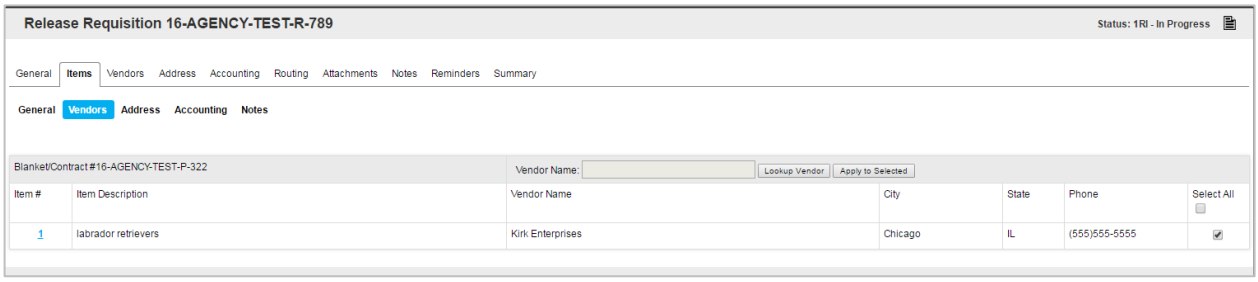
Requisition Item Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially listed by BidBuy. This field cannot be modified by the user.
Print Sequence*	The order in which the items will be displayed. The item # is the default value for this field. The user can change this field if the print sequence needs to be different from the item number sequence.
Item Type	The user can select *Normal* or *Narrative* as the type. Selecting *Narrative* will make it a non-orderable item addition where the user can type in text to appear on the purchase order.
Item Status	The status of the item on the Requisition. Status is "In Progress" at this point
Description*	The description of the item as defined by the user. Use complete words, not abbreviations. Start with NIGP description, then add more detailed information.
Quantity	The Quantity of the item being requested. The user can type the amount of the item that is needed. The default value is zero.
Unit Cost	An contracted unit cost per item.
Net Unit Cost	Net unit cost per item is the Unit Cost – Discount amount for unit cost.
UOM	User selects a unit of measure from the drop-down menu. This is already populated on a Release Requisition based on the Master Blanket. **Reference Appendix A: Unit of Measure Descriptions**

Field Name	Description
Discount %	Used if there is a percentage discount applicable to the item.
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) – Total Discount Amount. The user cannot edit this field.
NIGP Class*	The three-digit Class Code associated with the item. Class Codes are listed on the pulldown menu in alphabetical order or through the search feature.
NIGP Class Item*	The two-digit Class Item associated with the item. Class items are listed on the pulldown menu in alphabetical order or through the search feature.
Commodity Code	Completes the full 11-digit NIGP code
Tax Rate	The State is not using Tax Rate.
Tax Amount	The State is not using Tax Amount.
Freight	The amount of Freight applied to this item.
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount + Freight. The user cannot edit this field.
Manufacturer	Optional field.
Brand	Optional field.
Model	Optional field.
Make	Optional field.
Packaging	Optional field.
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab: Vendor

Allows you to view vendor information. Because the State is not using the Distributor function of BidBuy, the vendor cannot be updated.

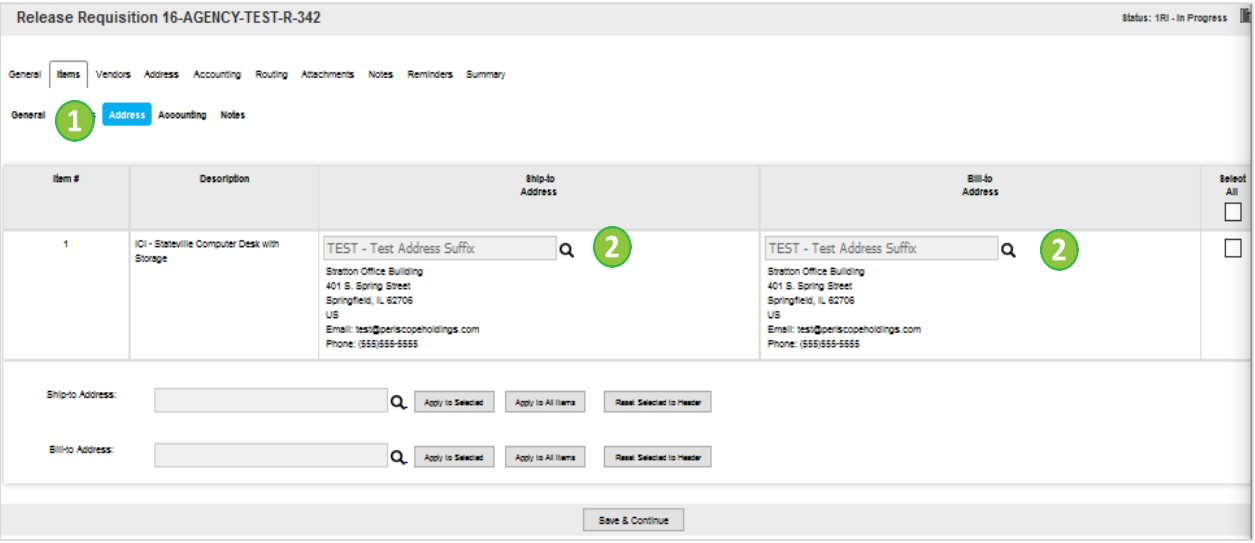


Items Tab: Address

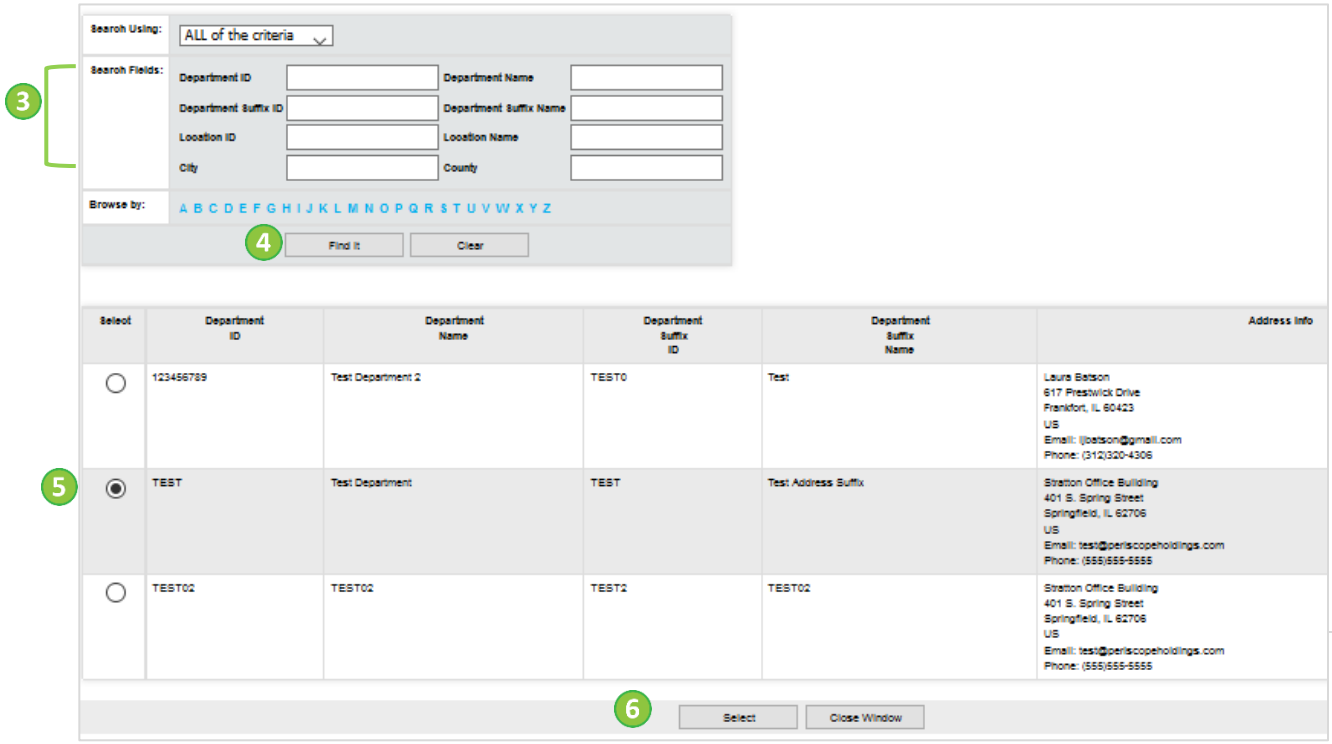
This allows shipping and billing addresses for specific items. This is used at the item level to accommodate when the ship to or bill to addresses are different by item. To assign shipping and billing addresses for all items Select the Address tab at the header level.

1. Select **Address** sub-tab

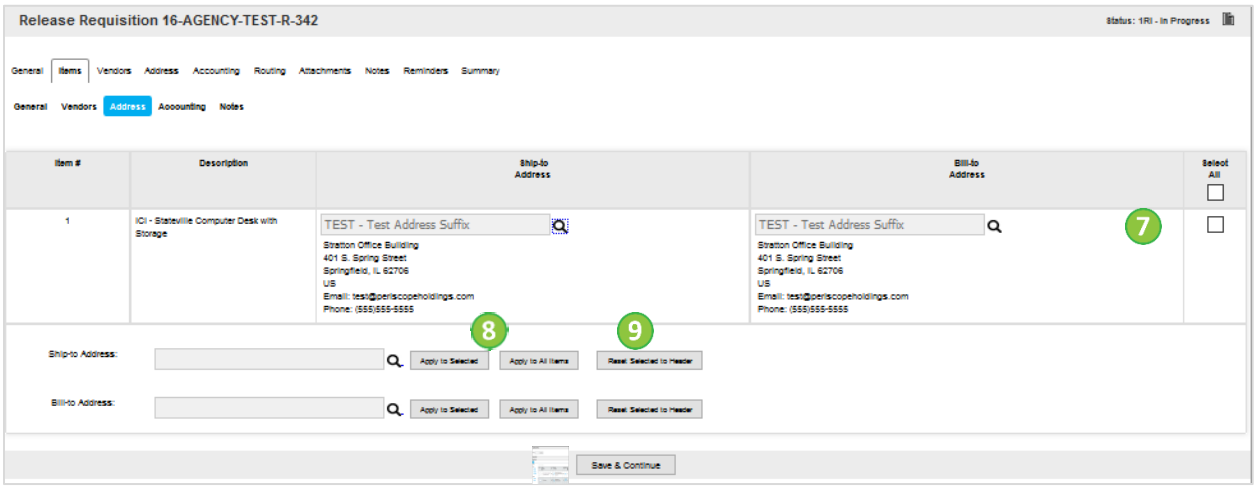
Addresses are auto-populated with the address on main tab



2. To change **Ship-to** or **Bill-to Address**, click to search for new address
3. Enter Search Criteria
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



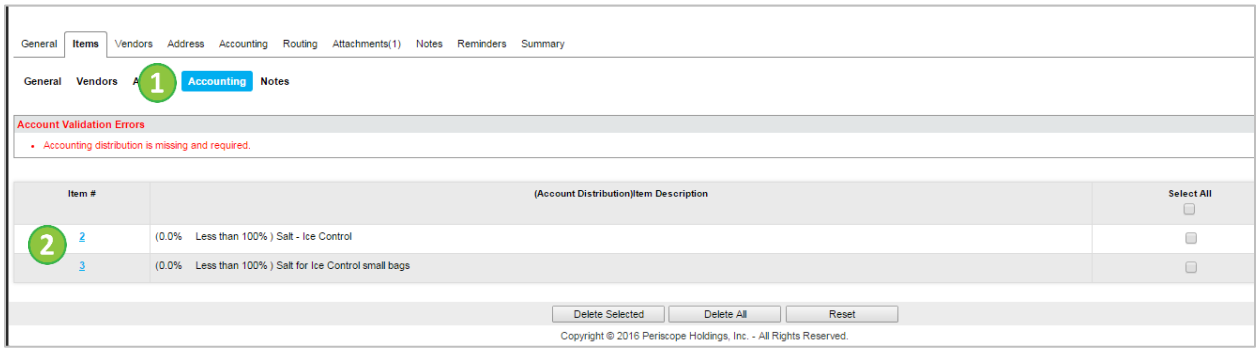
7. Select item(s) to change address (Ship/Bill To Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All Items** to apply changes to all items
9. Click **Reset Selected to Header** to reset all addresses to default from the Address Tab
10. Click **Save & Continue** to save changes and continue



Items Tab: Accounting

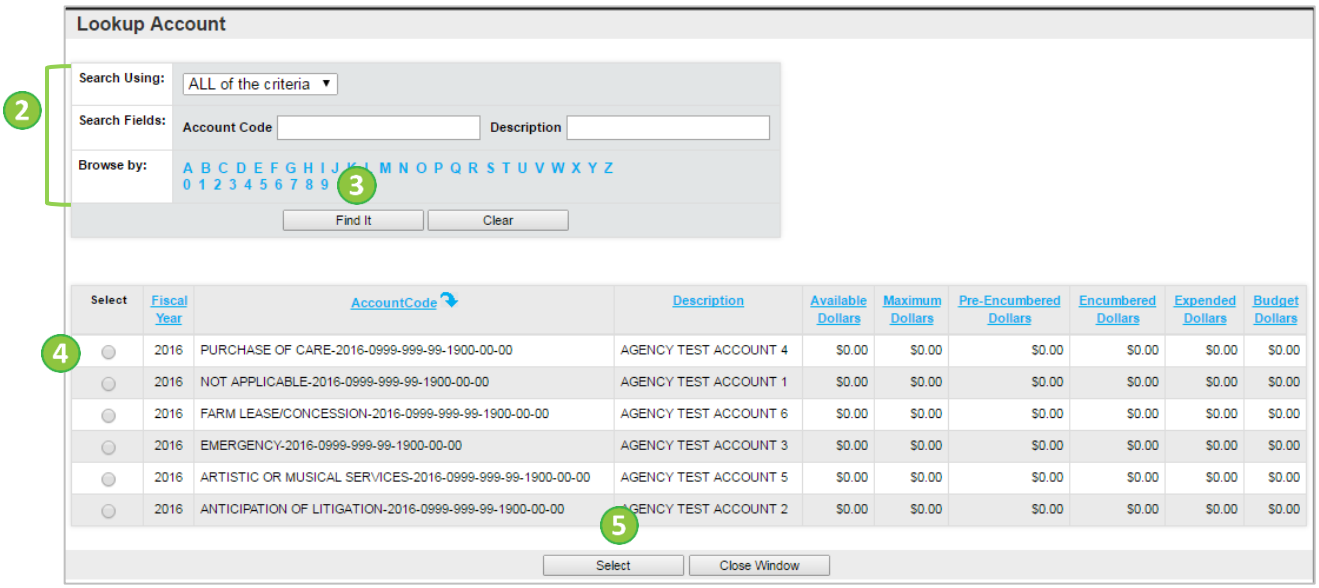
The Item's Accounting sub-tab allows the user to enter accounting information for specific items. To add the same accounting information to all items, go to the main Accounting tab for the requisition. Accounting information that is entered on the requisition is carried over to the converted PO and is mandatory. The requisition will not proceed to approvals unless this tab is filled correctly.

1. Select **Accounting** sub-tab
2. Select **Item #** to update accounting information

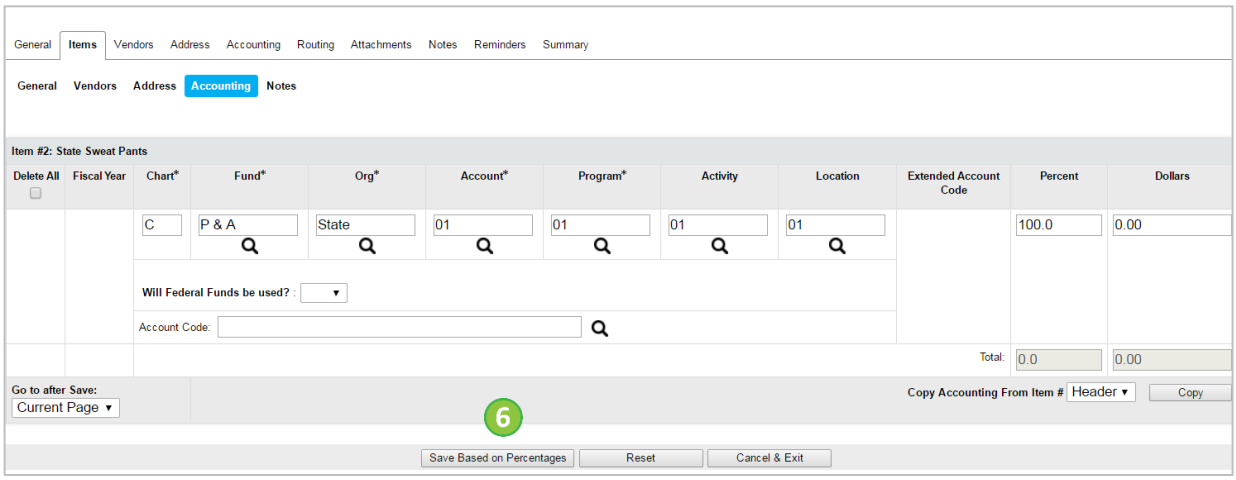


Add Account Code

1. Click to search for **Account Code**
2. Enter search criteria or Browse by: letter
3. Click **Find It**
4. Select Account Code
5. Click Select



6. Click Save Based on Percent or Dollars – to save based on percent designated or a specific dollar amount entered

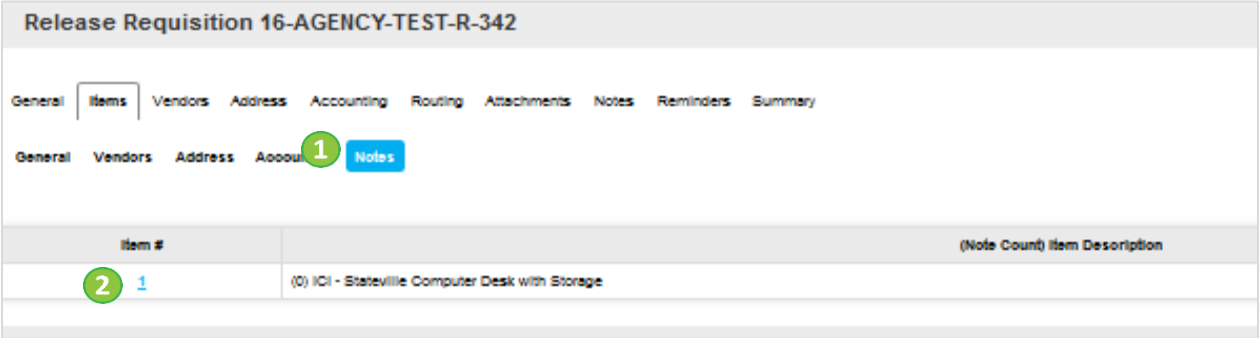


Items Tab: Notes

This notes section allows you to add notes to specific items. To add notes that apply to all items, go the main Notes tab for the requisition.

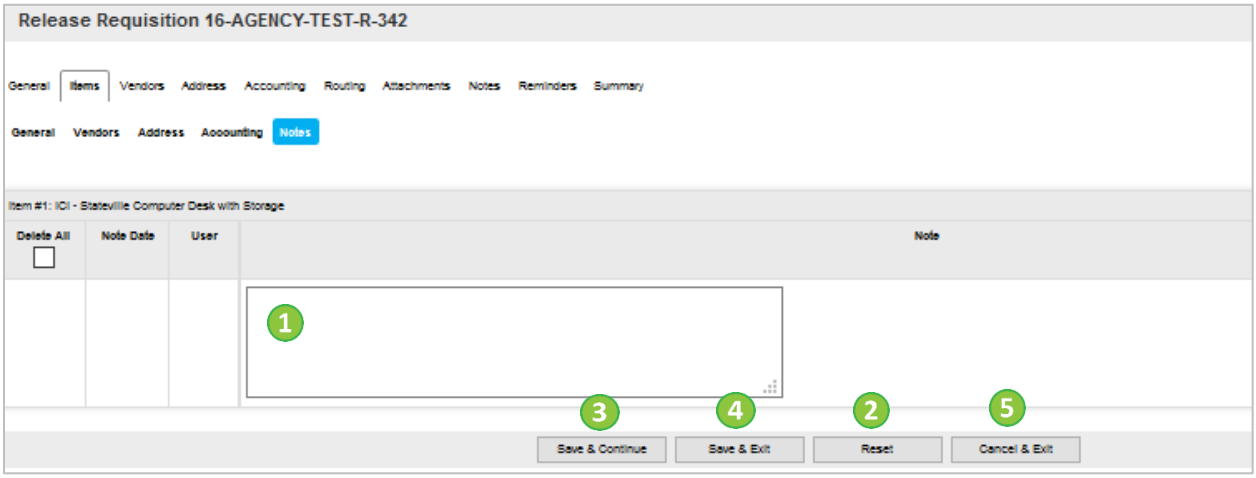
1. Select **Notes** sub-tab

2. Click **item#** to add notes to that item



Create Item Notes

1. Enter notes content
2. Click **Reset** to reset screen display before saving
3. Click **Save & Continue** to save changes
4. Click **Save & Exit** to add note and exit
5. Click **Cancel & Exit** to exit without saving

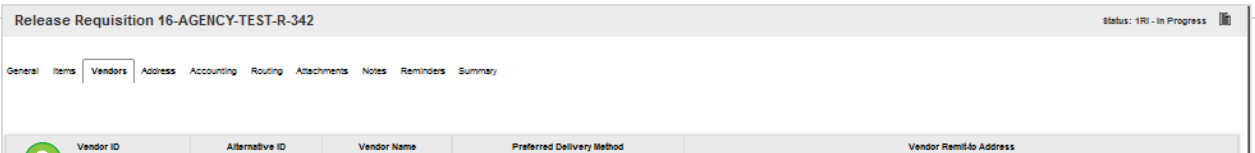


Vendor Tab

The vendor tab allows you to look up the vendor and select for the Release Requisition only if there are distributors on the Master Blanket and the state has chosen to not use distributors. This tab is only to update the Remit Address when no distributors are present.

1. Select **Vendor** Tab

2. Select **Vendor Remit-to Address**
3. Click **Save & Continue**



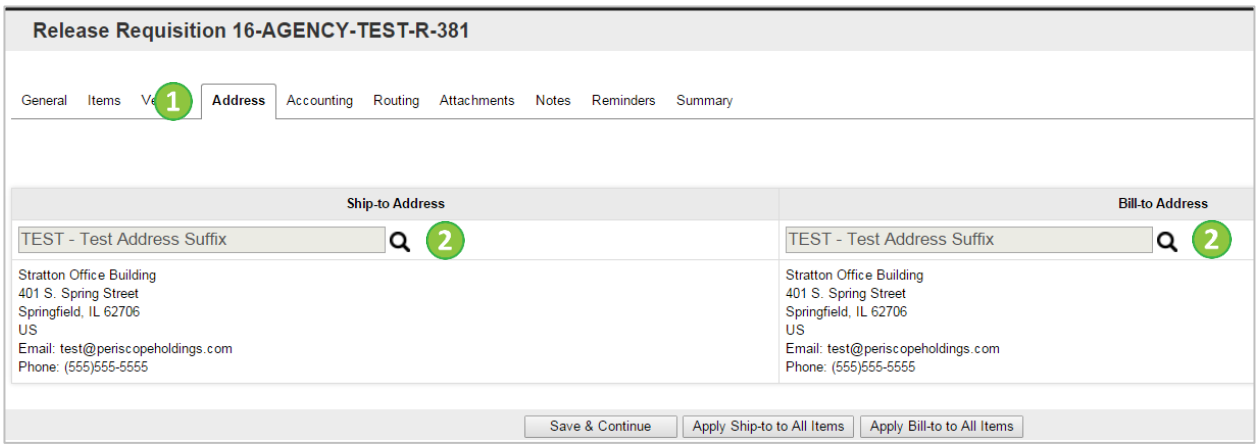
Requisition Vendor Field Descriptions

Field Name	Description
Vendor Remit-to Address	Is default by vendor selection. This can be updated to a different address if that vendor has added additional addresses on their vendor profile.

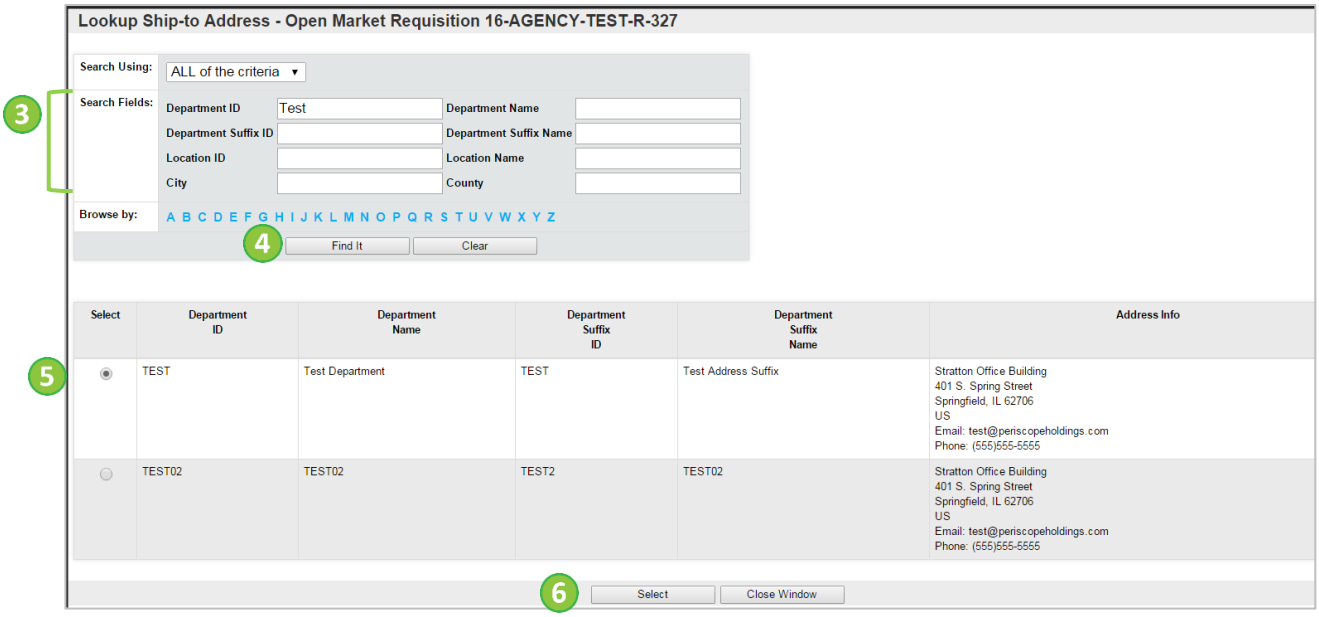
Address Tab

The Requisition Address is auto filled by the default for the user's setting on **Ship-to Address** and **Bill to Address.** Updating the Ship-to and Bill-to addresses at the header level and selecting **Apply Ship-to to All Items** or **Apply Bill-to To All Items** will override any selections made at the address Sub-Tab for the Item Tab

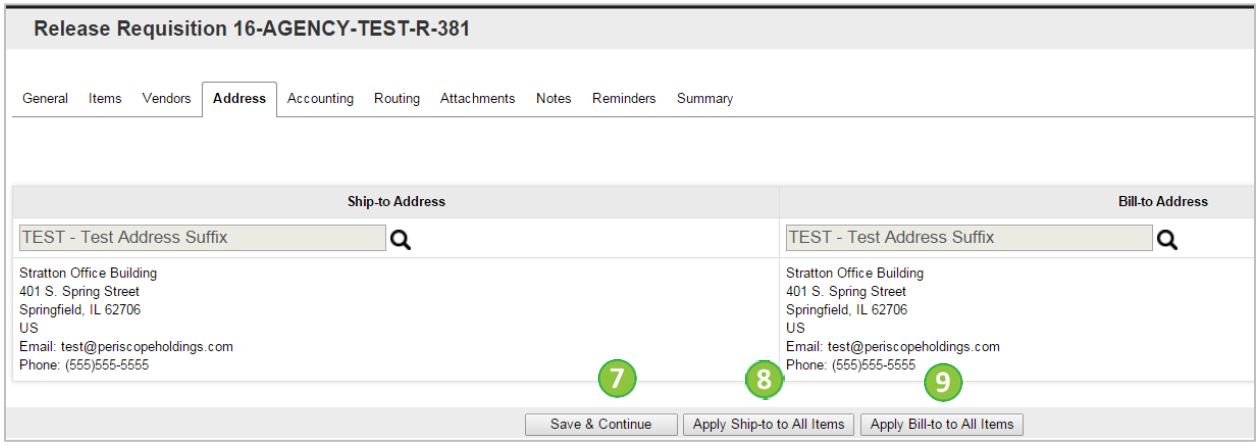
1. Select **Address** tab
2. To change Ship-to or Bill-to-Address, click to search for new address



3. Enter **Search Criteria** or enter nothing to receive all addresses
4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



7. Click **Save & Continue** to save changes and continue
8. Click **Apply Ship-to to All Items –** to apply changes to Ship-to to all items on Requisition
9. Click **Apply Bill-to to All Items** – to apply changes to Bill-to to all items on Requisition



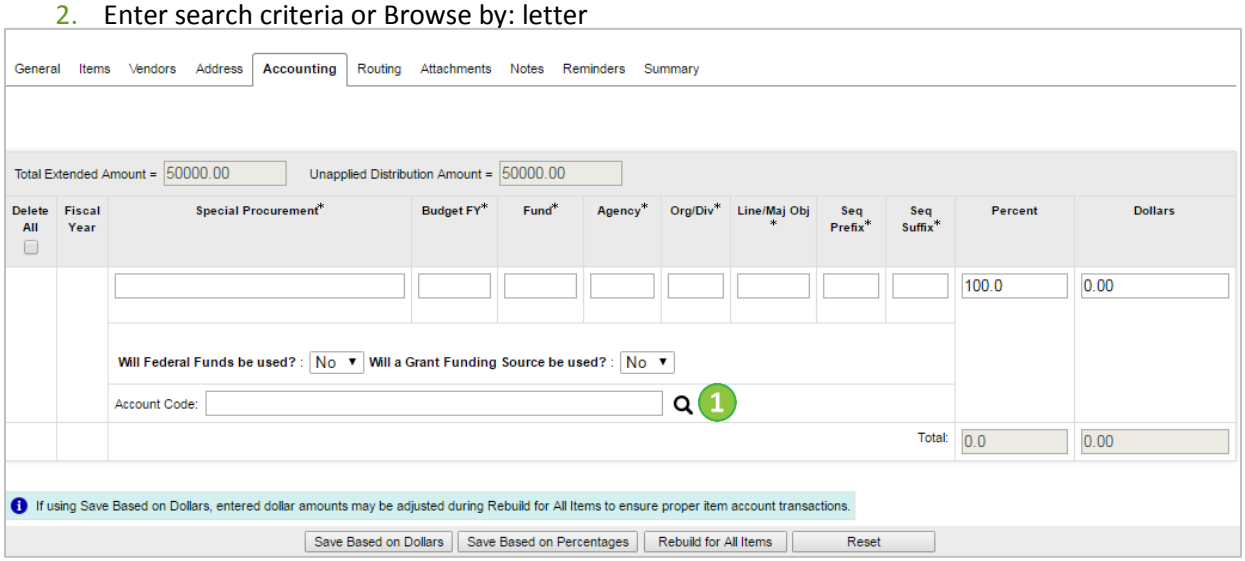
Accounting Tab

This is accounting information for all items. To enter different accounting for individual items, go to **Items** tab and select **Accounting** sub-tab.

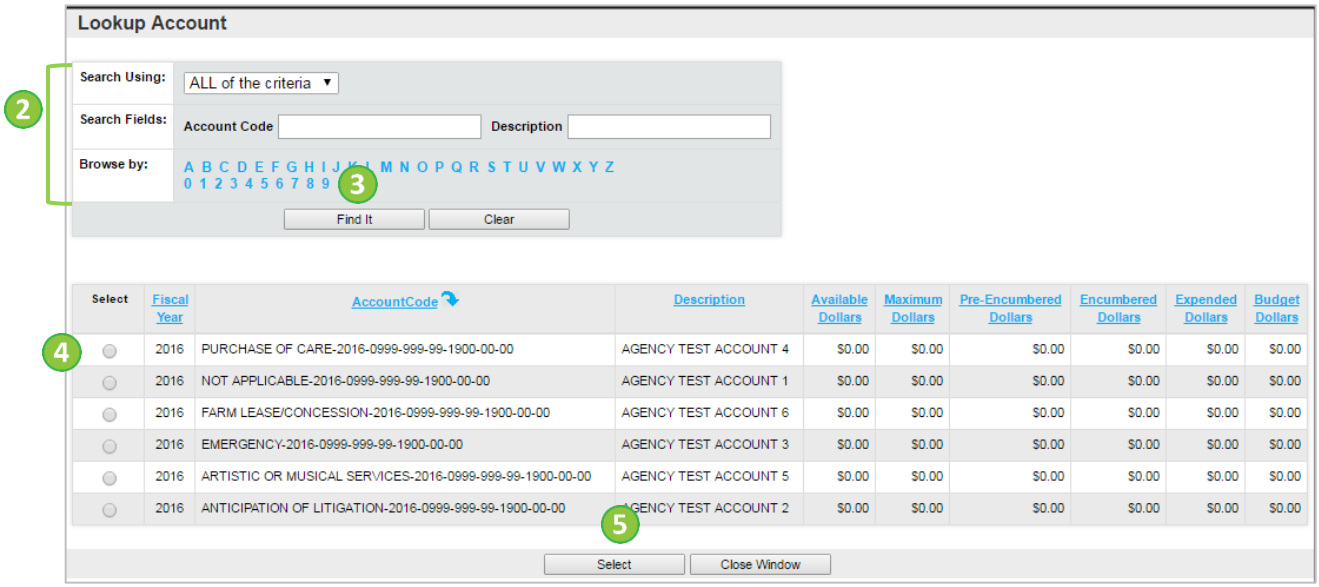
The account code selected has the funding source embedded in it.

Add Account Code

1. Click to search for **Account Code**
2. Enter search criteria or Browse by: letter

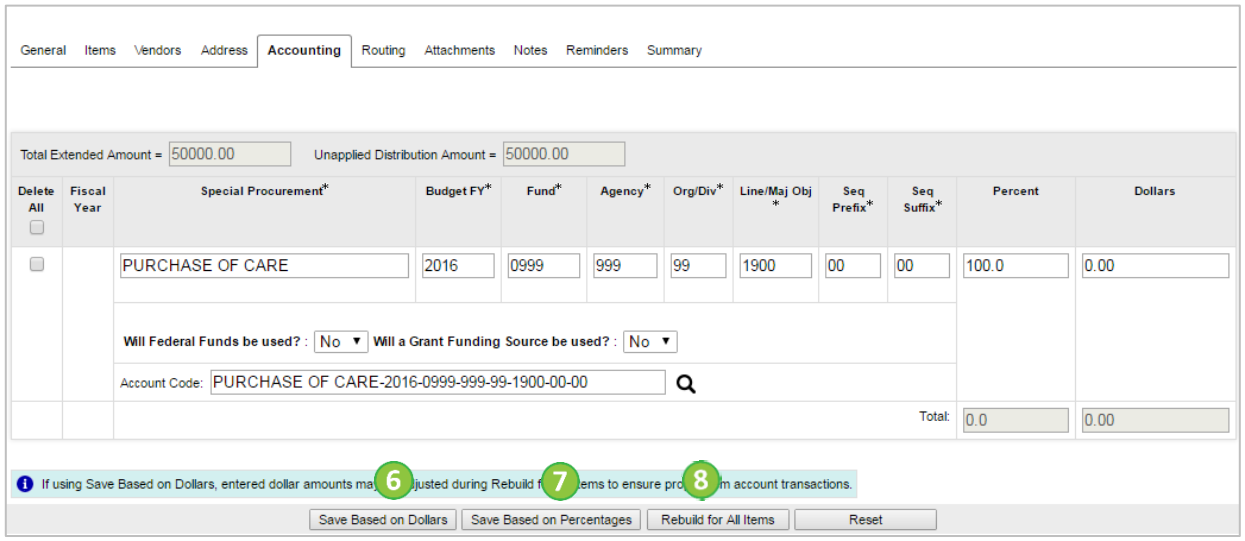


3. Click **Find It**
4. Select Account Code
5. Click **Select**



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentage entered

8. Click **Rebuild for All Items –** to apply accounting to all items (Do not do this if you have already entered accounting at the item level).

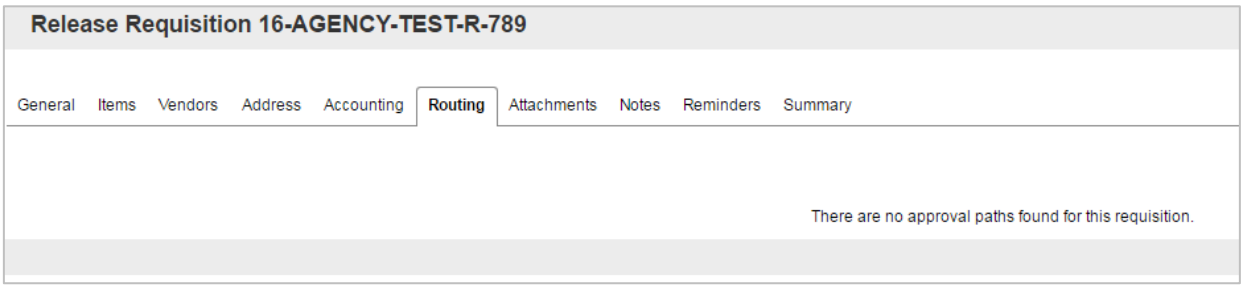


Accounting Field Descriptions

Field Name	Description
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Routing Tab

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. This tab remains blank until the requisition is submitted for approval. At that time the approval paths are determined.



Requisition Routing Fields Description

Field Name	Description
Approval Path (header)	Approval Path ID of applied approval.
Order Sequence	Approval sequence of the approval.

Field Name	Description
Approver	The name of the approver(s).
Alternate Approver	The name of the alternate approver(s) associated with the approver.
Level	The level of the approver (the lowest level approves the requisition first).
Date Requested	The date the approver was sent notification to approve the requisition.
Date (Approved/Disapproved/Cancelled)	The date the approver approved, disapproved or cancelled the requisition.
Action	The approval action taken by the approver: approved, disapproved or cancelled.
Comment	The comment entered by the approver during the approval process.

Attachments Tab

Both files and forms can be attached for the agency or for the vendor.

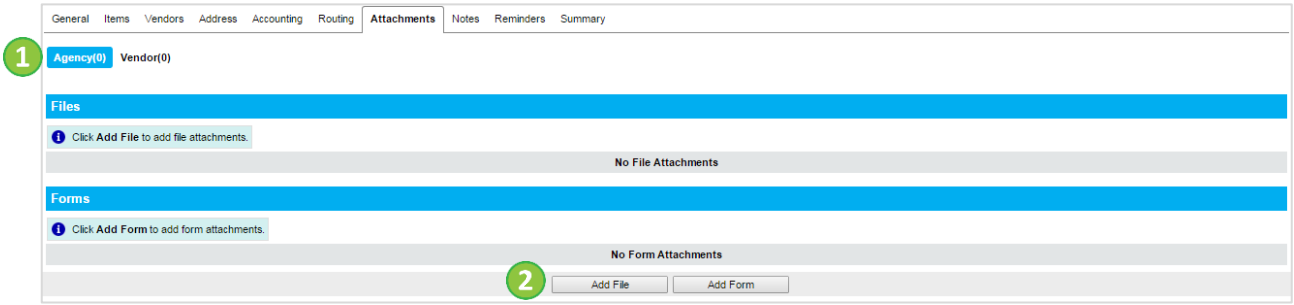
Attaching files to the BidBuy documents is a useful way to include specifications or other guidelines pertaining to the procurement. The user can attach multiple files, such as documents, spreadsheets, memoranda, etc. and can use the Attachment Tab to upload the files.

Adding Forms displays the Add Form button that allows the user to attach predefined published forms. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document.

For form and file information from CMS and the CPO-GS, see the Attachment Appendix.

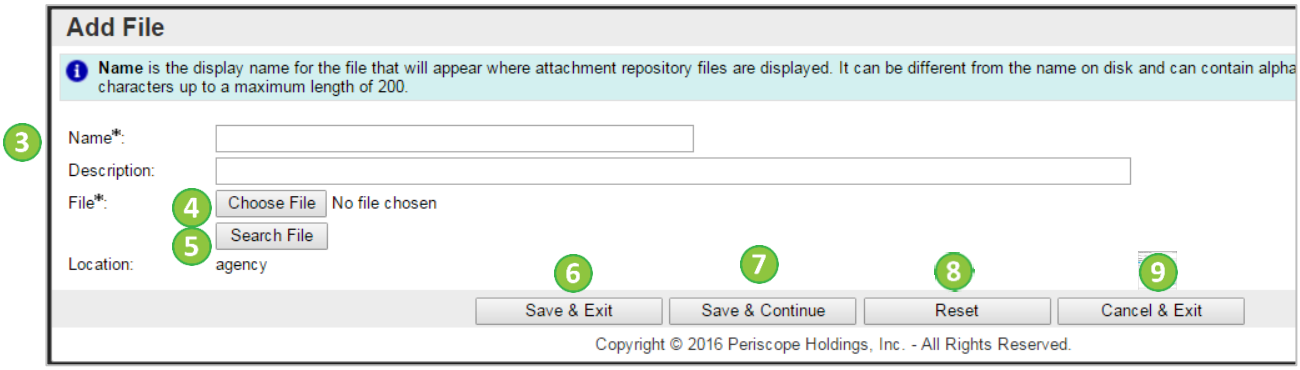
Attachments Tab: Agency

1. Under **Attachments**, select **Agency** tab
2. Click **Add File**



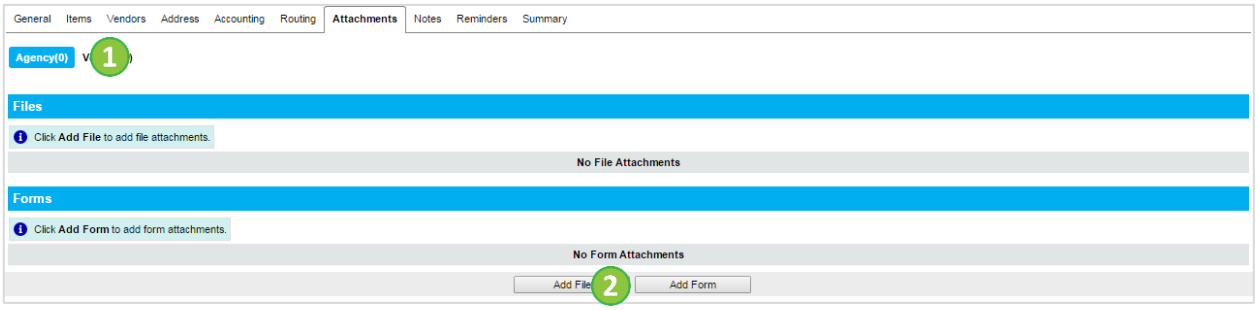
Add Agency Attachments to Requisition

3. Add file **Name** and **Description**
4. Click **Choose File** to browse the computer for a file
5. Click **Search File** to search in the repository for a file – **Not used by the State**
6. Click **Save & Exit** when done with loading the file
7. Click **Save & Continue** to save changes made and remain on the same screen
8. Click **Reset** – to reset display and start from scratch
9. Click **Cancel & Exit** to exit without adding any files

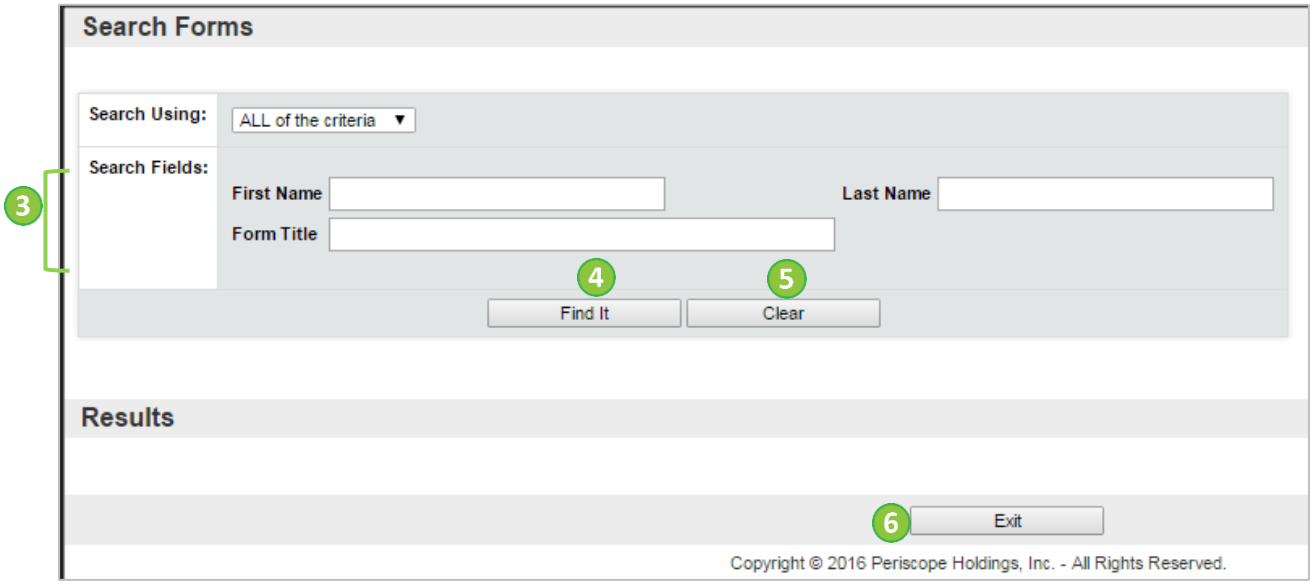


Add Agency Forms to Requisition

1. Select **Agency** tab
2. Click **Add Form**

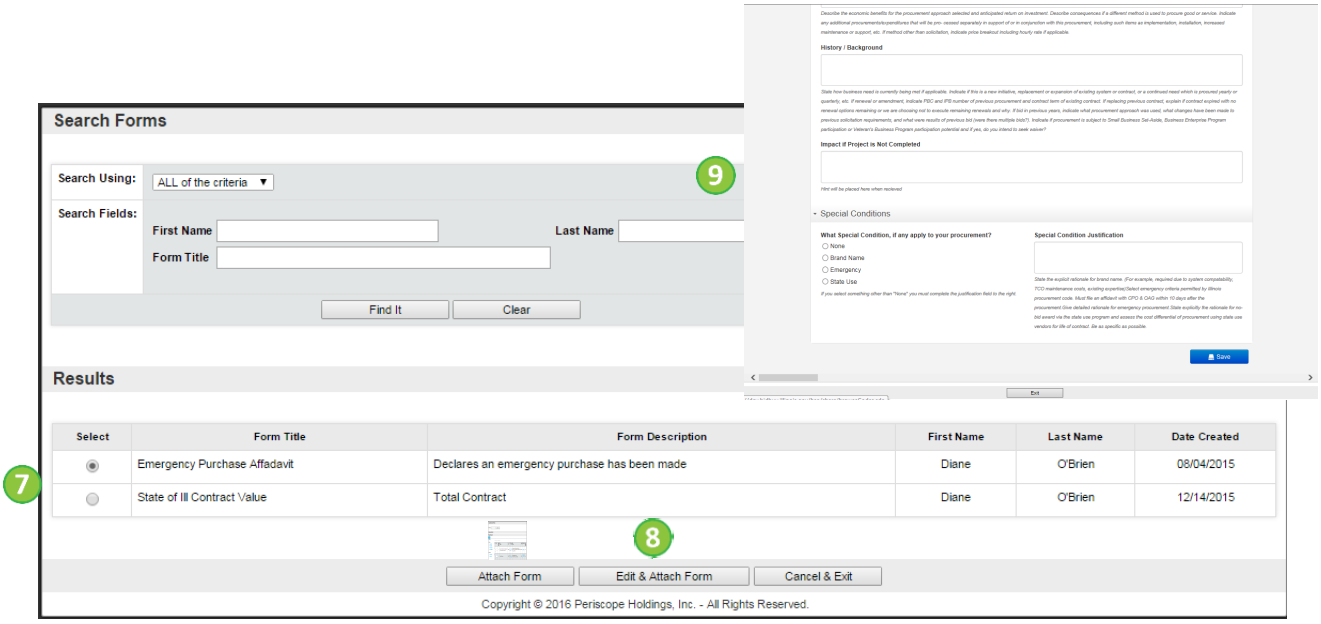


3. Enter search criteria
4. Click **Find it** to find form
5. Click **Clear** to restart search
6. Click **Exit** to exit



7. Select radio button for **Form Title**
8. Click **Edit & Attach Form** to edit form and attach to Requisition

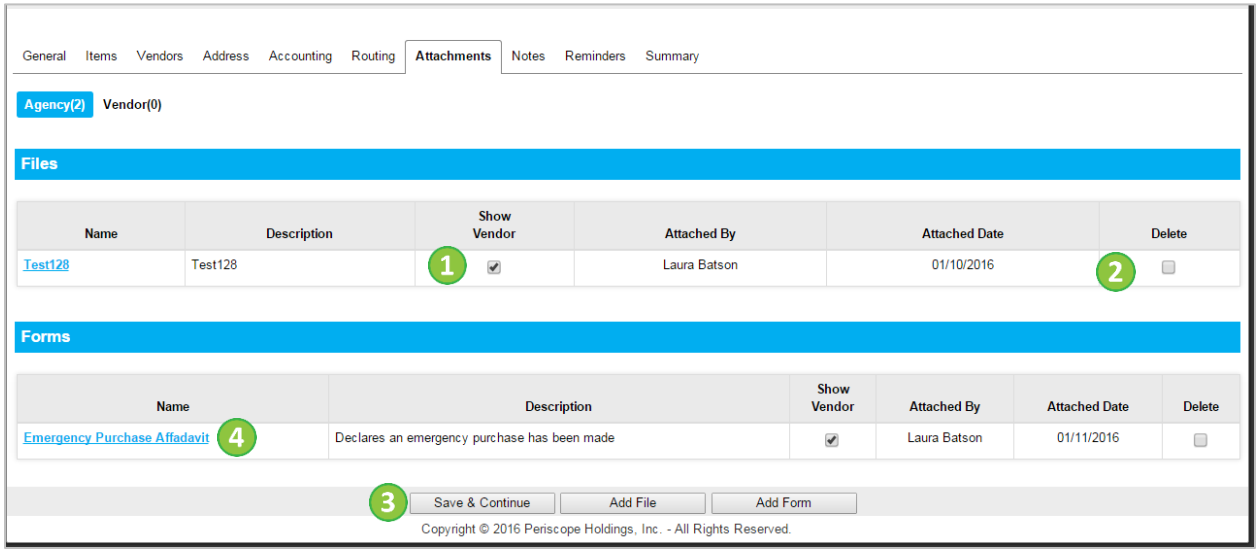
9. Enter form information, then click **Save and Exit** buttons
10. Click **Attach Form** to Requisition



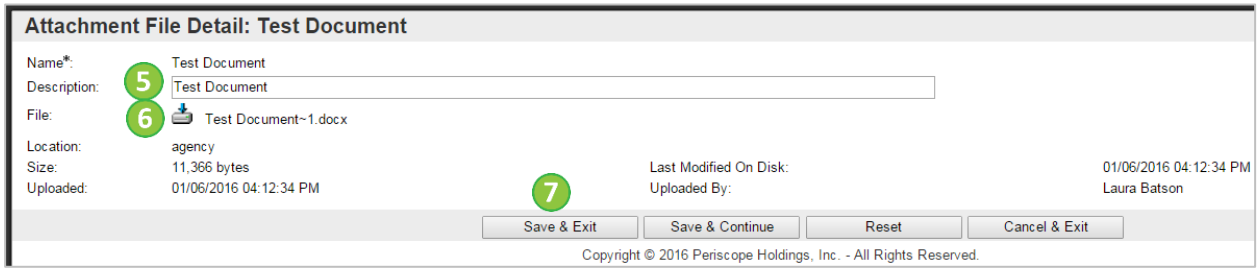
Update Agency Attachments

Attachments can be added and deleted. To update a specific attachment, you need to update the file outside BidBuy, then delete the old one and add the new one.

1. Select **Show Vendor** to show to all vendors
2. Select **Delete** to delete attachment
3. Click **Save & Continue** to save changes
4. Click **Name** to update **Description** or download attachment



5. Update **Description**
6. Download file, click
7. Click **Save & Exit**

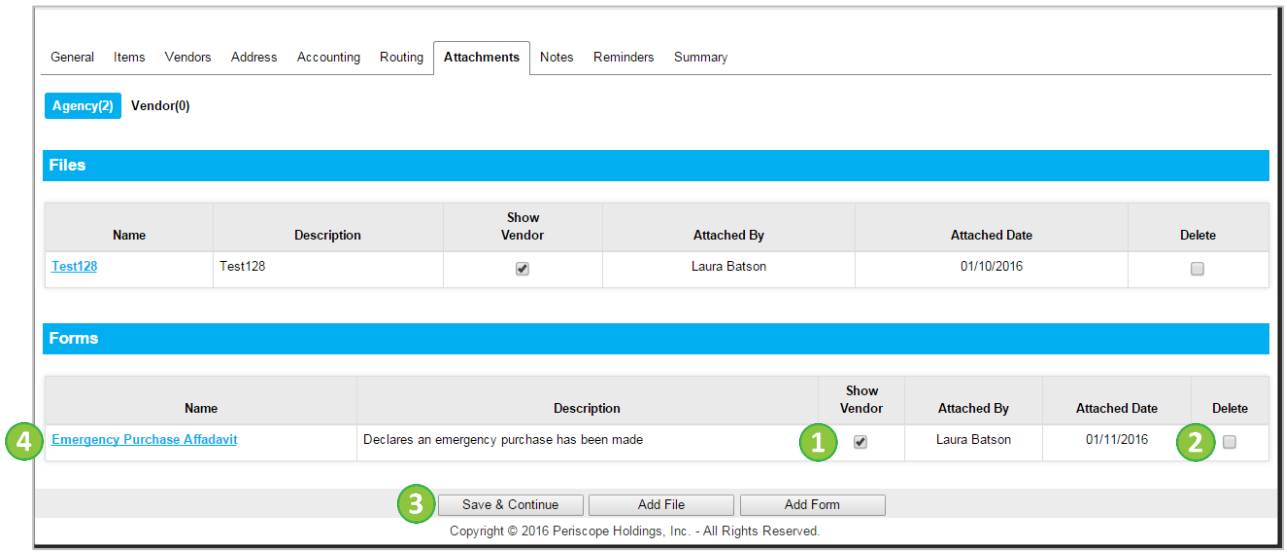


Other information must be updated by deleting and adding a new file.

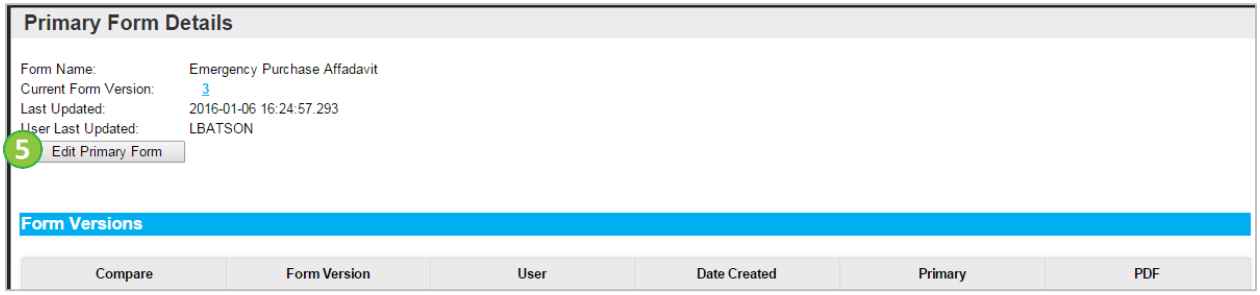
Update Agency Forms

Forms can have multiple versions. If anything is added to a form, it then becomes the primary form.

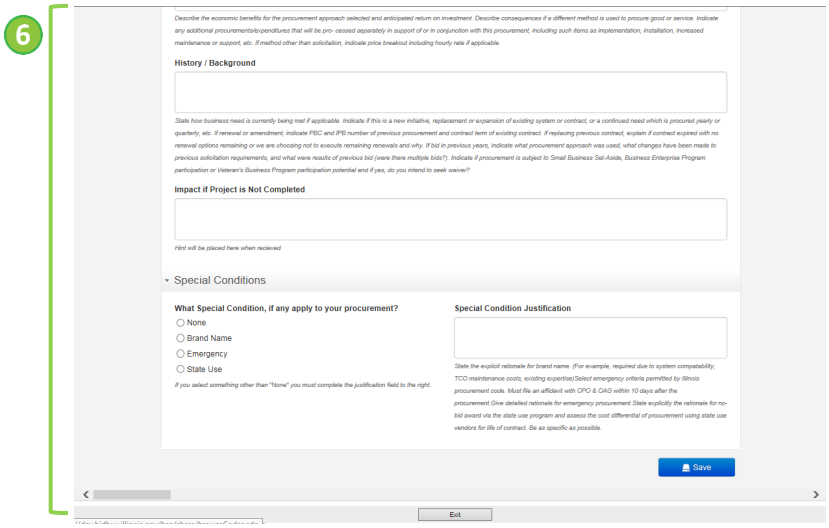
1. Select **Show Vendor** to show to all vendors
2. Select **Delete** to delete form
3. Click **Save & Continue** to save changes
4. Click **Name** to view and modify form



5. Click **Edit Primary Form** to complete the form

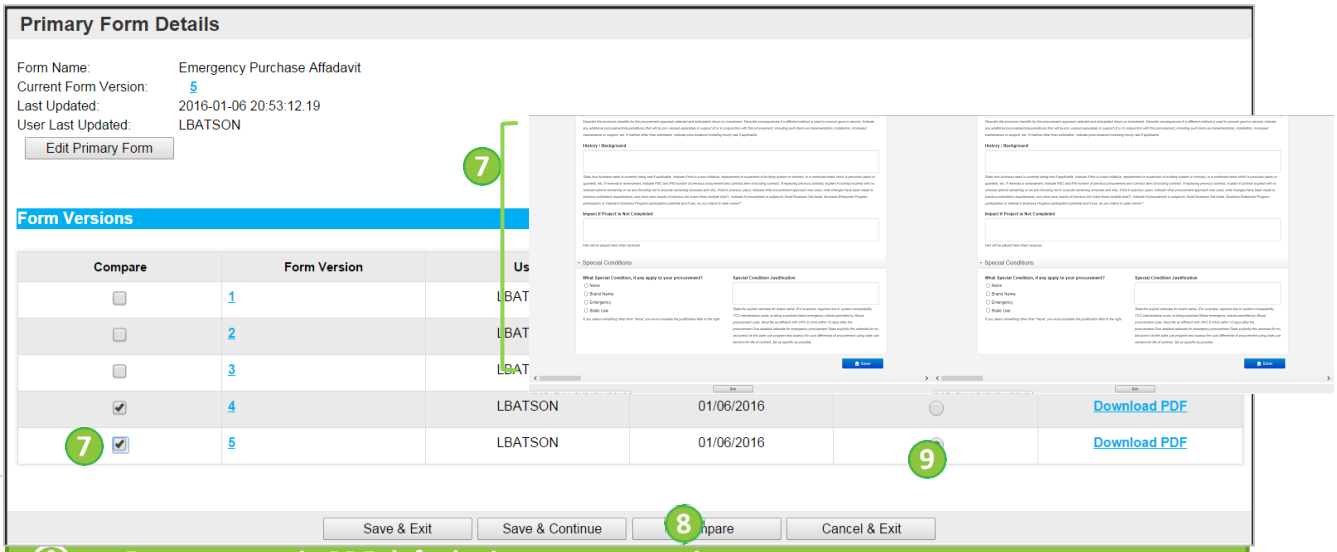


6. Complete the form information, then click **Save and Exit**



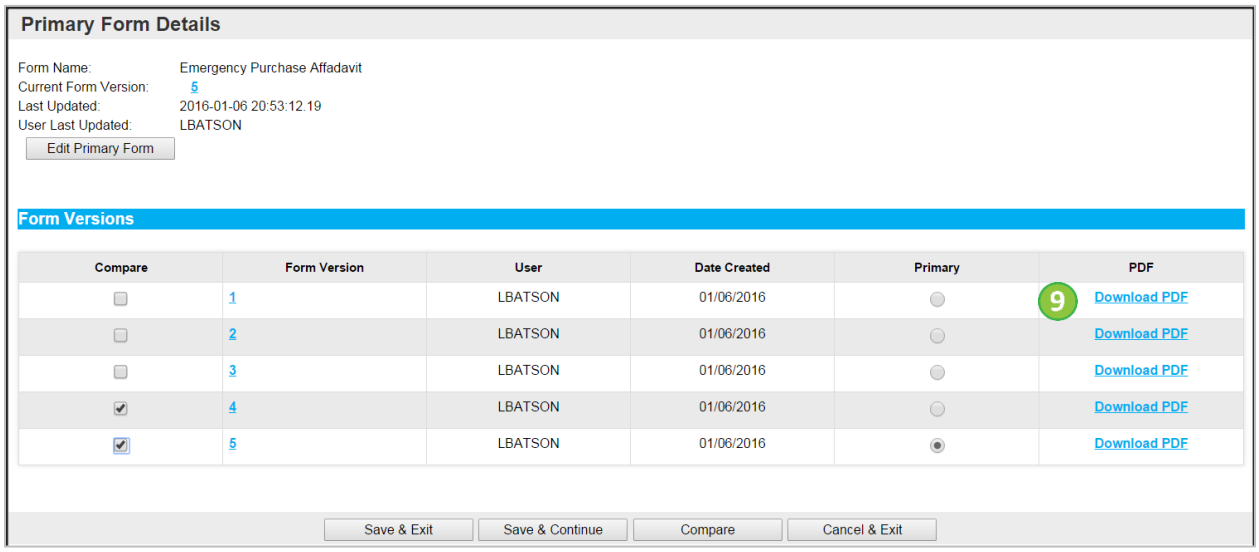
The updated form defaults as the Primary form.

7. Select **Compare** on the forms to compare
8. Click **Compare**
9. Review the two forms for changes and click **Exit** when finished



Form appears in PDF default viewer to save, print, etc.

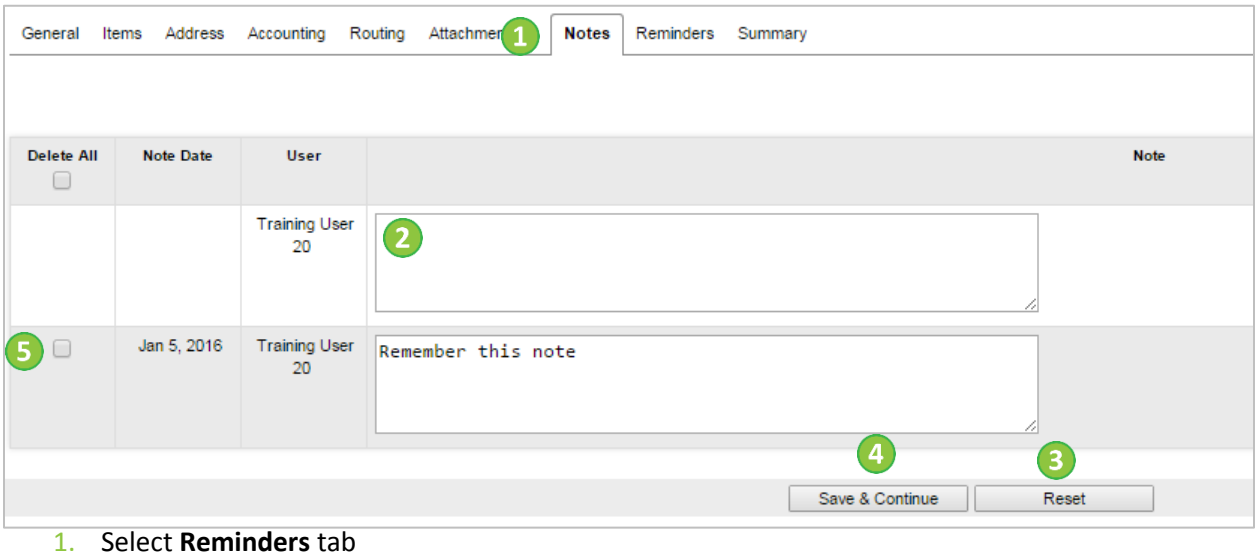
10. To view form as PDF, click **Download PDF**



Notes Tab

The **Notes** tab allows the user to add, edit and delete notes to provide additional information or special instructions for internal users. Only the user may edit their note. These notes are attached at the document header level and apply to all items on the requisition. To add notes to specific items, go to the Items tab. A note is similar to a post-it note as an internal communication.

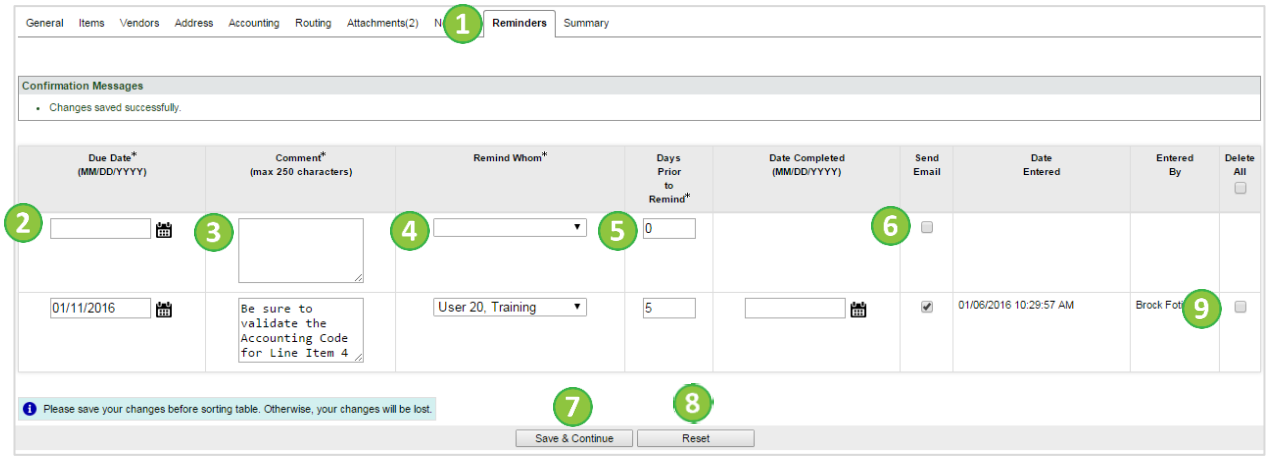
1. Select **Notes** tab
2. Enter note text
3. Click **Reset** to clear form
4. Click **Save & Continue** to save notes
5. To delete a note, select **Delete** and **Save & Continue**



1. Select **Reminders** tab

See Requisition Reminder Field Descriptions Table. All fields with an Asterisk * are required.

2. Enter the **Due Date** for the Reminder
3. Enter the Reminder **Comments**
4. Select **Remind Whom** from drop-down list of agency users
5. Enter **Days Prior to Remind**
6. Select **Send Email** for email reminder
7. Click **Save & Continue** to save reminder
8. Click **Reset** to empty all fields not yet saved
9. To delete a reminder, select the **Delete** and click **Save & Continue**



Requisition Reminder Field Descriptions

Field Name	Description
Due Date* (MM/DD/YYYY)	Using the calendar lookup icon, select the date the reminder is due.
Comment*	Enter up to 250 characters of comment text. The content of the note is up to the individual user.
Remind Whom*	Using the dropdown menu, select the person to remind.
Days Prior to Remind*	Enter the number of days prior to the due date, the person should be reminded. The user can enter up to 9999.
Date Completed*	The date that the reminder is marked as being accomplished by the "Remind Whom' person.
Send Email	To send out an email reminder in addition to sending the reminder in BidBuy, place a check in the checkbox.
Date Entered	Displays the date and time the reminder was created.
Entered By	Displays the name of the person who created or edited the reminder.
Delete	When checked and the Save & Continue button is selected, the reminder is deleted.

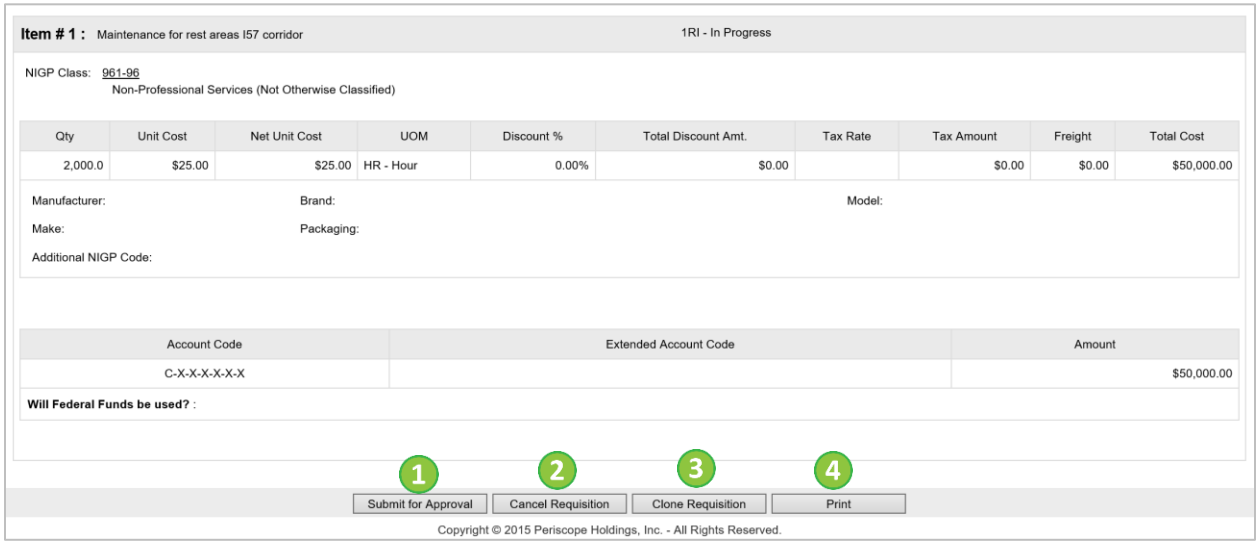
Submit Requisition for Approval

Once the tabs are completed, including all required fields, the user may submit the complete document for approval.

Summary Tab

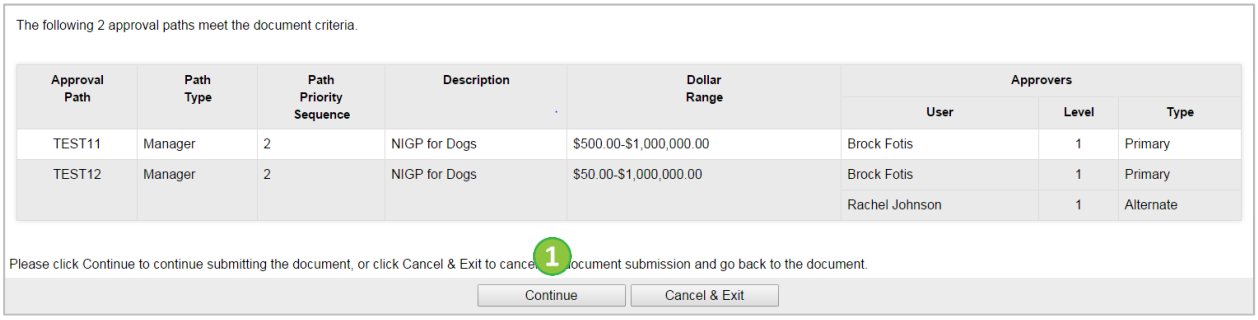
The Summary Tab will feature all the data entered and selection choices by the user in the previous tabs. The Summary Tab gives the user an opportunity to review all applicable information and return to any given tab to edit errors or update with new information.

1. At the bottom of Summary tab, click **Submit for Approval** to submit document for approval once the requisition is complete
2. Click **Cancel Requisition** to delete Requisition
3. Click **Clone Requisition** to start another Requisition with all the settings of the current one
4. Click **Print** to print Requisition



Submit for Approval

When an approval path is configured for the requisition, the approvers will attach to the requisition and it will move to Ready for Approval status.



The following 2 approval paths meet the document criteria.

Approval Path	Path Type	Path Priority Sequence	Description	Dollar Range	Approvers		
					User	Level	Type
TEST11	Manager	2	NIGP for Dogs	$500.00-$1,000,000.00	Brock Fotis	1	Primary
TEST12	Manager	2	NIGP for Dogs	$50.00-$1,000,000.00	Brock Fotis	1	Primary
					Rachel Johnson	1	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cance[illegible]ocument submission and go back to the document.

Continue | Cancel & Exit

If there is an approval path associated with this document, the user will see the approvers and the status on the summary page.

1. Click **Continue** to send approver email to approve

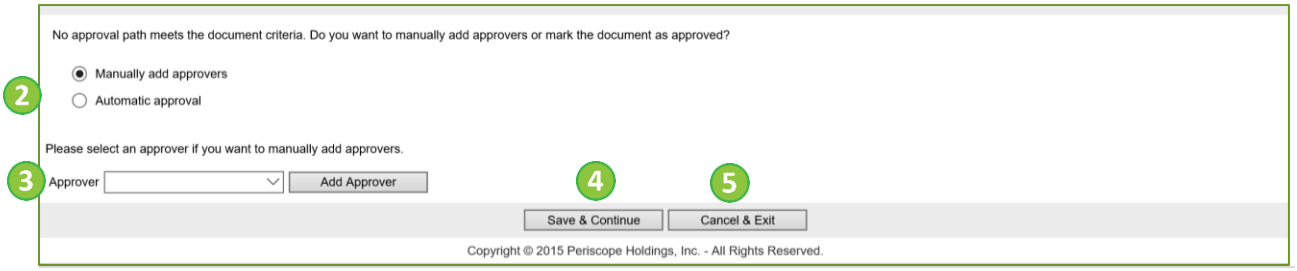
When there is no approval path configured, the user is prompted to select:

1. **Automatic Approval** – Selecting this will move a document to Ready for Purchasing status. This option is visible when there are no configured approval paths on the document.
2. **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual; clicks add approver and then saves the approval (see example below).

The sequence number is the order in which the approvers can approve the document.

1. Click **Submit for Approval**

2. Select **Manually add approvers** to add additional approvers
3. Select **Approvers** from drop-down list and click **Add Approver** (note you can add more than one approver manually)
4. Click **Save & Continue** to continue
5. Click **Cancel & Exit** to exit



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

Manually add approvers

Automatic approval

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

Approver | Add Approver

Save & Continue | Cancel & Exit

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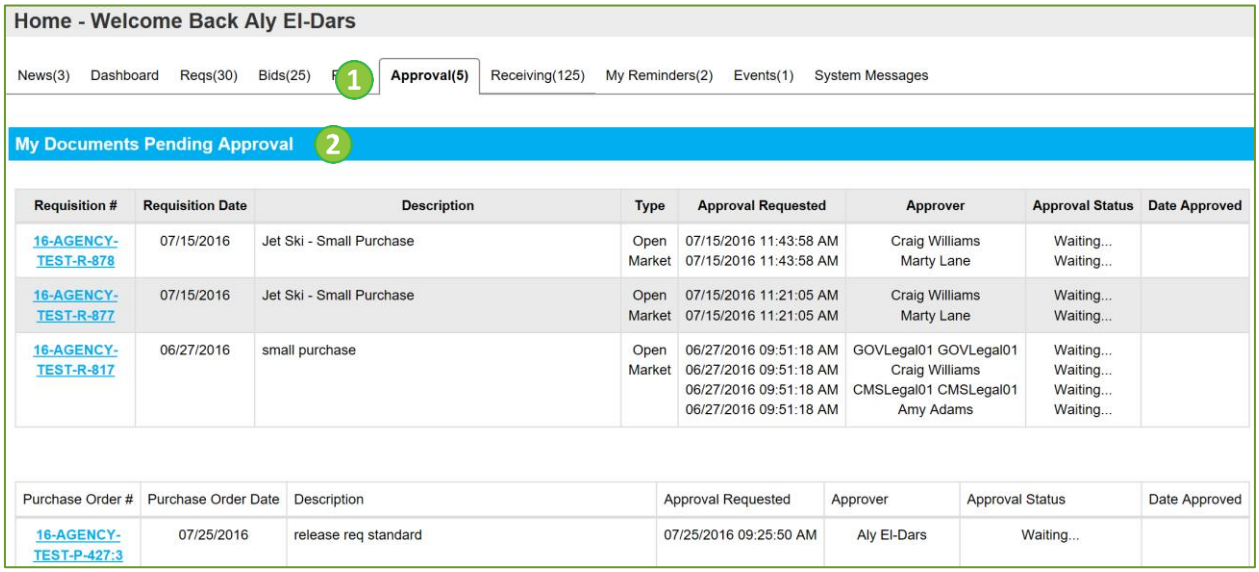
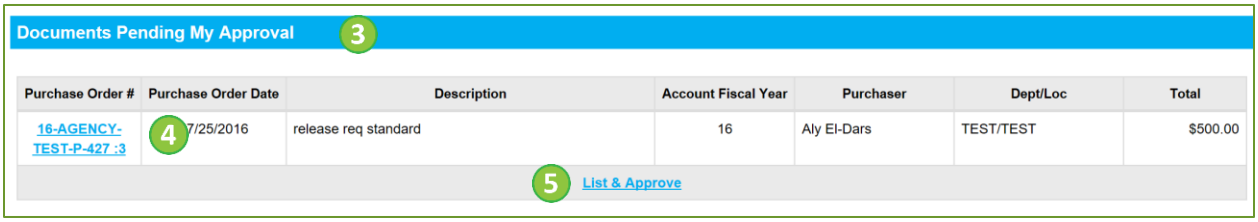
Approve Requisition at Home Page

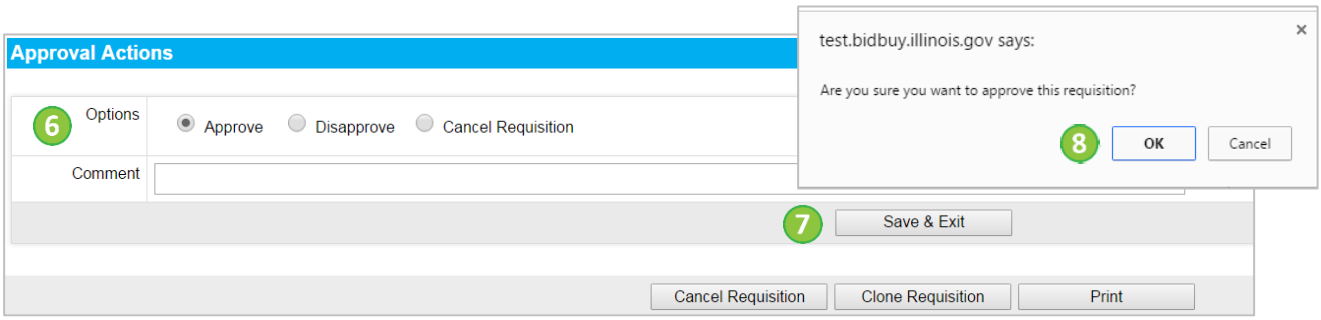
1. From the Home page, select **Approvals** tab
2. System will display all **My Documents Pending Approval**



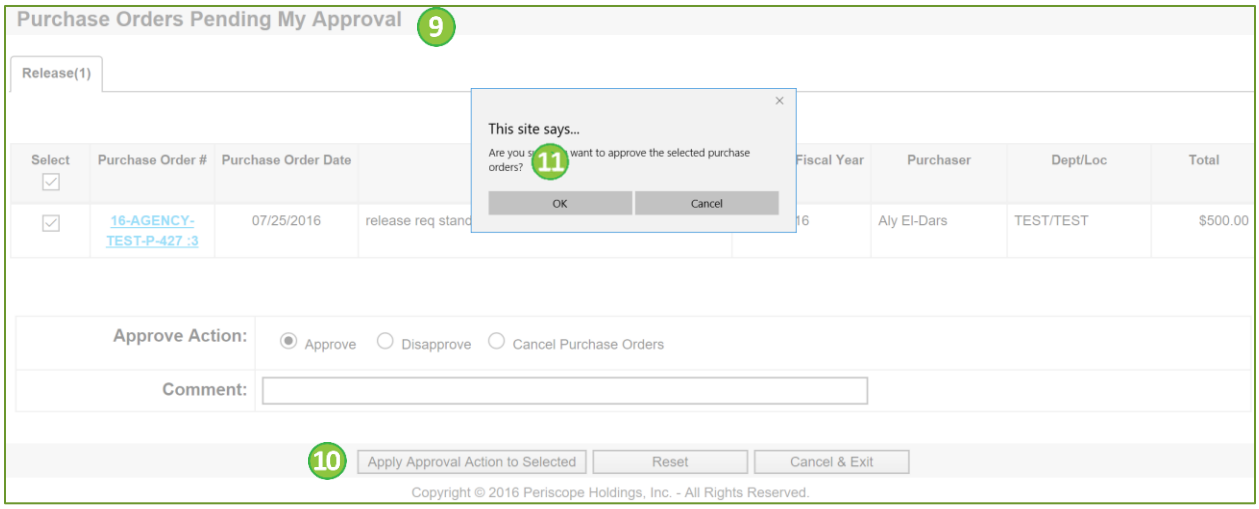
3. Scroll down to the bottom of the screen to display **Documents Pending My Approval**
4. For one document click on the **Hyperlink** for that document and go to the bottom of the **Summary Tab** to approve
5. For multiple documents Click **List & Approve** and the system will display a list of all documents for your approval



6. For a Single Document Approval, Scroll to the bottom of the **Summary** tab and select **Approve, Disapprove or Cancel.**
7. Click **Save & Exit**
8. Click **OK**



9. For Multiple documents Process all documents from the **{Documents} Pending My Approvals** screen by selecting the documents you wish to approve
10. For multiple document approval select action desired and click **Apply Approval Action to Selected Button**
11. Click **OK**

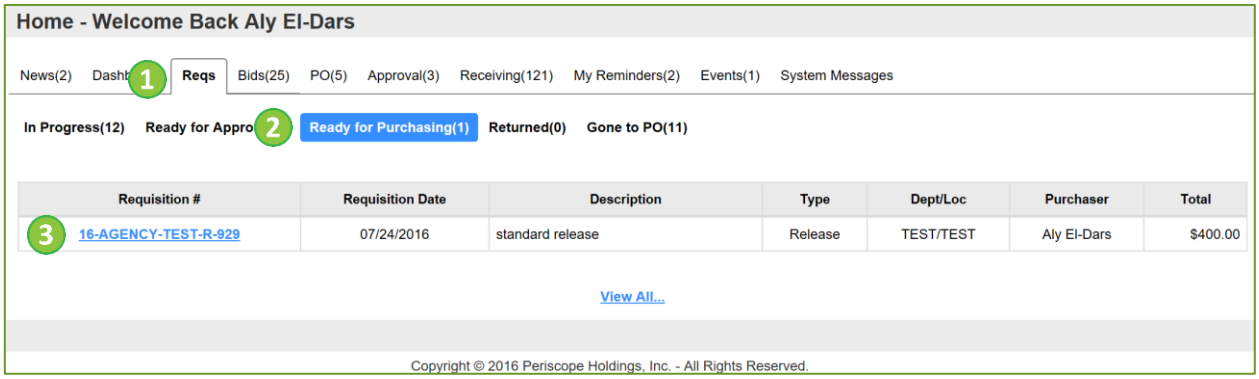


Process Purchase Order (Standard Release)

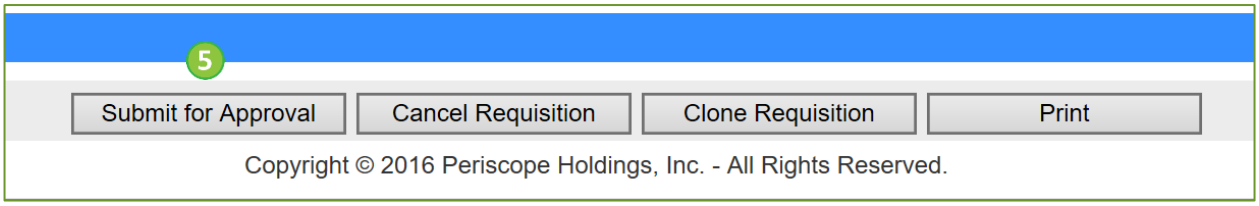
Upon approval of the Requisition document, a buyer will process the Purchase Order to submit to the vendor and place the order. This is for a Standard Release that requires a buyer to complete the purchase order. For a Direct Release, the Vendor is notified and the Purchase Order moves to Sent Status.

From the BidBuy Home Screen:

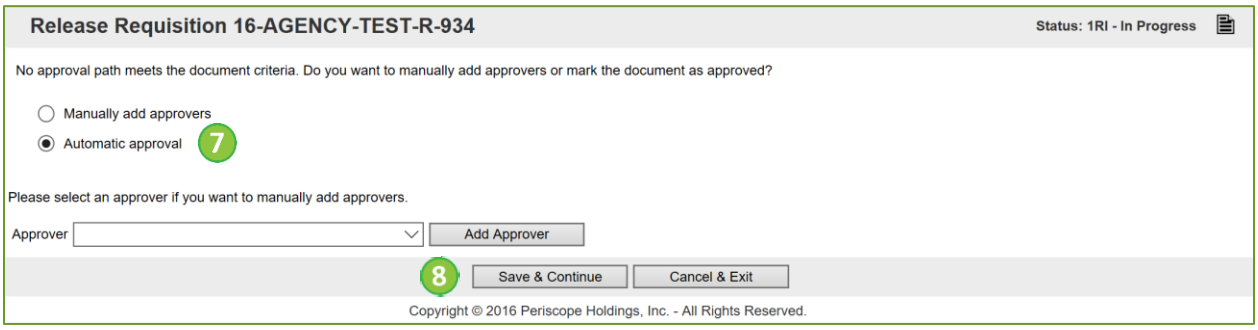
1. Click the **Reqs** Tab
2. Click the **Ready for Purchasing** sub-tab, only approved requisitions will display
3. Click the **Requisition #** to be converted



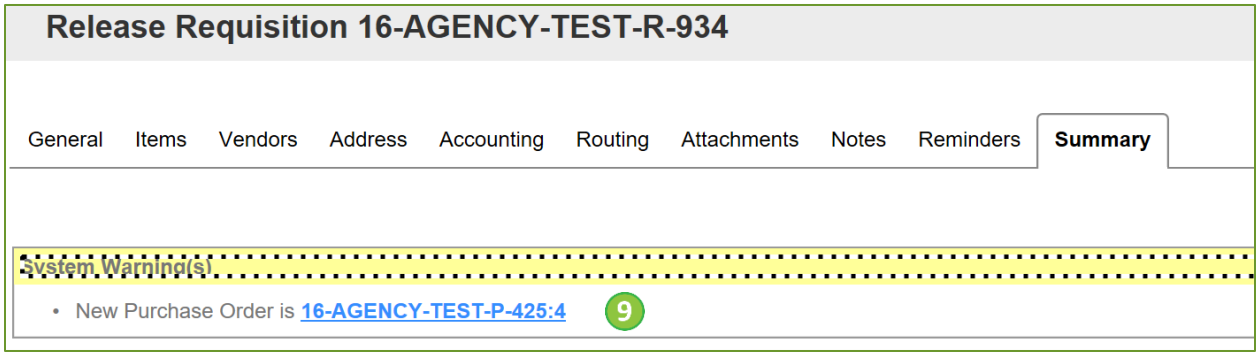
4. Scroll to the bottom of the Summary screen
5. Select **Submit for Approval** to convert requisition to a Release Purchase Order



6. Click **OK** on the pop up screen to continue
7. Enter selections from radio button list
8. Click **Save & Continue** to proceed and convert Release Requisition to PO



9. System will process requisition and give the user the new PO number click as a HYPERLINK. Clicking the hyperlink will take you directly to the PO



Purchase Order Conversion Field Description

Field Name	Description
Single PO using header recommended vendor	If user selected one recommended vendor
Single PO using selected reference vendor	If user wants to select from the list of vendor from Requisition
Single PO using item recommended vendor	If user wants to select by item each vendor
Choose vendor(s)	If user wants a lookup screen for vendors
Include Vendor Informal Quote Attachments	If user wants to copy vendor attachments to PO
PO Type of the New Purchase Order	For small purchases, this is Open Market

The PO conversion field options apply when Release Requisition items are from more than one Master Blanket PO.

Add Missing Information and Update Tabs

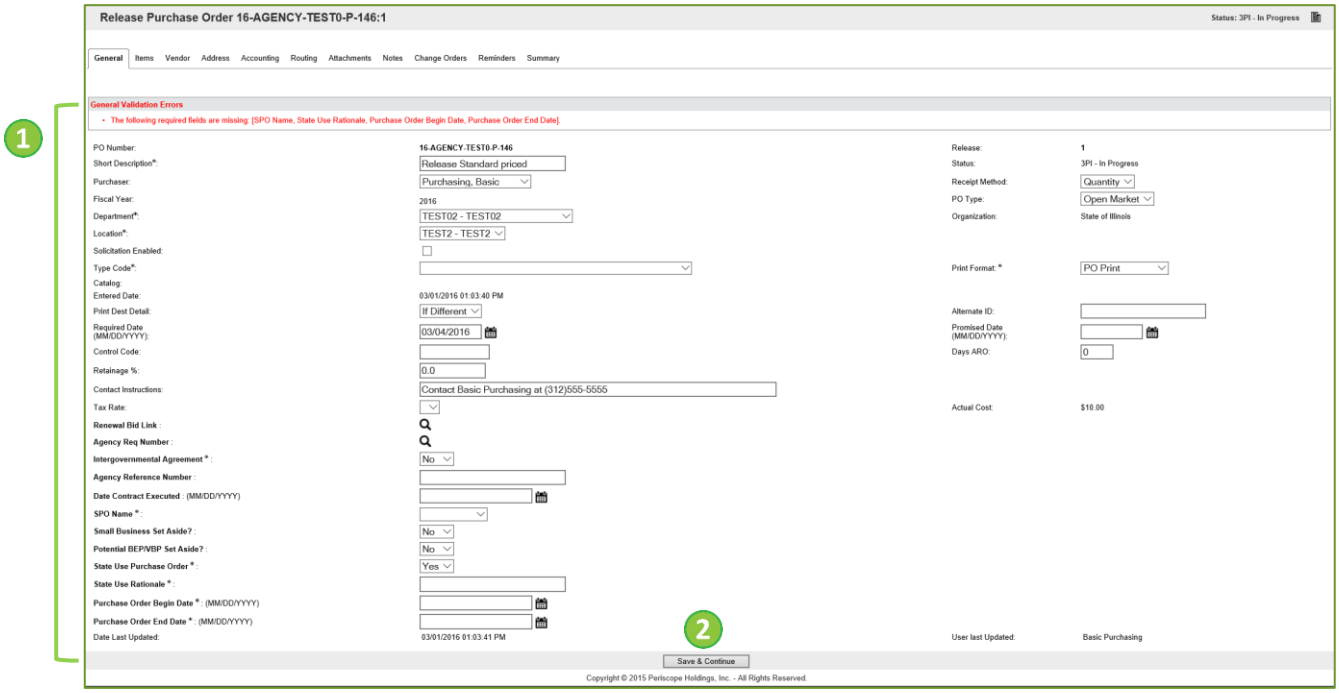
Information from the requisition is carried over into the Purchase Order. There are some fields that do not relate to the requisition but are necessary to have for the Purchase Order. These fields are flagged General Validation errors and need to be updated by the user.

General Tab

1. Update general information for the PO

Mandatory Fields are marked with asterisks (*).

2. Click **Save & Continue**



Purchase Order General Field Description

Field Name	Description
PO Number	This number is automatically generated when the user selects Save & Continue. Purchase Order number consist of:a Fiscal Year, O: Org ID, E: Dept. ID, Z: Sequential Number (Zero Suppression). For Example: 16-AGENCY-TEST-P-259
Short Description	Short Description helps the user identify or locate the document. Use complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Noun, Adjectives.
Department	The department that is managing the contract.
Location	The location within the department managing the contract.
Type Code	These are defined by each agency – See Custom Column List
Purchase Order Begin Date	Select a begin date for Blanket. This is the date that the contract should be available for ordering.
Purchase Order End Date	Select an end date for the Blanket. This is the date that the contract is no longer available for ordering.
PCard	Not used by the State
Print Format*	Use Default – PO Print
Entered Date	This will populate when the document is saved.
Print Dest	Detail Choose if addresses for items going to different destinations print out on the PO: if different, never select, always. Use default.
Alternate ID	Agency defined alternate ID field. The length of this field is determined by system settings. The field length can be from 0 to 50 characters. CAUTION: the alternate id field may be used by interface processing. Beware deleting or changing data within the alternate ID field as it may cause invalid data

Field Name	Description
	or errors during the interface processes. **Not to be updated by the user.**
Required Date	The date and time by which the originator requested that delivery of the items on this purchase order be delivered. **This is typically defined at the contract, so no input is necessary.**
Promised Date	The date by which the vendor must deliver the goods. **This is typically defined at the contract, so no input is necessary.**
Control Code	Agency defined control code.
Days ARO	The number of days after receiving this order by which the vendor should deliver the goods.
Retainage %	Not used by State.
Discount %	Percentage of discount to be applied to PO.
Contact Instructions	Defines contact for the document.
Tax Rate	Not used by State
Actual Cost	The total cost of all the items on this purchase order, including any applicable tax, freight, or discounts.
Invoice Method	Not used by State
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab

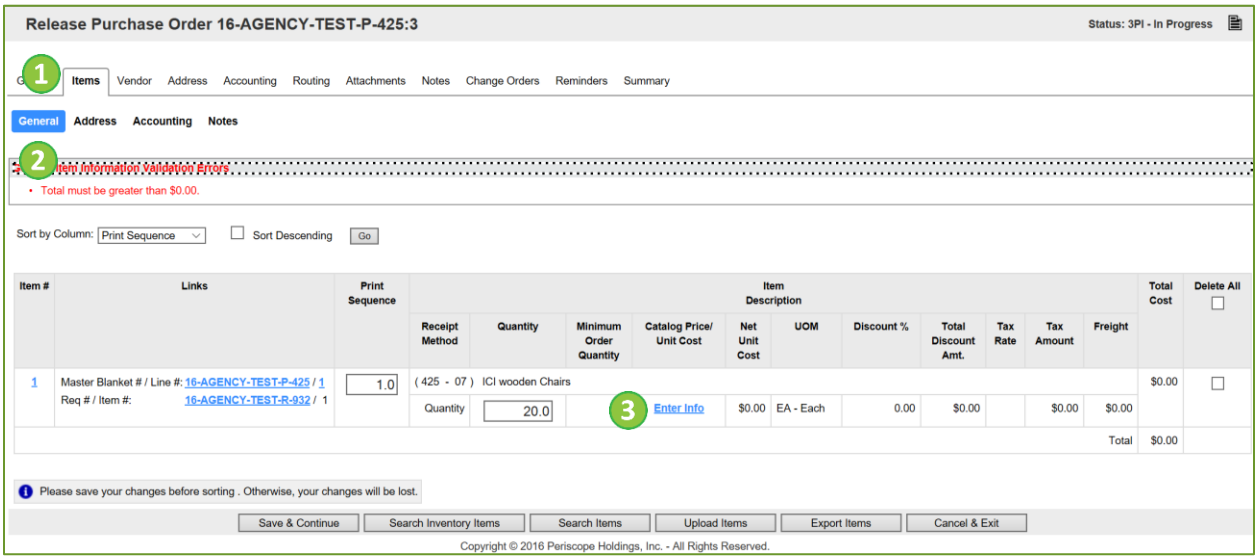
While the PO is in progress, the user is able to make any required modifications prior to submitting the PO to the Vendor.

Items Tab: General

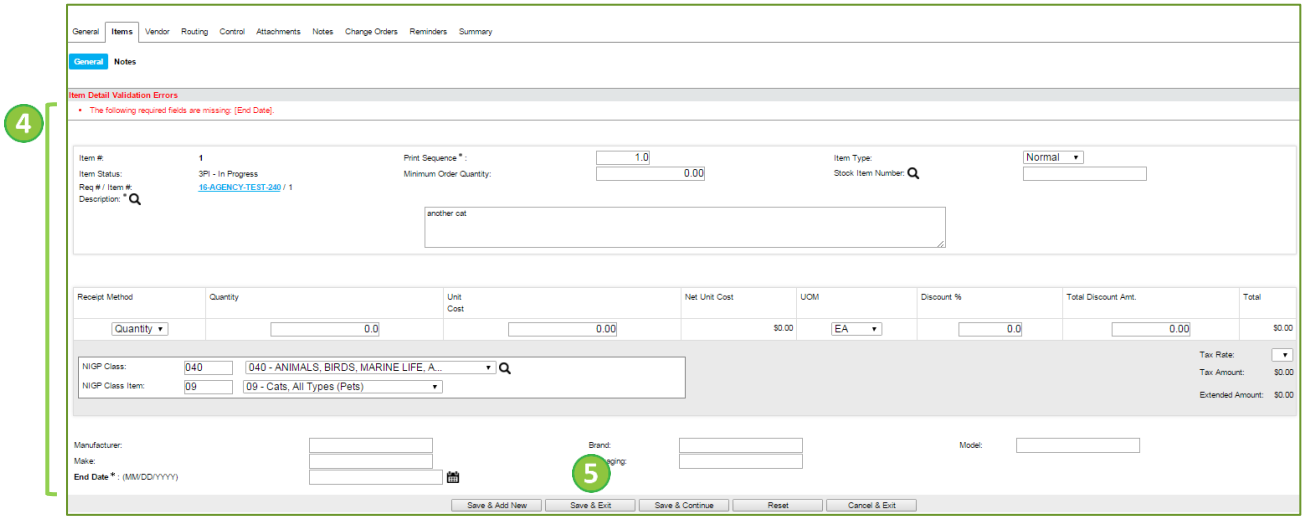
1. Select **Items tab** to review items in converted PO
2. Click **Item#** to update item information

For Standard Release if the item pricing information was not entered at the Requisition level the user can enter it at the PO level

3. Click **Enter Info** to adjust pricing and discounts per item.



4. Update item information
5. Click **Save & Exit**



Purchase Order Item Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially listed by BidBuy. This field cannot be modified by the user.
Print Sequence*	The order in which the items will be displayed. The item # is the default value for this field. The user can change this field if the print sequence needs to be different from the item number sequence.

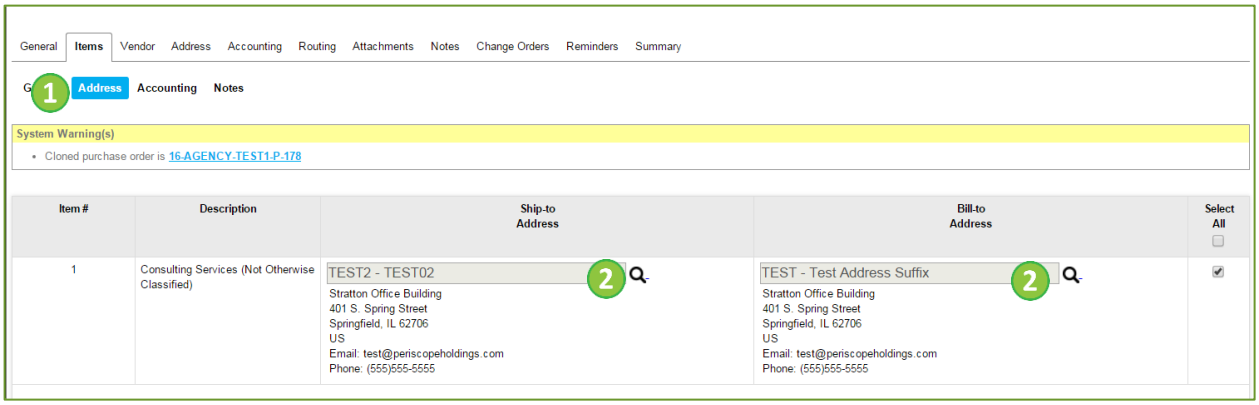
Field Name	Description
Item Type	The user can select *Normal* or *Narrative* as the type. Selecting *Narrative* will make it a non-item addition where the user can type in text to appear on the purchase order.
Item Status	The status of the item on the Requisition.
Description*	The description of the item as defined by the user. Use complete words, not abbreviations, NIGP description, where applicable, broad description, then detail (e.g. Lettuce, spring mix; service example: Maintenance, Repair, HVAC.) NOTE: This is a searchable field for blanket contracts using Quick Buy. Use a searchable description.
Quantity	The Quantity of the item being requested. The user can type the amount of the item that is needed. The default value is zero.
Unit Cost	An estimated unit cost per item.
Net Unit Cost	Net unit cost per item is the Unit Cost – Discount % amount for unit cost.
UOM	User selects a unit of measure from the drop-down menu**. Reference Appendix A: Unit of Measure Descriptions, page 80**
Discount %	Used if there is a percentage discount applicable to the item.
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) – Total Discount Amount. The user cannot edit this field.
NIGP Class*	The three-digit Class Code associated with the item. Class Codes are listed on the pulldown menu in alphabetical order or through the search feature.
NIGP Class Item*	The two-digit Class Item associated with the item. Class items are listed on the pulldown menu in alphabetical order or through the search feature.
Commodity Code	Completes the full 11-digit NIGP code
Tax Rate	The State is not using Tax Rate.
Tax Amount	The State is not using Tax Amount.
Freight	The amount of Freight applied to this item.
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount + Freight. The user cannot edit this field.
Manufacturer	Optional field.
Brand	Optional field.
Model	Optional field.
Make	Optional field.
Packaging	Optional field.
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab: Address

This allows shipping and billing addresses for specific items. To assign shipping and billing addresses for all items go to the main Address tab for the purchase order. Typically, this would not be changed on the PO because it's the Requestor's Address, not the Buyer's.

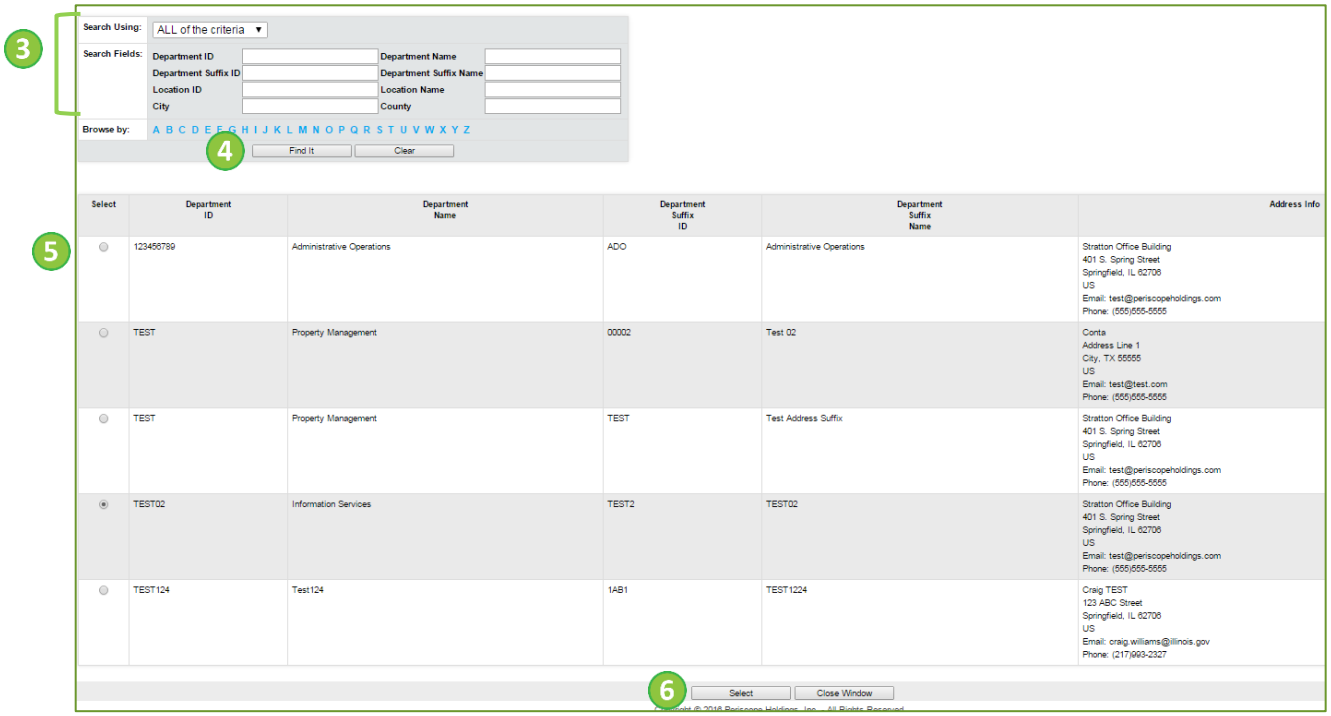
Default address information from the header Address tab displays

1. Select **Address** sub-tab
2. To change **Ship-to or Bill-to**-Address, click to search for new address

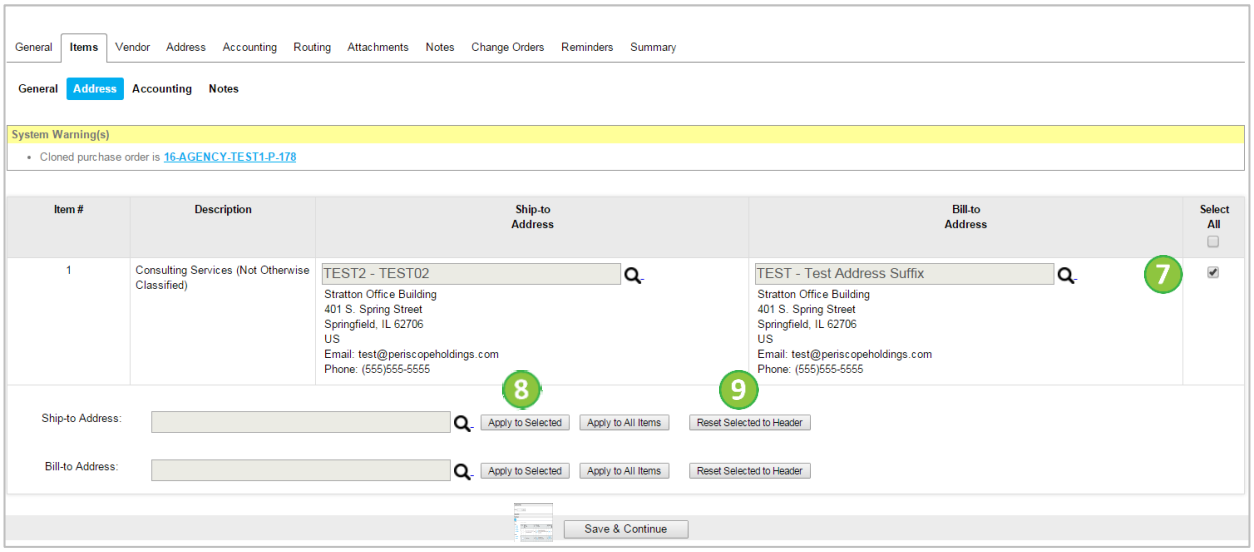


3. Enter Search Criteria
4. Click **Find It**
5. Select a new address

6. Click **Select** to update address



7. Select item(s) to change address (Ship/Bill To Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All** Items to apply changes to all items on PO
9. Click **Reset Selected to Header** to reset all addresses to default from Item Master
10. **Save & Continue** to save changes and continue



Items Tab: Accounting

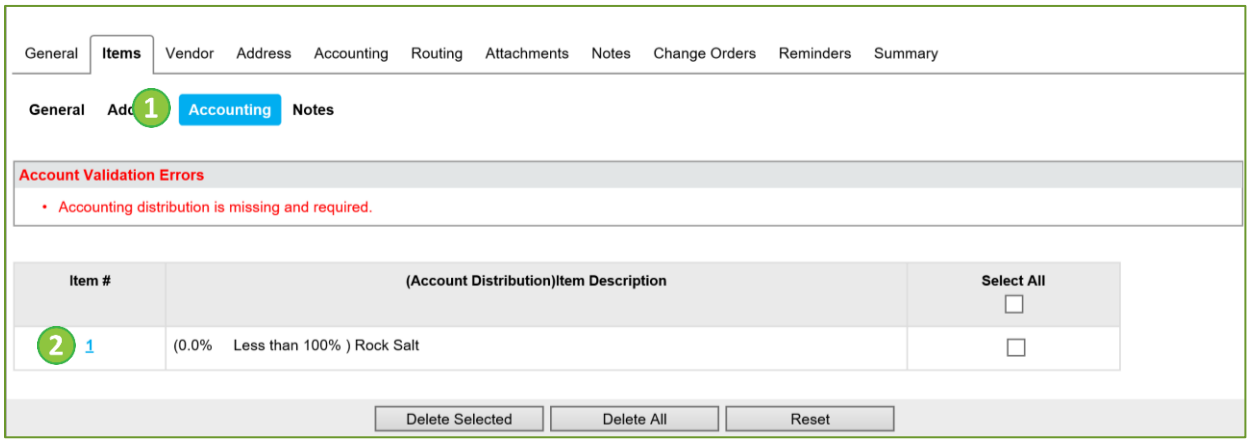
The Item's Accounting sub-tab allows the user to enter accounting information for specific items. To add the same accounting information to all items, go to the main Accounting tab for the purchase order.

1. Select **Accounting** sub-tab

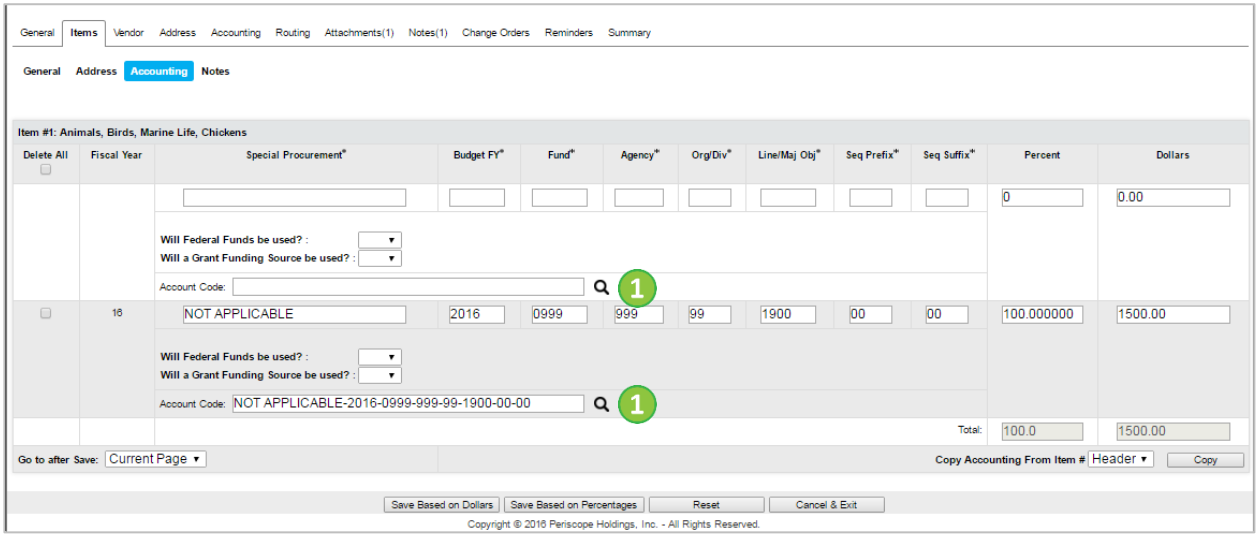
Default accounting information from the head Accounting tab displays.

2. Select **Item #** to update accounting information

Add or change Account Code

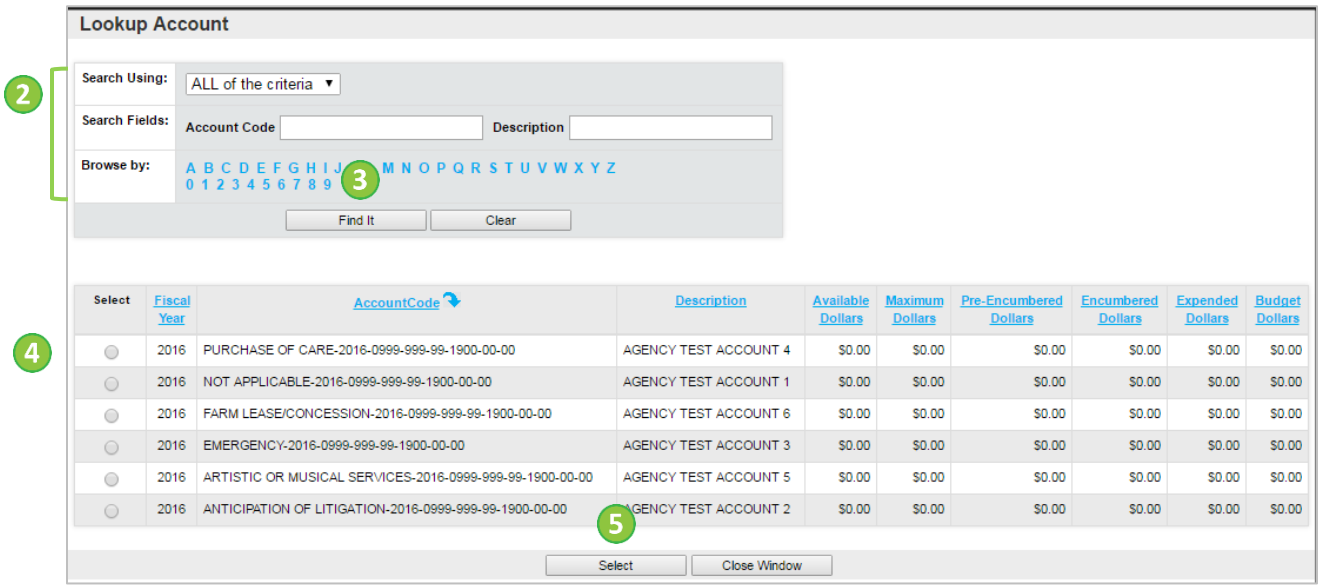


1. Click to search for **Account Code**

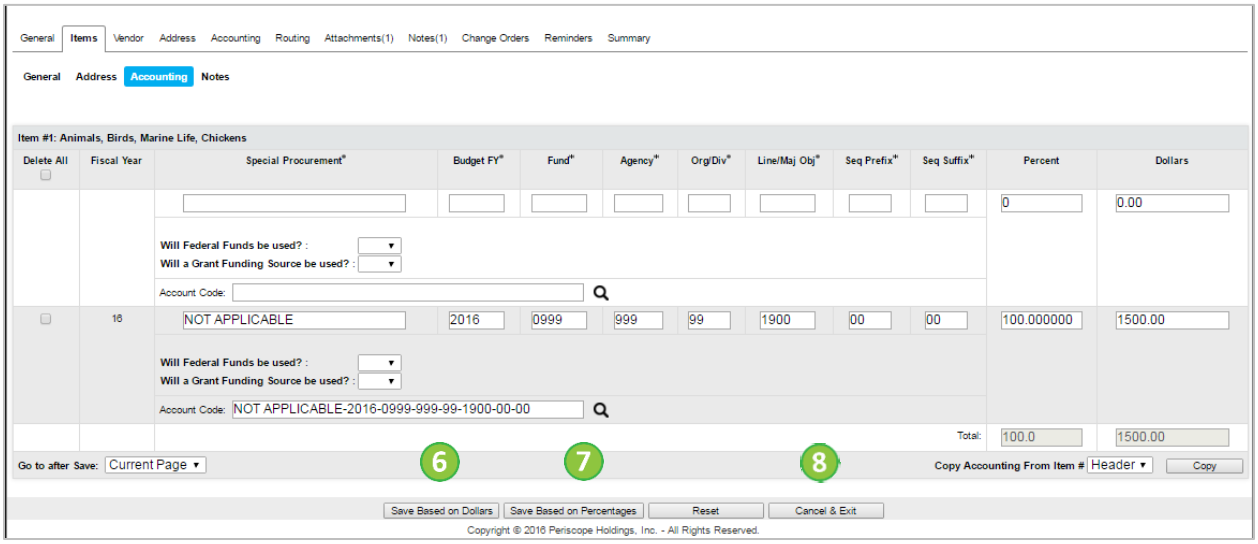


2. Enter search criteria
3. Click **Find It**
4. Select **Account Code**

5. Click Select



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentages entered
8. Click **Cancel & Exit** to exit without saving



Items Tab: Notes

This notes section allows the user to add notes to specific items. To add notes to all items, go the main Items tab for the purchase order.

1. Select **Notes** sub-tab

2. Click **Item #** to update notes

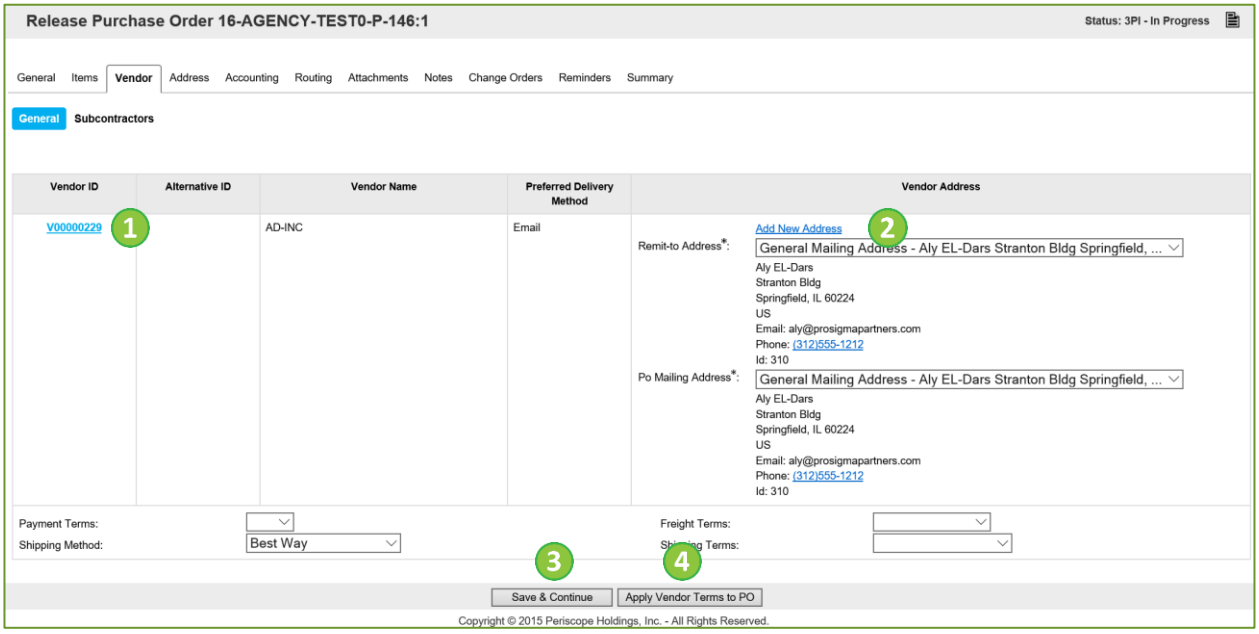
3. Update Notes
4. Click **Save & Continue** to save notes and continue adding more notes
5. Click **Save & Exit** to add note and exit to PO
6. Click **Reset** to reset screen display
7. Click **Cancel & Exit** to exit without saving

Vendor Tab

Vendor Tab: General

1. Click **Vendor** hyperlink to view vendor details for PO
2. Click **Add New Address** to add new address for this vendor
3. Click **Save & Continue** to save and continue

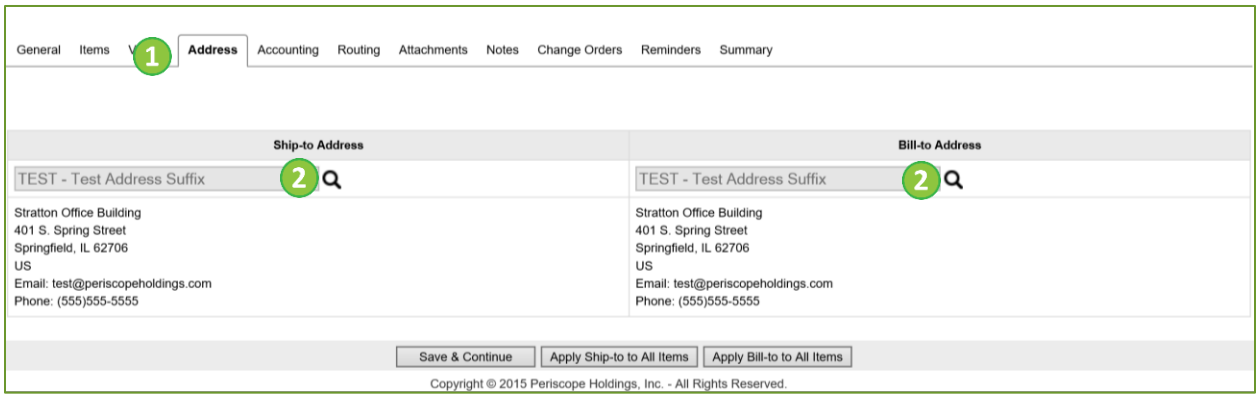
4. Click **Apply Vendor Terms to PO** to apply vendor terms



Address Tab

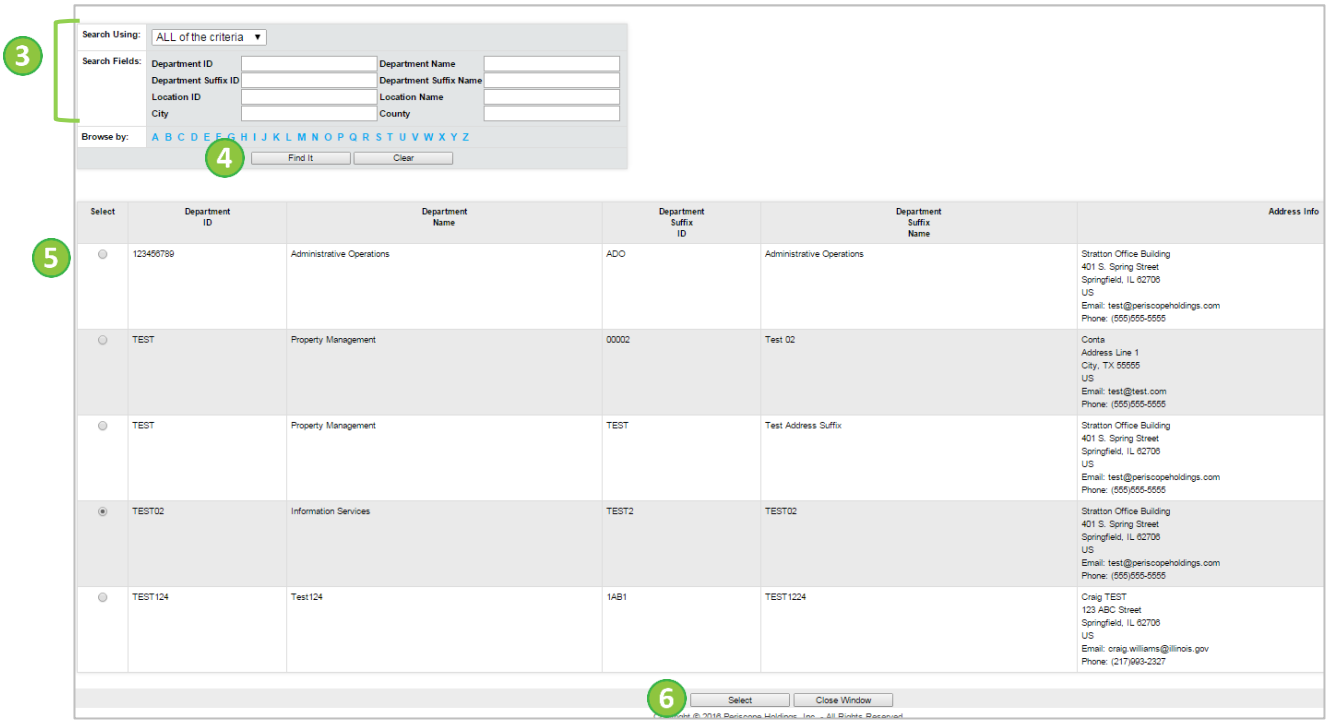
This is shipping and billing addresses for all items. To itemize shipping and billing addresses go to the Address Sub Tab under Items tab. Typically this would not be changed because it is the Requestor's Address, not the buyer's.

1. Select **Address** tab
2. To change **Ship-to** or **Bill-to-Address**, click 🔍 to search for new address
3. Enter Search Criteria

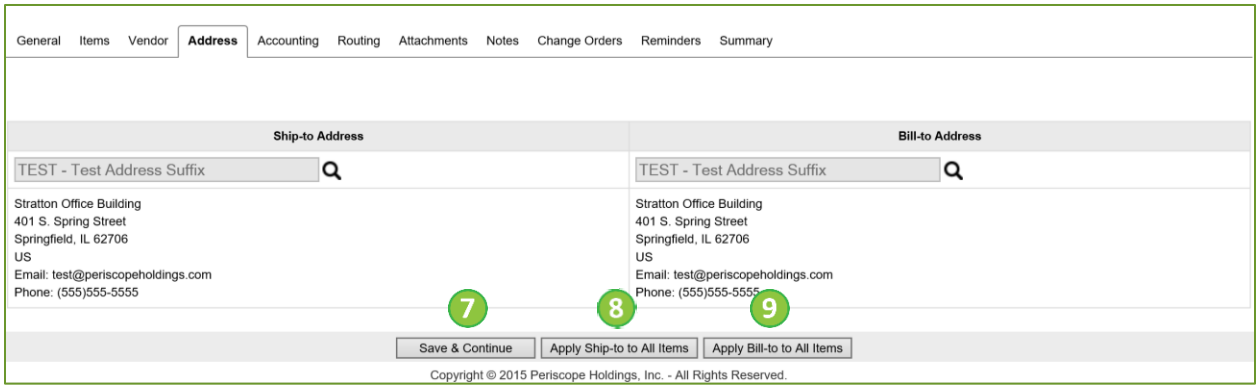


4. Click **Find It**
5. Select a new address

6. Click **Select** to update address



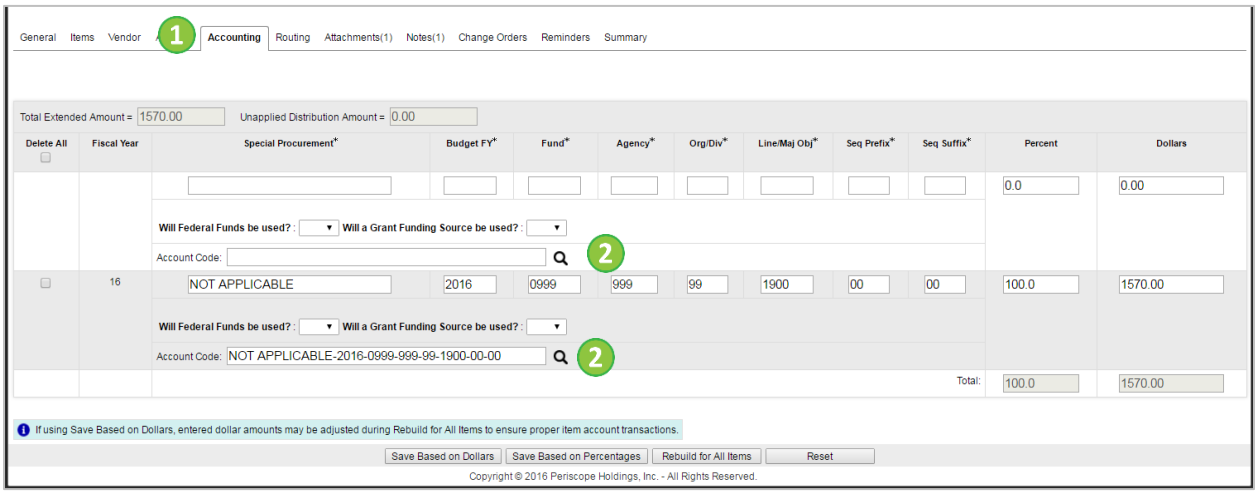
7. Click **Save & Continue** to save changes and continue
8. Click **Apply Ship-to to All Items –** to apply changes to ship-to to all items on PO
9. Click **Apply Bill-to to All Items** – to apply changes to Bill-to to all items on PO



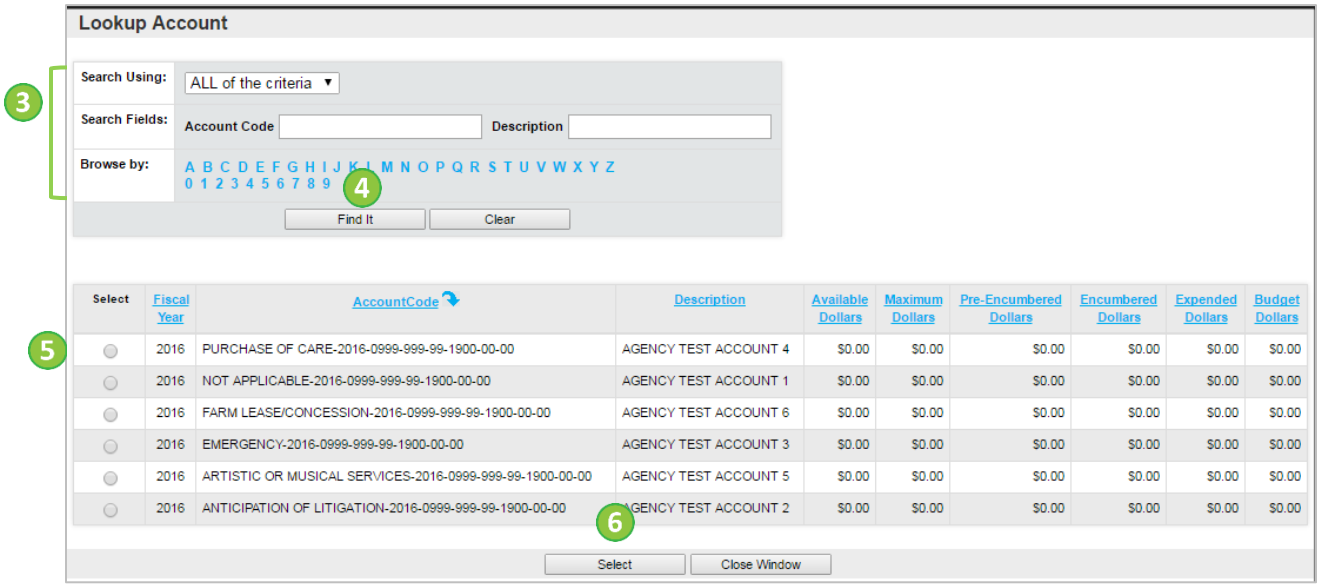
Accounting Tab

This is accounting information for all items. To itemize accounting go to the accounting sub tab under Items tab.

1. Select **Accounting** tab
2. Click 🔍 to search for **Account Code** to add or update account

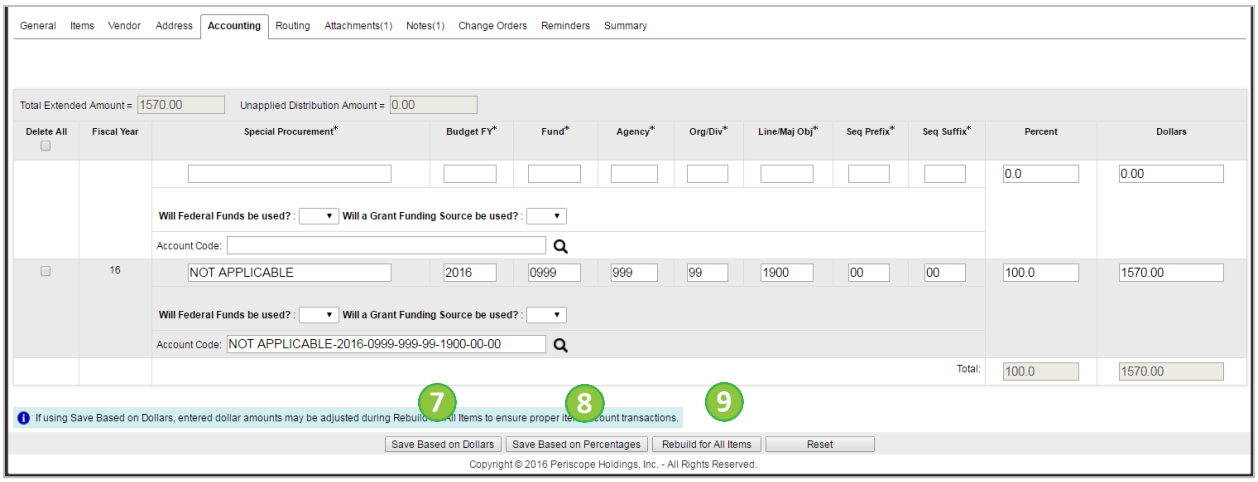


3. Enter search criteria
4. Click **Find It**
5. Select **Account Code**
6. Click **Select**



7. Click **Save Based on Dollars –** to save based on dollar amount entered, or
8. Click **Save Based on Percentages –** to apply changes and save based on percentages entered

9. Click **Cancel & Exit** to exit without saving



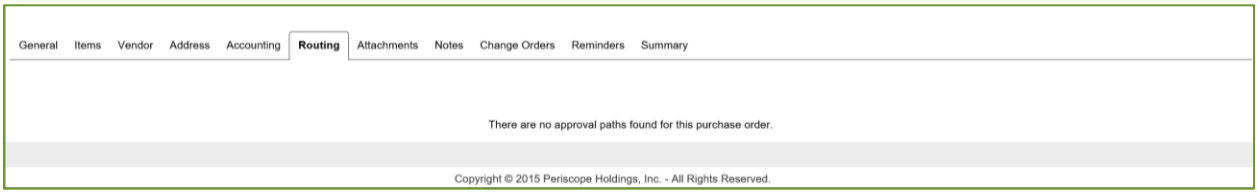
If the Rebuild for All Items is not completed, a PO cannot be submitted.

Accounting Field Descriptions

Field Name	Description
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Routing Tab

The routing that a requisition must follow for approval is determined by the applicable approval paths. The approval path(s) for the requisition is displayed on the Routing Tab. This tab remains blank until one or more approval paths are triggered when the requisition is submitted for approval.



Any Approval routings for this PO will display in this screen when the PO moves to Ready for Approval Status.

Attachments Tab

Both files and forms (when Form Builder is enabled) can be attached by the agency (BP user) or by the vendor (Seller user) on the purchase order.

Attaching files to BidBuy documents is a useful way to include specifications or other guidelines in procurement documents. The user can attach multiple files such as documents, spreadsheets, memoranda, etc. and can use the **Attachment** Tab to upload the files.

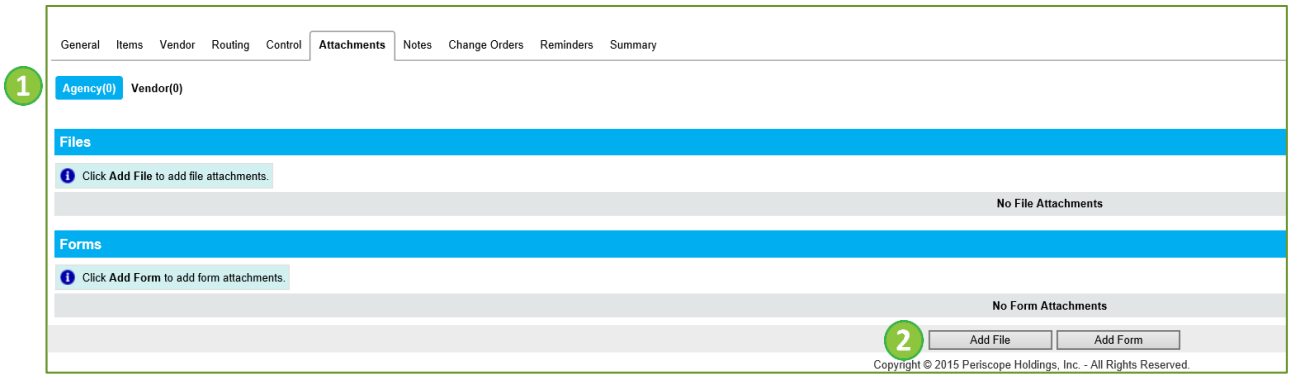
The Add Form button allows the agency to attach predefined published forms. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document.

For form and file information from CMS and the CPO-GS, see the Attachment Appendix.

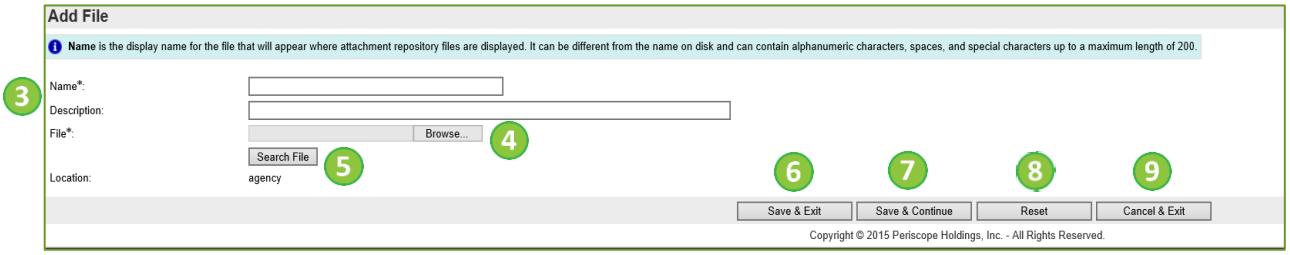
Attachments Tab: Agency

Add Agency Files to PO

1. Select **Agency** tab
2. Click **Add File** to add a file.

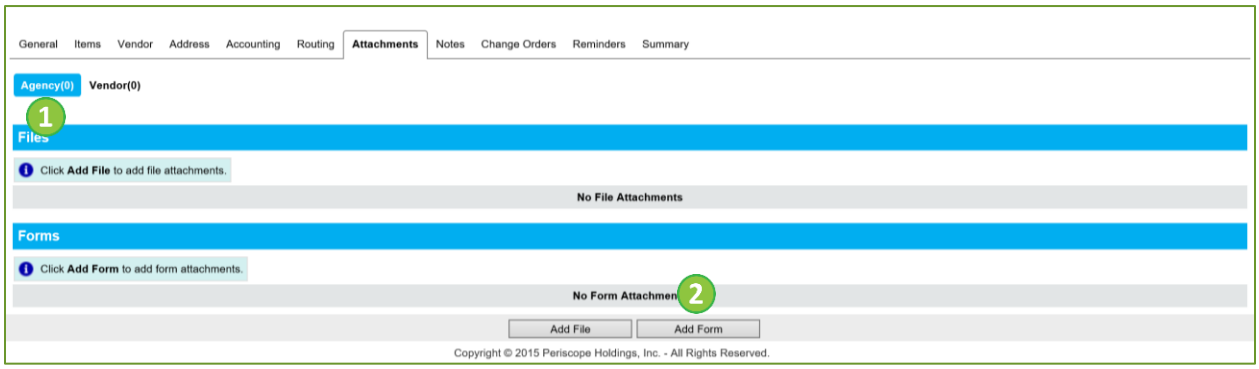


3. Add file **Name** and **Description**
4. Click **Browse** to browse the computer for a file
5. Click **Search File** to search for a file in the repository
6. Click **Save & Exit** when done with loading the file
7. Click **Save & Continue** to save changes made and remain on the same screen
8. Click **Reset** – to reset display and start from scratch
9. Click **Cancel & Exit** to exit without adding any files

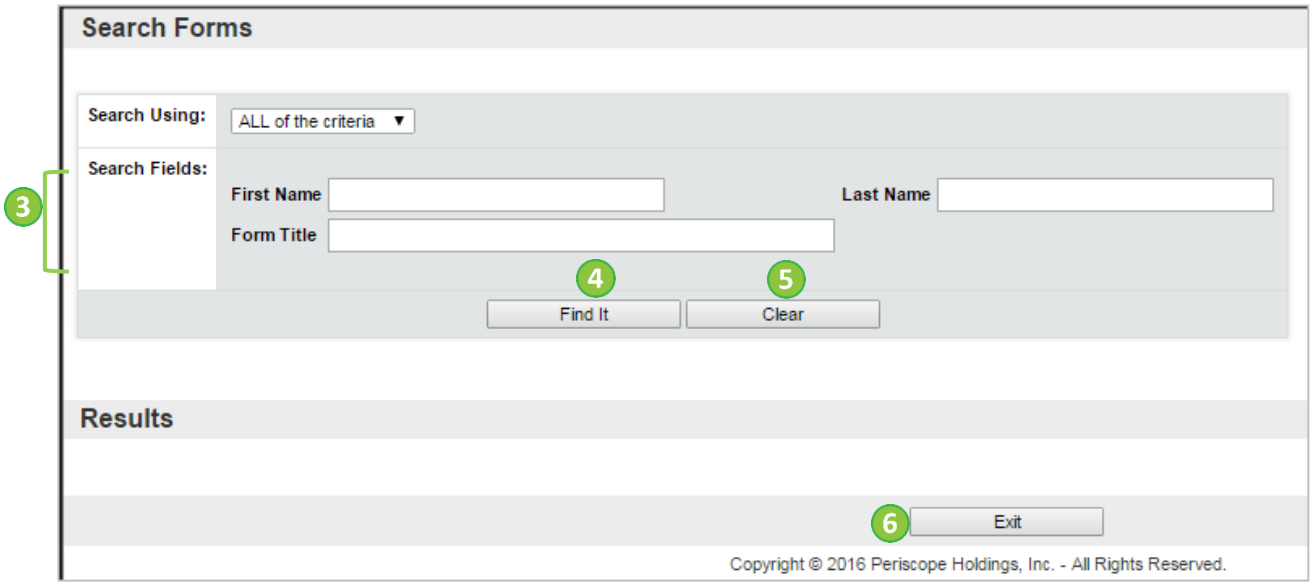


Add Agency Forms to PO

1. Select **Agency** tab
2. Click **Add Form**
3. Enter **search** criteria

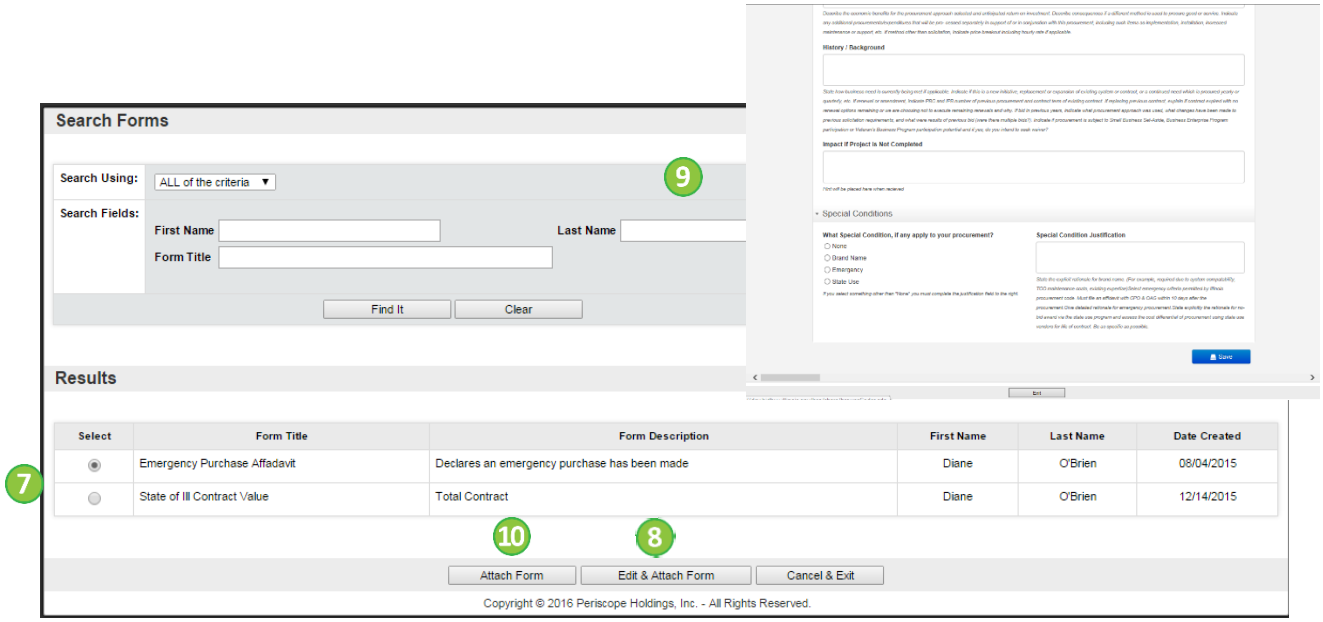


4. Click **Find it** to find form
5. Click **Clear** to restart search
6. Click **Exit** to exit



8. Click **Edit & Attach Form** to edit form and attach to PO
9. Enter **form i**nformation, then click Save and Exit buttons

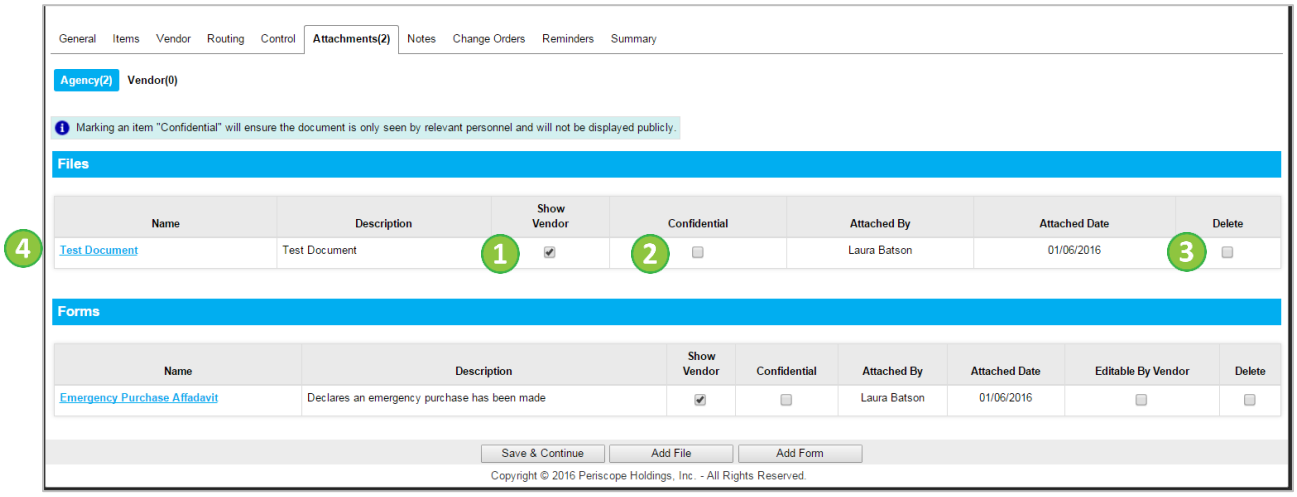
10. Click **Attach Form** to PO without editing



Update Files

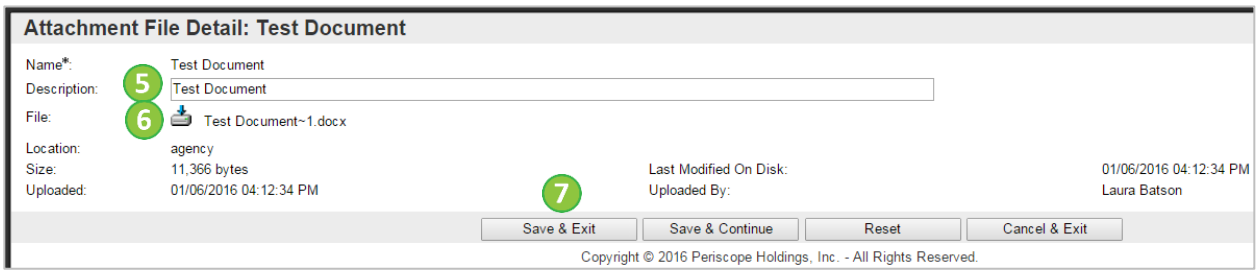
Attachments can be added and deleted. To update a specific attachment, you need to update the file outside BidBuy, then delete the old one and add the new one.

1. Select **Show Vendor** to show to all vendors
2. Select **Confidential** to display only to the seller and certain BP and DA roles within the organization and will not be displayed publicly
3. Select **Delete** to delete attachment
4. Click **Name** to update Description or download attachment



5. Update **Description**
6. Download file, click

7. Click **Save & Exit**

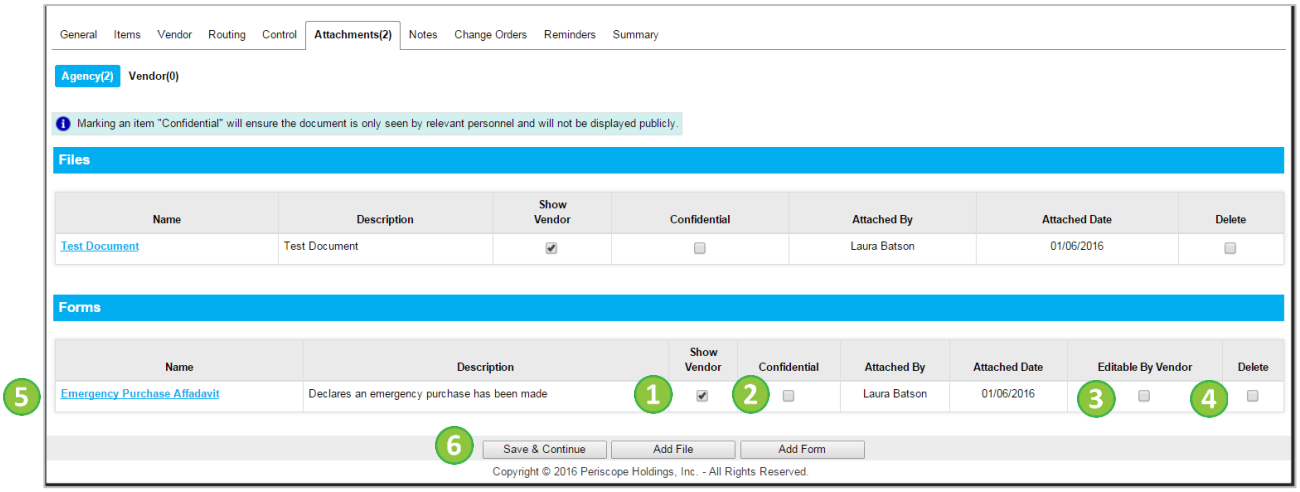


Other information must be updated by deleting and adding a new file.

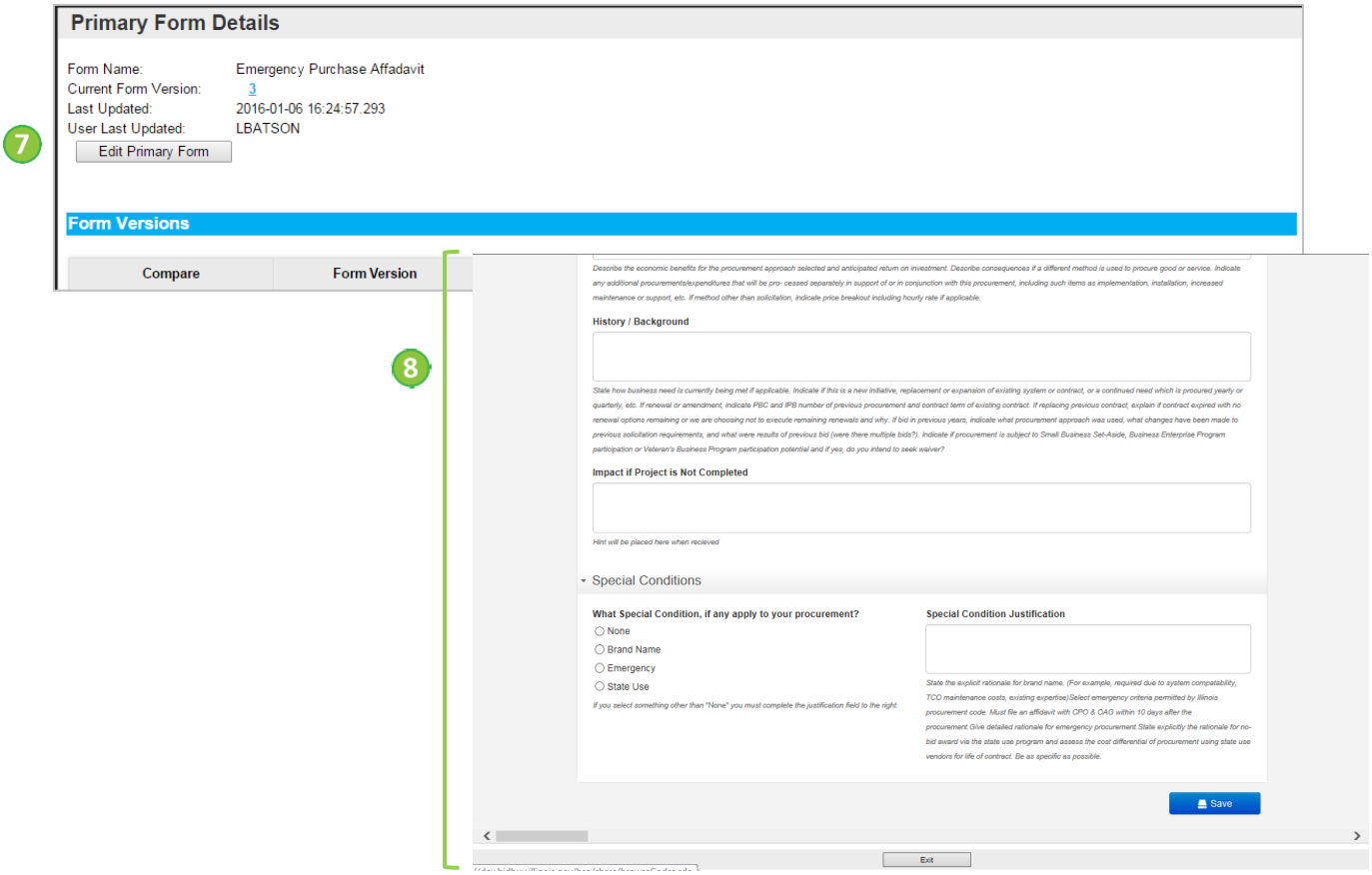
Update Forms

Forms can have multiple versions. If anything is added to a form, it then becomes the primary form.

1. Select **Show Vendor** to show to all vendors
2. Select **Confidential** to display only to the seller and the organization and will not be displayed publicly
3. Select **Delete** to delete form
4. Select **Editable By Vendor** to allow vendors to update the form
5. Click **Name** to view and modify form
6. Click **Save & Continue**



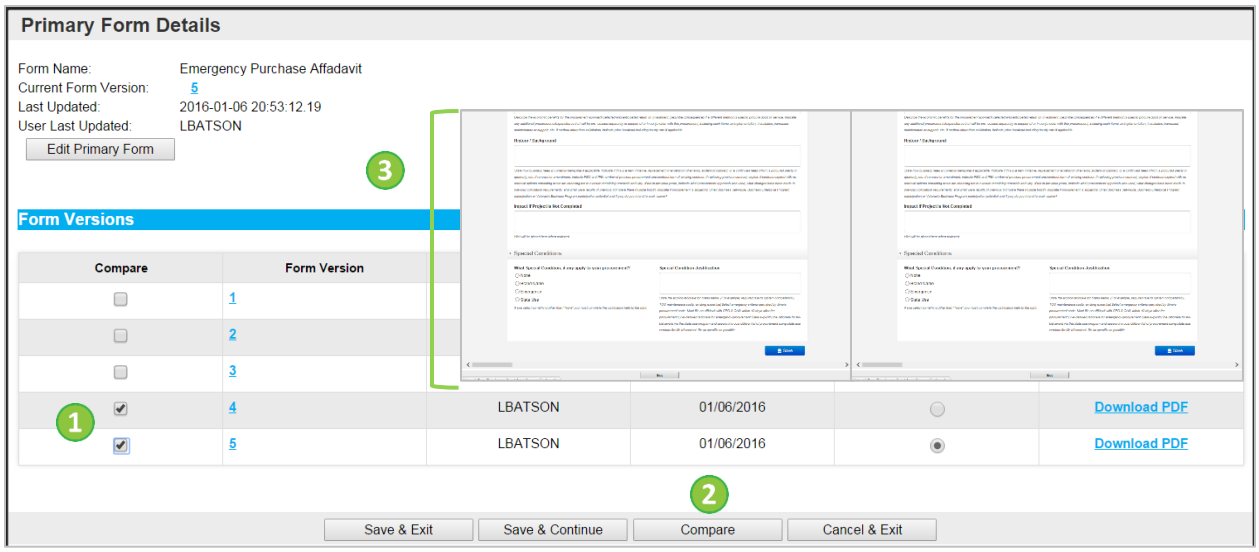
7. Click **Edit Primary Form** to update form
8. Update form information, then click **Save and Exit**



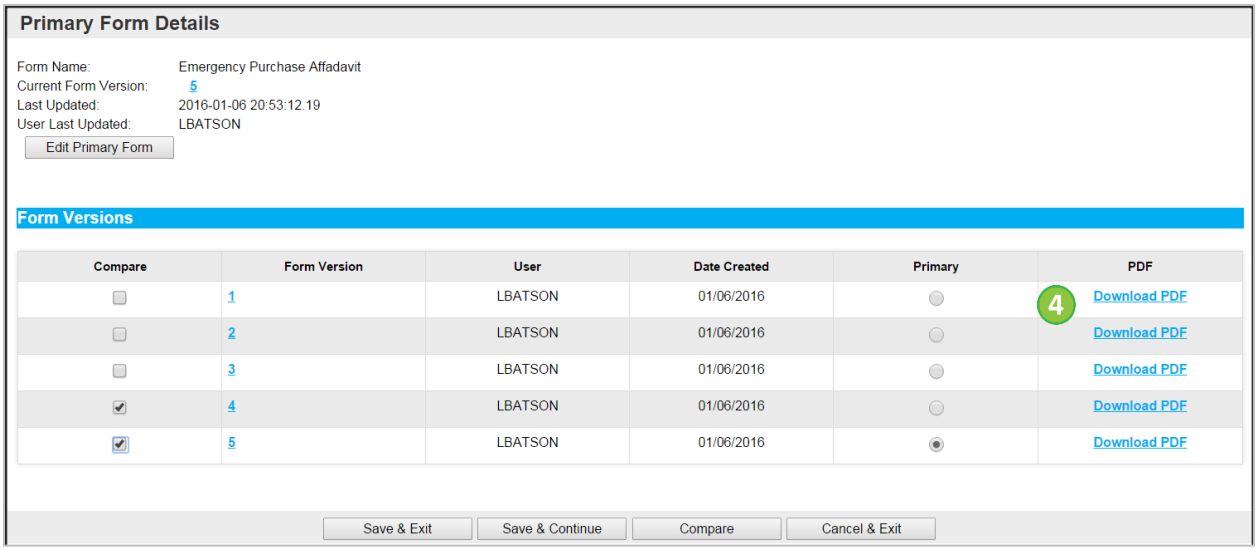
The updated form defaults as the Primary form.

Compare Form Versions

1. Select **Compare** on the Forms to compare
2. Click **Compare**
3. Review the two Forms for changes and click **Exit** when finished



4. To view form as PDF, click **Download PDF**



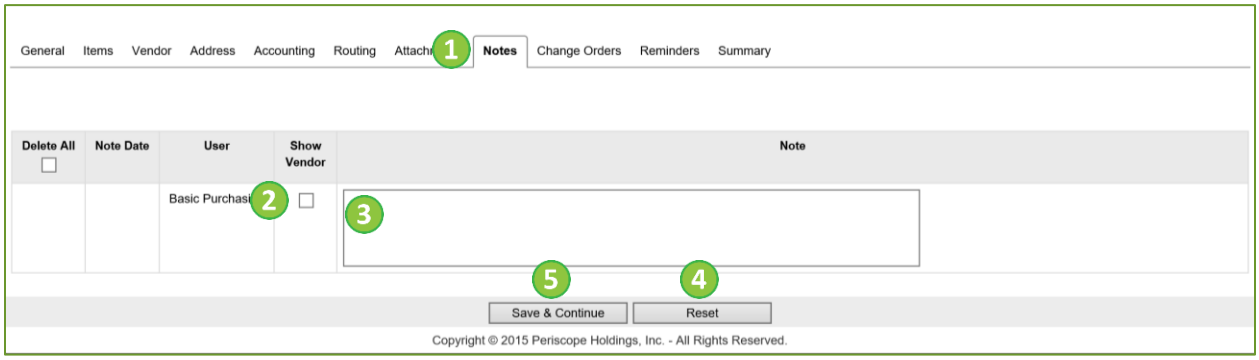
Notes Tab

The **Notes** tab allows the user to add, edit and delete notes to provide additional information or special instructions for internal users. Only the user may edit their note. These notes are attached to all items

Form appears in PDF default viewer to save, print, etc.

on the document. To add notes to specific items, go to the Items tab. A note is similar to a post-it note as an internal communication.

1. Select **Notes tab**
2. Click **Show Vendor** to display those notes on vendor purchase order
3. Enter **note text**
4. Click **Reset** to clear form
5. Click **Save & Continue** to save notes



Reminders Tab

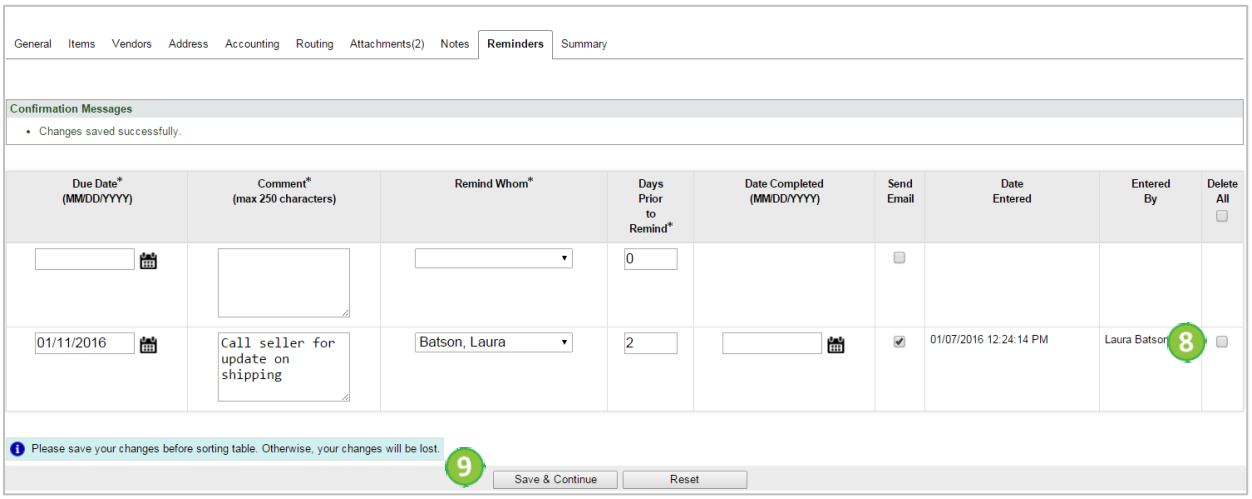
1. Select **Reminders** tab
2. Select **Due Date**
3. Enter **Comments**
4. Select **Remind Whom** from drop down list
5. Enter **Days Prior to Remind**
6. Select **Send Email** if desired
7. Click **Save & Continue** to save reminder

Purchase Order Reminders Field Descriptions

Field Name	Description
Due Date* (MM/DD/YYYY)	Using the calendar lookup icon, select the date the reminder is due and remind the BP users of expirations.
Comment*	Enter up to 200 characters of comment text
Remind Whom*	Using the dropdown menu, select the person to remind.
Days Prior to Remind*	Enter the number of days prior to the due date, the person should be reminded. The User can enter up to 9999.
Send Email	To send out an email reminder, place a check in the checkbox.

Field Name	Description
Date Entered	Displays the date and time the reminder was created.
Entered By	Displays the name of the person who created or edited the reminder.
Delete	When checked and the Save & Continue button is selected, the reminder is deleted from the vendor performance document.
Date Completed	The Date the user from the Remind Whom, has marked the reminder as being accomplished.

8. To delete a reminder, select **Delete**
9. Click **Save & Continue**



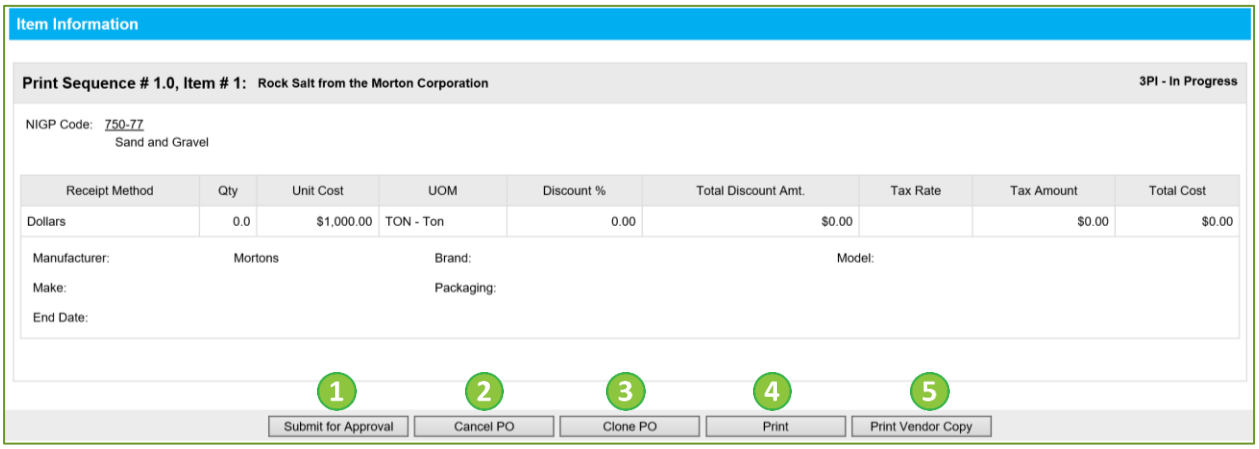
Submit Purchase Order for Approval (Standard Release)

The Summary Tab will feature all the data entered and selection choices by the user in the previous tabs. The Summary Tab gives the user an opportunity to review all applicable information and return to any given tab to edit errors or update with new information. Red validation errors do not allow you to process the Requisition until reconciliation. Yellow Errors are warnings, but allow you to process the Requisition.

1. At the bottom of Summary tab, click Submit (PO) for Approval to initiate approvals for the purchase order
2. Click **Cancel PO** to prevent any further action on the PO, or
3. Click **Clone PO** to create a copy of the PO as a new PO in progress, or
4. Click **Print** to print PO

5. Click **Print Vendor Copy** to print a copy for the seller

Vendor copy does not include accounting

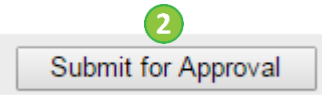


Submit for Approval

Upon completion of creating a purchase order the user submits the purchase order for approval by scrolling down to the bottom of the **Summary** tab.

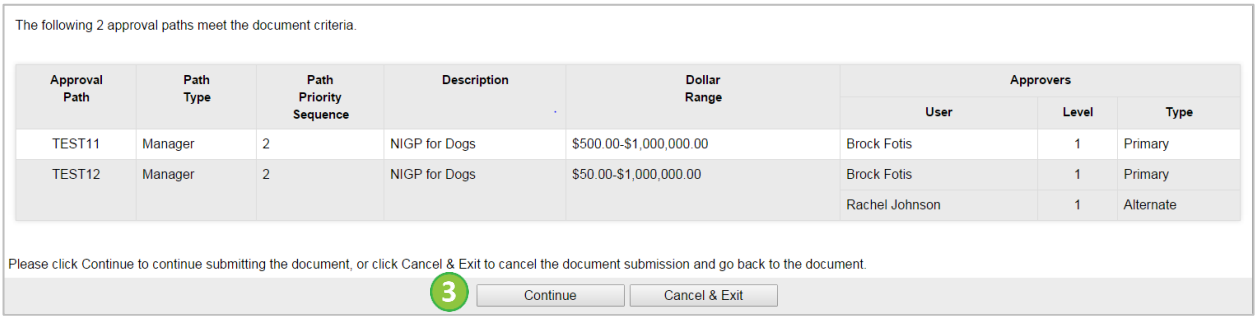
If there is an approval path associated with this document, the user will see the approvers and the status on the summary page.

1. Select **Summary** tab



2. Scroll-down to the bottom and click **Submit for Approval**

3. Click **Continue** to send approver email to approve

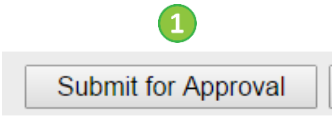


The sequence number is the order in which the approvers can approve the document.

When there is no approval path configured, the user is prompted to select:

- **Automatic Approval** – Selecting this will move a document to the Ready to Send status. This option is visible when no approval paths were triggered by the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual; clicks add approver and then save the approval (see example below).

1. From **Summary** tab, click **Submit for Approval**

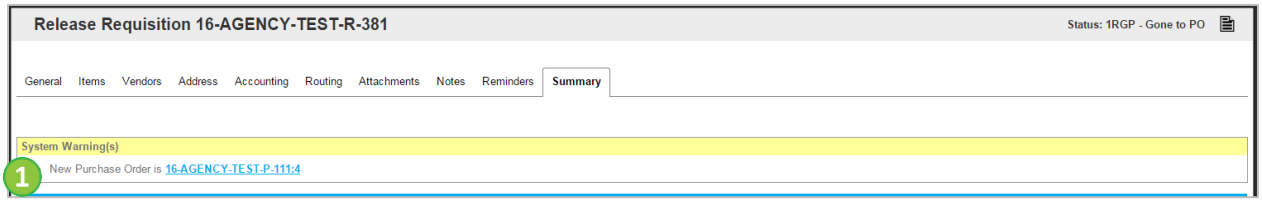


2. Select **Manually add approvers** to add additional approvers
3. Select **Approvers** from drop-down list and click **Add Approver**
4. Click **Save & Continue** to continue
5. Click **Cancel & Exit** to exit

Process Purchase Order (Direct Release)

Once a direct release is approved a PO is automatically created and sent to the vendor. The user may review all tabs for the PO but not update anything on an approved direct release PO, because the PO is in Sent status

1. From the Requisition Summary Tab, click **New Purchase Order** link

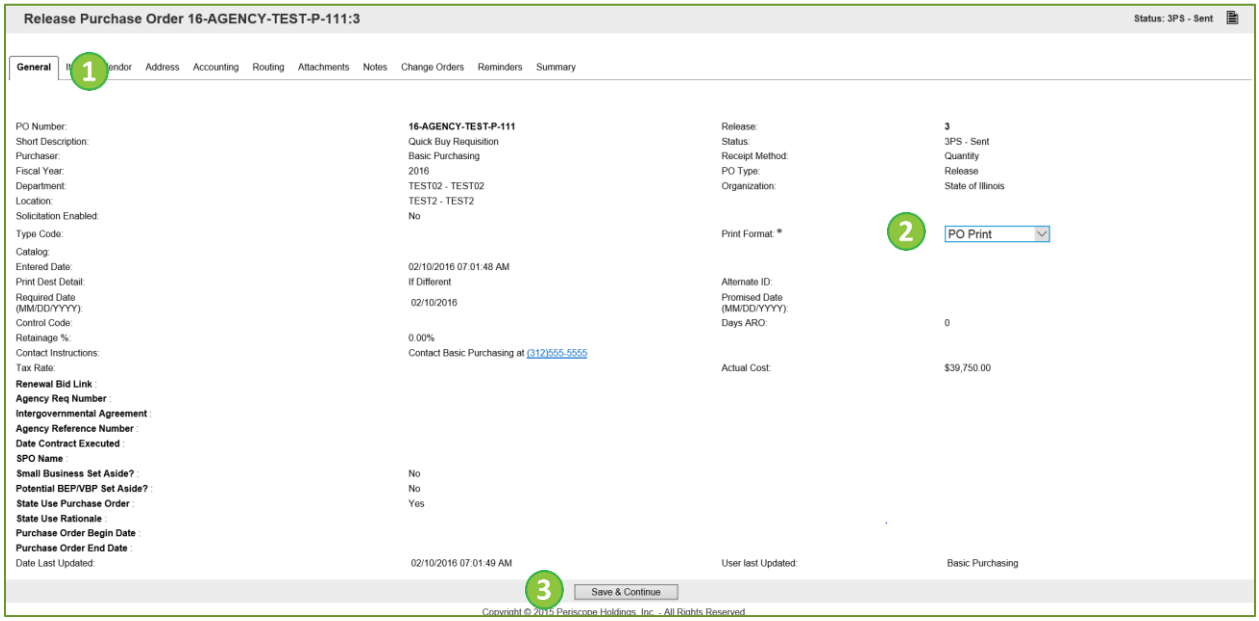


If there are multiple vendors, separate Purchase Orders are created. Both need to be processed.
The Requisition has moved to a Gone to PO status

The Direct Release Purchase Order is automatically processed to the "Sent" status .

General Tab (Review)

1. Select **General** Tab
2. Select **Print Format** from drop down if desired (system default is PO Print)
3. Click **Save & Continue** to continue

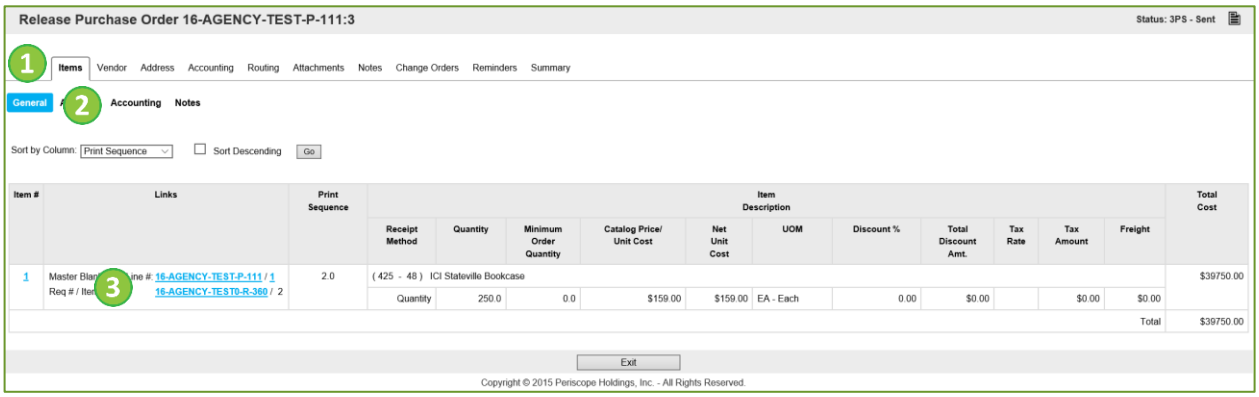


Items Tab (Review)

Items Tab: General

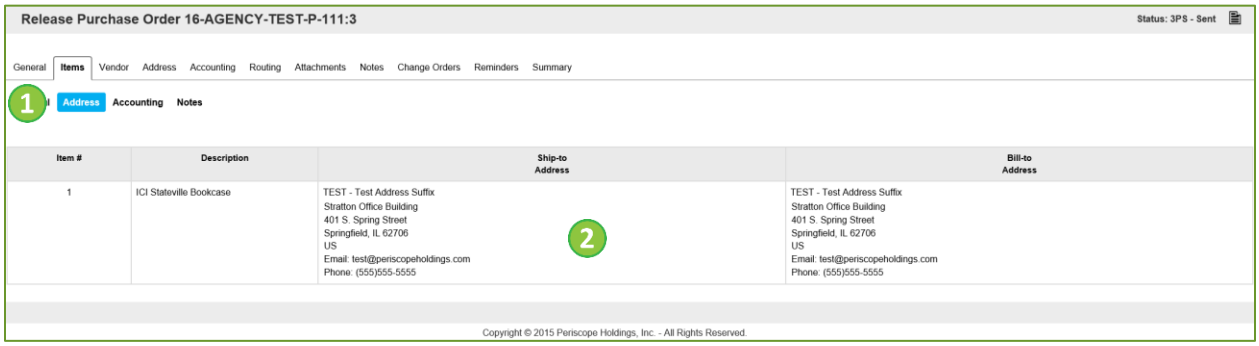
The items tab, general subtab contains the item information. Each additional subtab contains additional information that can be associated to specific items.

1. Select **Items** Tab
2. System will default **Items > General Sub-Tab**
3. Click ***HyperLinks*** to review original contract (s)



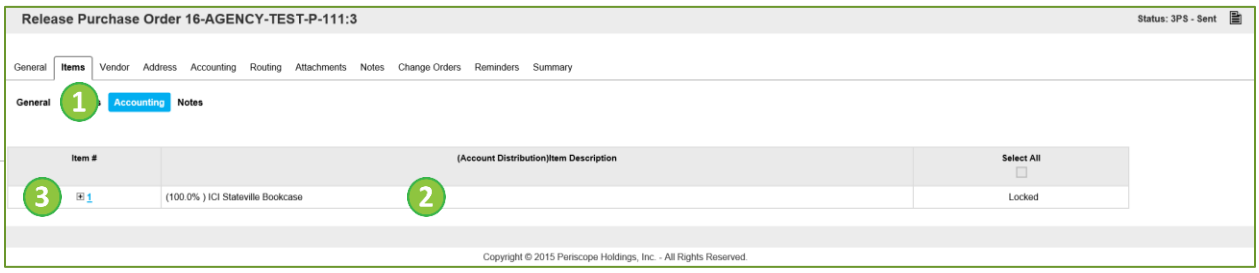
Items Tab: Address

1. Select **Items** > **Address** Sub Tab
2. View Address information



Items Tab: Accounting (Review)

1. Select **Items** > **Accounting** Sub Tab
2. View accounting information for this PO
3. Click **Item #** to review accounting distribution



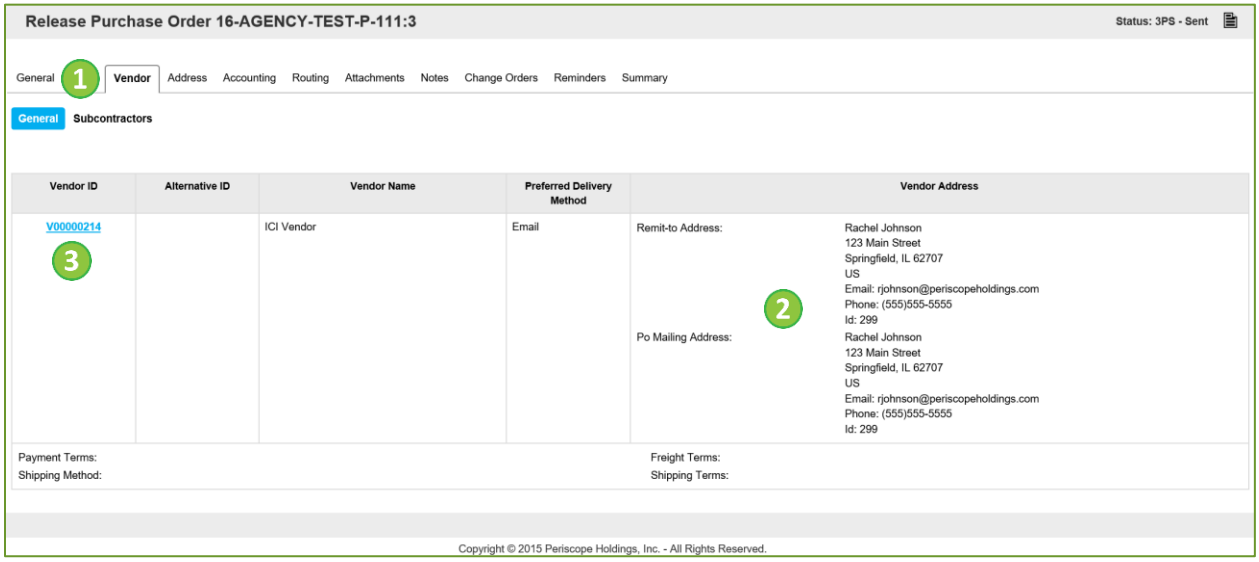
Items Tab: Notes (Review)

1. Select **Items** > **Notes** Sub Tab
2. Review notes
3. Click **Item #** to add notes

Vendor Tab (Review)

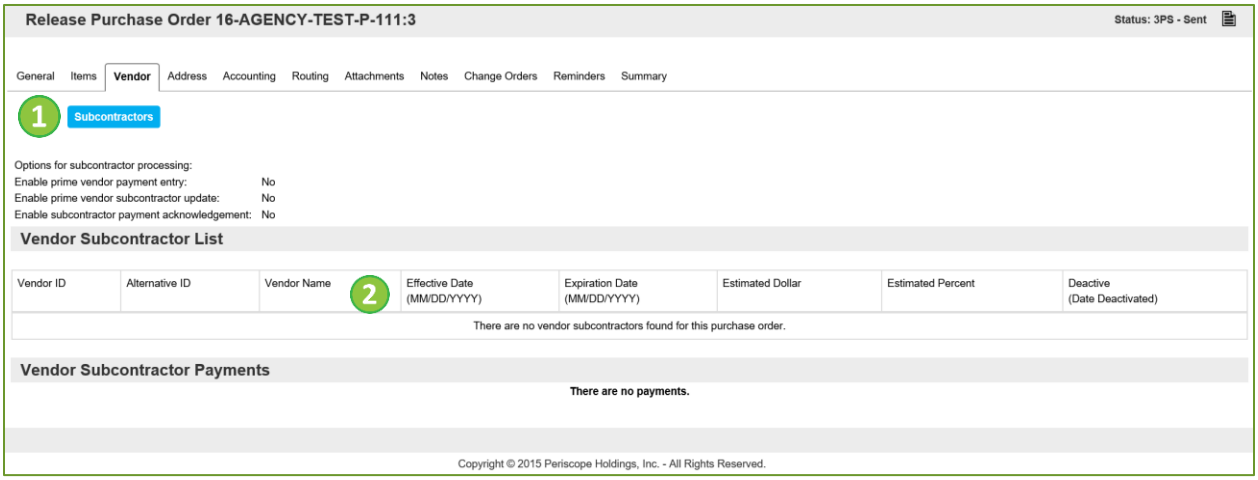
Vendor Tab: General (Review)

1. Select **Vendor Tab** > **General** Sub Tab
2. View vendor information for this PO
3. Click **Vendor ID** to review vendor details.



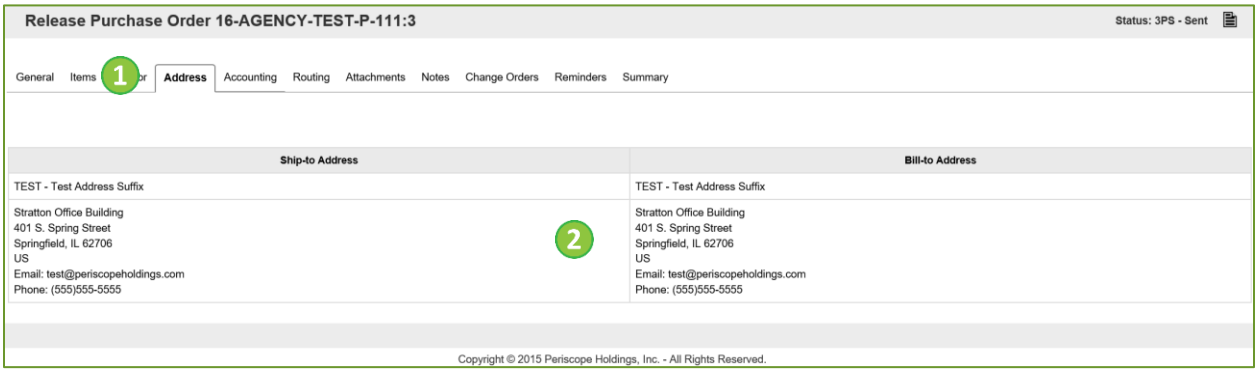
Vendor Tab: Subcontractor (Review)

1. Select **Vendor Tab** > **Subcontractor** Sub Tab
2. View subcontractor information



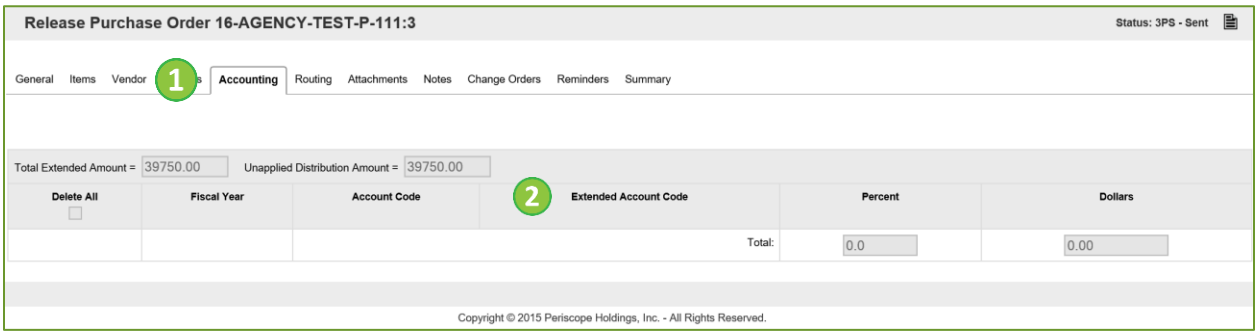
Address Tab (Review)

1. Select **Address Tab**
2. View address information



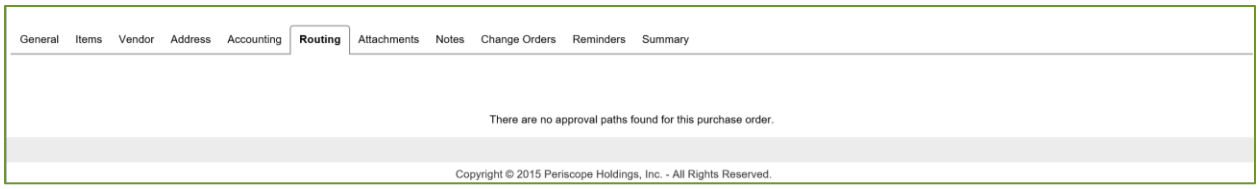
Accounting Tab (Review)

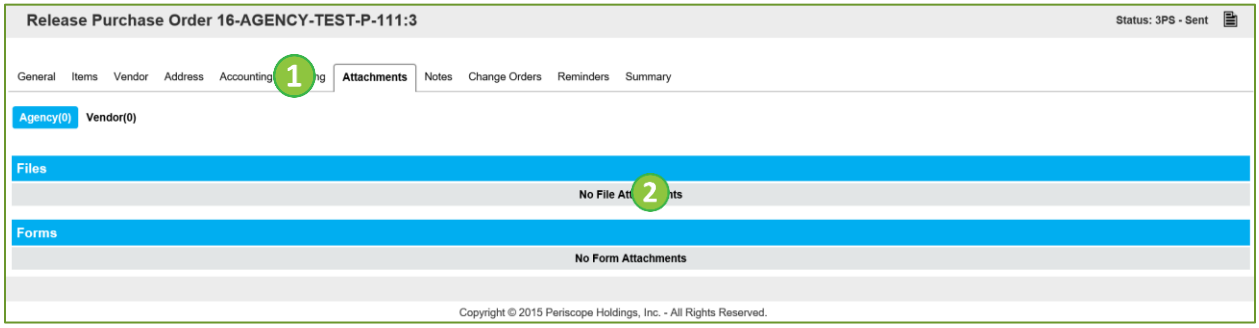
1. Select **Accounting Tab**
2. View Accounting distribution details



Routing Tab (Review)

A Direct Release PO does not attach approvals because it moves directly to Sent status.



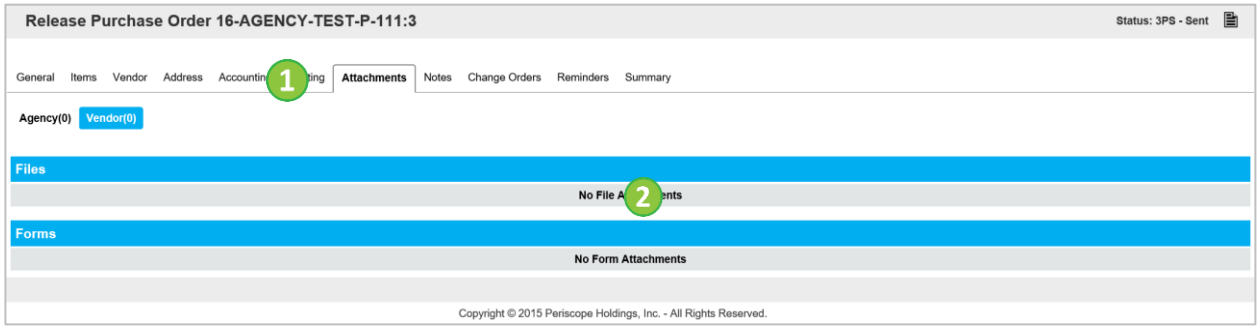


Attachment Tab (Review)

1. Select **Attachment Tab** > **Agency** Sub Tab
2. View attachments

Attachment Tab: Vendor (Review)

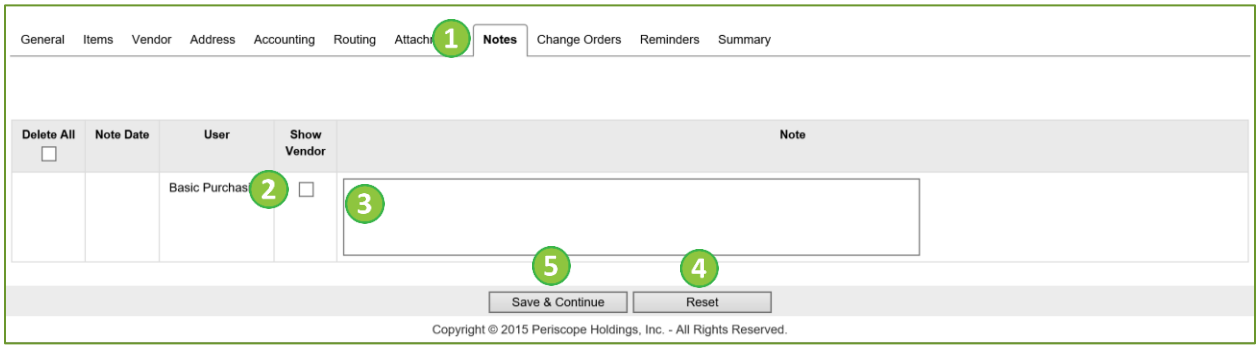
1. Select **Attachment Tab** > **Vendor** Sub Tab
2. View attachments



Notes Tab (Review)

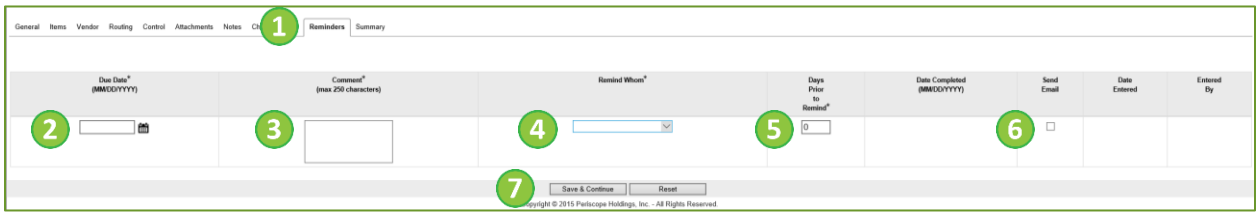
These notes are attached to all items of the purchase order. To add notes to specific items, go to the Items tab.

1. Select **Notes** tab
2. Click **Show Vendor** to display those notes on vendor purchase order
3. Enter note text
4. Click **Reset** to clear form
5. Click **Save & Continue** to save notes



Reminders Tab (Review)

1. Select **Reminders** tab
2. Select **Due Date**
3. Enter **Comments**
4. Select **Remind Whom** from drop down list
5. Enter **Days Prior to Remind**
6. Select **Send Email** if desired
7. Click **Save & Continue** to save reminder

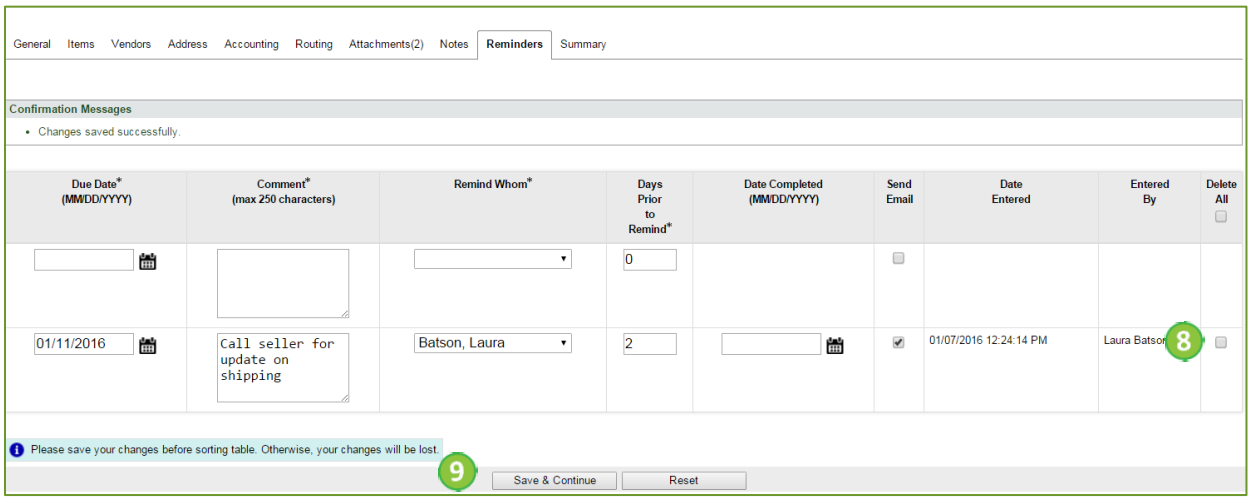


Purchase Order Reminders Field Descriptions

Field Name	Description
Due Date (MM/DD/YYYY)	Required. Using the calendar lookup icon, select the date the reminder is due.
Comment	Required. Enter up to 200 characters of comment what this reminder is about.
Remind Whom	Required. Using the dropdown menu, select the person to remind
Days Prior to Remind	Required. Enter the number of days prior to the due date, the person should be reminded. You can enter up to 9999.
Send Email	To send out an email reminder, place a check in the checkbox.

Field Name	Description
Date Entered Protected.	Displays the date and time the reminder was created.
Entered By Protected.	Displays the name of the person who created or edited the reminder.
Delete	When checked and the Save & Continue button is selected, the reminder is deleted from the vendor performance document.
Date Completed	Auto-populates to show the date of the Change Order

8. To delete a reminder, select **Delete**
9. Click **Save & Continue**



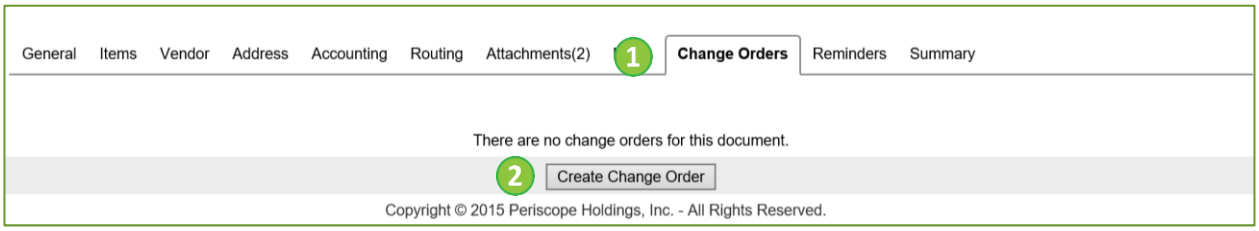
Change Order

Change Orders Tab

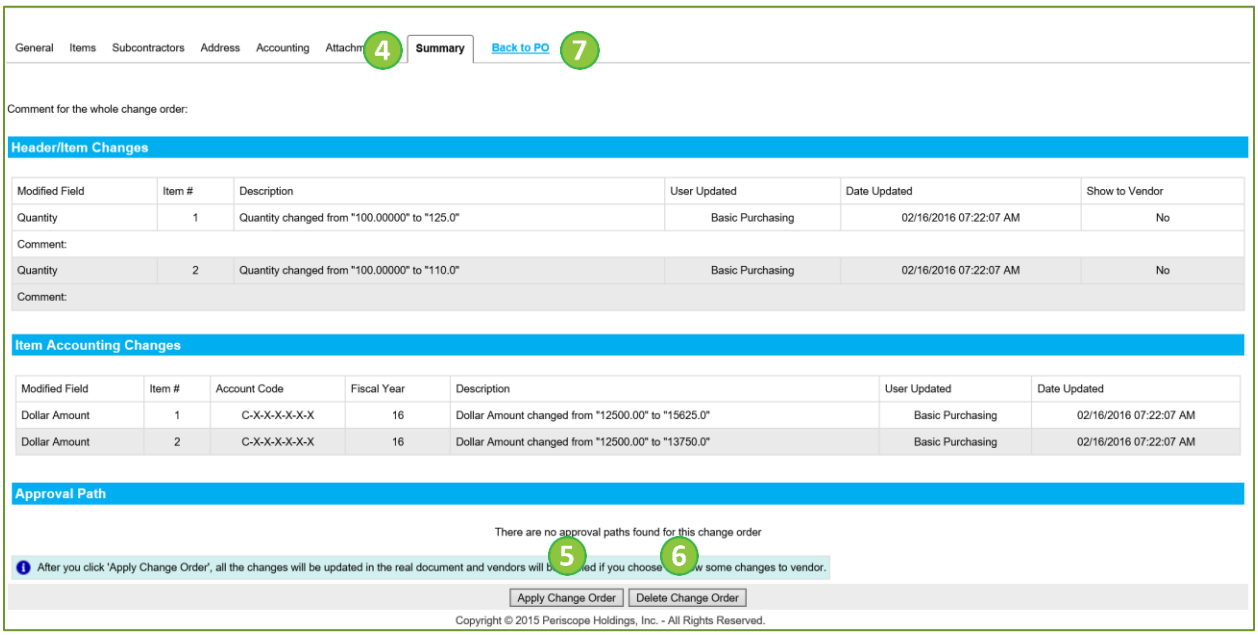
Change orders can only be applied after a purchase order has moved to Ready to Send or Sent status. The Change Order tab is used when the PO has been approved and changes need to be made.

The purchase order has to be approved and in Ready to Send or Sent status to initiate a change order.

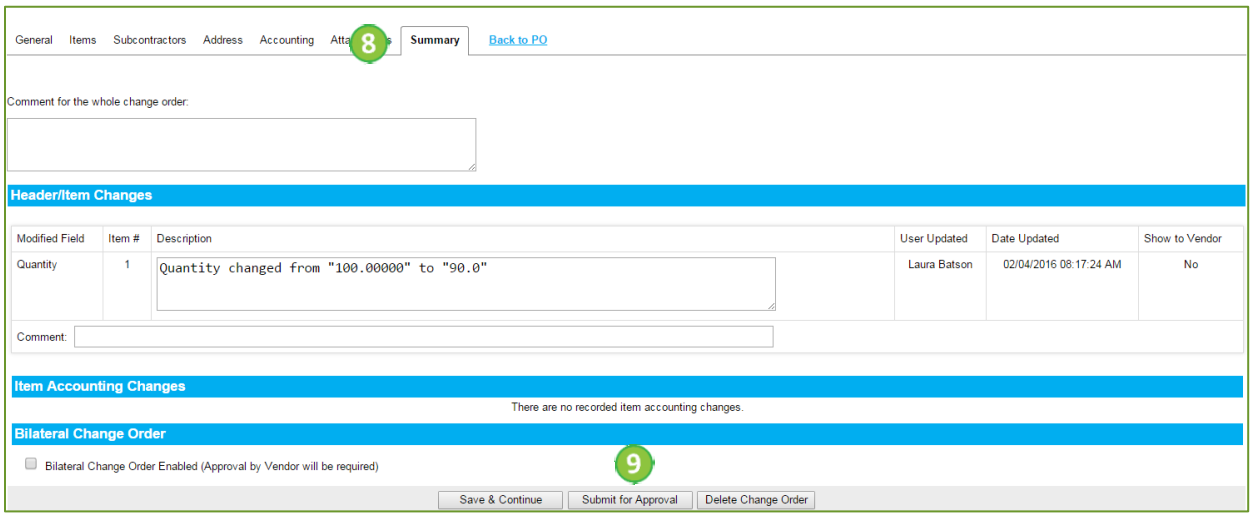
1. Select **Change Orders** tab
2. Click **Create Change Order**



3. Update various tabs (General, Items, Attachments, etc.)
4. The **Summary Tab** displays the summary of the change order.
5. To apply change order, click **Apply Change Order**
6. To delete change order, click **Delete Change Order**
7. Click **Back to PO** hyperlink to return to the original PO



8. Once all changes are made, select **Summary** tab
9. Click **Submit for Approval**



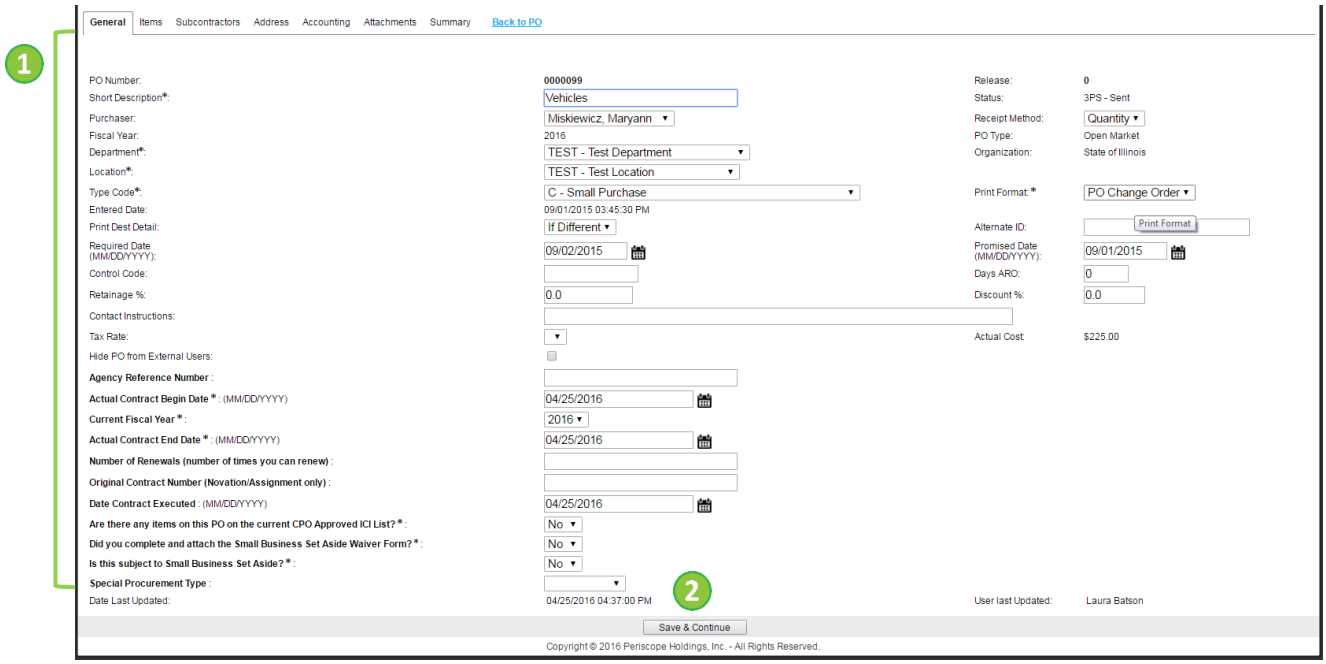
Update Change Order Tabs

General Tab

6. Update General information for the CO

> **See Purchase Order General Field Descriptions Table. All fields with an Asterisk* are required.**

7. Click **Save & Continue**



Purchase Order General Field Description

Field Name	Description
PO Number	System generated number:
Short Description	Short Description helps the user identify or locate the document. Use complete words, not abbreviations. Start with alpha agency identifier, and then describe the item to be procured. Noun, Adjectives.
Department	The department that is managing the contract.
Location	The location within the department managing the contract.
Type Code	These are defined by your agency
Intergovernmental Agreement	Select from drop down list (Yes / No)
SPO Name	Select the State Procurement Office for the PO
State Use Rationale	Describe the rationale for using State Use or not
Purchase Order Begin Date	Select a begin date for Blanket. This is the date that the contract should be available for ordering.
Purchase Order End Date	Select an end date for the Blanket. This is the date that the

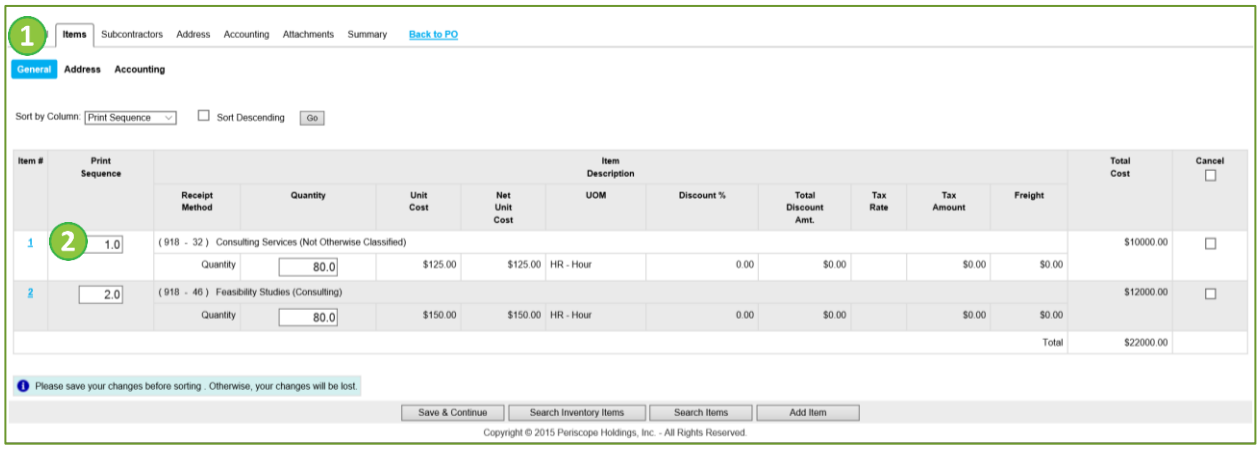
Field Name	Description
	contract is no longer available for ordering.
PCard	Not used by the State
Print Format*	Use Default – PO Print
Entered Date	This will populate when the document is saved.
Print Dest	Detail Choose if addresses for items going to different destinations print out on the PO: if different, never select, always. Use default.
Alternate ID	Agency defined alternate ID field. The length of this field is determined by system settings. The field length can be from 0 to 50 characters. CAUTION: the alternate id field may be used by interface processing. Beware deleting or changing data within the alternate ID field as it may cause invalid data or errors during the interface processes. **Not to be updated by the user.**
Required Date	The date and time by which the originator requested that delivery of the items on this purchase order be delivered. **This is typically defined at the contract, so no input is necessary.**
Promised Date	The date by which the vendor must deliver the goods. **This is typically defined at the contract, so no input is necessary.**
Control Code	Agency defined control code.
Days ARO	The number of days after receiving this order by which the vendor should deliver the goods.
Retainage %	Not used by State.
Discount %	Percentage of discount to be applied to PO.
Contact Instructions	Defines contact for the document.
Tax Rate	Not used by State
Actual Cost	The total cost of all the items on this purchase order, including any applicable tax, freight, or discounts.
Invoice Method	Not used by State
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

Items Tab

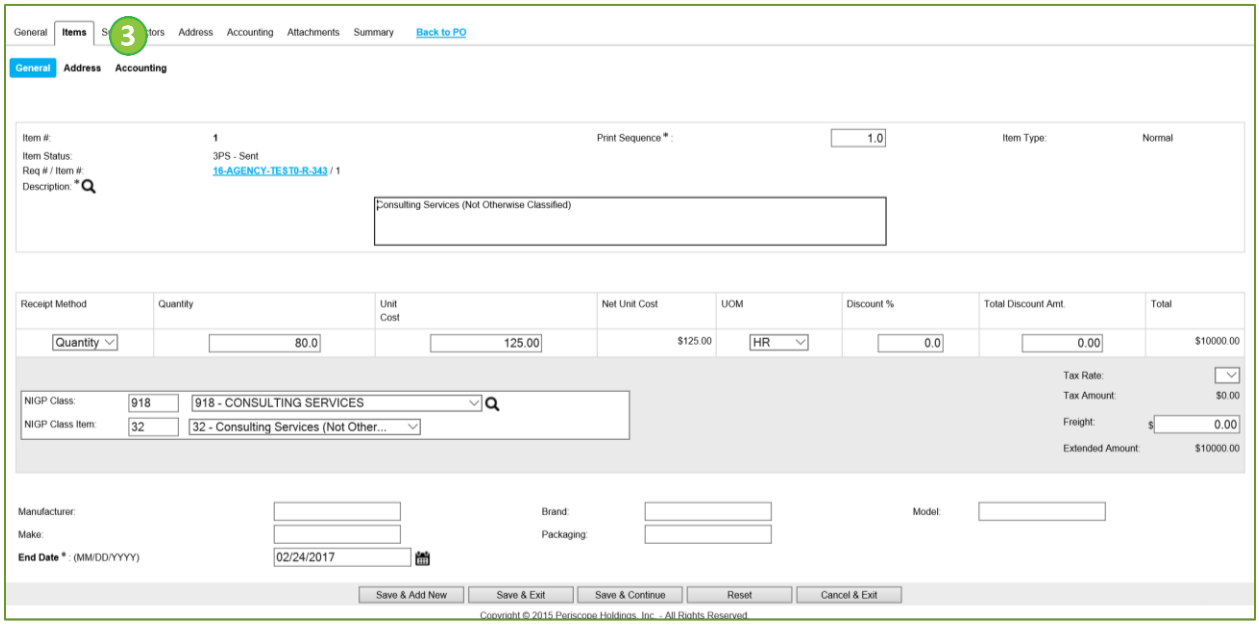
Items Tab: General

1. Select **Items** tab to review items in CO

2. Click **Item #** to update item information



3. Update information on Item Details Screen
4. Click **Save & Exit**



Purchase Order Item Field Descriptions

Field Name	Description
Item #	The order in which items are entered and are sequentially listed by BidBuy. This field cannot be modified by the user.
Print Sequence*	The order in which the items will be displayed. The item # is the default value for this field. The user can change this field if the print sequence needs to be different from the item number sequence.

Field Name	Description
Item Type	The user can select *Normal* or *Narrative* as the type. Selecting *Narrative* will make it a non-item addition where the user can type in text to appear on the purchase order.
Item Status	The status of the item on the Requisition.
Description*	The description of the item as defined by the user. Use complete words, not abbreviations, NIGP description, where applicable, broad description, then detail (e.g. Lettuce, spring mix; service example: Maintenance, Repair, HVAC.) NOTE: This is a searchable field for blanket contracts using Quick Buy. Use a searchable description.
Quantity	The Quantity of the item being requested. The user can type the amount of the item that is needed. The default value is zero.
Unit Cost	An estimated unit cost per item.
Net Unit Cost	Net unit cost per item is the Unit Cost – Discount % amount for unit cost.
UOM	User selects a unit of measure from the drop-down menu**. Reference Appendix A: Unit of Measure Descriptions, page 80.**
Discount %	Used if there is a percentage discount applicable to the item.
Total Discount Amt.	The Total Discount Amount, based on the Discount %. This value is calculated automatically by the system based on the Discount % value entered by the user. The value will not appear until the user tabs out of the Discount % field. The user can also manually type in a discount amount without entering a Discount %. The value must be negative for it to be deducted from the total.
Total	The Total Cost before tax. This value is calculated automatically. The formula used is: (Quantity x Unit Cost) – Total Discount Amount. The user cannot edit this field.
NIGP Class*	The three-digit Class Code associated with the item. Class Codes are listed on the pulldown menu in alphabetical order or through the search feature.
NIGP Class Item*	The two-digit Class Item associated with the item. Class items are listed on the pulldown menu in alphabetical order or through the search feature.
Commodity Code	Completes the full 11-digit NIGP code
Tax Rate	The State is not using Tax Rate.
Tax Amount	The State is not using Tax Amount.
Freight	The amount of Freight applied to this item.
Extended Amount	The Total Extended Amount of the item. This value is calculated automatically. The formula used is: Total + Tax Amount + Freight. The user cannot edit this field.
Manufacturer	Optional field.
Brand	Optional field.
Model	Optional field.
Make	Optional field.
Packaging	Optional field.
Receipt Method	Not used by State
Custom Columns	Any fields visible on the screen that are not referenced in this manual or the online help, may be custom columns or fields created and maintained by the Internal or Organization Administrators. For additional information on those fields, reference the Custom Column Quick Reference Guide.

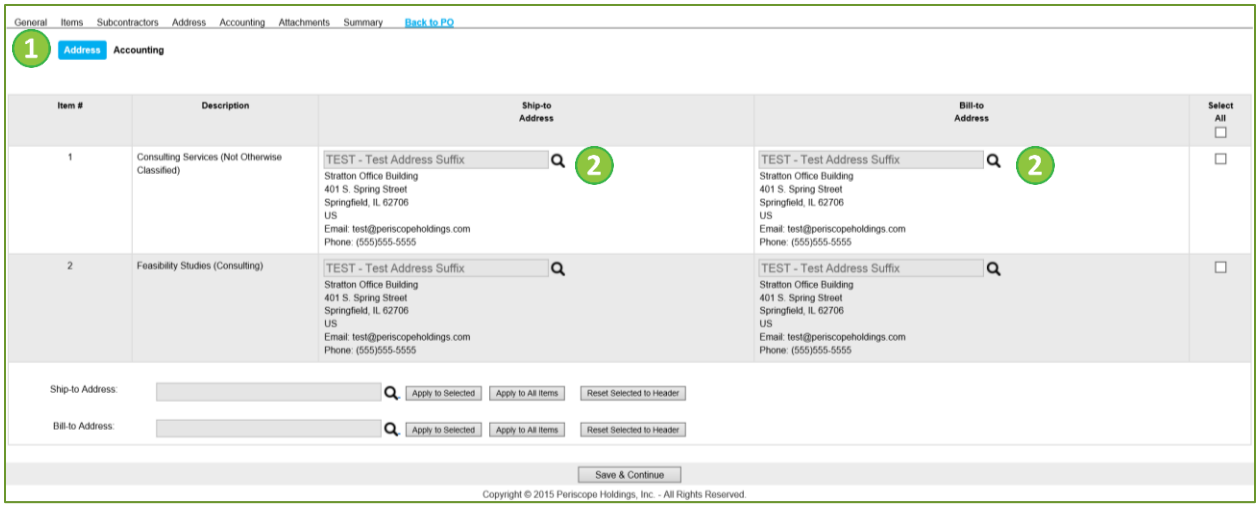
Items Tab: Address

This allows shipping and billing addresses for specific items. To assign shipping and billing addresses for all items go to the main Address tab for the purchase order.

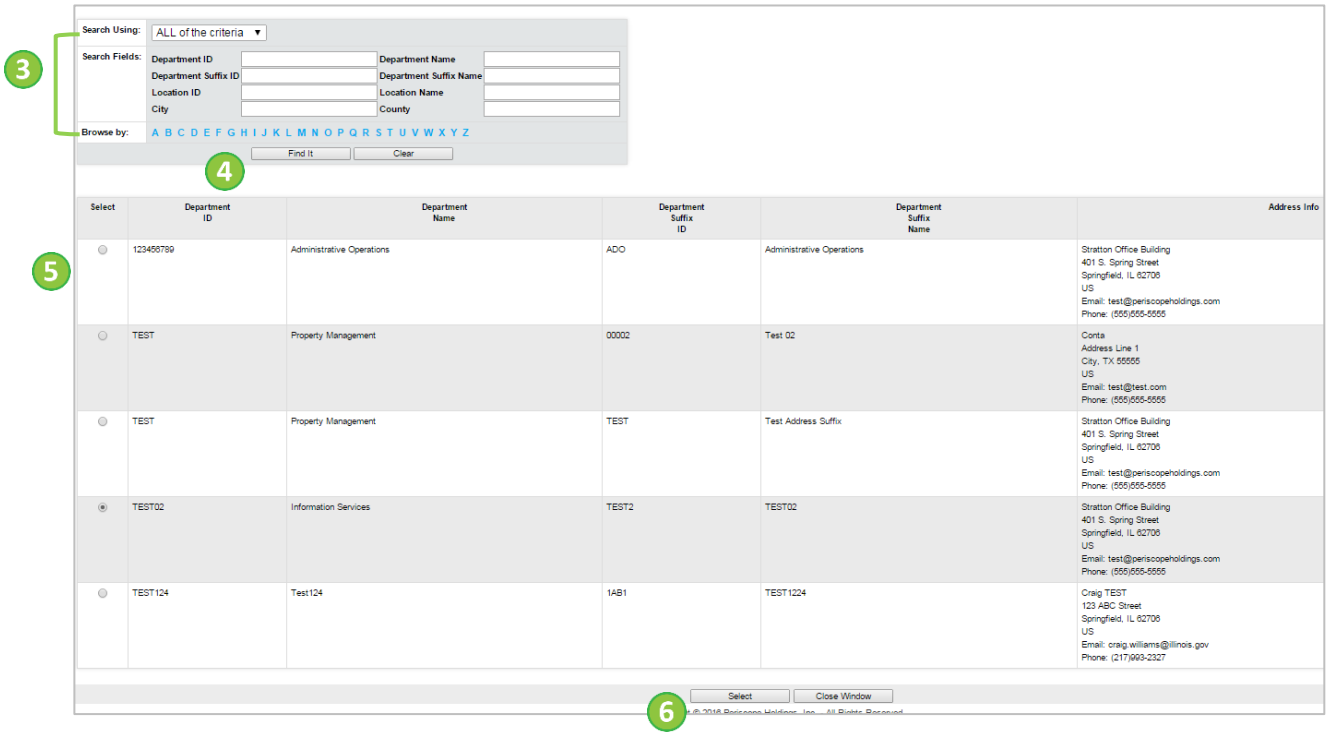
1. Select **Address** sub-tab

Default address information from the Address header displays.

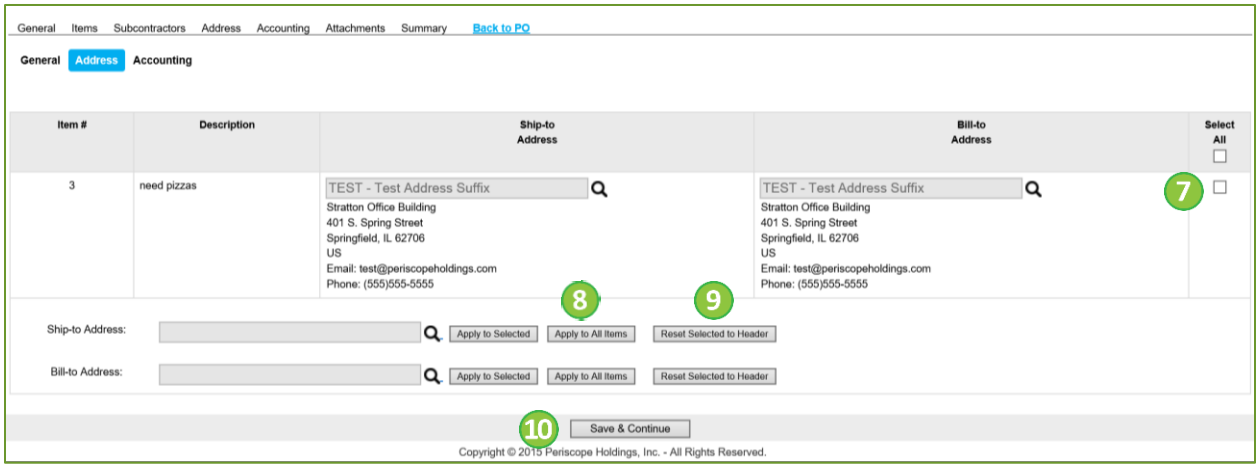
2. To change **Ship-to** or **Bill-to-Address**, click to search for new address
3. Enter Search Criteria



4. Click **Find It**
5. Select a new address
6. Click **Select** to update address



7. Select item(s) to change address (Ship/Bill to Address)
8. Click **Apply to Selected** to apply changes to only selected items or click **Apply to All Items** to apply changes to all items
9. Click **Reset Selected to Header** to reset all addresses to default from **Item Master**
10. **Save & Continue** to save changes and continue



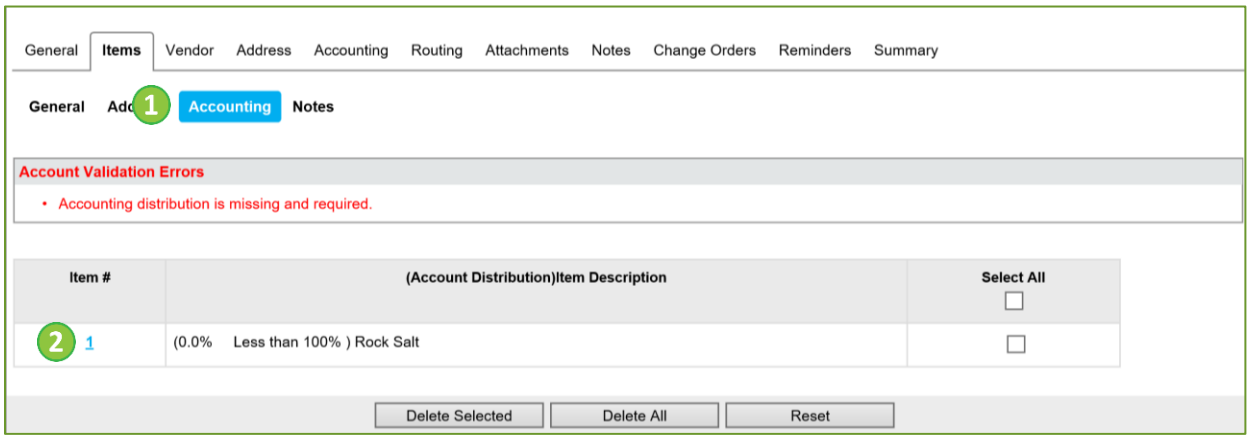
Items Tab: Accounting

The Item's Accounting sub-tab allows the user to change accounting information for specific items. To add the same accounting information to all items, go to the main Accounting tab for the purchase order.

1. Select **Accounting** sub-tab

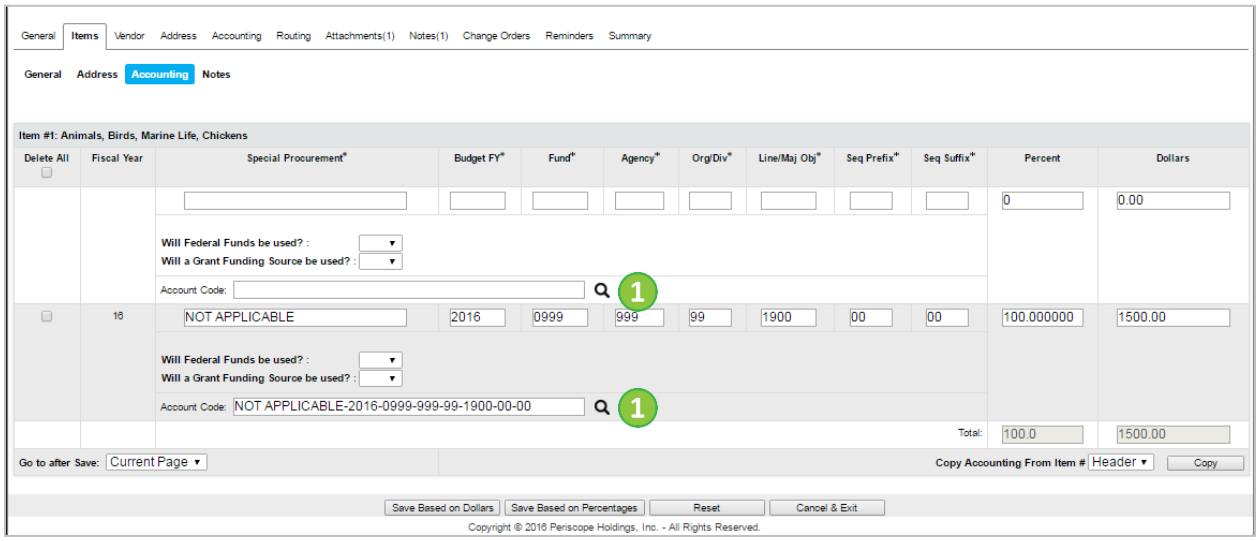
Default accounting information from the item master displays.

2. Select Item # to update accounting information

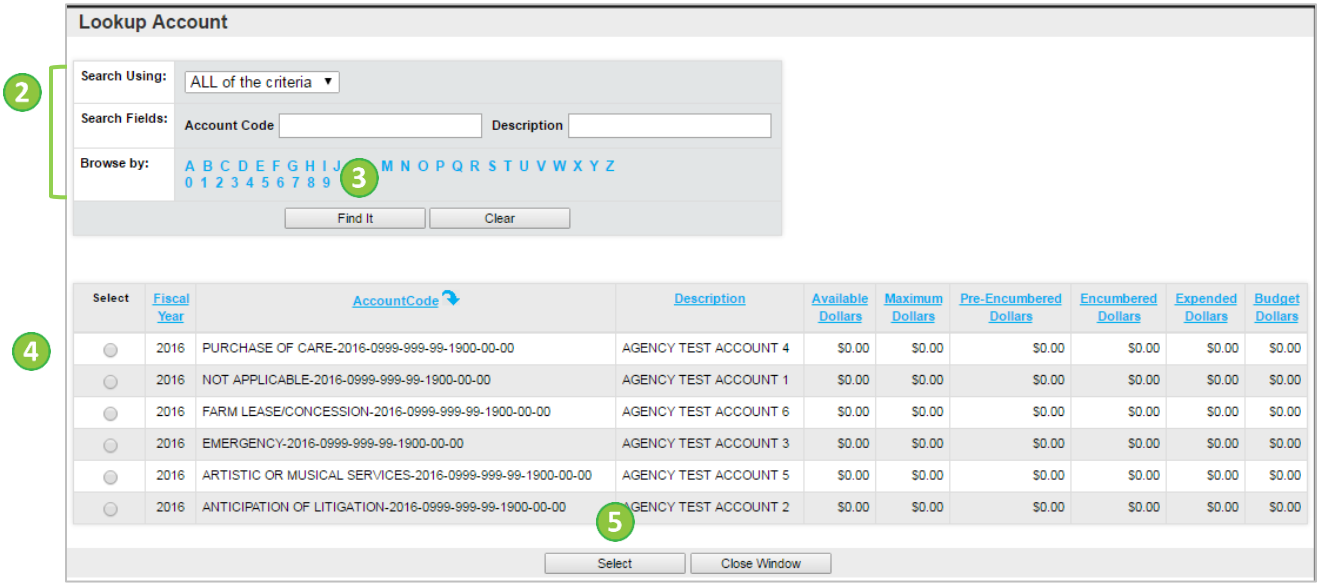


Add or change Account Code

1. Click 🔍 to search for **Account Code**

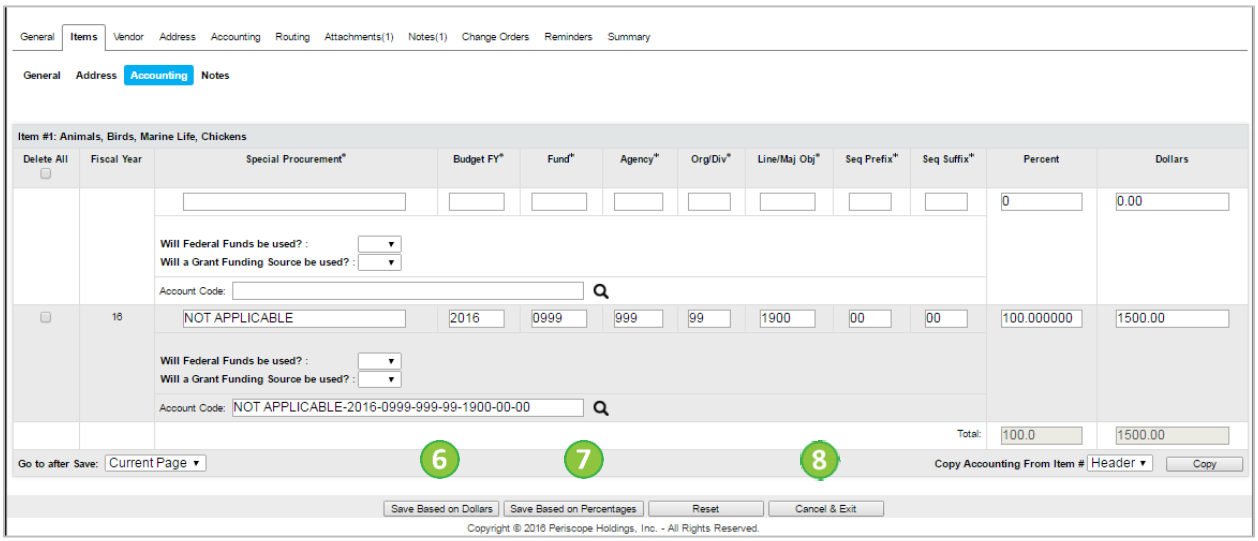


2. Enter search criteria
3. Click **Find It**
4. Select **Account Code**
5. Click Select



6. Click **Save Based on Dollars –** to save based on dollar amount entered, or
7. Click **Save Based on Percentages –** to apply changes and save based on percentages entered

8. Click **Cancel & Exit** to exit without saving



Attachments Tab

Both files and forms (when Form Builder is enabled) can be attached by the agency (BP user) or by the vendor (Seller user) on the purchase order. The user may also change those attachments when creating a change order.

Attaching files to BidBuy documents is a useful way to include specifications or other guidelines in procurement documents. The user can attach multiple files such as documents, spreadsheets, memoranda, etc. and can use the **Attachment** Tab to upload the files.

The Add Form button allows the agency to attached predefined published forms. Only those forms that are published for the organization (agency) with the specific document type and specific user role can be attached to the specific document. **(See page 50 for details).**

For form and file information from CMS and the CPO-GS, see the Attachment Appendix.

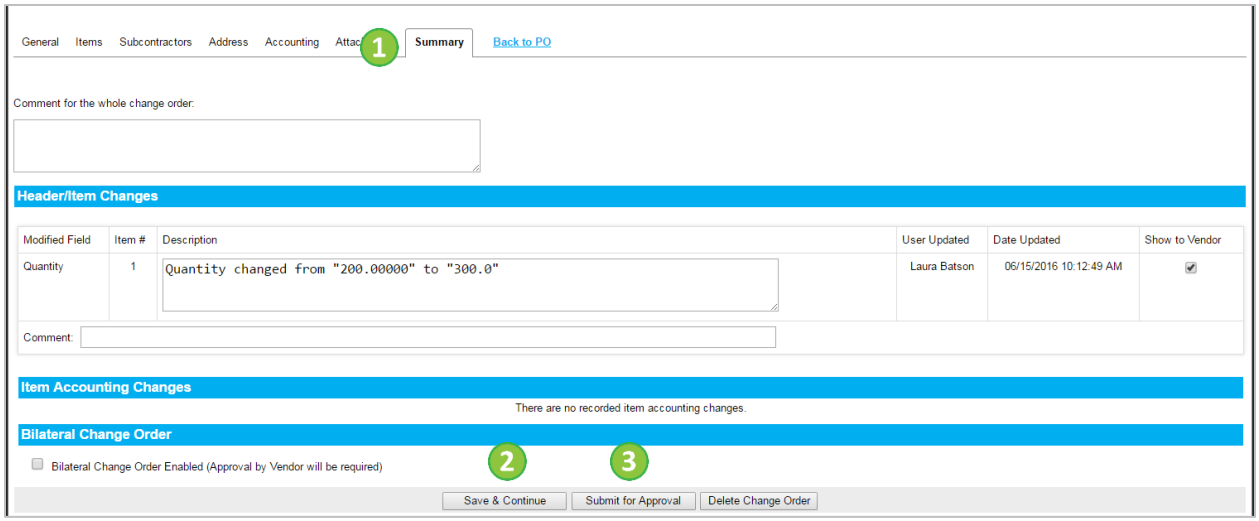
Submit CO for Approval & Apply the CO

Summary Tab

Once changes are made to the change order, they will be listed on the summary page. All the changes are listed for review.

Upon completion of creating a change order the user submits the purchase order for approval by scrolling down to the bottom of the **Change Order Summary** tab.

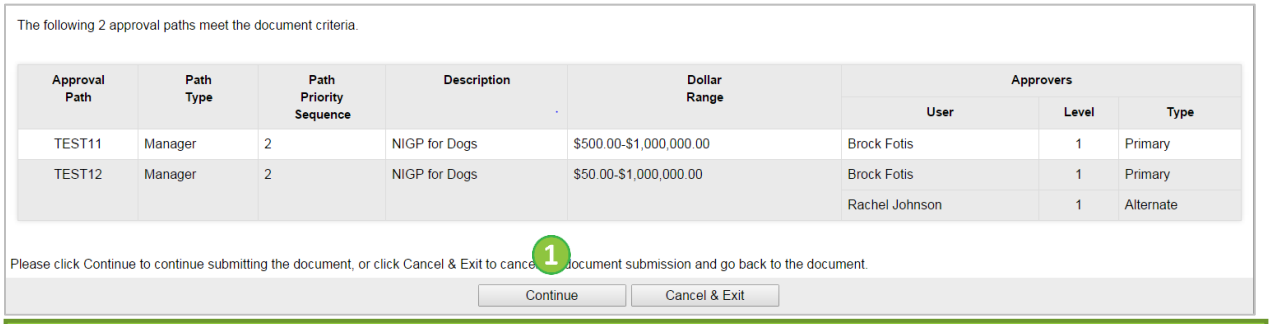
1. Select **Change Order Summary** tab
2. Scroll-down to the bottom and click **Save & Continue**
3. Click **Submit for Approval**



Change Order Approval

If there is an approval path triggered by this document, the user will see the approvers and the status on the summary page.

1. Click **Continue** to send approver email to approve

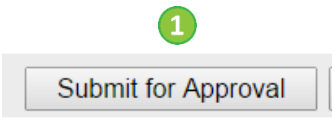


The sequence number is the order in which the approver can approve the document.

When there is no approval path configured, the user is prompted to select:

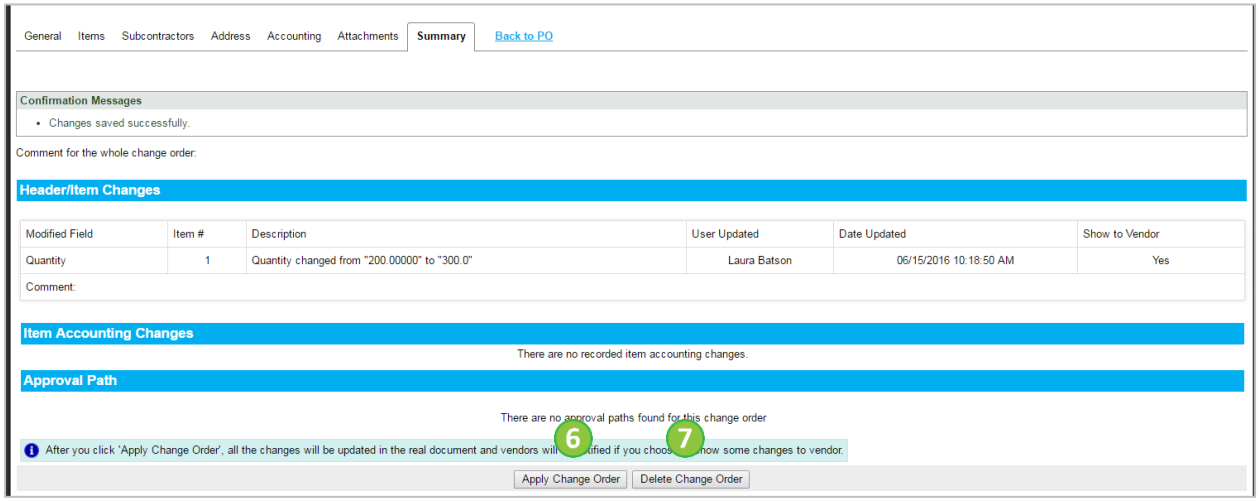
- **Automatic Approval** – Selecting this will make it possible to next apply the change order. This option is visible when there are no configured approval paths on the document.
- **Manually Add Approvers** – Requires the user to choose from a drop down list with individuals designated as approvers. The user selects an individual; clicks add approver and then save the approval (see example below).

1. From **Summary** tab, click **Submit for Approval**



2. Select **Manually add approvers** to add additional approvers
3. Select **Approvers** from drop-down list and click **Add Approver**
4. Click **Save & Continue** to continue
5. Click **Cancel & Exit** to exit

6. Click **Apply Change Order** to apply to PO
7. Click **Delete Change Order** to delete CO



You must apply the Change Order after it is approved or the PO will not reflect the changes.

Appendix A: Unit of Measure Descriptions

BidBuy UOM	Unit of Measure Description	BidBuy UOM	Unit of Measure Description
ACR	Acre	M	Meter
AU	Activity Unit	MI	Mile
BAG	Bag	ML	Milliliter
BAR	Bar	MM	Millimeter
BT	Bottle	MON	Month
CAN	Canister	PRS	Person
CAR	Carton	OZ	Ounce
CV	Case	PAL	Pallet
CM	Centimeter	%	Percentage
CRT	Crate	PC	Piece
CCM	Cubic centimeter	PT	Pint
FT3	Cubic Foot	QT	Quart
"3	Cubic Inch	S	Second
YD3	Cubic Yard	FT2	Square foot
DAY	Days	"2	Square inch
DZ	Dozen	YD2	Square Yard
DR	Drum	TS	Thousands
EA	Each	GAL	US Gallon
FOZ	Fluid Once	LB	US Pound
FT	Foot	TON	Ton
G	Gram	WK	Week
GRO	Gross	YD	Yard
HR	Hour	YR	Year
"	Inch		
KG	Kilogram		
KM	Kilometer		
L	Liter		

Appendix B: Forms By Process

Procurement Document						Procurement Method													
						IFB	RFP	RFI Lse	Emr/ Ext	Sol Sro	St Use	Lse/ Cono	QBS	RFI	Sml	Dem Req	Ord Off Mast	Chg Ord	Rnw
BidBuy Document	Owner	Document Name	Type	Location	Show Y/N	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Requisition	CPO-GS/CMS	Cloud Computing Check Sheet	Attach	https://www.illinois.gov/cpo/general/Documents/20140812%20Open%20Operating%20Standards%20Act%20-%20Cloud%20Checklist%20.pdf	N	X	X		X	X				X	X				
Requisition	CMS	IT Governance	Attach	http://www.illinois.gov/bcc/services/governance/Pages/default.aspx	N	X	X			X									
Requisition	CMS	New Furniture Purchase Form (Surplus Waiver)	Attach	https://cmc.partner.illinois.gov/lopr/Forms/Documents/New%20furniture%20purchase%20form.pdf	N	X	X		X	X	X				X		X	X	X
Requisition	CMS	Non-Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Requisition	CMS	Service Procurement and Contracting Checklist	Attach	https://cmc.partner.illinois.gov/lopr/Forms/Documents/Labor%20Relations%20Checklist%20March%202014.pdf	N	X	X		X	X	X		X		X		X	X	X
Requisition	PPB	Sole Source Form (part 1)	PPB Doc	http://www.illinois.gov/ppb/Documents/SS-IF%20140301%20V5.1%20for%20Dist.docx	Y					X									
Requisition	CMS	Space Req Form	Attach	CMS	N			X											
Requisition	CMS	State Use Committee Approval Form	Attach	CMS	N						X								
Requisition	CMS	Usage Fleet Request	Form	BidBuy	N	X	X		X	X							X		
Bid	CPO-GS	(Solicitation) IFB	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X													
Bid	CPO-GS	(Solicitation) P & A	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y		X												
Bid	CPO-GS	(Solicitation) QBS	Attach		Y								X						
Bid	CPO-GS	(Solicitation) RFP	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/SiteAssets/Pages/SolicitationandContractTemplates/RFP%20Template%20V.16.1.docx	Y		X												
Bid	CDB	266 Submittal Form	Attach	http://www.illinois.gov/cdb/business/library/Documents/266%20FORM.pdf	Y								X						
Bid	Agency	Agency Vet Form	Attach	Agency	N	X	X						x						

Bid	CMS	BEP Exemption Decision Memo	Attach	https://oms.partner.illinois.gov/topr/PR/ProcurementResourcesDocuments/Decision%20Memo_BEP%20Subcontracting.doc	N	X	X						X						
Bid	CMS	BEP Subcontract Goal Setting	Attach	https://oms.partner.illinois.gov/topr/PR/BEPGoalSetting/NEW%20CMS%20Goal%20Setting%20Worksheet%20revised%2004-14.xlsx	N	X	X						X						
Bid	CPO-GS	BEP Utilization Plan	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X					X	X						
Bid	CPO-GS	Change Order Justification	Form	BidBuy	N													X	
Bid		Emergency Affidavit	Attach		Y				X										
Bid	CPO-GS	Emergency Extension Justification/Hearing Notice	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y				X										
Bid	CPO-GS	Forms A	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X			X	X
Bid	CPO-GS	Forms B	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X			X	X
Bid	CPO-GS	ICI Waiver	Form	BidBuy	N	X	X			X					X				
Bid	CPO-GS	Letter of Intent BEP - CMS	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X						X			X			
Bid	CPO-GS	Notice of Award/Justification	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X					X	X		X				X
Bid	CPO-GS	QBS Rank Order Form	Form	BidBuy	Y								X						
Bid	PPB	Renewal Questions for over $250,000 (PPB) Form	Attach	http://www.illinois.gov/ppb/Documents/ExtOrRen250_110610.pdf	Y														X
Bid	CPO-GS	Small Business Set Aside Waiver	Form	BidBuy	N	X	X		X	X	X	X			X	X			
Bid	PPB	Sole Source Form (part 2)	PPB Doc	http://www.illinois.gov/ppb/Documents/SSJF%20140301%20V5.1%20for%20Dist.docx	Y					X									
Bid	CPO-GS	Sole Source Hearing Notification	Attach		Y					X									
Bid	CPO-GS	Standard Certifications (Terms and Conditions)	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y	X	X		X	X	X	X	X		X				
Bid	Agency	Supplemental Terms and Conditions	Attach	Agency	Y	X	X		X	X	X	X	X		X				X

Bid Tabulation & Award	CMS	BEP Waiver (If needed due to good faith effort)	Attach		N	X	X						X						
Bid Tabulation & Award	CPO-GS	Non-Responsive Vendor Determination	Form	BidBuy	N	X	X					X	X		X				
Bid Tabulation & Award	CPO-GS	Procurement File Checklist	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X												X
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Emergency	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N				X										
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Order Against Master	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N												X		
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Small Purchase	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N										X				
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Sole Source	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N					X									
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - Solicitations	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	x	x					x	x			x			
Bid Tabulation & Award	CPO-GS	Procurement File Checklist - State Use	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N						X								
Bid Tabulation & Award	CPO-GS	Responsiveness Review Checklists - IFB	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X													
Bid Tabulation & Award	CPO-GS	Responsiveness Review Checklists - RFP	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N		X												
Bid Tabulation & Award	CPO-GS	Scoring Justification	Attach		N		x			X			X						
Purchase Order	CPO-GS	BOA Orders Against Master	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx/general/Pages/DoingBusinesswithStateAgencies.aspx	N												X		
Purchase Order	CPO-GS	BOA Over 50,000	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X		X	X	X	X	X		X	X			
Purchase Order	CPO-GS	BOA Under 50,000	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N										X				
Purchase Order	CPO-GS	Continuing Disclosure - Change	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N													X	X
Purchase Order	CPO-GS	Continuing Disclosure - No Change	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N													X	X
Purchase Order	CPO-GS	Contract Renewal	Attach	http://www.illinois.gov/cpo/general/Pages/DoingBusinesswithStateAgencies.aspx	N														X

Purchase Order	CPO-GS	Emergency Extension Hearing Determination	Attach	http://www.illinois.gov/opo/general/Pages/DoingBusinesswithStateAgencies.aspx	Y				X										
Purchase Order	Agency	3-Signature Form	Attach	Agency	N	X	X		X	X	X		X			X	X	X	X
Purchase Order	CPO-GS	Financial Disclosures & Conflict Of Interest	Attach	http://www.illinois.gov/opo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X		X	X	X	X	X		X		X	X	X
Purchase Order	DOL	Prevailing Wage Certificate	Attach	http://www.illinois.gov/idol/forms/Documents/Prevailing%20Wage%20Certification%20Form.pdf	N	X	X	X	X	X		X	X	X				X	X
Purchase Order	CPO-GS	Stand Alone Contract	Attach	http://www.illinois.gov/opo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X	X	X	X	X	X	X		X				X
Purchase Order	CPO-GS	Standard Amendment to Vendor Form	Attach	http://www.illinois.gov/opo/general/Pages/DoingBusinesswithStateAgencies.aspx	N	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Appendix C: Custom Columns

Requisition

Column Label*	Column Description	Document Tab
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Special Procurement Type: If any yes, please complete and attach the applicable Form or Attachment	Select as applicable	General
Link to Original Contract	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	General
Skip Transaction (If yes, transaction is NOT sent to AIS)	AIS Agencies Only	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting

Bid

SPO Name	Enter SPO name	Bid
Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	Bid
Special Procurement Rationale	Select as applicable	Bid

Emergency Rationale	Appears when 'Special Procurement Rationale' is set to 'Emergency'. Enter narrative to provide justification for using this special procurement method	Bid
Sole Source Rationale	Appears when 'Special Procurement Rationale' is set to 'Sole Source'. Enter narrative to provide justification for using this special procurement method	Bid
Has the approved State Use Request Form and Authorization Letter been attached?	Appears when 'Special Procurement Rationale' is set to 'State Use'. Indicate whether applicable files/forms have been attached	Bid
Brand Name	Used for reporting/tracking; mark whether specifications require a Brand Name item or service	Bid
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	Bid
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Busines Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	Bid
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	Bid
Potential BEP/VBP Participation Goal? Only if estimated amount is >/= $250,000	Used for tracking/reporting purposes; mark whether specifications include BEP/VBP participation goals	Bid
Link to Original Contract (for a Renewal or Change Order)	Allows user to establish a hyperlink to another BidBuy document using an Advanced Search feature	Bid
Original Bid Number (for a Renewal or Change Order)	Allows user to identify an original Bid Number, as applicable	Bid
Original Reference Bid Post Date (for a Renewal or Change Order)	Allows user to identify the date the original Bid was posted, as applicable	Bid
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Bid
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Bid

If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Bid
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Bid

Purchase Order

Agency Reference Number	Used for reporting/tracking; enter any applicable Agency-generated reference number	General
Original Contract No.	Needed for novation and assignments. This custom column is required anytime the original contract no. is needed. (SAMS or AIS)	General
Bulletin Reference Number		General
Publication Date		General
Special Procurement Type	Select as applicable	General
Emergency Affidavit Date		General
Is this subject to Small Business Set Aside?	Used for reporting/tracking; mark whether this procurement meets the definition of one of the 673 mandated NIGP Code categories and/or dollar threshold that requires soliciting from qualified, registered SBSP vendors	General
Are you utilizing an active, registered Small Business Set Aside Vendor?	Appears when 'Is this subject to Small Busines Set Aside?' is marked 'Yes'. Indicate whether a registered SBSP vendor will be solicited	General
Did you complete and attach the Small Business Set Aside Waiver form?	Appears when 'Are you utilizing an active, registered Small Business Set Aside Vendor?' is marked 'No'. Indicate whether a Small Business Set Aside Waiver has been completed and attached.	General
Are there any items on this PO on the current CPO Approved ICI List?		General
Has the ICI Preference Waiver been attached?		General
Actual Contract Begin Date		General
Actual Contract End Date		General
Date Contract Executed	n/a	General

Number of Renewals (number of times you can renew)	n/a	General
Number of Renewal Terms (number of units in one renewal)	n/a	General
Renewal Term Units (renewal indicator; ex months, years, etc)	n/a	General
Next Renewal Start Date		General
Fiscal Year of Obligation	n/a	General
Transaction Code-Prefix (first 2 digits)	AIS Agencies Only	General
Transaction Code-Suffix (last 2 digits)	AIS Agencies Only	General
Master Contract?		General
Master Contract?	AIS Agencies Only	General
Subcontractor Utilization		General
Skip Transaction (If yes, transaction is not sent to AIS)	AIS Agencies Only	General
Original Contract No (Novation/Assignment only)	n/a	General
Subcontractor Disclosed?		General
Travel Indicator		General
Travel Amount		General
Fixed Price?		General
Advance Payment?		General
Incoterm Key		General
Usage % Alert	Please enter the whole percentage, such as 10 for 10%, in which you would like to receive an alert regarding the usage of this contract.	General
Validity Alert (Days)	To receive an alert regarding the number of remaining contract days, please enter a whole number days.	General
Additional NIGP Code	Use to identify additional codes for the BP user to notify vendors on the Bid of the opportunity	Items

Fixed/Variable	AIS Agencies Only	Item
SAP Material Master Number	n/a	Item
Will Federal Funds be used?	Select 'Yes' if Federal Funds will be used	Accounting
If yes, please provide the CFDA#.	Appears when 'Will Fed Funds be used?' is marked 'Yes'	Accounting
Will a Grant Funding Source be used?	Select 'Yes' if Grant Funding will be used	Accounting