

# Navigation Training

# *Agenda*

- Buy A&M Overview
- Login Screen
- Homepage
- Header Bar
- Navigation Bar
- Document Navigation

## *Overview – What is Buy A&M?*

### **Online eProcurement System**

- Test Environment: <https://buy-test.tamus.edu>
- Training Environment: <https://buy-train.tamus.edu>
- Production Environment: <https://buy.tamus.edu>
- Vendor registration and management
- Solicitation and contract management
- Agency-specific solicitation and contract management
- Real-time Integration with FAMIS
- Requisitions, POs, Receiving and Invoicing Support.

# Overview – Pilot Hierarchy

Business Units	TAMUS Business Units				
Agency	The Texas A&M University System				
Organizations	System Office (01)	Tarleton State University (04)	Texas A&M Corpus Christi (05)	West Texas A&M University (18)	Texas A&M Commerce (21)
Departments	<i>Ex. Business Computing Services</i>	<i>Ex. Human Resources</i>	<i>Ex. Procurement &amp; Disbursements</i>	<i>Ex. Risk Management</i>	<i>Ex. Vice President of Business Administration</i>
Locations	<i>Ex. Information Technology</i>	<i>Ex. Human Resources</i>	<i>Ex. Procurement &amp; Disbursements</i>	<i>Ex. Risk Management</i>	<i>Ex. VPBA Foundation</i>

# Overview – Terminology

Buy A&M Terminology	TAMUS Terminology	Definition
Accounts Payable	Accounts Payable	Enter data from invoices received from vendors into Invoice documents in Buy A&M as part of a 3-way match between PO, Receipt and Invoice, and submit for approval. AP Supervisor role, approve the Invoices of others.
Basic Purchasing	Purchaser	Process requisitions, Conduct solicitations, Manage contracts, Create purchase orders.
Bid	Bid; Solicitation	Conduct solicitations, Create and publish solicitation amendments, Close response period, Access the Bid Tabulation (Bid Tab) document (scoring Proposals/Application).
Bid Amendment		Amendment to an Request for Grant Application or RFP.
Change Order		Manage change orders and contract amendments.
Department Access	Requisitioner	Create requisitions, Approve documents, Receive items.
Invoice	Invoice	Pay for goods and service with 3 way match.
Purchase Order	Purchase Order	
Quote	Proposals; Bids	
Receipts	Receipts	Receive goods and services for 3 way match.

# Overview – Terminology

Buy A&M Terminology	TAMUS Terminology	Definition
Requisitioner	Preparer	
Requisition	Requisition	Request on- or off-contract goods and services.
Requisition Type - Direct Open Market	L-Doc	For authorized users, this is a request for items not contained on a contract or blanket that will allow the user to complete the purchase order and send without need of a buyer.
Requisition Type - Open Market	Off-contract Purchase	A request for items not contained on a contract or blanket.
Requisition Type - Release	Contract Purchase	A request for items off of a Master Blanket PO.
Requisition Type - RPA	Paper Voucher	A Request for Payment Authorization. This allows an already made purchase to be entered into the system and for which should be accounted.
Seller	Vendor	
Vendor	Vendor; Supplier	

# Overview – Functional User Roles

Purchasing Roles	Primary Functions	Personnel
Basic Purchasing (BP)	<ul style="list-style-type: none"> <li>• Process requisitions</li> <li>• Conduct solicitations</li> <li>• Manage contracts</li> <li>• Cut purchase orders</li> </ul>	<ul style="list-style-type: none"> <li>• Purchasing / Procurement</li> </ul>
Department Access (DA)	<p><b>All Optional</b></p> <ul style="list-style-type: none"> <li>• Create requisitions</li> <li>• Approve documents</li> <li>• Receive items*</li> <li>• Manage informal solicitations</li> </ul>	<ul style="list-style-type: none"> <li>• End-users (Customers)</li> <li>• Approvers</li> <li>• Business Managers</li> <li>• Budget</li> <li>• Central Receiving</li> </ul>
Accounts Payable (AP)	<ul style="list-style-type: none"> <li>• Enter data from invoices received from vendors into Invoice documents in Buy A&amp;M as part of a 3-way match between PO, Receipt and Invoice, and submit for approval</li> <li>• With AP Supervisor role, approve the Invoices of others</li> </ul>	<ul style="list-style-type: none"> <li>• Accounts Payable</li> </ul>

## Overview – Documents

Document Type	Purpose	Created By
Requisition	<ul style="list-style-type: none"> <li>Request on- or off-contract goods and services</li> </ul>	<ul style="list-style-type: none"> <li>Department Access</li> <li>Basic Purchasing</li> </ul>
Bid	<ul style="list-style-type: none"> <li>Conduct formal and informal solicitations</li> <li>Create and publish solicitation amendments</li> <li>Close response period</li> <li>Access the Bid Tabulation (Bid Tab) document</li> </ul>	<ul style="list-style-type: none"> <li>Basic Purchasing</li> </ul>
Bid Tab	<ul style="list-style-type: none"> <li>View and evaluate solicitation responses</li> <li>Request clarifications and revisions to responses</li> <li>Recommend vendors for award</li> <li>Convert awards to purchase orders and contracts</li> </ul>	<ul style="list-style-type: none"> <li>Basic Purchasing (automatically created by closing response period)</li> </ul>
Quote	<ul style="list-style-type: none"> <li>Respond to a solicitation</li> </ul>	<ul style="list-style-type: none"> <li>Seller (vendor)</li> </ul>
Purchase Order	<ul style="list-style-type: none"> <li>Send orders to vendors</li> <li>Setup and manage term contracts</li> </ul>	<ul style="list-style-type: none"> <li>Basic Purchasing</li> </ul>
Change Order	<ul style="list-style-type: none"> <li>Manage change orders and contract amendments</li> <li>Access via Purchase Order</li> </ul>	<ul style="list-style-type: none"> <li>Department Access (Initiate/Approve)</li> <li>Basic Purchasing (Initiate/Approve/Apply)</li> </ul>
Receipt	<ul style="list-style-type: none"> <li>Record receipt, return and cancellation of ordered goods/services</li> <li>Access via Purchase Order</li> </ul>	<ul style="list-style-type: none"> <li>Department Access (optional)</li> <li>Basic Purchasing</li> </ul>
Invoice Periscope HOLDINGS INC	<ul style="list-style-type: none"> <li>Document invoices received from vendors against the PO and Receipt to facilitate a 3-way match</li> <li>Approve to send payable transaction to USAS</li> </ul>	<ul style="list-style-type: none"> <li>Accounts Payable</li> </ul>



## Overview – Document Statuses

Status Name	Meaning	Available Actions	Actions Permitted By
In Progress	The initial status of new documents. The document is still being completed by the creator.	<ul style="list-style-type: none"> <li>• Edit</li> <li>• Submit for Approval</li> <li>• Clone (creates a new copy of the document)</li> <li>• Cancel</li> </ul>	<ul style="list-style-type: none"> <li>• Creator</li> <li>• Authorized users</li> </ul>
Ready for Approval	The document has been submitted for approval and is travelling down one or a series of approval paths.	<ul style="list-style-type: none"> <li>• Approval/Disapproval</li> <li>• Edit (accounting and commodity code information only)</li> <li>• Clone</li> <li>• Cancel</li> </ul>	<ul style="list-style-type: none"> <li>• Current approver</li> </ul>
Returned	The document was disapproved by an approver.	<ul style="list-style-type: none"> <li>• Reopen (returns document to “In Progress” status)</li> <li>• Clone</li> <li>• Cancel</li> </ul>	<ul style="list-style-type: none"> <li>• Creator</li> <li>• Authorized users</li> </ul>
Ready to Send	The document has been approved and is ready to be sent to a vendor or vendors.	<ul style="list-style-type: none"> <li>• Send to vendor</li> <li>• Clone</li> <li>• Cancel</li> </ul>	<ul style="list-style-type: none"> <li>• Creator</li> <li>• Authorized users</li> </ul>
Sent	The document has been sent to a vendor or vendors.	<ul style="list-style-type: none"> <li>• Clone</li> <li>• Cancel</li> </ul>	<ul style="list-style-type: none"> <li>• Creator</li> <li>• Authorized users</li> </ul>
Cancelled	The document has been cancelled by the creator or an authorized user for the document’s business units.	<ul style="list-style-type: none"> <li>• Clone</li> </ul>	<ul style="list-style-type: none"> <li>• Creator</li> <li>• Authorized users</li> </ul>

## Overview – Document Statuses, Continued

Status Name	Meaning	Available Actions	Actions Permitted By
Gone to Bid	Requisition has been converted to a solicitation for competitive bidding by vendors as required by procurement policies	•Clone	•N/A
Gone to PO	Requisition has been converted directly to a PO or the Bid it was previously converted to has been awarded as one or more POs to one or more vendors	•Clone	•N/A
Partial receipt	An order (PO) that was previously Sent to a vendor has been partially received in Buy A&M.	•Change Order •Additional Receiving •Clone	•Department Access (if authorized) •Basic Purchasing
Complete receipt	An order (PO) that was previously Sent to a vendor has been completely received in Buy A&M.	• Change Order •Additional Receiving •Clone	• Creator • Authorized users
Approved for Invoice	A receipt has been approved against a PO so that payment of Invoices for the items received can be made	• None (additional Receipts can be created against the same PO to adjust received totals if needed)	• N/A
Closed	A PO has been fully paid and received	•None	• Creator • Authorized users

# Login Screen

# Login Screen – Overview

Welcome To **Buy A&M Test**

**THE TEXAS A&M  
UNIVERSITY SYSTEM**

Welcome to Buy A&M Test environment.

- Register**  
Register here to begin using Buy A&M Test.  
Vendors, please read this [disclaimer](#) prior to registering.
- Complete Registration**  
Complete registration here to begin using Buy A&M Test.  
Vendors, please read this [disclaimer](#) prior to completing registration.
- Open Bids**  
Browse open bid opportunities.
- Active Contracts**  
Browse active Contracts/Blankets.
- Contract & Bid Search**  
Search for Bids and active Contracts/Blankets.
- Registered Vendor Search**  
Search for registered vendors.

Login ID:

Password:

[Forgot your password?](#)

© 2013 Periscope Holdings, Inc.  
All Rights Reserved

# Login Screen - Open Bids

**Open Bids**

Show Bids for Category

**Bid(3)**

Bid #	Alternate Id	Buyer	Description	Purchase Method	Bid Opening Date	Pre-Bid Conference	Bid Holder List
<a href="#">ADSP010-00000082</a>		Stacy Ingalls	Telecommunication Carrier Services	Blanket	05/04/2010 03:00:00 PM	Tuesday, April 13, 2010 10:00 A.M. 100 N. 15th. Ave. Ste. 300 Phoenix, AZ. 85007	
<a href="#">ADSP010-00000059</a>		Agnes Magezi	Contact Center Services for the Arizona Office of Tourism	Blanket	04/20/2010 03:00:00 PM		
<a href="#">ADSP010-00000053</a>		Agnes Magezi	Fulfillment Services	Blanket	04/20/2010 03:00:00 PM	N/A	

# Login Screen – Exit Button

**Open Bids**

Show Bids for Category

**Bid(3)**

Bid #	Alternate Id	Buyer	Description	Purchase Method	Bid Opening Date	Pre-Bid Conference	Bid Holder List
<a href="#">ADSP010-0000082</a>		Stacy Ingalls	Telecommunication Carrier Services	Blanket	05/04/2010 03:00:00 PM	Tuesday, April 13, 2010 10:00 A.M. 100 N. 15th. Ave. Ste. 300 Phoenix, AZ. 85007	
<a href="#">ADSP010-0000059</a>		Agnes Magezi	Contact Center Services for the Arizona Office of Tourism	Blanket	04/20/2010 03:00:00 PM		
<a href="#">ADSP010-0000053</a>		Agnes Magezi	Fulfillment Services	Blanket	04/20/2010 03:00:00 PM	N/A	

# Login Screen – Active Contracts

**Active Contracts**

Show Contracts for Category

Contract/Blanket #	Bid #	Description	Vendor Name	Type Code	Begin Date	End Date
<a href="#">DES090035-1</a>		Cafeteria and Kitchen Equipment (Including Food Service Equipment)	Standard Industries		08/01/2009	07/31/2010
<a href="#">SCC060003-A1-1-A18</a>		Paper, Plastics, Liners, Janitorial Supplies and Equipment	Waxie Sanitary Supply		03/01/2009	02/16/2011
<a href="#">SCC080005-1-A1</a>		Food Products	Schade Distributing		06/01/2008	05/31/2010
<a href="#">SCC080005-2-A1</a>		Food Products	Shamrock Foods-Dairy Division		06/01/2008	05/31/2010

# Login Screen - Contract & Bid Search

## Advanced Search

Search for:

Bids

Contracts/Blankets

Exit



THE  
TEXAS A&M  
UNIVERSITY  
SYSTEM

# Homepage

# Homepage – Role Selection

[NIGP Code Browse](#) | [My Account](#) | [Customer Service](#) | [About](#)

Current Organization: [Baltimore City](#)

August 30, 2011 2:24:31 PM CDT

Home | Items | Documents | Vendors

Quick Buy  Find It

Mary Smith

Home - Welcome Back Mary Smith

[News\(5\)](#) | [Reqs\(0\)](#) | [Bids\(3\)](#) | [PO\(0\)](#) | [Approval\(0\)](#) | [My Reminders\(0\)](#) | [Events\(0\)](#)

News ID	Effective Date	Category	Title
<a href="#">93</a>	09/27/2010	Notices	QA regression testing
<a href="#">90</a>	09/22/2010	Notices	Testing of Enhancements
<a href="#">87</a>	05/12/2010	Notices	Invoices and Permit to Pay are visible to everyone
<a href="#">79</a>	08/13/2009	Notices	New Office Supplies Contract
<a href="#">78</a>	07/28/2009	Procedures	PROCEDURES FOR NEW TEMPORARY PERSONNEL SERVICES CONTRACT

# Homepage - Header & Navigation Bars

The screenshot shows the homepage header and navigation bars. The header bar includes a 'Logg' button, a 'Navigation Menus' dropdown, a 'Current Organization: P...' field, a 'Quick Buy' search bar, and a 'Find It' button. The user profile 'Mary Smith' is visible in the top right. The main content area displays a welcome message 'Home - Welcome Back Mary Smith' and a table of news items.

News ID	Effective Date	Category	Title
<a href="#">93</a>	09/27/2010	Notices	QA regression testing
<a href="#">90</a>	09/22/2010	Notices	Testing of Enhancements
<a href="#">87</a>	05/12/2010	Notices	Invoices and Permit to Pay are visible to everyone
<a href="#">79</a>	08/13/2009	Notices	New Office Supplies Contract
<a href="#">78</a>	07/28/2009	Procedures	PROCEDURES FOR NEW TEMPORARY PERSONNEL SERVICES CONTRACT

# Homepage - Overview (non-Administrative Users)

The screenshot shows a web browser window with the following elements:

- Browser Tab:** Logo
- Page Header:**
  - Left: [NIGP Code Browse](#) | [My Account](#) | [Customer Service](#) | [About](#)
  - Center: Current Organization: [Baltimore City](#)
  - Right: August 30, 2011 3:20:06 PM CDT
- Navigation Bar:**
  - Home | Items ▾ | Documents ▾ | Vendors ▾
  - Quick Buy  Find It
  - Basic Purchasing | Department Access
  - Mary Smith
- Main Content Area:**
  - Greeting: Home - Welcome Back Mary Smith
  - Navigation: [News\(5\)](#) | [Reqs\(0\)](#) | [Bids\(3\)](#) | [PO\(0\)](#) | [Approval\(0\)](#) | [My Reminders\(0\)](#) | [Events\(0\)](#)
  - Table:

News ID	Effective Date	Category	Title
<a href="#">93</a>	09/27/2010	Notices	QA regression testing
<a href="#">90</a>	09/22/2010	Notices	Testing of Enhancements
<a href="#">87</a>	05/12/2010	Notices	Invoices and Permit to Pay are visible to everyone
<a href="#">79</a>	08/13/2009	Notices	New Office Supplies Contract
<a href="#">78</a>	07/28/2009	Procedures	PROCEDURES FOR NEW TEMPORARY PERSONNEL SERVICES CONTRACT

# Homepage - News Tab

Home - Welcome Back Chris Harris

News(2) Reqs(0) Bids(3) PO(0) Approval(2) My Reminders(2) Events(0)

News ID	Effective Date	Category	Title
<a href="#">4</a>	04/01/2010	Procedures	New Process for Conducting Bid Evaluations
<a href="#">3</a>	04/01/2010	Events	System Down for Maintenance

## News Details

**News ID** 3  
**Effective Date** 04/01/2010  
**End Date** 04/10/2010  
**Category** Events  
**Title** System Down for Maintenance  
**News** The system will be taken down for maintenance for one hour starting at 5pm on Monday, April 5, 2010.  
**Link**

Exit

# Homepage - Reqs and other Document Tabs

Home - Welcome Back Chris Harris

News(0) Reqs(1) Bids(3) PO(0) Approval(2) My Reminders(2) Events(0)  
In Progress(1) Ready for Approval(0) Ready for Purchasing(0) Returned(0) Gone to PO(0)

Requisition #	Requisition Date	Description	Type	Dept/Loc	Total
<a href="#">ADES10-00000435</a>	04/09/2010	Computer Power Supplies		ADES/ADES	\$0.00

# Homepage - Approval Tab

Home - Welcome Back Chris Harris

News(0) Reqs(1) Bids(3) PO(1) **Approval(4)** My Reminders(2) Events(0)

## My Documents Pending Approval

Bid #	Description	Bid Opening Date	Approval Requested	Approver	Approval Status	Date Approved	Approval Type
<a href="#">ADES10-00000100</a>	test	04/16/2010 03:00:00 PM	04/09/2010 11:30:25 AM	Chris Harris	Waiting...		Pre-bid

## Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">ADSP010-00000155</a>	11/23/2009	Carpeting	10	Open Market	System Administrator	ADSP0 / SPO	\$15,000.00
<a href="#">ADSP010-00000084</a>	11/05/2009	Elevator Maintenance	10	RPA	Chris Harris	ABA / ABA	\$500.00

[List & Approve](#)

Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status
<a href="#">ADES10-00000100</a>	test	Open Market	04/16/2010 03:00:00 PM	ADES / ADES	Cheryl Wynn	\$10.00	Ready for Approval

# Homepage – My Reminders Tab

**My Reminders**

Purchase Order(0) Requisition(0) **Bid(2)** Quote(0) Invoice(0)

Bid #	Due Date	Comment	Days Prior to Remind	Date Completed (MM/DD/YYYY)	Date Entered	Entered By
<a href="#">ADES10-00000090</a>	04/01/2010	have a safe trip back to texas	0	<input type="text"/>	03/31/2010 10:21:56 AM	Rita Schmidt
<a href="#">ADSP010-00000089</a>	04/05/2010	Remember to look at the Q&A for this Bid.	2	<input type="text"/>	03/31/2010 10:22:00 AM	Chris Harris

**i** Please save your changes before sorting table. Otherwise, your changes will be lost.



Save & Exit   Save & Continue   Reset   Cancel & Exit




# Homepage - Standard Button Options

**My Reminders**

Purchase Order(0) Requisition(0) **Bid(2)** Quote(0) Invoice(0)

Bid #	Due Date	Comment	Days Prior to Remind	Date Completed (MM/DD/YYYY)	Date Entered	Entered By
<a href="#">ADES10-00000090</a>	04/01/2010	have a safe trip back to texas	0	<input type="text"/> 	03/31/2010 10:21:56 AM	Rita Schmidt
<a href="#">ADSPO10-00000089</a>	04/05/2010	Remember to look at the Q&A for this Bid.	2	<input type="text"/> 	03/31/2010 10:22:00 AM	Chris Harris

 Please save your changes before sorting table. Otherwise, your changes will be lost.

# Header Bar






# Header Bar - Overview

The screenshot displays a web application interface. At the top, there is a navigation bar with links for 'NIGP Code Browse', 'My Account', 'Customer Service', and 'About'. The current organization is identified as 'Baltimore City'. The user is logged in as 'Mary Smith' on 'August 30, 2011 3:23:43 PM CDT'. Below the navigation bar, there are tabs for 'Home', 'Items', 'Documents', and 'Vendors'. A 'Quick Buy' button and a 'Find It' search field are also present. The main content area is titled 'Home - Welcome Back Mary Smith' and features a series of tabs: 'News(5)', 'Reqs(0)', 'Bids(3)', 'PO(0)', 'Approval(0)', 'My Reminders(0)', and 'Events(0)'. The 'News(5)' tab is active, displaying a table of news items.

News ID	Effective Date	Category	Title
<a href="#">93</a>	09/27/2010	Notices	QA regression testing
<a href="#">90</a>	09/22/2010	Notices	Testing of Enhancements
<a href="#">87</a>	05/12/2010	Notices	Invoices and Permit to Pay are visible to everyone
<a href="#">79</a>	08/13/2009	Notices	New Office Supplies Contract
<a href="#">78</a>	07/28/2009	Procedures	PROCEDURES FOR NEW TEMPORARY PERSONNEL SERVICES CONTRACT

# Header Bar - My Account

NIGP Code Browse | **My Account** | Customer Service | About

April 9, 2010 10:16:27 AM MST     

Home | Items ▾ | Documents ▾ | Vendors ▾

Chris Harris

## My Account Information

My Information

Edit

Salutation			
First Name	Chris	Last Name	Harris
Job Title	Test	Department	DEP01 - My Department
Email	charris@periscopeholdings.com		
Phone	(555)555-5555		
Proxy User			

My Information

Salutation

First Name\*

Last Name\*

Job Title\*

E-mail\*

Phone\*

(  )  -  Ext.

Change Password\*

Confirm Password\*

Login Question

Login Answer

Proxy User

(No Proxy)   Activate Proxy User

Default Homepage Tab for Basic Purchasing

News

Default Homepage Tab for Department Access

News

User Manual Version:

Standard

Save & Exit









Save & Continue

Reset

Cancel & Exit

# Header Bar – Icons



Icon	Name	Description
	Advanced Search	Find any accessible document by various criteria – The most effective way to find any document.
	Help	Open a help manual for the role currently selected.
	Ad-Hoc Reports	Ad-hoc report creation for authorized roles
	Reporting Dashboard	If developed / configured, pre-defined reporting dashboard will display (none currently available).
	Administrative Reports	Choose from and run preset reports configured to be accessible by your current role.
	Dashboard	Browse your documents by type and status from the last 180 days.
	G2B Punchout	If configured, start a requisition for on-contract items that will route you to an external vendor website. This feature requires a custom integration with vendor.
	Logout	Logs you out of Buy A&M.

# Header Bar - Administrative Reports

## Administrative Reports

### Other

Report File Name

[Approval Paths](#)

[Bid Processing Cycle Time](#)

[Blanket & Contract Threshold](#)

[Charge to Dept Report - Accounting](#)

[Contract Utilization](#)

[Debt by User and Role](#)

[Expire Contracts](#)

[NIGP Spend Analysis - Detail](#)

[NIGP Spend Analysis - Summary](#)

#### \* Organization

CPSK12 | Cincinnati Public Schools

All None Inverse

#### \* Purchaser

All | Purchasers

Administrator | System

Angie | Tolle

Brad | Price

All None Inverse

#### \* Start Date

2012-06-22

# Header Bar – Help Manual

NIGP Code Browse | My Account | Customer Service | About April 9, 2010 10:16:27 AM MST

Home | Items ▾ | Documents ▾ | Vendors ▾ Chris Harris

Contents | Index | Search   Powered By **RoboHelp**

- [-] Purpose of this Manual
- [-] Application Basics
  - [-] Home Page/Control Center
  - [-] Header & Navigation Bars
    - [-] The Header Bar
      - [-] NIGP Code Browse
      - [+] My Account
      - [-] Customer Service
      - [-] My Reminders
      - [-] About
      - [-] Icons in the Header bar
    - [-] The Navigation Bar
      - [-] Home
      - [-] Items
      - [+] Documents
      - [-] Vendors
- [-] Red and Yellow Error Messages
- [+] Requisitions
- [+] Bids
- [+] Purchase Orders - Overview
- [+] Creating an Open Market Purchase Order
- [+] Creating Master Blanket Purchase Orders
- [+] Approving or Canceling Documents
- [-] Creating Change Orders
- [+] Purchase Order Receipts
- [-] About This Manual

## Purpose of this Manual

The purpose of the BuySpeed Online Basic Purchasing Manual is to introduce the BSO's purchasing functions and to provide the tools necessary to:

- Configure Personal Settings (Passwords, names, addresses, etc.)
- View, create and modify purchasing documents like requisitions, purchase orders and bids.

# Header Bar - Advanced Search

NIGP Code Browse | My Account | Customer Service | About

April 9, 2010 10:16:27 AM MST



Home | Items v | Documents v | Vendors v

Chris Harris

## Advanced Search

Search for:

Module: Purchasing Module v

Document Type: v

Exit

- Bids
- Commodity Codes
- Contract/Blankets
- Items
- Purchase Orders
- Quotes
- Requisitions
- Vendors

Copyright © 2010 Periscope Holdings, Inc.



# Header Bar - Advanced Search (cont.)

Advanced Search

Search for: Module: Purchasing Module Document Type: Bids

Search Using: ALL of the criteria  
ALL of the criteria  
ANY of the criteria

Bid Description Bid Opening Date(MM/DD/YYYY)

Current Major Status Buyer

Current Minor Status Alternate Id

Department

Location

Search Fields: Type Code

Catalog

Purchase Method Entered Date(MM/DD/YYYY)

Required Date(MM/DD/YYYY) Update Date(MM/DD/YYYY)

NIGP Class Organization

NIGP Item

Commodity Code Stock Item Number

Find It Clear

Exit

# Header Bar – Standard Advanced Search Fields

Advanced Search Field	Description
Document #	The number auto-assigned to the document by Buy A&M.
Release Number	The number of an order off of a particular contract.
Alternate ID	The alternate identification number on the document.
Current Major Status	The current status of the document.
Document Description	The description provided for the document.
Organization / Department / Location	The business unit associated with the document.
Entered Date	The date the document was created.
Item Description	The description of any item on the document.
Buyer	The Basic Purchasing user that owns the document.
Requestor	The user that created the corresponding Requisition document.
Purchase Method	The purchase method associated with the document.
NIGP Class / Item	The NIGP Code provided to any item on the document.
Vendor	The vendor associated with the document.

<b>Browse by:</b>	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10
-------------------	---

# Header Bar – Advanced Search (cont.)

Results

1-25 of 76  
 1 2 3 4

Bid #	Description	Purchase Method	Bid Opening Date	Organization	Dept/Loc	Purchaser	Total	Status	Alternate Id
<a href="#">ADSP010-00000005</a>	Regional Needs and Assets Report	Open Market	10/01/2009 03:00:00 PM	State Procurement Office	ADSP0 / SPO	Alicia Bewsey	\$0.00	Bid to PO	
<a href="#">ADSP010-00000002</a>	Arizona Corporation Commission Legislative Liaison	Open Market	09/24/2009 03:00:00 PM	State Procurement Office	CCA / CCA	Alicia Bewsey	\$0.00	Bid to PO	

Exit

# Navigation Bar

# Navigation Bar – Home

The screenshot shows a web application interface. At the top, there is a navigation bar with the following elements: a logo, links for 'NIGP Code Browse', 'My Account', 'Customer Service', and 'About', the current organization 'Baltimore City', the date and time 'August 30, 2011 3:51:05 PM CDT', and the user name 'Mary Smith'. Below this is a secondary navigation bar with 'Home' (highlighted with a red box and arrow), 'Items', 'Documents', and 'Vendors' dropdown menus, a 'Quick Buy' search box, and a 'Find It' button. The main content area is titled 'Home - Welcome Back Mary Smith' and features a set of tabs: 'News(5)', 'Reqs(0)', 'Bids(3)', 'PO(0)', 'Approval(0)', 'My Reminders(0)', and 'Events(0)'. The 'News(5)' tab is selected, displaying a table with the following data:

News ID	Effective Date	Category	Title
<a href="#">93</a>	09/27/2010	Notices	QA regression testing
<a href="#">90</a>	09/22/2010	Notices	Testing of Enhancements
<a href="#">87</a>	05/12/2010	Notices	Invoices and Permit to Pay are visible to everyone
<a href="#">79</a>	08/13/2009	Notices	New Office Supplies Contract
<a href="#">78</a>	07/28/2009	Procedures	PROCEDURES FOR NEW TEMPORARY PERSONNEL SERVICES CONTRACT

# Navigation Bar – Documents

Home | Items ▾ | **Documents ▾** | Vendors ▾

- Requisitions >
- Bids >
- POs >
- Receipts >
- Invoice >
- Ready to Send
- Sent
- Partial Receipt
- Complete Receipt
- Approved
- Returned
- Canceled
- Closed

**Purchase Orders - Sent**

Release(0) | Direct Open Market(0) | Open Market(0) | **Master Blanket(3)** | Contract(0) | RPA(0)

Purchase Order #	Organization	Purchase Order Date	Description	Dept/Loc	Purchaser	Total
<a href="#">ADSP010-000173</a>	State Procurement Office	04/01/2010	Laptop computers	AZDOHS/HLA	Chris Harris	\$0.00
<a href="#">ADSP010-00000141</a>	State Procurement Office	02/03/2010	Generator Maintenance for the Industrial Commission of Arizona	ECA/ECA	Chris Harris	\$10.00
<a href="#">ADSP010-00000075</a>	State Procurement Office	11/18/2009	Mailing Software	ABA/ABA	Chris Harris	\$0.00

**View All** | Exit

# Document Navigation

# Document Navigation – Tabs

**New Requisition**

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

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

Department\*:

Location\*:

Required By Date:

Requisition Type:

Requestor: Audrey Nobles

Contact:

Alternate ID:

Estimated Cost: \$0.00

Print Format: \*

User Ref / Ref 4:

RPA Received Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Short Description\*:

Fiscal Year:

Organization: Organization 1 for Training

Solicitation Enabled:

Entered Date: 09/20/2013

Type Code:


Purchaser:

Contact Phone:    -

Tax Rate:



# Document Navigation - Summary Tab

Release Requisition ADSP010-00000122 Status: 1RGP - Gone to PO 

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


**Header Information**

<b>Requisition Number:</b>	ADSP010-00000122	<b>Short Description:</b>	Envelopes	<b>Status:</b>	1RGP - Gone to PO
<b>Department:</b>	ADOA - Arizona Department of Administration	<b>Location:</b>	GAO - General Accounting Office	<b>Required By Date:</b>	
<b>Entered Date:</b>	11/12/2009	<b>Requisition Type:</b>	Release	<b>Type Code:</b>	
<b>Requestor:</b>	Angela Dillard	<b>Purchaser:</b>		<b>Fiscal Year:</b>	2010
<b>Contact:</b>	Angela Dillard	<b>Contact Phone:</b>	(555)555-1212	<b>Alternate ID:</b>	
<b>Pcard Enabled:</b>	Yes	<b>Estimated Cost:</b>	\$866.92	<b>Print Format:</b>	Requisition


**Item Information**

**Approval Path:**

# Document Navigation - Warnings & Errors

Open Market Bid ADSP010-0000099 Status: 2BI - In Progress 

[General](#) [Items](#) [Address](#) [Accounting](#) [Routing](#) [Attachments](#) [Notes](#) [Bidders](#) [Questions](#) [Amendments](#) [Q & A](#) [Reminders](#) [Summary](#)


Overall Validation Errors 

- No items.

Overall Validation Warnings

- No bid bidder.

# Document Navigation - Document & Item Status

Release Requisition ADSP010-0000122 Status: 1RGP - Gone to PO 

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Header Information

**Item Information**

**Item # 1 :** #10 OSDS 20 WW Plain, Virgin Executive Style (Envelopes, Plain and Printed (Statewide)) 1RGP - Gone to PO

NIGP Code: 310-30  
Envelopes, Plain, Stock Sizes

PO # / PO Item #: AD040504-A3-4-A7 : 11 / 1

Blanket/Contract #/Line #	Qty	Minimum Order Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
<u>AD040504-A3-4-A7 / 1</u>	20.0	0.0	\$14.8833	\$14.8833	Thousand	\$0.00		\$0.00	\$297.67

Manufacturer: Brand: Model:  
Make: Packaging:

Account Code	Amount
12345	\$297.67

# Document Navigation - Document History

Release Requisition ADSP010-00000122 Status: 1RGP - Gone to PO 

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Header Information

Requisition Number: ADSP010-00000122 Short Envelopes Status: 1RGP - Gone to PO

Department: **Release Requisition ADSP010-00000122 - Status History**

Status Date	Level	Item #	Major Status	User
11/12/2009 11:09:01 AM	Header	0	1RI - In Progress	Angela Dillard
11/12/2009 11:27:21 AM	Header	0	1RRA - Ready for Approval	Angela Dillard
11/12/2009 11:27:32 AM	Header	0	1RGP - Gone to PO	Angela Dillard
11/12/2009 11:27:32 AM	Header	0	1RRP - Ready for Purchasing	Angela Dillard

Print Close Window

Project No.:  
Project Manager: