Requisitions Training
Agenda

• Overview
• Creation & Setup
• On-Contract Items & Vendors
• Addresses
• Accounting
• Attachments
• Internal Communication
• Approval
• Vendor Notification
• Change Orders
• Off-Contract Items & Vendors
• Informal Quotes
• Punchouts
Overview
Overview – What is a Requisition?

Requisition documents in Buy A&M allow users to place requests for goods and services. The type of Requisition will determine whether the request is for goods and services on- or off-contract, or for a reimbursement for funds already spent.

Requisitions are completed by indicating the type of request, adding the items representing the good and services being requested, providing the shipping and billing addresses and indicating funding sources.
## Overview – Requisition Types

<table>
<thead>
<tr>
<th>Requisition Type</th>
<th>Purpose</th>
<th>Primary Features</th>
</tr>
</thead>
</table>
| **Open Market**        | Request off-contract goods/services             | • Creator defines goods/services being requested  
• Enables creator to solicit price quotes from vendors via Informal Quote document  
• Routes to Procurement for final approval and to convert to Bid or PO  
• Procurement can edit resulting PO before sending it to the vendor  
• Creator must have “Requisitioner” role designation |
| **Direct Open Market** | Place orders for off-contract goods/services that do not route through procurement | • Creator defines goods/services being requested  
• Enables creator to solicit price quotes from vendors via Informal Quote document  
• Vendor must be selected prior to submitting for approval  
• Routes to creator to send to the vendor following approval  
• No procurement involvement  
• Creator must have “Department Buyer” role designation |
| **(Standard) Release** | Request on-contract goods/services              | • Associated contract setup for “Standard” Release Type  
• Creator finds on-contract items via search and adds them to the requisition  
• Routes to Procurement for final approval and to convert to PO  
• Procurement can edit resulting PO (except vendor) before sending it to the vendor  
• Creator must have “Requisitioner” or “Contract Shopper” role designation |
| **Direct Release**     | Place orders for on-contract goods/services that do not route through procurement | • Associated contract setup for “Direct” Release Type  
• Creator finds on-contract items via search and adds them to the requisition  
• Routes to creator to send to the vendor following approval  
• No procurement involvement  
• Creator must have “Requisitioner” or “Contract Shopper” role designation |
| **RPA**                | Document purchase made outside of Buy A&M, such as emergency purchases | • Creator defines items already purchased  
• Invoice information, including vendor must be provided  
• Following approval, immediately becomes completed PO  
• Creator must have “Requisitioner” role designation |
# Overview – Requisition Statuses

<table>
<thead>
<tr>
<th>Status Code</th>
<th>Status Name</th>
<th>Meaning</th>
<th>Available Actions</th>
<th>Actions Permitted By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1RI</td>
<td>In Progress</td>
<td>The initial status of new documents. The document is still being</td>
<td>• Edit&lt;br&gt;• Submit for Approval&lt;br&gt;• Clone (creates a new copy of the document)&lt;br&gt;• Cancel</td>
<td>• Creator&lt;br&gt;• Authorized Superusers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>completed by the creator.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1RRA</td>
<td>Ready for Approval</td>
<td>The document has been submitted for approval and is travelling down an approval path.</td>
<td>• Approve/Disapprove&lt;br&gt;• Edit (accounting and commodity code information only)&lt;br&gt;• Clone&lt;br&gt;• Cancel</td>
<td>• Current approver</td>
</tr>
<tr>
<td>1RRP</td>
<td>Ready for Purchasing</td>
<td>The document has been approved and procurement must decide whether to conduct a solicitation (for off-contract Requisitions), purchase the items or disapprove the request.</td>
<td>• Convert to Bid (for Open Markets)&lt;br&gt;• Convert to Purchase Order&lt;br&gt;• Disapprove&lt;br&gt;• Clone&lt;br&gt;• Cancel</td>
<td>• Basic Purchasing user</td>
</tr>
<tr>
<td>1RRT</td>
<td>Returned</td>
<td>The document was disapproved by an approver or Basic Purchasing user.</td>
<td>• Reopen (returns document to “In Progress” status)&lt;br&gt;• Clone&lt;br&gt;• Cancel</td>
<td>• Creator&lt;br&gt;• Authorized Superusers</td>
</tr>
<tr>
<td>1RPO; 1RB</td>
<td>Gone to X</td>
<td>The document has been converted into a Purchase Order or Bid. The resulting Purchase Order or Bid must be processed.</td>
<td>• Clone</td>
<td>• Any DA or BP user</td>
</tr>
<tr>
<td>1RC</td>
<td>Cancelled</td>
<td>The document has been cancelled.</td>
<td>• Clone</td>
<td>• Any DA or BP user</td>
</tr>
</tbody>
</table>
Creation & Setup
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/Blanks.

- **Contract & Bid Search**
  Search for Bids and active Contracts/Blanks.

- **Registered Vendor Search**
  Search for registered vendors.

---

**Forgot your password?**
Creation & Setup – Role Selection
Creation & Setup – Items Dropdown
### Creation & Setup – Quick Buy

**Quick Buy Search Results**

<table>
<thead>
<tr>
<th>Select</th>
<th>Quantity</th>
<th>Minimum</th>
<th>Order Quantity</th>
<th>Item Description</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Vendor Name</th>
<th>Class</th>
<th>Class Item</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>microscope</td>
<td></td>
<td>$0.00</td>
<td>EA, Each</td>
<td>Rumsfield’s Scientific Equipment</td>
<td>495 - LABORATORY AND FIELD EQUIPMENT AND SUPPLIES: BIOLOGY, BOTANY, GEOLOGY, MICROBIOLOGY, ZOOLOGY, ETC. 75 - Prepared Slides (Microscope)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>microscope blanket demo</td>
<td></td>
<td>$0.00</td>
<td>EA, Each</td>
<td>Rumsfield’s Scientific Equipment</td>
<td>490 - LABORATORY EQUIPMENT, ACCESSORIES AND SUPPLIES: GENERAL ANALYTICAL AND RESEARCH FOR NUCLEAR, OPTICAL, AND PHYSICAL 29 - Electron Microscopy Equipment: Electron Microscopes, Vacuum Sputtering Systems, etc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Select A Requisition**

<table>
<thead>
<tr>
<th>Select</th>
<th>Requisition #</th>
<th>Description</th>
<th>Entered Date</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No records found.
### Quick Buy Search Results

**Search Using:** microscope

**Advanced Search**

**Release Results**

**Search By:**
- **Any Price**
  - Up to $2 (2)
- **Any Vendor**
  - Rumfield's Scientific Equipment (2)

<table>
<thead>
<tr>
<th>Select</th>
<th>Quantity</th>
<th>Minimum Order Quantity</th>
<th>Item Description</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Vendor Name</th>
<th>Class Code</th>
<th>Item Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>15</td>
<td>0</td>
<td>microscope</td>
<td>$50.00</td>
<td>EA - Each</td>
<td>Rumfield's Scientific Equipment</td>
<td>400 - LABORATORY AND FIELD EQUIPMENT AND SUPPLIES: BIOLOGY, BOTANY, GEOLOGY, MICROBIOLOGY, ZOOLOGY, ETC.</td>
<td>AM02-15-P000761 /1</td>
</tr>
<tr>
<td>✷</td>
<td>0</td>
<td>0</td>
<td>microscope</td>
<td>$50.00</td>
<td>EA - Each</td>
<td>Rumfield's Scientific Equipment</td>
<td>400 - LABORATORY EQUIPMENT, ACCESSORIES AND SUPPLIES: GENERAL ANALYTICAL AND RESEARCH FOR NUCLEAR, OPTICAL, AND PHYSICAL</td>
<td>AM02-15-P000762 /1</td>
</tr>
</tbody>
</table>

### Select A Requisition

**Select**

<table>
<thead>
<tr>
<th>Requisition #</th>
<th>Description</th>
<th>Entered Date</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

_No records found._

---

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Creation & Setup – Cloning Requisitions

Advanced Search

NIGP Code Browse | My Account | Customer Service | About

Current Organization: AM23 - Texas A&M System Health Science Center
June 15, 2015 5:15:27 PM UTC

Module: Purchasing Module
Document Type: Requisitions

Search for:
- Req #
- Buyer
- Current Major Status
- Current Minor Status
- Department
- Location
- Type Code
- Catalog
- Required Date
- Requestor
- NIGP Class
- NIGP Class Item
- Commodity Code
- Vendor ID
- Vendor Name
- Vendor Legal Name

Find It | Clear

Enter: [Find It]
<table>
<thead>
<tr>
<th>Req #</th>
<th>PO #</th>
<th>Description</th>
<th>Requisition Type</th>
<th>Requisition Date</th>
<th>Dept/Loc</th>
<th>Requestor</th>
<th>Total</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM23-15-R001251</td>
<td>AM23-15-P000812</td>
<td>am23 demo; health service</td>
<td>Open Market</td>
<td>05/29/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Training User 01</td>
<td>$5,000.00</td>
<td>Gone to PO</td>
</tr>
<tr>
<td>AM23-15-R001252</td>
<td>AM23-15-P000853</td>
<td>am23 demo; health service</td>
<td>Open Market</td>
<td>05/29/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Training User 01</td>
<td>$5,000.00</td>
<td>Gone to PO</td>
</tr>
<tr>
<td>AM23-15-R001254</td>
<td>AM23-15-P000823</td>
<td>dental school; equipment; AM23 demo</td>
<td>Open Market</td>
<td>06/01/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Training User 01</td>
<td>$5,000.00</td>
<td>Gone to PO</td>
</tr>
<tr>
<td>AM23-15-R001255</td>
<td>AM23-15-P000838</td>
<td>Ultrafiltration skid for CI/ADM</td>
<td>Open Market</td>
<td>06/01/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Training User 03</td>
<td>$50,000.00</td>
<td>Gone to PO</td>
</tr>
<tr>
<td>AM23-15-R001256</td>
<td></td>
<td>Dental Equipment</td>
<td>Open Market</td>
<td>06/01/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Robby Bounds</td>
<td>$5,000.00</td>
<td>In Progress</td>
</tr>
<tr>
<td>AM23-15-R001257</td>
<td></td>
<td>dental school equipment</td>
<td>Open Market</td>
<td>06/01/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Debbie Ebright</td>
<td>$5,000.00</td>
<td>Ready for Purchasing</td>
</tr>
<tr>
<td>AM23-15-R001258</td>
<td>AM23-15-P000834</td>
<td>Info</td>
<td>Open Market</td>
<td>06/01/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Jeff Burton</td>
<td>$8,000.00</td>
<td>Gone to PO</td>
</tr>
<tr>
<td>AM23-15-R001259</td>
<td>AM23-15-P000832</td>
<td>office supplies Summus</td>
<td>Direct Open Market</td>
<td>06/01/2015</td>
<td>TRAIN23 / TRN23</td>
<td>Debbie Ebright</td>
<td>$260.00</td>
<td>Gone to PO</td>
</tr>
</tbody>
</table>

**Approval Paths**

There are no approval paths found for this requisition.

[Clone Requisition] [Print]
### Creation & Setup – Setup Overview

#### New Requisition

<table>
<thead>
<tr>
<th>General</th>
<th>Items</th>
<th>Address</th>
<th>Accounting</th>
<th>Routing</th>
<th>Attachments</th>
<th>Notes</th>
<th>Reminders</th>
<th>Summary</th>
</tr>
</thead>
</table>

- **Requisition Number:**
- **Status:**
- **Department**: TRAIN23 - Training Department
- **Location**: TRN23 - Training Location
- **Required By Date:**
- **Requisition Type:**
- **Invoice Method:**
- **P-Card Desired:**
- **Requestor:**
- **Contact:**
- **Alternate ID:**
- **Estimated Cost:** $0.00
- **RPA Goods Received Date:** (MM/DD/YYYY HH:MM:SS AM or PM)
- **Special Payment Handling:**
- **User Ref/Ref 4:**
- **Rush Payment:**
- **TIEH:**

#### Short Description

- **Fiscal Year:** 2015
- **Organization:** AM23 - Texas A&M System Health Science Center
- **SolICitation Enabled:**
- **Entered Date:** 08/15/2015
- **Type Code:**
- **Purchaser:** Ramey, Ardis
- **Contact Phone:** 555-555-5555
- **Tax Rate:**

---

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Creation & Setup – Optional Tabs

**Release Requisition AM23-15-R001366**

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

**Confirmation Messages**
- Changes saved successfully.

- **Requisition Number:** AM23-15-R001366
- **Status:** 1RI - In Progress
- **Department:** TRAIN23 - Training Department
- **Location:** TRN23 - Training Location
- **Required By Date:**
- **Requisition Type:** Release
- **Invoice Method:** Three Way Match
- **Requestor:** Ardis Ramey
- **Alternate ID:** Ardis Ramey
- **Estimated Cost:** $0.00
- **RPA Goods Received Date:**
- **Special Payment Handling:**
- **User Ref / Ref 4:**
- **Rush Payment:**
- **TIBH:**
- **Date Last Updated:** 06/15/2015 05:31:33 PM
- **User Last Updated:** Ardis Ramey

**Short Description:** Lab Equipment and Needs

- **Fiscal Year:** 2015
- **Organization:** AM23 - Texas A&M System Health Science Center
- **Solicitation Enabled:**
- **Entered Date:** 06/15/2015
- **Type Code:**
- **Purchaser:** Ramey, Ardis
- **Contact Phone:** 555 555 5555
- **Tax Rate:**

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**Creation & Setup – General Tab**

**Release Requisition AM23-15-R001366**

- **Status:** 1RI - In Progress
- **Status:** 1RI - In Progress
- **Status:** 1RI - In Progress
- **Status:** 1RI - In Progress

- **Department:** TRAIN23 - Training Department
- **Location:** TRN23 - Training Location
- **Requisition Number:** AM23-15-R001366
- **Requisition By Date:**
- **Requisition By Date:**
- **Invoice Method:** Three Way Match
- **Requestor:** Ardis Ramey
- **Contact:** Ardis Ramey
- **Alternate ID:** Ardis Ramey
- **Estimated Cost:** $0.00
- **RPA Goods Received Date:** (MM/DD/YYYY HH:MM:SS AM or PM)
- **Special Payment Handling:**
- **User Ref./Ref. 4:**
- **Rush Payment:**
- **TIBH:**

- **Short Description:** Lab Equipment and Needs
- **Fiscal Year:** 2015
- **Organization:** AM23 - Texas A&M System Health Science Center
- **Solicitation Enabled:**
- **Entered Date:** 06/15/2015
- **Type Code:**
- **Purchaser:** Ramey, Ardis
- **Contact Phone:** 555-5555

- **Date Last Updated:** 06/15/2016 05:31:33 PM
- **User Last Updated:** Ardis Ramey

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### Creation & Setup – General Tab Standard Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Number</td>
<td>The document number auto-assigned</td>
</tr>
<tr>
<td>Short Description*</td>
<td>Short description of the Requisition. 100 character limit.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the Requisition.</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>The fiscal year that the document is being created for.</td>
</tr>
<tr>
<td>Department / Location*</td>
<td>The business units that own the contract. Generally, these are the units that originally requested the items being contracted. These will automatically transfer from cloned documents and awarded Bids.</td>
</tr>
<tr>
<td>Organization</td>
<td>The Organization that the document is being placed on behalf of.</td>
</tr>
<tr>
<td>Required by Date</td>
<td>The date that the requested goods/services are needed by.</td>
</tr>
<tr>
<td>Entered Date</td>
<td>The date that the Requisition was originally assigned a number</td>
</tr>
<tr>
<td>Requisition Type</td>
<td>The type of Requisition that is being completed. Only necessary to select if Direct Open Market is desired.</td>
</tr>
<tr>
<td>Type Code</td>
<td>The Type Code field enables agencies to identify documents by a label of their own definition. Administrators must define the options available within this dropdown box.</td>
</tr>
<tr>
<td>Solicitation Enabled</td>
<td>Selecting this check box will enable solicitations against this requisition.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Requestor</td>
<td>The user that created that owns the Requisition and has rights to edit it. This field automatically populates with the name of the creator.</td>
</tr>
<tr>
<td>Purchaser</td>
<td>The Basic Purchasing user that the Requisition will be routed to if it requires procurement involvement.</td>
</tr>
<tr>
<td>Contact</td>
<td>The name of the person that should be contacted with questions about this Requisition. This field automatically populates with the name of the creator.</td>
</tr>
<tr>
<td>Contact Phone</td>
<td>The phone number of the person that should be contacted with question about this Requisition. This field automatically populates with the phone number of the creator.</td>
</tr>
<tr>
<td>Alternate ID</td>
<td>The Alternate ID field is used by the interface to document the encumbrance number. Anything input into this field will be overwritten once the Requisition is approved.</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>If selected, the tax rate will automatically be applied to all items on the Requisition.</td>
</tr>
<tr>
<td>Estimated Cost</td>
<td>The estimated cost of the all the goods/services being requested on this document. This field automatically updates as Items are added to the Requisition.</td>
</tr>
<tr>
<td>Print Format*</td>
<td>The format of the Requisition that will print when selecting the <strong>Print</strong> button on the Summary tab. This can be changed while the Requisition is in any status.</td>
</tr>
</tbody>
</table>
# Creation & Setup – General Tab Custom Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Ref/Ref 4</td>
<td>7-digit number</td>
</tr>
<tr>
<td>RPA Receive Date</td>
<td>Date goods received when creating an RPA</td>
</tr>
</tbody>
</table>

**Excerpt from the document:**

- **User Ref/Ref 4**: 7-digit number
- **RPA Receive Date**: Date goods received when creating an RPA
On-Contract Items & Vendors
On-Contract – Items Tab w/ No Items

There are no items. Please click 'Search Items' below to add an item.
On-Contract – Searching for Items to Add

Release Requisition AM23-15-R001366 - Search Items

Search Using: __________________________________________ Find It

Advanced Search

Search Using: ALL of the criteria

Search Fields:
- Contract/PO #
- Item Description
- Catalog
- Item Type
- NIGP Class
- NIGP Class Item
- Commodity Code

Result Type: Document

Add to Req & Exit  Cancel & Exit

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### Release Results

#### Search By:
- Any Price
  - Up to $250 (25)
  - $250 - $500 (2)
- Any Vendor
  - 1202983931800 | BURGOON COMPANY DBA EVCO PARTNERS, LP (1)
  - 1204008381300 | TECHFORCE TECHNOLOGY, INC. (1)
  - 176053392500 | SUMMUS INDUSTRIES, INC. (1)
  - ABC Supply (9)
  - Dacia, Incorporated (2)

#### Release Results Table

<table>
<thead>
<tr>
<th>Select</th>
<th>Quantity</th>
<th>Minimum Order Quantity</th>
<th>Item Description</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Vendor Name</th>
<th>Class Item</th>
<th>Discount %</th>
<th>Master Blanket #</th>
<th>Direct Release Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>General Labor</td>
<td>$52.50</td>
<td>HR - Hour</td>
<td>Thomas, LLC.</td>
<td>210 - CONCRETE AND METAL PRODUCTS, CULVERTS, PILINGS, SEPTIC TANKS, ACCESSORIES AND SUPPLIES 15 - Bricks, Concrete</td>
<td>0.00%</td>
<td>AGENCY-15-P000264 / 1</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>Concrete</td>
<td>$40.00</td>
<td>CFT - Hundred feet</td>
<td>Thomas, LLC.</td>
<td>210 - CONCRETE AND METAL PRODUCTS, CULVERTS, PILINGS, SEPTIC TANKS, ACCESSORIES AND SUPPLIES 17 - Concrete Bunker Panels</td>
<td>0.00%</td>
<td>AGENCY-15-P000264 / 2</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>Project Management</td>
<td>$159.33</td>
<td>EA - Each</td>
<td>Thomas, LLC.</td>
<td>912 - CONSTRUCTION SERVICES, GENERAL (INCL MAINTENANCE AND REPAIR SERVICES) 68 - Monitoring Services, Structural</td>
<td>0.00%</td>
<td>AGENCY-15-P000264 / 3</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>0</td>
<td>0</td>
<td>software</td>
<td>$0.00</td>
<td>EA - Each</td>
<td>1204008381300</td>
<td>TECHFORCE TECHNOLOGY, INC. 208 - COMPUTER SOFTWARE FOR MICROCOMPUTERS (PREPROGRAMMED) 54 - Internet and Web Site Software for Microcomputers</td>
<td>0.00%</td>
<td>AM01-15-P000270 / 1</td>
<td>Yes</td>
</tr>
</tbody>
</table>
## Release Results

### Search By:
- **Any Price**
  - Up to $250 (25)
  - $250 - $500 (2)
- **Any Vendor**
  - 126983516009355: eCo Partners, L.P. (1)
  - 126400081300114: Summum Industries, Inc., Inc. (1)
  - 17665172906017: ABC Supply (9)
- **Show more**

### Release Details

<table>
<thead>
<tr>
<th>Select</th>
<th>Quantity</th>
<th>Minimum Order Quantity</th>
<th>Item Description</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Vendor Name</th>
<th>Class Code</th>
<th>Class Description</th>
<th>Discount %</th>
<th>Master Planet</th>
<th>Direct Release Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>General Labor</td>
<td>$52.50</td>
<td>HR</td>
<td>Thomas, LLC.</td>
<td>210</td>
<td>Concrete and Metal Products, Culverts, Pilings, Septic Tanks, Accessories and Supplies</td>
<td>0.00%</td>
<td>AGENCY-15-P0000264/1</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Concrete</td>
<td>$40.00</td>
<td>CFT</td>
<td>Thomas, LLC.</td>
<td>210</td>
<td>Concrete and Metal Products, Culverts, Pilings, Septic Tanks, Accessories and Supplies</td>
<td>0.00%</td>
<td>AGENCY-15-P0000264/2</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Project Management</td>
<td>$159.03</td>
<td>EA</td>
<td>Thomas, LLC.</td>
<td>012</td>
<td>Construction Services, General (Incl. Maintenance and Repair Services)</td>
<td>0.00%</td>
<td>AGENCY-15-P0000264/3</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Buttons
- [Add to Req & Exit]
- [Add to Req & Next Page]
- [Cancel & Exit]
On-Contract – Searching for Items to Add (cont.)

<table>
<thead>
<tr>
<th>Release Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search By:</strong></td>
</tr>
<tr>
<td><strong>Any Price</strong></td>
</tr>
<tr>
<td>· Up to $250,000 (2)</td>
</tr>
<tr>
<td>· $250,000 - $500,000 (1)</td>
</tr>
<tr>
<td><strong>Any Vendor</strong></td>
</tr>
<tr>
<td>· 1202983931800</td>
</tr>
<tr>
<td>· 1204008381300</td>
</tr>
<tr>
<td>· 176053392500</td>
</tr>
<tr>
<td>· ABC Supply (9)</td>
</tr>
<tr>
<td>· Dacia, Incorporated (2)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Master Blanket #</th>
<th>Effective Date</th>
<th>Expiration Date</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Department</th>
<th>Direct Release Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGENCY-15-P000264</td>
<td>09/08/2014</td>
<td>09/30/2016</td>
<td>Vendor Performance Test</td>
<td>Thomas, LLC.</td>
<td>AGY</td>
<td>Yes</td>
</tr>
<tr>
<td>AM01-15-P000270</td>
<td>09/01/2014</td>
<td>09/01/2015</td>
<td>test123</td>
<td>1204008381300</td>
<td>AGY</td>
<td>Yes</td>
</tr>
<tr>
<td>AM01-15-P000277</td>
<td>09/01/2014</td>
<td>08/31/2015</td>
<td>Asbestos Services</td>
<td>Dacia, Incorporated</td>
<td>AGY</td>
<td>Yes</td>
</tr>
<tr>
<td>AM01-15-P000283</td>
<td>09/11/2014</td>
<td>09/11/2015</td>
<td>Blanket Regression Test</td>
<td>Thomas, LLC.</td>
<td>AGY</td>
<td>Yes</td>
</tr>
<tr>
<td>AM01-15-P000285</td>
<td>09/12/2014</td>
<td>09/14/2015</td>
<td>Blanket Regression Test 2</td>
<td>Thomas, LLC.</td>
<td>AGY</td>
<td>Yes</td>
</tr>
<tr>
<td>AM01-15-P000286</td>
<td>09/01/2014</td>
<td>09/30/2015</td>
<td>TBS - Office Max G2B Blanket</td>
<td>TBS - Office Max Solutions</td>
<td>AGY</td>
<td>Punchout</td>
</tr>
<tr>
<td>AM01-15-P000313</td>
<td>10/01/2014</td>
<td>10/31/2015</td>
<td>TIBH Punchout Catalog</td>
<td>TIBH</td>
<td>AGY</td>
<td>Punchout</td>
</tr>
</tbody>
</table>

Add to Req & Exit
On-Contract – Items Tab w/ Items

Release Requisition AM23-15-R001366

<table>
<thead>
<tr>
<th>Items</th>
<th>Vendors</th>
<th>Address</th>
<th>Accounting</th>
<th>Routing</th>
<th>Attachments</th>
<th>Notes</th>
<th>Reminders</th>
<th>Summary</th>
</tr>
</thead>
</table>

General

Confirmation Messages
- Changes saved successfully.

Sort by Column: Print Sequence
- Sort Descending

<table>
<thead>
<tr>
<th>Item #</th>
<th>Print Sequence</th>
<th>Item Description</th>
<th>Quantity</th>
<th>Minimum Order Quantity</th>
<th>Catalog Price/Unit Cost</th>
<th>Net Unit Cost</th>
<th>UOM</th>
<th>Total Discount Amt</th>
<th>Tax Rate</th>
<th>Tax Amount</th>
<th>Total Cost</th>
<th>Reportable</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1.0</td>
<td>Concrete</td>
<td>1.0</td>
<td>0.0</td>
<td>$40.00</td>
<td>$40.00</td>
<td>OOT - Hundred feet</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$80.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2.0</td>
<td>microscope</td>
<td>2.0</td>
<td>0.0</td>
<td>$115.00</td>
<td>$67.75</td>
<td>EA - Each</td>
<td>- $51.75</td>
<td>$0.00</td>
<td>$289.25</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please save your changes before sorting. Otherwise, your changes will be lost. Please do not save items with a code.

Edit Item
Sort
Delete Items
Edit Print Sequence
Change Quantity
Search for More Items

Search Items
On-Contract – Items Tab w/ Items (cont.)
On-Contract –
On-Contract Items w/o Unit Pricing

### Release Requisition ADSPO15-00064120

<table>
<thead>
<tr>
<th>Item #</th>
<th>Links</th>
<th>Print Sequence</th>
<th>Item Description</th>
<th>Fixed Asset</th>
<th>Quantity</th>
<th>Minimum Order Quantity</th>
<th>Catalog Price/Unit Cost</th>
<th>Net Unit Cost</th>
<th>UOM</th>
<th>Total</th>
<th>Total Cost</th>
<th>Delete All</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Master Blanket # / Line #: ADSPO15-00011679</td>
<td>No</td>
<td>1.0</td>
<td>1.0</td>
<td>$110.00</td>
<td>$110.00</td>
<td>EA - Each</td>
<td>$110.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Release Requisition ADSPO10-00000644

<table>
<thead>
<tr>
<th>Item #:</th>
<th>2</th>
<th>Item Type:</th>
<th>Normal</th>
<th>Item Status:</th>
<th>1R1 - In Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Blanket #: / Line #:</td>
<td>FIS00133-1-62 / 4</td>
<td>Pharmacy Benefits - Pass Through Model, Mail Order Pricing, Generic, Brand, Specialty. See Attachment for pricing. End user will enter unit cost.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Description

Pharmacy Benefits - Pass Through Model, Mail Order Pricing, Generic, Brand, Specialty. See Attachment for pricing. End user will enter Unit cost.

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Catalog Price/Unit Cost</th>
<th>Net Unit Cost</th>
<th>UOM</th>
<th>Discount %</th>
<th>Total Discount Amt.</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>0.00</td>
<td>0.00</td>
<td>EA</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
## On-Contract – Items Tab (cont.)

### Release Requisition ADSPO10-00000544

Status: 1RI - In Progress

<table>
<thead>
<tr>
<th>Item #</th>
<th>Links</th>
<th>Print Sequence</th>
<th>Item Description</th>
<th>Total Cost</th>
<th>Reportable</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Master Blanket # / Line #: EPS080133-1-A2 / 4</td>
<td>2.0</td>
<td>Generic Headache Medicine</td>
<td>$1200.00</td>
<td>√</td>
<td></td>
</tr>
</tbody>
</table>

- Pcard is enabled. If you would like to turn off pcard please go to 'General' page to uncheck the 'Pcard Enabled' checkbox. Please save your changes before sorting. Otherwise, your changes will be lost. Please do not search contract po items that have the same NIGP code.

### Save & Continue button
On-Contract – Item-Level Tabs

Open Market Requisition ADSPO10-00000132

Status: 1RI - In Progress

<table>
<thead>
<tr>
<th>Item #</th>
<th>Print Sequence</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Net Unit Cost</th>
<th>UOM</th>
<th>Total Discount Amt.</th>
<th>Tax Rate</th>
<th>Tax Amount</th>
<th>Freight</th>
<th>Total Cost</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1.0</td>
<td>50.0</td>
<td>$8.38</td>
<td>$8.38</td>
<td>EA - Each</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$419.00</td>
<td></td>
</tr>
</tbody>
</table>

Total $419.00

Pcard is enabled. If you would like to turn off pcard please go to ‘General’ page to uncheck the ‘Pcard Enabled’ checkbox. Please save your changes before sorting. Otherwise, your changes will be lost.
### On-Contract – Vendor Tab

Using the software interface, you can manage vendor information as part of a release requisition process. This tab allows you to input vendor details such as ID, name, preferred delivery method (e.g., email), and remit-to address. The vendor ID is 9000007853, and the name is MedImpact Healthcare Systems Inc. The preferred delivery method is set to email. The remit-to address field is circled for emphasis, indicating where additional details might be needed or added.
Addresses
Addresses – Overview

Open Market Requisition ADSPO15-00064170

<table>
<thead>
<tr>
<th>General</th>
<th>Items</th>
<th>Vendors</th>
<th>Address</th>
<th>Accounting</th>
<th>Routing</th>
<th>Attachments(2)</th>
<th>Notes</th>
<th>Reminders</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Ship-to Address**

<table>
<thead>
<tr>
<th>SPO - State Procurement Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Procurement Office</td>
</tr>
<tr>
<td>100 N. 15th Ave.</td>
</tr>
<tr>
<td>Suite 201</td>
</tr>
<tr>
<td>Phoenix, AZ 85007</td>
</tr>
<tr>
<td>US</td>
</tr>
<tr>
<td>Email: test@periscop holdings.com</td>
</tr>
<tr>
<td>Phone: (123) 456-7890</td>
</tr>
</tbody>
</table>

**Bill-to Address**

<table>
<thead>
<tr>
<th>ADOA - GSD- Accounting</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSD Accounting</td>
</tr>
<tr>
<td>100 N. 15th Avenue</td>
</tr>
<tr>
<td>Suite 202</td>
</tr>
<tr>
<td>Phoenix, AZ 85007</td>
</tr>
<tr>
<td>US</td>
</tr>
<tr>
<td>Email: test@periscop holdings.com</td>
</tr>
<tr>
<td>Phone: (123) 456-7890</td>
</tr>
</tbody>
</table>

Status: 1RI - In Progress
Addresses – Header-level Tab
Addresses – Items-level Tab

![Open Market Requisition ADSPO15-00064170](image)

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Ship-to Address</th>
<th>Bill-to Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>test</td>
<td>SPO - State Procurement Office</td>
<td>ADOA - GSD - Accounting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>State Procurement Office State Procurement Office</td>
<td>GSD Accounting ADOA - GSD - Accounting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>100 N 15th Ave 100 N. 15th Avenue</td>
<td>Suite 201 Suite 202</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Suite 201 Suite 202</td>
<td>Phoenix, AZ 85007 Phoenix, AZ 85007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Email: <a href="mailto:test@periscopeholdings.com">test@periscopeholdings.com</a> Email: <a href="mailto:test@periscopeholdings.com">test@periscopeholdings.com</a></td>
<td>UO UO</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Phone: (123)456-7590 Phone: (123)456-7590</td>
<td>Att. Reference: null Att. Reference: null</td>
</tr>
</tbody>
</table>

**Ship-to Address:**

**Bill-to Address:**

Save & Continue
Accounting
## Accounting – Overview

This image shows a screenshot of an account reconciliation screen titled "Open Market Requisition ADSPO15-00064170". The screen includes a section for "Accounting" with options for fiscal year and account code. The screenshot highlights the process of reconciling accounts, possibly for financial or logistical purposes. It includes a table with columns for fiscal year, account code, extended account code, percent, and dollars. There is also a note at the bottom explaining that if using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.

### Table

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Account Code</th>
<th>Extended Account Code</th>
<th>Percent</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td></td>
<td></td>
<td>100.0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Total:**
- Dollars: 0.00

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Accounting – Header-level Tab

### Open Market Requisition AM23-15-R001368

Status: IN - In Progress

#### Validation Errors
- Accounting distribution is missing and required.

#### Total Extended Amount
- 140.00
- Unapplied Distribution Amount: 0.00

<table>
<thead>
<tr>
<th>Delete</th>
<th>Fiscal</th>
<th>CAMPUS</th>
<th>DEPT</th>
<th>SUB DEPT</th>
<th>ACCOUNT</th>
<th>SUPPORT ACCT</th>
<th>SUBCODE (OBJ)</th>
<th>CR1</th>
<th>CR2</th>
<th>CR3</th>
<th>CLASS CODE</th>
<th>RE5</th>
<th>EXEC</th>
<th>D6</th>
<th>COL1</th>
<th>Percent</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>15</td>
<td></td>
<td>2050</td>
<td>BLANK</td>
<td>130050</td>
<td>00000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100.0</td>
<td>140.0</td>
</tr>
<tr>
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<td></td>
<td></td>
<td>X1-2050-BLANK-130050-00000-----N-DD-MD-MD</td>
<td>100.0</td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

If using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.

<table>
<thead>
<tr>
<th>Save Based on Dollars</th>
<th>Save Based on Percentages</th>
<th>Rebuild for All Items</th>
<th>Reset</th>
</tr>
</thead>
</table>

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Accounting –
Header-level Tab (cont.)

Open Market Requisition AM23-15-R001368

<table>
<thead>
<tr>
<th>Delete All</th>
<th>Fiscal Year</th>
<th>CAMPUS*</th>
<th>DEPT</th>
<th>SUB-DEPT</th>
<th>ACCOUNT*</th>
<th>SUPPORT ACCT*</th>
<th>SUBCODE (OBJ)</th>
<th>CR1</th>
<th>CR2</th>
<th>CR3</th>
<th>CLASS CODE</th>
<th>RES</th>
<th>EXEC</th>
<th>DIV</th>
<th>COLL</th>
<th>Percent</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>□</td>
<td>15</td>
<td>X1</td>
<td>2050</td>
<td>BLANK</td>
<td>130050</td>
<td>00000</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Account Code:</td>
<td></td>
<td>X1-2050-BLANK-130050-00000---N-DD-MD-MD</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 100.0 140.00

If using Save Based on Dollars, entered dollar amounts may be adjusted during rebuild for all items to ensure proper item account transactions.

Save Based on Dollars  Save Based on Percentages  Rebuild for All Items  Rebuild

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Accounting –
Header-level Tab – Rebuild for All Items
Accounting – Items-level Tab

<table>
<thead>
<tr>
<th>Item #</th>
<th>Account Distribution</th>
<th>Item Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>100.0% pencil</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>Test Item #1</th>
<th>Account Code:</th>
<th>Fiscal Year</th>
<th>DEPT</th>
<th>SUB-DEPT</th>
<th>ACCOUNT#</th>
<th>SUPPORT</th>
<th>SUBCODE (OBJ)</th>
<th>OR1</th>
<th>OR2</th>
<th>OR3</th>
<th>CLASS_CODE</th>
<th>RES</th>
<th>EXEC</th>
<th>DIV</th>
<th>COLL</th>
<th>Percent</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td>S1-BREG</td>
<td>215020</td>
<td>12000</td>
<td>9999</td>
<td>S1-BREG-215020-12000-9999-11-NBR-BR</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>50.000000</td>
<td>500.00</td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td>S1-BREG</td>
<td>39000</td>
<td>12000</td>
<td>9999</td>
<td>S1-BREG-215020-39000-9999-11-NBR-BR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>50.000000</td>
<td>500.00</td>
</tr>
</tbody>
</table>

Total: 1000.00
Attachments
Attachments – Attachments Tab

Open Market Requisition AM23-15-R001368

Status: 1RI - In Progress

Files

Click Add File to add file attachments.

No File Attachments

Add File

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Attachments – Attaching Files

[Image of an Open Market Requisition form with highlighted sections for attaching files]

- **Name**: The display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

- **Description**: A brief description of the file.

- **File**: Select the file to attach.

- **Location**: The location of the file.

[Buttons for saving, continuing, resetting, and canceling the process]
Attachments – Downloading Attachments
## Attachments – Deleting Files

### Open Market Requisition AM23-15-R001368

![Image of Open Market Requisition](image)

#### Files

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Show Vendor</th>
<th>Attached By</th>
<th>Attached Date</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cappadocia.jpg</td>
<td></td>
<td>✔</td>
<td>Ardis Ramey</td>
<td>05/16/2015</td>
<td></td>
</tr>
</tbody>
</table>

**Status:** 1RI - In Progress
Internal Communication
Internal Communication – Notes Tab
Internal Communication – Item-Level Notes Tab

Open Market Requisition AM23-15-R001368

Status: 1RI - In Progress

General | Items | Vendors | Address | Accounting | Routing | Attachments(1) | Notes | Reminders | Summary

General | Vendors | Address | Accounting | Notes

Item #1: pencil

Delete All | Note Date | User | Note

Save & Continue | Save & Exit | Reset | Cancel & Exit

Copyright © 2015 Periscope Holdings, Inc. - All Rights Reserved.
Internal Communication – Reminders Tab

<table>
<thead>
<tr>
<th>Due Date* (MM/DD/YYYY)</th>
<th>Comment* (max 250 characters)</th>
<th>Remind Whom*</th>
<th>Days Prior to Remind*</th>
<th>Date Completed (MM/DD/YYYY)</th>
<th>Send Email</th>
<th>Date Entered</th>
<th>Entered By</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save & Continue  Reset

Copyright © 2015 Periscope Holdings, Inc. - All Rights Reserved.
Approval
Approval – Summary Tab

Open Market Requisition AM23-15-R001368

Status: RIR - In Progress

Header Information
- Requisition Number: AM23-15-R001368
- Organization: AM23 - Texas A&M System Health Science Center
- Department: TRN23 - Training Department
- Entered Date: 08/16/2015
- Requestor: Ardis Ramsey
- Contact: Ardis Ramsey
- Estimated Cost: $140.00
- Solicitation Enabled: No
- Invoice Method: Three Way Match
- P-Card Desired: No
- Ship-to Address: Texas A&M - Health Science Center
  2447 TX-47
  Bryan, TX 77807
  US
  Email: procurement@tamu.edu
  Phone: (512)555-5555

Short Description: Quick Buy Requisition

Status: RIR - In Progress

- Location: TRN23 - Training Location
- Requisition Type: Open Market
- Purchaser: Ardis Ramsey
- Contact Phone: (512)555-5555

Required By Date: 08/19/2015
- Type Code: Fiscal Year: 2015

Bill-to Address: Texas A&M - Health Science Center
2447 TX-47
Bryan, TX 77807
US
Email: procurement@tamu.edu
Phone: (512)555-5555

RPA Goods Received Date: Special Payment Handling:
User Ref / Ref 4: Rush Payment:
TIBH:

Attachments

Submit for Approval  Cancel Requisition  Clone Requisition  Print
## Approval – Approval Paths

### Open Market Requisition 1300319

The following 2 approval paths meet the document criteria.

<table>
<thead>
<tr>
<th>Approval Path</th>
<th>Path Type</th>
<th>Path Priority Sequence</th>
<th>Description</th>
<th>Dollar Range</th>
<th>Approvers</th>
</tr>
</thead>
<tbody>
<tr>
<td>BREG</td>
<td>Departmental</td>
<td>10</td>
<td>Board of Regents</td>
<td>$0.01-$999,999.99</td>
<td>Monica Poehl (10, Primary)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Linda Brief (10, Alternate)</td>
</tr>
<tr>
<td>PILOT</td>
<td>Pilot</td>
<td>50</td>
<td>All Documents</td>
<td>$0.00-$999,999,999.99</td>
<td>Don Berwick (10, Primary)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Donna Keel (10, Alternate)</td>
</tr>
</tbody>
</table>

Please click `Continue` to continue submitting the document, or click `Cancel & Exit` to cancel the document submission and go back to the document.

### Open Market Requisition ADSPO10-00000553

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 ]
### Master Blanket Purchase Order ADSPO10-000199

**Status:** 3PRA - Ready for Approval

<table>
<thead>
<tr>
<th>Approver</th>
<th>Level</th>
<th>Approver Type</th>
<th>Date Requested</th>
<th>Date Approved/Disapproved/Canceled</th>
<th>Approved/Disapproved/Canceled by</th>
<th>Comment View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chris Harris</td>
<td>1</td>
<td>Primary</td>
<td>05/11/2010 02:44:41 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Administrator</td>
<td>2</td>
<td>Primary</td>
<td>05/11/2010 02:44:41 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### RPA Requisition ADSPO10-00000084 (RPA1)

**Status:** 1RR - Returned

<table>
<thead>
<tr>
<th>Delete</th>
<th>Approver</th>
<th>Order Sequence</th>
<th>Approval Path ID</th>
<th>Level</th>
<th>Approver Type</th>
<th>Date Requested</th>
<th>Date Approved/Disapproved/Canceled</th>
<th>Approved/Disapproved/Canceled by</th>
<th>Comment View</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Chris Harris</td>
<td>1</td>
<td></td>
<td>1</td>
<td>Primary</td>
<td>02/02/2010 06:33:55 AM</td>
<td>04/10/2010 02:39:38 PM</td>
<td>Chris Harris</td>
<td></td>
</tr>
</tbody>
</table>

- [Reopen Requisition]
- [Cancel Requisition]
- [Clone Requisition]
- [Print]
Off-Contract Items & Vendors
Off-Contract – Create New Requisition

- Requisition Number:
- Status: In Progress (When User request is created)
- Department: ABA - Accountancy Board
- Location: ABA - Accountancy Board
- Required By Date: 
- Requisition Type: 
- Requestor: Harris, Chris
- Contact: Chris Harris
- Alternate ID:
- Short Description:
- Fiscal Year: 2010
- Organization: State Procurement Office
- Entered Date: 08/02/2010
- Type Code: 
- Purchaser: 
- Contact Phone: 555 555 5555
Off-Contract – Adding New Items

Results

No records found.

Exit

Requisition ADSPO10-00000545

Status: 1RI - In Progress

There are no items. Please click 'Search items' or 'Add Open Market Item' or 'Add RPA Item' below to add an item.

Search Items  Add Open Market Item  Add RPA Item
### Off-Contract – Adding New Items (cont.)

#### Requisition ADSPO10-00000545

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Net Unit Cost</th>
<th>UOM</th>
<th>Discount %</th>
<th>Total Discount Amt.</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0</td>
<td>0.00</td>
<td>0.00</td>
<td>EA</td>
<td>0.0</td>
<td>0.0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Tax Rate:** 

**Tax Amount:** $0.00

**Freight:** $0.0

**Extended Amount:** $0.0

**Manufacturer:**

**Brand:**

**Model:**

**Make:**

**Packaging:**

**Periscope Holdings, Inc.**
### Off-Contract – Adding New Items: Standard Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Sequence*</td>
<td>The order the items will appear to vendors. The default sequence is the order that the items are added to the document.</td>
</tr>
<tr>
<td>Item Type*</td>
<td>Can be either “Normal” or “Narrative.” Normal items can be ordered while Narrative items cannot. Narrative items only permit you to enter a <strong>Description</strong> and a <strong>Print Sequence</strong>.</td>
</tr>
<tr>
<td>Description*</td>
<td>The definition of the good or service being requested. For Narrative items, the Description can be instructions or other information.</td>
</tr>
<tr>
<td>Quantity*</td>
<td>The total number of the item being requested.</td>
</tr>
<tr>
<td>Unit Cost*</td>
<td>The estimated cost of one unit of the item.</td>
</tr>
<tr>
<td>UOM*</td>
<td>The unit of measure for the item.</td>
</tr>
<tr>
<td>Discount %</td>
<td>The standard discount percentage for each unit of the item. Negative numbers entered here signify a markup. You cannot enter both a <strong>Discount %</strong> and <strong>Total Discount Amount</strong>.</td>
</tr>
<tr>
<td>Total Discount Amount</td>
<td>The dollar discount for each unit of the item. Negative numbers entered here signify a markup. You cannot enter both a <strong>Discount %</strong> and <strong>Total Discount Amount</strong>.</td>
</tr>
<tr>
<td>NIGP Class*</td>
<td>The 3-digit NIGP Class code for the item. You can either type in the code, select a code from the dropdown, or use the eyeglass icon to conduct a keyword search for the appropriate code.</td>
</tr>
<tr>
<td>NIGP Class-Item*</td>
<td>The 2-digit NIGP Class-item code for the item.</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>The 11-digit NIGP Detail code for the item. Use the <strong>Lookup Commodity Code</strong> button to search for the appropriate code. This is an optional field. Most agencies will not use this field.</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>The tax rate that should be applied to this item. This is an optional field.</td>
</tr>
<tr>
<td>Freight</td>
<td>The estimated freight charges associated with ordering the desired quantity of the item.</td>
</tr>
<tr>
<td>Manufacturer / Brand / Model / Make / Pckg</td>
<td>The specific product details. These fields are optional.</td>
</tr>
</tbody>
</table>
Off-Contract – Adding New Items: Commodity Codes
### Off-Contract – Items Tab w/ Items

- **Edit Item**
- **Change Requested Quantity**
- **Sort Items**
- **Delete Items**
- **Edit Print Sequence**
Off-Contract – Items Detail Screen

Open Market Requisition ADSPO10-00000132

Status: 1RI - In Progress

Item #: 1
Item Type: Normal
Item Status: 1RI - In Progress

Description: Replacement casters for office chairs

Quantity | Unit Cost | Net Unit Cost | UOM | Discount % | Total Discount Amt. | Total
---|---|---|---|---|---|---
50.0 | 8.38 | $8.38 | EA | 0.0 | 0.0 | $419.00

NIGP Class: 450 - HARDWARE AND RELATED ITEMS
NIGP Class Item: 16 - Casters, All Types
Commodity Code:

Manufacturer:
Brand:
Model:
Make:
Packaging:

Tax Rate:
Tax Amount: $0.00
Freight: $0.00
Extended Amount: $419.00

Save & Add New  Save & Exit  Save & Continue  Reset  Cancel & Exit
Off-Contract – RPA Items

RPA Requisition ADSPO10-0000546 (RPA20)

General Item Information Validation Errors
- Item #2: invoice number is required.
- Item #2: payment due date is required.

<table>
<thead>
<tr>
<th>Item #</th>
<th>Print Sequence</th>
<th>Item Description</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Net Unit Cost</th>
<th>UOM</th>
<th>Total Discount Amt.</th>
<th>Tax Rate</th>
<th>Tax Amount</th>
<th>Freight</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2.0</td>
<td>Mailing Software</td>
<td></td>
<td>$150.00</td>
<td>$150.00</td>
<td>EA - Each</td>
<td>$0.00</td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Total $150.00

Please save your changes before sorting. Otherwise, your changes will be lost.
Off-Contract – Vendors Tab

**Vendor Validation Warnings**
- No recommended vendor.
- Item #1: No vendor, and there is no recommended vendor at header level.

**Vendor Validation Errors**
- Item #1: No vendor, and there is no recommended vendor at header level.
Off-Contract – Vendor Search

Lookup & Add Reference Vendors - Requisition ADSPO10-0000551

Search Using: ALL of the criteria

Search Fields:
- Vendor ID
- Vendor Tax ID
- Vendor Keyword
- ZIP Code
- State
- Emergency Suppliers
- Reference Vendor
- NIGP Class
- NIGP Class Item
- NIGP Keyword
- Counties Served: Apache (includes Eger, Groes & Springerville)
- Business Indicator: Non-Small, Non-Minority or Non-Woman Owned Business or Individual, Non-Business
- Entity Type: State of Arizona Employee
- Tax ID Certification: Under penalties of perjury, I certify that the number shown on this form is my correct taxpayer identification number.
- Backup Withholding Certification: Under penalties of perjury, I certify that I am not subject to backup withholding because I am exempt from backup withholding.
- Citizenship Certification: Under penalties of perjury, I certify that I am a U.S. person (including U.S. resident alien).

Browse by: ABCDEFGHIJKLMNOPQRSTUVWXYZ

Find it: Find Vendors for All Commodity Codes on the Req
<table>
<thead>
<tr>
<th>Select</th>
<th>Vendor ID</th>
<th>Vendor Name</th>
<th>Alternate ID</th>
<th>Last PO Date</th>
<th>Last Bid Date</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Contact Name</th>
<th>Phone</th>
<th>Reference Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>9000000930</td>
<td>AL'S ACE HARDWARE</td>
<td></td>
<td></td>
<td></td>
<td>4010 E 29TH STREET</td>
<td>TUCSON</td>
<td>AZ</td>
<td>Micah Thomas</td>
<td>(520) 747-8144</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>9000033646</td>
<td>Bingham Equipment Company</td>
<td></td>
<td></td>
<td></td>
<td>1655 S. Country Club Dr.</td>
<td>Mesa</td>
<td>AZ</td>
<td>Brant Bingham</td>
<td>(480) 969-5516</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>000002509</td>
<td>Cactus Hardware Inc.</td>
<td></td>
<td></td>
<td></td>
<td>1899 W. Grant Rd.</td>
<td>Tucson</td>
<td>AZ</td>
<td>David Rhude</td>
<td>(520) 620-0704</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>000004091</td>
<td>Construction Tool &amp; Supply</td>
<td></td>
<td></td>
<td></td>
<td>5213 S. 30th St #C300</td>
<td>Phoenix</td>
<td>AZ</td>
<td>Brian Hill</td>
<td>(602) 323-2807</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>9000000898</td>
<td>GRAINGER</td>
<td></td>
<td></td>
<td></td>
<td>4405 E. Broadway Road</td>
<td>Phoenix</td>
<td>AZ</td>
<td>Alex Rodriguez</td>
<td>(520) 275-0519</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>000002788</td>
<td>Paul's Ace Hardware</td>
<td></td>
<td></td>
<td></td>
<td>2845 n scottsdale rd</td>
<td>scottsdale</td>
<td>AZ</td>
<td>Ron Buchtel</td>
<td>(480) 947-7281</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>000000235</td>
<td>SWABS-Az, Inc</td>
<td></td>
<td></td>
<td></td>
<td>3517 e indian school road</td>
<td>phoenix</td>
<td>AZ</td>
<td>marcy kostewa</td>
<td>(602) 522-2010</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>9000019557</td>
<td>TRIGGLEDIGGER ENTERPRISES, LLC</td>
<td></td>
<td></td>
<td></td>
<td>516 W. HOPI</td>
<td>HOLBROOK</td>
<td>AZ</td>
<td>AMBER HILL</td>
<td>(928) 524-6946</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>000002218</td>
<td>six points hardware</td>
<td></td>
<td></td>
<td></td>
<td>1409 n. 19th ave</td>
<td>phoenix</td>
<td>AZ</td>
<td>chad christison</td>
<td>(602) 252-6157</td>
<td>No</td>
</tr>
</tbody>
</table>
Off-Contract – Recommending Vendors
## Off-Contract – Informal Quote

### Open Market Requisition ADSPO10-00000132

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit-to Address</th>
<th>Recommended</th>
<th>Informal Quote</th>
</tr>
</thead>
</table>

- Publish Informal Bid On Web
- Show Unit Prices to Vendors
- Allow Vendor to Change Quantity
- Allow Vendor to Change UOM

**Select bidder participation**
- Unrestricted informal bid, all vendors can view and respond
- Restricted informal bid, only selected vendors can view and respond

### Informal Bid Date Section

- **Bid Ending Date:** *(MM/DD/YYYY HH:MM AM or PM)*
- **Bid Available Date:** *(MM/DD/YYYY HH:MM AM or PM)*
- **Purge Date:** *(MM/DD/YYYY)*

[Save & Continue] [Lookup & Add Vendors]
Off-Contract – “Ready for Purchasing” Status

Open Market Requisition ADSPO10-0000092

Status: 1RRP - Ready for Purchasing

Approval Actions

Options: Disapprove

Convert to Bid, Convert to PO
Informal Quotes
### Setup – Overview

#### New Requisition

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Number</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>1RI - Requisition In Progress (When User request is created)</td>
</tr>
<tr>
<td>Department*</td>
<td>ADOA - Arizona Department of Administration</td>
</tr>
<tr>
<td>Location*</td>
<td>ADOA - Arizona Department of Administration</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>2011</td>
</tr>
<tr>
<td>Organization</td>
<td>State Procurement Office</td>
</tr>
<tr>
<td>Enter Date</td>
<td>02/28/2011</td>
</tr>
<tr>
<td>Type Code</td>
<td></td>
</tr>
<tr>
<td>Purchaser</td>
<td></td>
</tr>
<tr>
<td>Contact Phone</td>
<td>555 555 5555 -</td>
</tr>
<tr>
<td>Tax Rate</td>
<td></td>
</tr>
</tbody>
</table>

**Submit and Continue**
Setup – Vendors Tab

Open Market Requisition ADSPO10-00000132

Vendor Validation Warnings
- No recommended vendor.
- Item # 1: No vendor, and there is no recommended vendor at header level.

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit-to Address</th>
<th>Recommended</th>
<th>Informal Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Publish Informal Bid On Web
- Show Unit Prices to Vendors
- Allow Vendor to Change Quantity
- Allow Vendor to Change UOM

Select bidder participation
- Unrestricted informal bid, all vendors can view and respond
- Restricted informal bid, only selected vendors can view and respond

Informal Bid Date Section

Bid Ending Date: (MM/DD/YYYY HH:MM:SS AM or PM)
Bid Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)
Purge Date: (MM/DD/YYYY)

[Save & Continue] [Lookup & Add Vendors]
Setup – Soliciting Quotes via Buy A&M

Open Market Requisition ADSPO10-00000132

Status: 1RI - In Progress

<table>
<thead>
<tr>
<th>General</th>
<th>Items</th>
<th>Vendors</th>
<th>Address</th>
<th>Accounting</th>
<th>Routing</th>
<th>Attachments</th>
<th>Notes</th>
<th>Reminders</th>
<th>Summary</th>
</tr>
</thead>
</table>

Vendor Validation Warnings

- No recommended vendor.
- Item #1: No vendor, and there is no recommended vendor at header level.

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit-to Address</th>
<th>Recommended</th>
<th>Informal Quote</th>
</tr>
</thead>
</table>

- [ ] Publish Informal Bid On Web
- [ ] Show Unit Prices to Vendors
- [ ] Allow Vendor to Change Quantity
- [ ] Allow Vendor to Change UOM

Select bidder participation

- [ ] Unrestricted informal bid, all vendors can view and respond
- [ ] Restricted informal bid, only selected vendors can view and respond

Informal Bid Date Section

- [ ] Bid Ending Date: *(MM/DD/YYYY HH:MM SS AM or PM)*
- [ ] Bid Available Date: *(MM/DD/YYYY HH:MM SS AM or PM)*
- [ ] Purge Date: *(MM/DD/YYYY)*

[Save & Continue] [Lookup & Add Vendors]
## Setup – Vendors Tab Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publish Informal Bid on Web</td>
<td>When checked, allows vendors to view and submit price quotes for the Items on your Requisition. If this option is not checked, you must solicit price quotes outside of the system. Once selected, “Bid Ending Date” field becomes required in order to publish the solicitation.</td>
</tr>
<tr>
<td>Show Unit Prices to Vendors</td>
<td>When checked, displays to vendors the unit price estimates entered for each Item on the Requisition. This option is unchecked by default so that vendors are not given an idea of how much you are expecting to spend per Item.</td>
</tr>
<tr>
<td>Allow Vendor to Change Quantity</td>
<td>When checked, allows vendors to edit the desired quantity you provided for each Item. This option is useful if vendors may provide the Item(s) in pre-packaged quantities (e.g. package of 3 vs. package of 8).</td>
</tr>
<tr>
<td>Allow Vendor to Change UOM</td>
<td>When checked, allows vendors to edit the desired unit of measure you provided for each Item. This option is useful if vendors may provide the Item(s) in different units (e.g. boxes vs. each).</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>When selected, all registered vendors can view and respond to the solicitation within the system.</td>
</tr>
<tr>
<td>Restricted</td>
<td>When selected, only the vendors you select on the Vendors tab can view and respond to the solicitation within the system. If neither “Restricted” or “Unrestricted” is selected, all registered vendors will be able to view and respond to the solicitation within the system.</td>
</tr>
<tr>
<td>Bid Ending Date</td>
<td>If soliciting price quotes, the date and time you expect all vendor price quotes to be submitted. This will be communicated to vendors, but does not effect when you are able to end the solicitation, view submitted price quotes or recommend vendors for award.</td>
</tr>
<tr>
<td>Bid Available Date</td>
<td>If soliciting price quotes, the date and time that the notification about the solicitation will be sent to selected vendors, and that vendors will be able to view and respond to the solicitation within the system.</td>
</tr>
<tr>
<td>Purge Date</td>
<td>NOT USED</td>
</tr>
</tbody>
</table>
Setup – Date Selection

Bid Ending Date: *(MM/DD/YYYY HH:MM:SS AM or PM)*
## Bidders – Overview

**Lookup & Add Reference Vendors - Requisition ADSPO10-0000551**

<table>
<thead>
<tr>
<th>Search Using:</th>
<th>ALL of the criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Fields:</td>
<td></td>
</tr>
<tr>
<td>Vendor ID</td>
<td></td>
</tr>
<tr>
<td>Vendor Tax ID</td>
<td></td>
</tr>
<tr>
<td>Vendor Keyword</td>
<td></td>
</tr>
<tr>
<td>ZIP Code</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Emergency Suppliers</td>
<td></td>
</tr>
<tr>
<td>NIGP Class</td>
<td></td>
</tr>
<tr>
<td>NIGP Class Item</td>
<td></td>
</tr>
<tr>
<td>NIGP Keyword</td>
<td></td>
</tr>
<tr>
<td>Counties Served</td>
<td></td>
</tr>
<tr>
<td>Business Indicator</td>
<td></td>
</tr>
<tr>
<td>Entity Type</td>
<td></td>
</tr>
<tr>
<td>Tax ID Certification</td>
<td></td>
</tr>
<tr>
<td>Backup Withholding Certification</td>
<td></td>
</tr>
<tr>
<td>Citizenship Certification</td>
<td></td>
</tr>
<tr>
<td>Browse by:</td>
<td></td>
</tr>
</tbody>
</table>

Under Penalties of perjury, I certify that the number shown on this form is my correct taxpayer identification number.

Under Penalties of perjury, I certify that I am not subject to backup withholding because I am exempt from backup withholding.

Under Penalties of perjury, I certify that I am a U.S. person (including U.S. resident alien).
<table>
<thead>
<tr>
<th>Select</th>
<th>Vendor ID</th>
<th>Vendor Name</th>
<th>Alternate ID</th>
<th>Last PO Date</th>
<th>Last Bid Date</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Contact Name</th>
<th>Phone</th>
<th>Reference Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>9000000930</td>
<td>AL'S ACE HARDWARE</td>
<td></td>
<td></td>
<td></td>
<td>4010 E 29TH STREET</td>
<td>TUCSON</td>
<td>AZ</td>
<td>Micah Thomas</td>
<td>(626) 747-8144</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>9000003646</td>
<td>Bingham Equipment Company</td>
<td></td>
<td></td>
<td></td>
<td>1655 S. Country Club Dr.</td>
<td>Mesa</td>
<td>AZ</td>
<td>Brant Bingham</td>
<td>(480) 969-5516</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>000002509</td>
<td>Cactus Hardware Inc.</td>
<td></td>
<td></td>
<td></td>
<td>1899 W. Grant Rd.</td>
<td>Tucson</td>
<td>AZ</td>
<td>David Rhude</td>
<td>(520) 620-0704</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>000004091</td>
<td>Construction Tool &amp; Supply</td>
<td></td>
<td></td>
<td></td>
<td>5213 S. 30th St #C300</td>
<td>Phoenix</td>
<td>AZ</td>
<td>Brian Hill</td>
<td>(602) 323-2807</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>900000085</td>
<td>GRAINGER</td>
<td></td>
<td></td>
<td></td>
<td>4465 E. Broadway Road</td>
<td>Phoenix</td>
<td>AZ</td>
<td>Alex Rodriguez</td>
<td>(520) 275-0519</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>000002788</td>
<td>Paul's Ace Hardware</td>
<td></td>
<td>2845 n scottsdale rd</td>
<td>scottsdale</td>
<td></td>
<td>scottsdale</td>
<td>AZ</td>
<td>Ron Buchtel</td>
<td>(480) 947-7281</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>000000235</td>
<td>SWABS-Az, Inc</td>
<td></td>
<td>3517 e indian school road</td>
<td>phoenix</td>
<td></td>
<td>phoenix</td>
<td>AZ</td>
<td>marcy kostewa</td>
<td>(602) 522-2010</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>9000019557</td>
<td>TRIGGEDIGGER ENTERPRISES, LLC</td>
<td></td>
<td>516 W. HOPI</td>
<td>HOLBROOK</td>
<td>AMBER HILL</td>
<td>HOPKIN</td>
<td>AZ</td>
<td>chad christison</td>
<td>(928) 524-6946</td>
<td>No</td>
</tr>
<tr>
<td>☐</td>
<td>000002218</td>
<td>six points hardware</td>
<td></td>
<td>1409 n. 19th ave</td>
<td>phoenix</td>
<td></td>
<td>phoenix</td>
<td>AZ</td>
<td></td>
<td>(602) 252-6157</td>
<td>No</td>
</tr>
</tbody>
</table>

**Bidders – Adding Bidders**

- **Select:** Check to select the vendor.
- **Vendor ID:** Unique identifier for the vendor.
- **Vendor Name:** Name of the vendor.
- **Alternate ID:** Optional additional identifier for the vendor.
- **Last PO Date:** Date of the last purchase order.
- **Last Bid Date:** Date of the last bid.
- **Address:** Physical address of the vendor.
- **City:** City of the vendor.
- **State:** State of the vendor.
- **Contact Name:** Name of the contact person.
- **Phone:** Phone number of the contact person.
- **Reference Vendor:** Flag to indicate if the vendor is a reference vendor.
### Bidders – Vendors Tab

#### Direct Open Market Requisition ADSPO10-00000551

**Vendor Validation Errors**
- Item #1: No vendor, and there is no recommended vendor at header level.

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit to Address</th>
<th>Recommended</th>
<th>Informal Quote</th>
</tr>
</thead>
</table>
|           |                | Cactus Hardware Inc. | Email                    | General Mailing Address - David Rhude 1899 W. Grant Rd. Tucson, A_  
David Rhude  
1899 W. Grant Rd.  
Tucson, AZ 85746  
US  
Email: test@periscope.com  
Phone: (520)620-0704 |           | Create           |

- Publish Informal Bid On Web
- Show Unit Prices to Vendors
- Allow Vendor to Change Quantity
- Allow Vendor to Change UOM

#### Informal Bid Date Section

- Bid Ending Date: 08/13/2010 06:46:00 AM
- Bid Available Date: MM/DD/YYYY HH:MM:SS AM or PM
- Purge Date: MM/DD/YYYY

- Save & Continue  
- Lookup & Add Vendors  
- Notify Vendors  

Periscope Holdings, Inc.
Bidders – Notifying Vendors

**Direct Open Market Requisition ADSPO10-00000551**

**Vendor Validation Errors**
- Item # 1: No vendor, and there is no recommended vendor at header level.

<table>
<thead>
<tr>
<th>Delete All</th>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit to Address</th>
<th>Recommended</th>
<th>Informal Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0500002509</td>
<td></td>
<td>Cactus Hardware Inc.</td>
<td>Email</td>
<td>General Mailing Address: David Rhude 1839 W. Grant Rd, Tucson, AZ 85746 US Email: <a href="mailto:test@goaperiscope.com">test@goaperiscope.com</a> Phone: (520)620-0704</td>
<td></td>
<td>Create</td>
</tr>
</tbody>
</table>

- Publish Informal Bid On Web
- Show Unit Prices to Vendors
- Allow Vendor to Change Quantity
- Allow Vendor to Change UOM

**Select bidder participation**
- Unrestricted informal bid, all vendors can view and respond
- Restricted informal bid, only selected vendors can view and respond

**Informal Bid Date Section**
- Bid Ending Date: 08/13/2010 06:46:00 AM
- Bid Available Date: 08/13/2010 06:46:00 AM
- Purge Date: None

**Buttons**
- Save & Continue
- Lookup & Add Vendors
- Notify Vendors
Bidders – Notifying Vendors (cont.)

**Vendor Notification Result**

**Subject:** Informal Quote Request - Req # ADSPO10-00000132, MRO

**Email Recipients**

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Vendor Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>9000019557</td>
<td>TRIGGLEDIGGER ENTERPRISES, LLC</td>
<td>JAQUELYN HAMILTON (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
<tr>
<td>000003947</td>
<td>Terra Verde Services</td>
<td>Edward Vasko (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
<tr>
<td>000002788</td>
<td>Paul’s Ace Hardware</td>
<td>Ron Buchtel (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
<tr>
<td>000002663</td>
<td>Wilson Electric Services Corp</td>
<td>Rachel Graziadei (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
<tr>
<td>000002117</td>
<td>Smart Home Pro</td>
<td>Jon Milan (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
<tr>
<td>000002018</td>
<td>Oliveleaf Enterprises</td>
<td>Dee Cardona (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
<tr>
<td>000002001</td>
<td>TRiadvocates LLC</td>
<td>Jennifer Woods (<a href="mailto:test@goperiscope.com">test@goperiscope.com</a>)</td>
</tr>
</tbody>
</table>

**OK**
Informal quote requests have been sent to the following vendors:
000000235 - SWABS-Az, Inc
000002218 - six points hardware
000002509 - Cactus Hardware Inc.
000002788 - Paul's Ace Hardware
000004091 - Construction Tool & Supply
9000000085 - GRAINGER
9000000930 - AL'S ACE HARDWARE
900003646 - Bingham Equipment Company
900019557 - TRIGGLEDIGGER ENTERPRISES, LLC

This is a notification and no response is necessary.

An informal quote request has been sent to you by State Procurement Office.

To respond, you need your company's user name and login ID. Go to the State Procurement Office site at https://procurettst.az.gov/bso_train/login.jsp. Enter your login and password information to sign into the system. Once logged in, click Quotes, and then click on the Informal Quotes link.

The information from the request is below:

REQUISITION HEADER

Requesting Department: ABA - Accountancy Board
Buyer Name:
Buyer Phone: $$BUYERPHONE$$
Buyer Email: $$EMAILADDRESS$$
Requisition Number: ADSPO10-00000551
Description: MRO
## Response – Vendor Roles

<table>
<thead>
<tr>
<th>Vendor Roles</th>
<th>Primary Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seller</td>
<td>• Respond to solicitation opportunities</td>
</tr>
<tr>
<td></td>
<td>• Acknowledge received purchase orders</td>
</tr>
<tr>
<td>Seller Administrator</td>
<td>• Manage vendor users (Sellers)</td>
</tr>
</tbody>
</table>
Response – Vendor Homepage
Response – Vendor Quotes Tab

### Home - Welcome Back Vendor User

<table>
<thead>
<tr>
<th>Req Number</th>
<th>Organization</th>
<th>Description</th>
<th>Estimated Total</th>
<th>Bid Ending Date</th>
<th>Informal Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADSPO10-00000551</td>
<td>State Procurement Office</td>
<td>MRO</td>
<td>Unknown</td>
<td>Aug 13, 2018 6:46:00 AM</td>
<td>create</td>
</tr>
</tbody>
</table>
# Response – Vendor Price Quote Entry

## Informal Quote - Requisition

### Header Information

<table>
<thead>
<tr>
<th>Requisition Number</th>
<th>Description</th>
<th>MRO</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADSPO10-00003551</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Buyer</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chris Harris</td>
<td>Phone: (555)555-5555</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:charris@periscopeholdings.com">charris@periscopeholdings.com</a></td>
</tr>
</tbody>
</table>

### Attachments

- Specifications.pdf

### Item Information

<table>
<thead>
<tr>
<th>Req Item Info</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Tax Rate</th>
<th>Freight</th>
<th>Extended Amount</th>
<th>Quote Total</th>
<th>No Bid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item #: 1 Print Sequence: 1.0 (450 - 16) Replacement casters for office furniture Quantity (UOM): 100.00(EA)</td>
<td>100.00</td>
<td>0.00</td>
<td>EA - Each</td>
<td></td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

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

[Save & Exit] [Save & Continue]
Response – Documenting Offline Price Quotes

Open Market Requisition ADSPO10-00000132

Requisition Number: ADSPO10-00000551  Description: MRO

Buyer: Chris Harris  Phone: 555-555-5555  charris@periscopeholdings.com

Attachments:
Specifications.pdf

Informal Quote - Requisition

Item Information
Sort by Column: Print Sequence

<table>
<thead>
<tr>
<th>Req Item Info</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Tax Rate</th>
<th>Freight</th>
<th>Extended Amount</th>
<th>Quote Total</th>
<th>No Bid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item #1 Print Sequence: 1.0 (450 - 18) Replacement casters for office furniture</td>
<td>100.00</td>
<td>0.00</td>
<td>EA - Each</td>
<td></td>
<td>0.00</td>
<td>$10.93</td>
<td>No Charge</td>
<td></td>
</tr>
</tbody>
</table>
Review & Recommendation – Overview

Direct Open Market Requisition ADSPO10-00000551

Vendor Validation Errors
- Item 1: No vendor, and there is no recommended vendor at header level

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit-to Address</th>
<th>Recommend</th>
<th>Informal Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Periscope Holdings, Inc.</td>
<td>Email</td>
<td></td>
<td></td>
<td>View/Edit</td>
</tr>
</tbody>
</table>

- Publish Informal Bid On Web
- Show Unit Prices to Vendors
- Allow Vendor to Change Quantity
- Allow Vendor to Change UOM

Informal Bid Date Section
- Bid Ending Date (MM/DD/YYYY HH:MM:SS AM or PM): 08/14/2010 06:46:00 AM
- Bid Available Date (MM/DD/YYYY HH:MM:SS AM or PM): 
- Purge Date (MM/DD/YYYY): 

Informal Quote Tabulation
### Review & Recommendation – Single Price Quote

#### Direct Open Market Requisition ADSPO10-00000551

**Vendor Validation Errors**
- Item #1: No vendor, and there is no recommended vendor at header level.

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Alternative ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit to Address</th>
<th>Recommend</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Periscope Holdings, Inc.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Informal Quote - Requisition

**Header Information**
- **Requisition Number**: ADSPO10-00000551
- **Description**: MRO
- **Buyer**: Chris Harris
- **Phone**: (555)555-5555
- **Email**: charlie@periscopeholdings.com

**Message from webpage**

You are going to apply the quantity, unit cost, tax rate and UOM of all the informal quotes to the corresponding requisition items, and set the item vendors of these requisition items to this vendor. Continue?

**Apply Pricing to Req Items**

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Unit Cost</th>
<th>UOM</th>
<th>Tax Rate</th>
<th>Freight</th>
<th>Extended Amount</th>
<th>Quote Total</th>
<th>NoBulk</th>
</tr>
</thead>
<tbody>
<tr>
<td>100.00</td>
<td>10.00</td>
<td>EA</td>
<td>FH - 8.90% - FOUNTAIN HILLS</td>
<td>0.00</td>
<td>$1089.00</td>
<td>$1089.00</td>
<td></td>
</tr>
</tbody>
</table>
**Review & Recommendation – Price Quote Tabulation**

### Direct Open Market Requisition ADSPO10-00000551

Status: 1RL - In Progress

#### Vendors Tabulation

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Vendor Name</th>
<th>Preferred Delivery Method</th>
<th>Vendor Remit-To Address</th>
<th>Recommended</th>
<th>Informal Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>900003340</td>
<td>Periscope Holdings, Inc.</td>
<td>Email</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Check Publish Informal Bid On Web
- Allow Vendor to Change Quantity
- Allow Vendor to Change UOM

#### Informal Bid Date Section

- Bid Ending Date: 08/14/2010 06:46:00 AM
- Bid Available Date: 
- Purge Date: 

- Informal Quote Tabulation button highlighted
Review & Recommendation – Price Quote Tabulation (cont.)
Review & Recommendation – Price Quote Tabulation (cont.)

Recommend a vendor for a specific Item

Recommend a vendor for all Items
Punchouts
Punchouts – Overview

G2B Punchout Shopping

Vendor

Department
GRAINGER
Waxie Sanitary Supply
Staples
Staples Coop No Agreement
Staples Coop Agreement

Location

Ship-to Address

Bill-to Address
ABA - ABA Central Receiving

ABA Central Receiving
100 N 15th Ave.
Suite 104
Phoenix, AZ 85007
US
Email: test@goperiscope.com
Phone: (602)542-5511

Punchout  Reset  Cancel & Exit
Punchouts – Creation

G2B Punchout Shopping

Vendor

Department
GRAINGER

Location
Waxie Sanitary Supply
Staples

Ship-to Address
Staples Coop No Agreement
Staples Coop Agreement

Bill-to Address
ABA - ABA Central Receiving
ABA Central Receiving
100 N 15th Ave.
Suite 104
Phoenix, AZ 85007
US
Email: tca@periscope.com
Phone: (602)442-8511
Punchouts – Setup

Vendor
Department
Location
Ship-to Address
Bill-to Address

Vendor Options:
- GRAINGER
- Waxie Sanitary Supply
- Staples
- Staples Coop No Agreement
- Staples Coop Agreement

ABA - ABA Central Receiving
Address:
ABA Central Receiving
100 N 15th Ave.
Suite 104
Phoenix, AZ 85007
US
Email: test@goperiscope.com
Phone: (602)542-5511
Punchouts – Punching Out

### G2B Punchout Shopping

<table>
<thead>
<tr>
<th>Vendor</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GRAINGER</td>
<td></td>
</tr>
<tr>
<td>Waxie Sanitary Supply</td>
<td></td>
</tr>
<tr>
<td>Staples</td>
<td></td>
</tr>
<tr>
<td>Staples Coop No Agreement</td>
<td></td>
</tr>
<tr>
<td>Staples Coop Agreement</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ABA Central Receiving</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ship-to Address</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ABA - ABA Central Receiving</td>
<td></td>
</tr>
</tbody>
</table>

ABA Central Receiving
100 N 15th Ave.
Suite 104
Phoenix, AZ 85007
US
Email: test@goperiscope.com
Phone: (602)542-5511

- Punchout
- Reset
- Cancel & Exit

---

Windows Internet Explorer

The webpage you are viewing is trying to close the tab.
Do you want to close this tab?

- Yes
- No
Punchouts – Completing the Requisition

Release Punchout Requisition 10-00000571

- Short Description: G2B From GRAINGER
- Fiscal Year: 2010
- Organization: State Procurement Office
- Entered Date: 08/27/2010
- Type Code: 
- Purchaser: 
- Contact Phone: 
- Tax Rate: 
- Estimated Cost: $16.79
- Print Format: Requisition
- Project No.: 
- Date Last Updated: 08/27/2010 07:08:26 AM

User Last Updated: Chris Harris

Save & Continue