MissouriBUYS User Activities

Requisition to Purchase Order

State of Missouri

Table of Contents

Guide Objectives

The purpose of this guide is to provide information to start and complete a request to become a Purchase Order. It covers the key features and functionality of the Order Management module.

After reviewing this guide, you will be able to:

- ❑ **Navigate MissouriBUYS with ease**
- ❑ **Create a new Purchase Request**
- ❑ **Edit an open Purchase Request**
- ❑ **Add frequently purchased items to your Favorites list**
- ❑ **Create a Personal template**
- ❑ **Create a Purchase Request from a Personal template**
- ❑ **Search for a specific product in the State of Missouri catalogs**
- ❑ **Add an Off-Catalog item to a Purchase Request**
- ❑ **Add a Contract Item from a Roundtrip Catalog session**
- ❑ **Add an ad hoc approver to your Purchase Request Approval workflow**
- ❑ **Stop/Delay Dispatch of a Purchase Order for Order Fulfillment**
- ❑ **Check the status of a Purchase Request and Purchase Order**
- ❑ **Create a Purchase Order Change Request**
- ❑ **Approve a Request or Purchase Order Change Request**

Activity 1 Purchase Request Activities – Catalog Item

Activity 1.1 Log in as a Requestor

Note: WebProcure is the product name for MissouriBUYS. Pop-up messages are a part of the Application. If your computer has a Pop-Up Blocker Application running, please allow Pop-ups for the WebProcure/MissouriBUYS URLs. See Pop Up Blocker instructions in the Appendix or contact ITSD Help Desk for assistance.

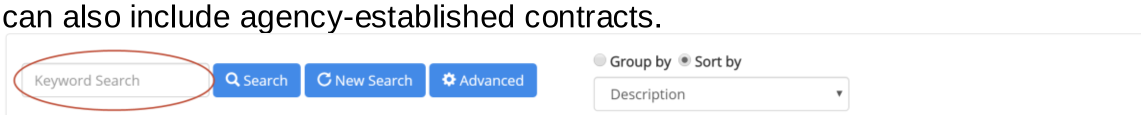
1. Enter your username and password provided to you for training in the stage environment (password field is case sensitive). The URL address for stage: https://webprocure-stage.perfect.com. For Production, you will log on through the MissouriBUYS website: https://MissouriBUYS.mo.gov.
2. Click Log In

Note: If you belong to multiple organizations/agencies, a drop down list will appear at the top of your screen under the Organization Name – i.e. State of Missouri. You will need to select the specific agency to work within during your session. Order Management functions are performed within the Sub-orgs, i.e. OA-Accounting, DNR, etc. To view Vendor Information, users have State of Missouri level access.

3. Select the Requests option on the **Home** page to access the Drop Down for **Create New Request** (to initiate new requests) or **View All Requests** (to review or edit existing requests)**.** Click option to **Create New Request**
4. The Request Management Sub-navigation bar will allow access to all functionality and pages within the **Request Creation** module that your user profile has permissions to access. System defaults to Catalog Creation.

Activity 1.2 Add Catalog Line Item/View Contract

The '**Catalog**' tab will take you to the online catalogs within MissouriBUYS that are contractor hosted (i.e. catalogs hosted by our contractor Perfect Commerce). The catalogs can include Purchasing-established statewide contracts and Purchasing-established contracts for individual agencies. They can also include agency-established contracts.



1. Type a keyword that describes the item into the **Catalog Keyword Search** field.
2. Click Search.

3. Review the display of the items that matches your keyword search. Click on the Display List Grid toggle button to view your results in list or grid format.
4. Click the blue Contract Number of one of the items to open the **Contract Summary** page for viewing.

Note: The details of the Contract are available from this view. Any contractual documents or additional information for the contract can be accessed and viewed by clicking on the document name.

5. Click Close on the **Contract Summary** page to return to the **Browse Catalog** page.
6. Click the Item description link of the first item in your **Results** list to see details for this catalog item.
7. Click on to view the list of suppliers of this item.
8. Click Ask Supplier and view the form you would use to submit a query to the supplier, then click Close.
9. Click + Add Item to add one item to your Purchase Request or enter the quantity to order and click on + Add Item.
10. If you order this item frequently, click on to add it to your Favorites list.
11. Click OK on the system message box that pops up to tell you have successfully added an item to your request.

Note: The blue Request Tally box across the bottom of the page displays the Request Name, Creation Date, Total and Number of Line Items (Item Count) for the current Purchase Request for quick reference.

Note*: Add Feature*

Clicking + Add Item next to a catalog item will automatically add the quantity of 1 to your Purchase Request.

Note*: Refined Search*

Once you are in a catalog, you can further refine your search by entering a more refined item and using the Search Current Category / Search All Categories to search further within the same category.

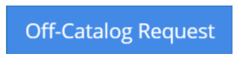
Activity 2 Off-Catalog

Activity 2.1 Add Off-Catalog Line Item

Catalog | RoundTrip | Favorites | Off-Catalog Request | Templates | View Request

The '**Off-Catalog Request**' tab is used for placing orders on contracts that are not set up in MissouriBUYS as either a roundtrip catalog or as a hosted catalog. The 'off-catalog request' tab will also be used when you are processing a request where the products/services you need are not on any catalog or any contract and are subject to the state’s informal and formal bidding limits (including direct purchases which are below the bidding limit). In MissouriBUYS, system users will use the “Off-Catalog” Request in many circumstances including those identified below:

(1) When ordering from a contract that is not set up as Roundtrip catalog or as a Hosted catalog;
(2) When making a single purchase of an item(s) that is not under a contract and falls under the “no bid” statutory authority.
(3) When making a purchase resulting from end user informal quotes (phone bids or written quotes);
(4) When requesting a bidding process be conducted to establish a contract (whether bidding is needed by the state agency under their delegated authority or by the Division of Purchasing)

1. Click the **Off-Catalog Request** 

option from the menu bar.

Note: Required Fields are marked with an asterisk (*).

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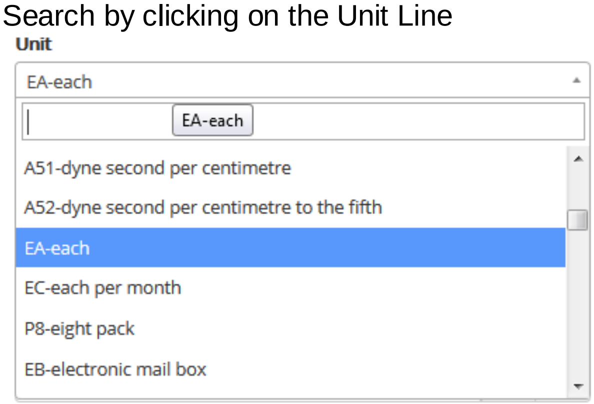
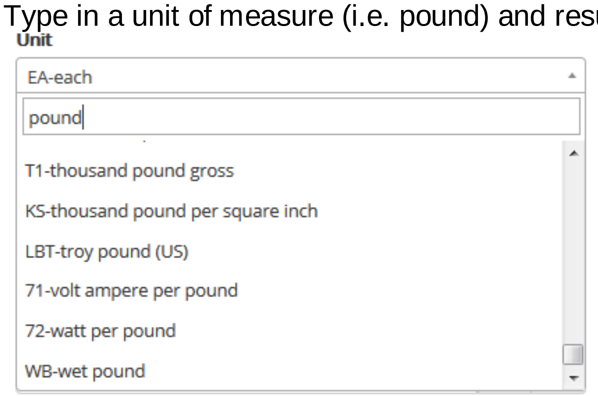
2. Enter “50” in the **Quantity*** field.
3. “Each” is the default value for the **Unit** field.
   Search by clicking on the Unit Line



Type in a unit of measure (i.e. pound) and results will show for you to click on:

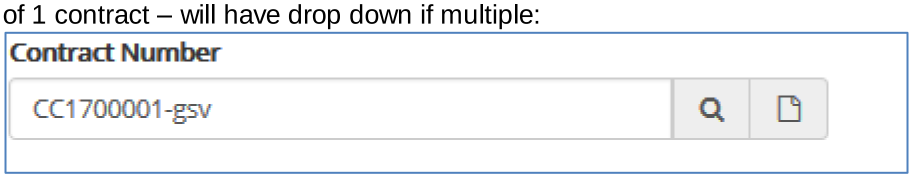


4. Enter “1.59” in the **Estimated Unit Price*** field.
5. USD-U.S. Dollar defaults in the **ISO Currency Code** field.

Note: If you have the specific supplier part number for the item that you are creating, complete the **Supplier Part Number** field. If you do not have the supplier part number for the item that you are creating, leave the **Supplier Part Number** field blank.

6. *(Optional)* Type the specific supplier part number in the **Supplier Part Number** field. (required only if the **Item Description** field is not completed)
7. Type the supplier name into the **Suggested Supplier** field. As you type the supplier name, the dynamic lookup will display with all available suppliers that match the data entered. Continue to type until the desired supplier's name appears within the dynamic lookup. Select the desired supplier by clicking on their name.
   OR
   Click the Search icon next to the **Suggested Supplier** field. Type in a part of the desired supplier's name and select Search. Find the supplier from the list and click on the to add to the request.
8. *(Optional)* Type the name of the manufacturer in the **Manufacturer** field. The dynamic lookup will display matching results. Select the desired name from the available list.
   OR
   Click the Search icon next to the **Manufacturer** field. Type in a part of the desired manufacturer's name and select Search. Find the manufacturer from the list and click on the to add to the request.
9. Select a **Need by Date** from the calendar. The date will default to 14 days from the date of the request creation. This date will appear on the Purchase Order as the Due Date for the supplier and cannot pre-date the request or the purchase order creation will fail in SAM II.
10. Type the item name or commodity code number in the **Service or Commodity Code*** field. The dynamic lookup will display matching results. Select the desired name from the available list Select an available commodity code for the item from the Commodity code drop down.
    OR
    Click the Search icon next to the **Service or Commodity Code*** field. Type in a **Keyword** of the desired commodity or a **Code** and select Search. Find the item from the list and click on it to add to the request.

    Note: If the Off Catalog Request commodity code is associated to a contract, the Contract Field will populate with Contract(s) to choose from/utilize for purchasing – below is example of 1 contract – will have drop down if multiple:



11. Enter the complete item description in the **Item Description** field.

    Note: The commodity code description by default will populate in the **Item Description** field. **Do not delete the commodity code description that appears in the Item Description field.** If the defaulted commodity description is not a complete description for the item, you may enter more details in order to have a complete and accurate item description.

12. Click Add to add this item to the Purchase Request.
13. The system default is to check the box to **Retain Key Information**. If you uncheck this, it will display a popup box asking if you would like to **Retain Key Information**. Your options are to click OK to save the supplier, commodity information, and contract number or RESET to not retain the detail information for your subsequent detail lines.
14. Click OK on the Popup displaying “Item(s) saved to Request”

Note: The blue Request Tally box across the bottom of the page displays the Request Name, Creation Date, Total and Number of Line Items (Item Count) for the current Purchase Request for quick reference – it will update the number and dollar amount each time you add a new line item

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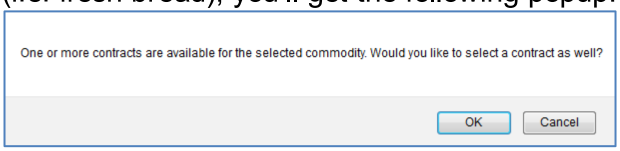
OPTIONAL: You may also use the Off Catalog Screen to search and find Contract items – described below:

15. Enter or Search for a Commodity Code/Description, and if the item is on a Contract (i.e. fresh bread), you’ll get the following popup:



16. Click the OK button to proceed with Contract and it will populate with the Contract or a list of Contracts in the **Contract Number** field along with the associated supplier in the **Suggested Vendor** field.
17. If you click the Cancel button, it will enter the **Service or Commodity Code** field and the default **Item Description**, but will not populate the **Contract Number** or **Suggested Vendor** fields.

    OR

18. Type the contract number into the **Contract Number** field. The dynamic lookup will display the available contracts that match your entered data. Select the desired contract number from the available results and the associated supplier is populated in the **Suggested Vendor** field.

    OR

19. Click the Search icon next to the **Contract Number** field.
20. Type in a keyword or commodity code that describes the Item contained on a Contract into the **Keyword** field.

Note: Several keyword searches may need to be performed in order to display the contract required within the **Contract Information** section. The search results are based on Commodity descriptions associated with the Contract. For example, if you are searching for a vehicle but you enter in the keyword of “automobile”, if the contract commodity code does not have the word automobile in the commodity code description, then the Contract will not be displayed. If you perform a search and the Contract is not displayed, redefine your keyword search word and click Search

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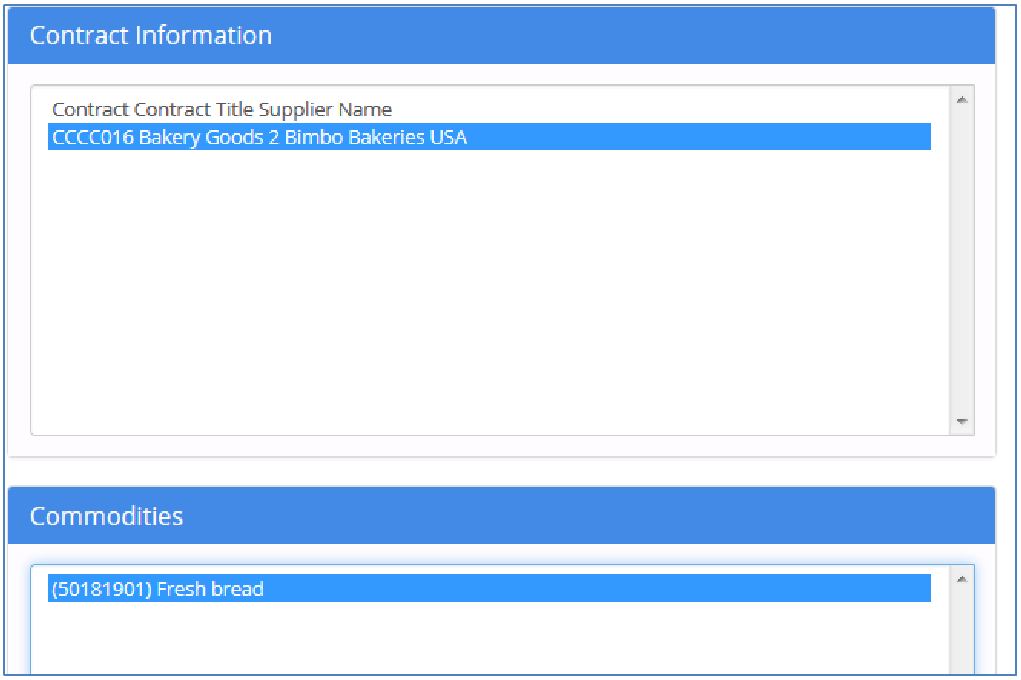
21. Click 

22. Click the appropriate Contract from the **Contract Information** section.
23. Click the appropriate Commodity description for the item within the **Commodities** section.



24. Scroll down, Click 

Note: If the **Commodity** field has already been populated with a Commodity Code that differs from the Commodity Code associated with the Contract available from the **Contract** page, then the commodity code associated with the Contract will override the Commodity code manually entered during the **Off Catalog Request** item creation. The reason for this is to ensure that there are no items of different commodities specified for the Contract being applied to the Contract Spend.

****Note**: In order for a Contract to be available from the **Off-Catalog Request** page for item association, the Contract has to have commodities assigned to it within the **Contract** module. If during the creation or maintenance of the Contract, the assignment of Commodities to the Contract was not performed, then the end-user will not be able to associate the **Off Catalog Request** item to a Contract. This feature ensures and allows the Contract Administrator to control the end users access to the Contract for purchases that are not in catalog format.

Activity 3 Roundtrip Item

Activity 3.1 Add Roundtrip Line Item

RoundTrip Catalog – Also referred to as a 'punchout' catalog, a Roundtrip Catalog is an online catalog in MissouriBUYS that is representative of the available items on an established contract and which is <u>hosted by a supplier/vendor</u>. To order from a Roundtrip catalog, the end user begins their request to purchase an item in MissouriBUYS by selecting the Roundtrip catalog and in doing so is "punching out" of MissouriBUYS into the vendor's Missouri-specific catalog (on the vendor's website). While in the catalog, the end user will find and select the needed items which will be placed in the end user's electronic shopping cart. When ready to checkout, the user's selection of the checkout button will return the user and their electronic shopping cart items to MissouriBUYS. The selected items will be placed on the end user's request to generate the purchase order to the contractor. Roundtrip catalogs will be used for those Division of Purchasing-established statewide contracts that are open to all agencies to use and that have extremely large numbers of items, high volume of orders, fluctuating prices, and changing items (typically these are a percentage discount off list price-type contract such as office supplies and MRO [maintenance, repair, operations] items).

1. Click the **Roundtrip** option from the Sub-navigation bar.
2. All Roundtrip Catalog Sessions available for purchasing will be displayed.
3. Click an available Supplier Name link.
4. The session with the selected suppliers catalog will connect and display.

Note: Once the Roundtrip session is launched within the MissouriBUYS system, you are now navigating within the selected supplier's on-line catalog. The steps required to locate and add specific catalog items from the suppliers' catalog will vary from one supplier to another. The basic steps are to search the Supplier catalog for the required items, add the desired items to the Cart and then select the Check-out option to initiate a return to the MissouriBUYS system to add the selected items to the Request being created.

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5. Type in keyword describing the desired item into the suppliers **Search** field. Select Item.
6. Type in a Quantity of 12 for an item.
7. Click the available add feature (exact button or option is dependent on the selected supplier). Example: "Add to Cart".
8. Access the available checkout page for supplier's website. Example: "View Cart".
9. Click the available option to return to the MissouriBUYS system (exact button or option is dependent on the selected supplier). Example: "Submit Cart".
10. The system will exit the selected supplier's website session and return to the **RoundTrip** page within the MissouriBUYS system.
11. A System message will display: Click OK

Note: To view the item(s) just added to your current Request from the Roundtrip session, click the View Request View Request option from the Sub-Navigation bar. To add more catalog items from another Roundtrip Supplier, select another Supplier Name from the **Roundtrip** page.

Activity 4 Favorite Items

Activity 4.1 Catalog Search/Add Line Item as a Favorite Item

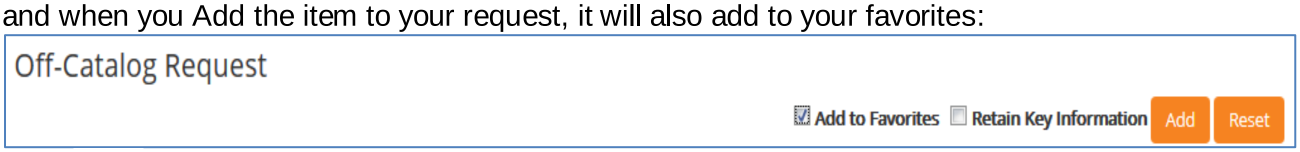
1. Select/Return to Catalog Page on New Request

2. Type a word that best describe the item in the **Catalog Keyword** field.
3. Click Search.
4. (Optional) Click the Item description link of the first item in the **Results** section.
5. (Optional) Click to view a list of all suppliers for this item.
6. (Optional) Click Close
7. Click to add the product to your **Favorites** list.
8. Click OK on the system message.
9. Item has been added to your **Favorites** List

Activity 4.2 Off- Catalog Search/Add Line Item as a Favorite Item

1. Select/Return to Off-Catalog Request on New Request

2. Complete the screen to enter another Off-Catalog Item (that you will use frequently)
3. Click the **Add to Favorites** checkbox after you have populated the required fields and when you Add the item to your request, it will also add to your favorites:



4. Click Add to add the item to your current Request
5. Now this item is saved in your favorites, so if you order it frequently you can access **Favorites** to add it to a request.

Activity 4.3 Add a Line Item from Favorites

1. Click the **Favorites** tab from the Sub-navigation bar.

2. Select an item from your list, enter a quantity and click Add
3. Click OK in the system message box.
4. Click Process Request when finished adding Favorites to your order.

Note: If there is a single item that you frequently order. The item should be saved in your **Favorites** list so you don't have to repeatedly search for this item.

Note: If the price of the item changes in the catalog, the price will be updated in your **Favorites** list.

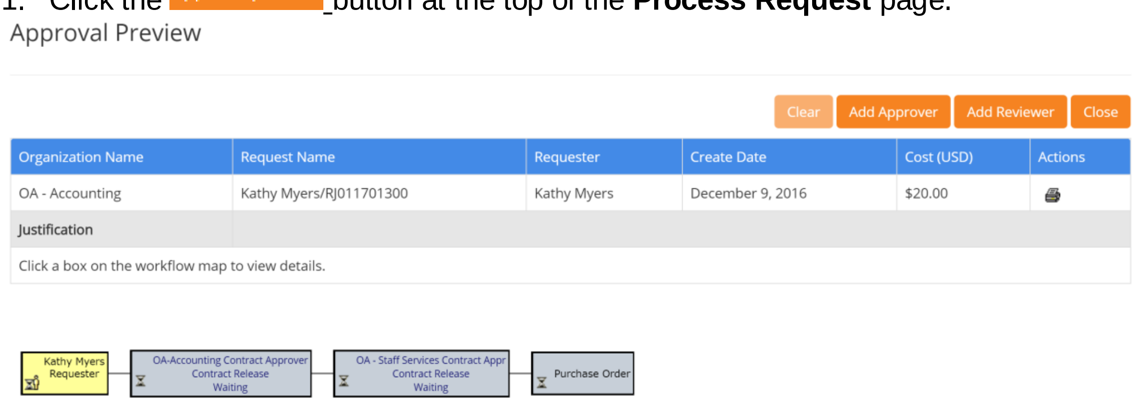
Note: If a Contract Catalog item saved as a favorite item expires, the Contract Item will remain in your **Favorites** list but when you attempt to add it to a Request, the system will display a system message stating the item has expired. At that time, you should delete the item from your **Favorites** list by clicking 🗑 and performing a Catalog Search for the new Contract item.

Activity 5 View Request / Process Request

1. At any time, a user can click the **View Request** option from the Sub-navigation bar to see items added to their current request.

Activity 5.1 View Approval Map/Add an AdHoc Approver or Reviewer

1. Click the approval preview button at the top of the **Process Request** page.

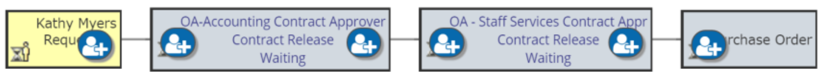


2. When you view your approval routes, if you would like to add a **Reviewer** or an Additional **Approver** follow the steps below (***if you select to add an Approver or Reviewer this cannot be undone)***.

   Note: An Approver must take an action in order for the request to continue in the workflow. If a Reviewer does not open and review a request, it will continue in its approval work flow.

Adding an Adhoc Approver

1. Click Add an Approver
2. You will see icons inserted into the workflow.



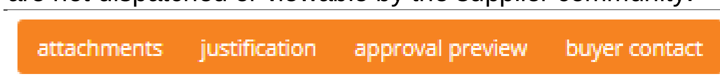
   Click on the icon that represents where you will want to add an Approver.
3. Select **Individual Approver** or **Approver Group** option from the **Approver Type** drop down box.
4. Enter a double Asterisk (**) in the **AdHoc Approver** field to search for all approvers associated with the agency. Or start to type in the name of the group or individual and you will receive a short list of possible matches.
5. Click on the name or group name to be added to the workflow and click Select.
6. Your new Approver is displayed in the **Approval Map.** Click Close.

Adding a Reviewer

1. Click Add Reviewer.
2. Select **Individual Reviewer** or **Reviewer Group** option from the **Reviewer Type** drop down box.
3. Enter a double Asterisk (**) in the **Reviewer** field to search for all reviewers associated with the agency. Or type in the name of the group or individual and you will receive a short list of possible matches.
4. Click on the name or group name to be added to the workflow and click Select.
5. Your new Approver is displayed in the **Approval Map** below the approval workflow**.** Click Close.

Activity 5.2 Enter a Justification

Note: Justifications are displayed to the Approvers of the Purchase document only. Justifications are not dispatched or viewable by the supplier community.



1. Click the justification button at the top of the **Process Request** page.
2. Enter your justification information in the **Justification** field.

Note: The Maximum character length for the Justification field is 225. If your justification exceeds the maximum length, you can add an attachment and reference it in the **Justification** field.

3. Click Save

Activity 5.3 Attach a Document to the Purchase Request

attachments justification approval preview buyer contact

1. Click the attachments button at the top of the **Process Request** page.
2. Click New
3. Click Browse...
4. Highlight the appropriate document from your files (or any document from your computer) and click Open in the **Choose File** window.
5. Enter a description of the document in the '**Type your Purpose here'** text box.
6. Select the Send to Supplier checkbox.

Note: The selection of the Send to Supplier checkbox for the attachment will mark the document to be dispatched to the supplier along with the Purchase Order. Examples of attachments: Supplier quotes for Item(s) being purchased, Item Specification sheet, Coupon for Item.

Attachments are available at the Request Header level and at the Line Item level. A Request document can contain items from multiple suppliers or for multiple locations. One Request document can become multiple Purchase Documents. If an attachment is for one line item contained on the Request document then attached the document at the Line Item level ( ) instead of the Request Header level.

The maximum document size for successful attachment to a Purchase Request within MissouriBUYS is 10 megabytes. This translates into the following:

10 megabytes = 9,765.625 Kilobytes (kb)
10 megabytes = 9.5368 Megabytes (mb)
10 megabytes = 0.0094 Gigabytes (GB)

Please check the file size of the documents that you are attempting to attach to your Purchase Request against the above file sizes. If too large, an error message will display. Most email systems, including Missouri's, will not forward an attachment of more than 10 megabytes.

If you are scanning your documents—the higher the resolution of the scans the bigger the file sizes. Adjust your scanner to a lower resolution and scan the documents again to get a lower file size.

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7. Click Save
8. Click Close

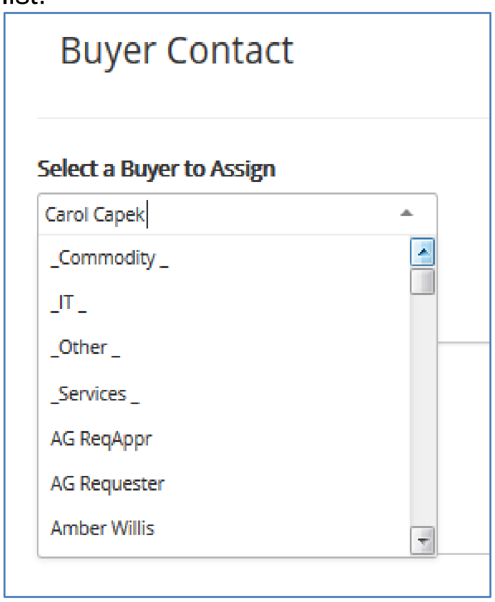
Note: Once an attachment is saved to the open document (not posted/in approval) you can view it by clicking again on the "Attachments" button at the top of the screen when you are viewing the request. You will then be transferred to the attachments screen where you can edit the attachment or delete it.

Once the document is fully approved/archived you will need to click on the print icon in order to view the attachments. Once on the print preview page you will see **Show Attachments** . Click on the hyperlink to view the attachments on the Request and/or PO.

Activity 5.5 Buyer Contact

Complete the Buyer Contact Field (Optional)

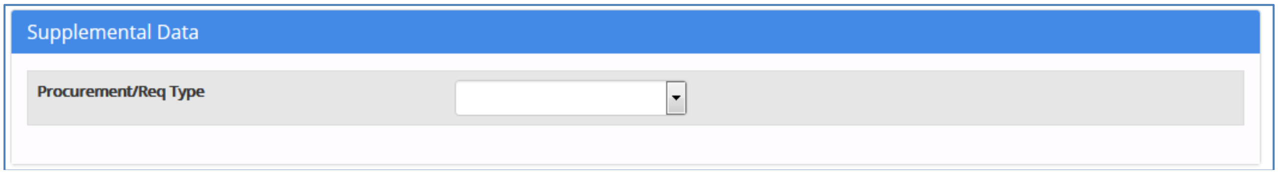
1. Click the buyer contact button at the top of the **Process Request** page.
2. Your User Contact Information Defaults – if not necessary to route/reference other Buyer, click Cancel
3. Otherwise, click the dropdown arrow next to your name and scroll to the top of the list:



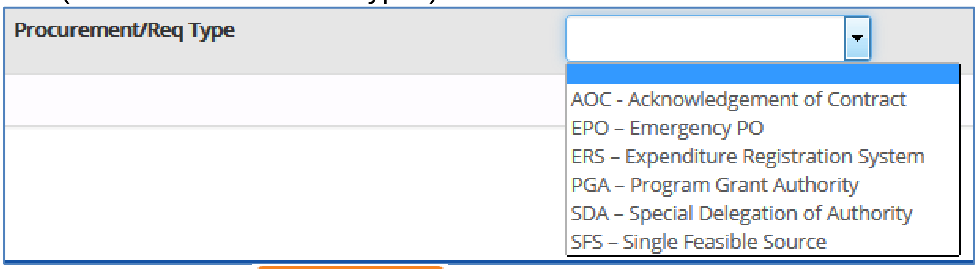
4. Select the appropriate Section – Commodity, IT, or Services – by clicking on that name, if submitting a request for processing by the Office of Administration, Division of Purchasing – this will allow an OA/Division of Purchasing Section Manager to review and assign the Request and related information the appropriate Buyer
5. Click Save

Activity 5.6 Supplemental Data

Complete the Supplemental Data Fields (Optional)



1. Scroll to the bottom of the page to Select **Procurement/Req Type** from Drop Down Box (for those that fit these types)



2. Scroll up and Click Update Request to save the Procurement/Req Type.

Activity 5.7 Assign Account Distribution

Note: Users in some agencies/divisions that do not enter Accounting may not have access to the Account Distribution and can skip this section.

1. Click the Assign Account Distribution icon in the **Actions** column for a line item.
2. Click Add Account Assignment to open the State of Missouri's specific **Account Distribution** page.
3. There are 11 Account Code segments (5 Required) available for completion:
   - Agency (Required)
   - Org (Required)
   - Sub Org
   - Fund (Required)
   - Approp (Required)
   - Object (Required)
   - Sub Obj
   - Activity
   - Function
   - Job #
   - Reporting Cat

Note: Users with access to accounts in SAM II are referenced within MissouriBUYS and only those accounts and segments are accessible in MissouriBUYS based on your SAM II authorized accounts, etc.

4. Type in the first few characters of the account code segment. A dynamic lookup will display with available account code segments specific to the user's SAMII access for selection. Select the desired segment by clicking it with your mouse.
5. OR Type in ** to search the available drop down list
6. Click the **Apply To All** checkbox beside the segments you wish to apply to all lines.

Note: The Apply All feature is available as a time saving process that will allow you to quickly assign Account Code information to all line items on the Request document. If you add a second accounting line and codes and click Apply All, it will overwrite the corresponding account code on the first accounting line. The ability to add additional account code information and copy it to all of the lines is being addressed in a future release.

7. Click Save
8. Click OK on the system message.
9. You will be returned to the **Item Cost Allocation** page.
10. Click the Add Account Assignment at the bottom of the page to add another Accounting Line.
11. Enter in the Item dollar amount into the **Amount** field for the Accounting line OR hit the Distribute Evenly button to allocate the line item to the appropriate Accounting line.

Note: If you assign more than one Accounting line for a Request Item, the Distribute Evenly button can be utilized to quickly allocate an even amount between the Accounting lines. If there is an odd number (3, 5, 7, or 9) of Accounting Lines associated with a Request Item, or an Odd Dollar Amount Split into an Even number of Accounting Lines, there will be a need for manual manipulation of the **Percentage or Amount** column to make the **Allocated Total** field equal 100%.

****Note**: If the values displayed in the **Allocated Total** or **Unallocated Total** fields are highlighted in red lettering, the information on the **Item Cost Allocation** page cannot be saved.

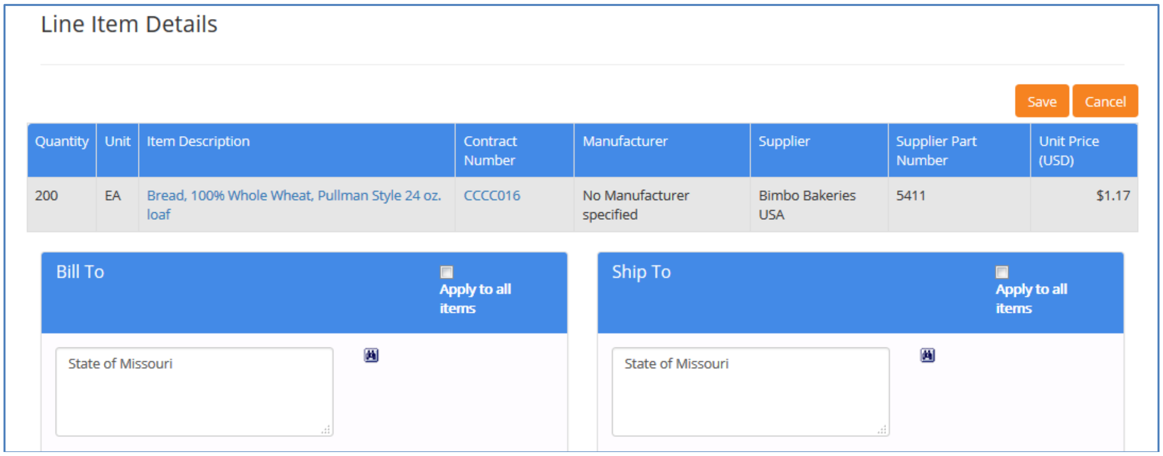
12. Click Save to return to the **Process Request** page.
13. You will need to repeat the steps listed above for each line item on the Purchase Request that remains highlighted in yellow.

Note*:* The Assign Account Distribution icon will have a yellow star associated with the icon and the line item is highlighted in yellow when no account code assignment action has been taken on the line item. Once the account code assignment action is complete, the Assign Account Distribution icon will be the same, absent the star, and the line item will no longer be highlighted. The absence of the star and the highlight is the indicator to the agency user that the account code assignment is complete for the line item.

***Note: Account codes must be added before final approval. Submitters/Approvers must review for account code distribution otherwise the Final Approver will reject the document.**

Activity 5.8 View Line Item Details/ShipTo Address Selection

1. Click the Line item Detail icon under the **Actions** column and next to the first line item.
2. Review the details within the document – including the Bill To Address, Ship To Address, Need By Date *<u>(Currently defaults to 15 days from current date when created/modified, but may be modified in the future)</u>*, Ship Via method, Special Instructions, Shipping Instructions, etc.



3. If you need to modify the **Ship to** Address from your default, click the Search icon beside the **Ship to** field.
4. Utilize one of the available search fields: Search Organization Name, Search Address, Search Contact Name.
5. Click Search
6. Click the Select icon next to the Location Address desired.

Note: Only Bill to or Ship to Addresses that have been established for your organization within the MissouriBUYS system will be available for selection. If there is a bill to or ship to address missing from the available search results, submit a request to MIssouriBUYS_Admin@oa.mo.gov to have the bill to or ship to address added for your Buying Organization.

---

7. Click the Save button Save

Note:

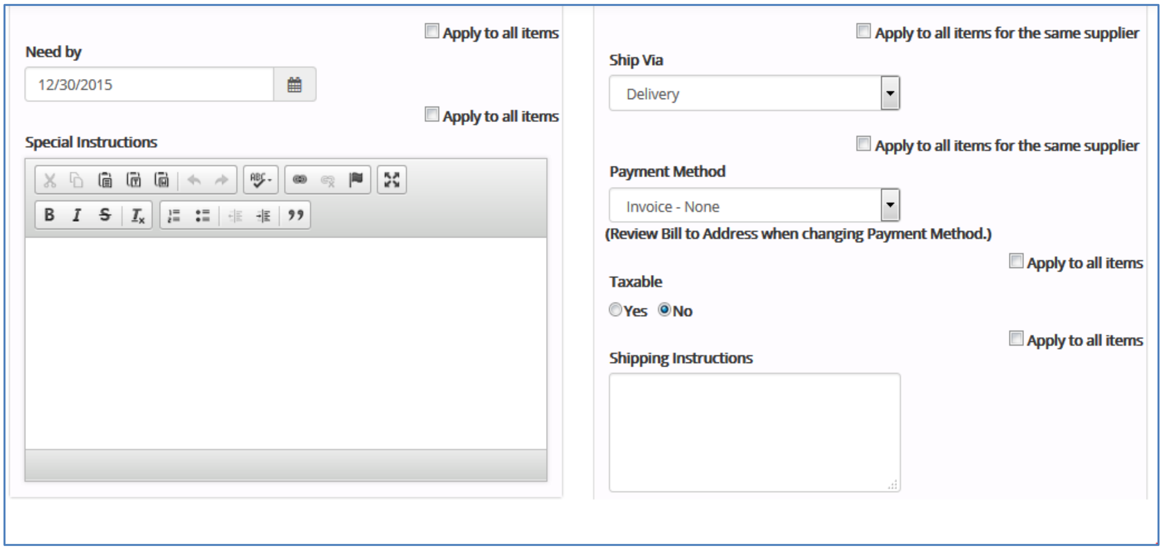
Bill To Contact : Use default Override | Ship To Contact : Use default Override

Each location address has Default Contact information associated with the Address in the system. If you need to specify another contact for the location address for this Document/Line only, select the **Override** radio button and type the alternative contact information into the available fields. Please note that this information is only retained for this document.

***Note**: When selecting the Apply to All Items checkbox, the changes apply to all the items in the Purchase Request. Changes to Line Item Details for one item that make it different from the other line items on a Purchase Request will result in a separate Purchase Order for that Line Item.

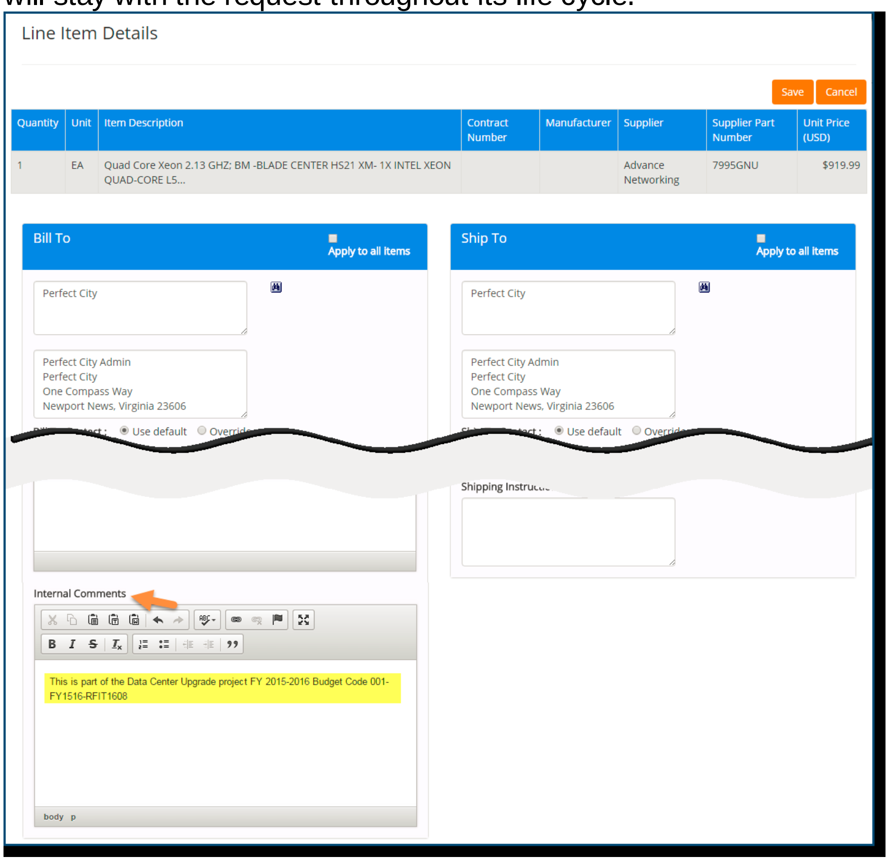
---

8. See Screen shot below for Special Instructions area and Shipping Instructions. These are free form text boxes for additional details as required.



9. If necessary, repeat the above steps for additional lines.

10. A new internal comments text box allows buying organizations to add comments that will stay with the request throughout its life cycle.



Internal comments will not be visible to the supplier; however, they will be visible when request is printed. See sample image below:

Request

Name:	Support Perfect City/2-75
Number:	2-75
Date:	December 2, 2015
Requested By:	Support Perfect City
Notes to Approver:	

Quantity	Unit	Supplier Part Number	Item Description	Unit Price	Tax	Total
10	EA	5599-823-109	Jabra UC Voice 550 MS Duo Headset Telephone Dialing and Answering Apparatus (EFFECTIVE 3-1-07 THIS CLASS-ITEM INACTI....	$59.99	$0.00	$599.90

Payment Terms:	No Payment Terms specified
Internal Comments	This will be used in the technology refresh planned in the Fiscal Year 2015-2016 Budget Code 001-FY1516-RFIT607

COST DISTRIBUTION

Account Assignment	Percentage	Quantity	Amount
FISCAL YEAR=2014, SUB OBJECT=6000, INDEX=6000, PCA= , PROJECT=	100.00	10.00	599.90

TOTAL: (USD) $599.90

Activity 5.9 Other Line Item options

	Quantity	Unit	Item	Actions	Contract Number	Manufacturer	Supplier	Supplier Part Number	Unit Price(USD)	SubTotal(USD)
RoundTrip Group: 1										
4	1	EA	TK3531910T 10 Gauge Crinkled Latex Coated Gloves Size L BlueGray **Commodity Code: 46181504**		CC111207001		Grainger Industrial Supply	48UR54	$4.090000	$4.09
1	1	BG	Textured Vegetable Protein (TVP) **Commodity Code: 47110000**		CC170010001	No Manufacturer specified	National Food Group	CC170010001-1	$25.990000	$25.99
2	50	EA	Abrasive papers - additional info **Commodity Code: 31191501**			No Manufacturer Specified	MODOT supplier 1		$1.590000	$79.50

1. All lines will have the following options:

   Line Item Attachment – click this link to include attachments at line level

   Delete Line Item

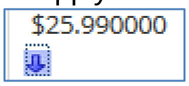
   Copy Line Item (for additional similar items or to edit for other items)

2. For each type, there is an edit icon

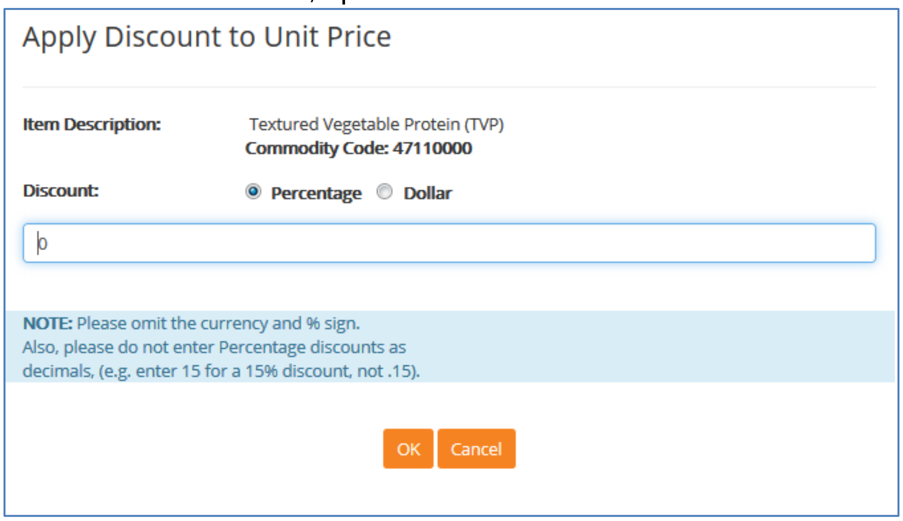
- Edit Roundtrip Item – only the quantity can be changed.
- Edit Off Catalog Line Item – see below.

3. For Catalog Items – only the quantity can be changed and the unit price via the next step

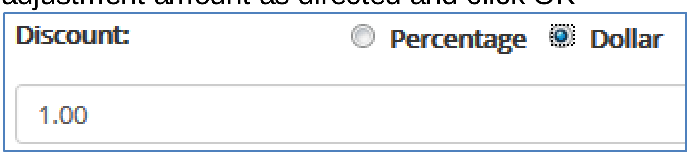
4. Apply Unit Price Discount – use the arrow below the price to adjust catalog price



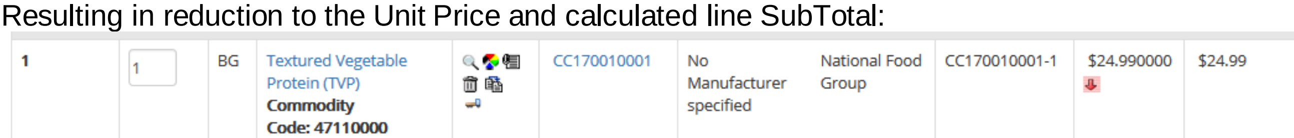
click icon; opens new window:



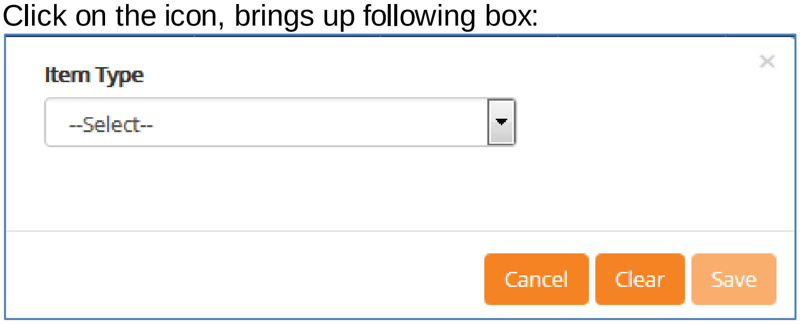
Enter a Percentage or Dollar Discount by toggling the radio button and entering the adjustment amount as directed and click OK



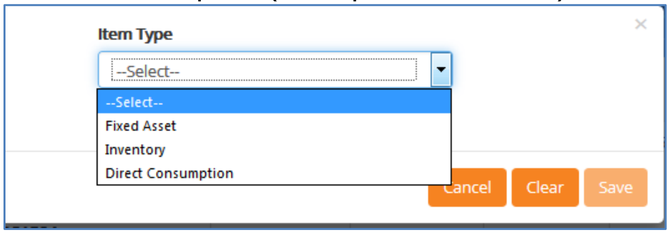
Resulting in reduction to the Unit Price and calculated line SubTotal:



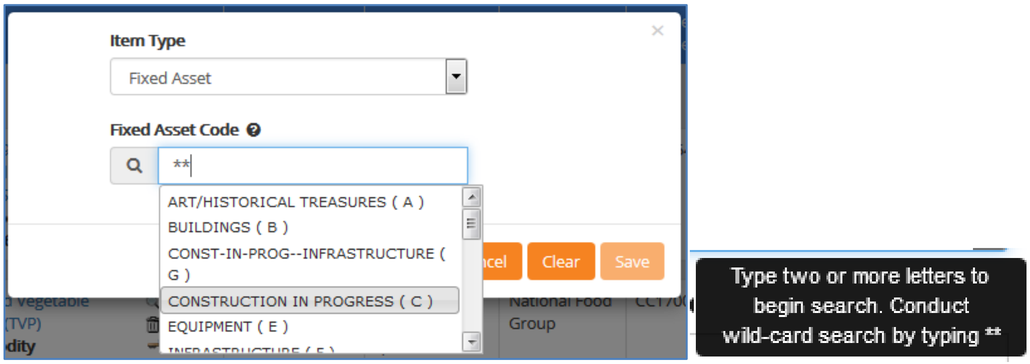
5. Item Type For Fixed Asset and Inventory and Direct Consumption Items
Click on the icon, brings up following box:



5a. Options for Item Type include Fixed Asset for Asset Identification; Inventory for Purchase of Items for Inventory; Direct Consumption for Purchase of Inventory Items for Direct Consumption (vs ship to Warehouse):

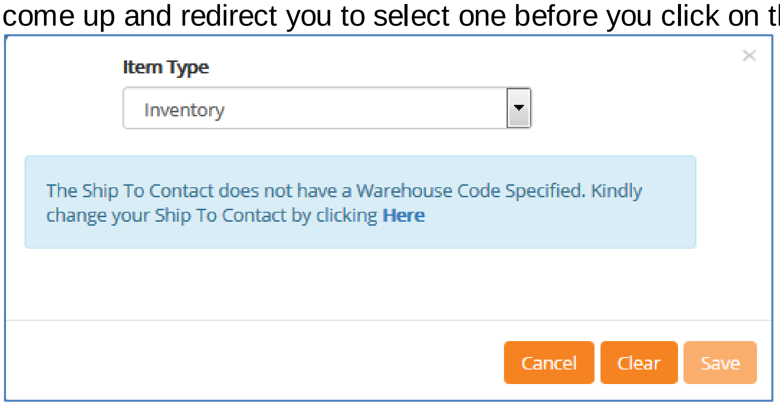


5b. Fixed Assets – Select/Enter the items' Fixed Asset Code



Note: Fixed Assets should be identified at the time of Invoice when SAM II will process the shells and apply the Fixed Asset Code. Designating an item as a Fixed Asset at this time is for informational purposes only.

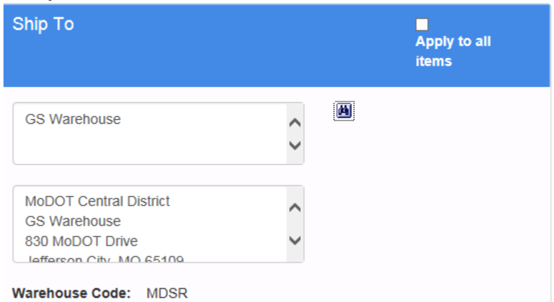
5c. Inventory – Select/Enter the Inventory Stock Code
NOTE: Inventory Items require a Warehouse Code specified by choosing the Ship To Address with the Warehouse on it. If you have not selected a warehouse, a warning will come up and redirect you to select one before you click on the Item Type:



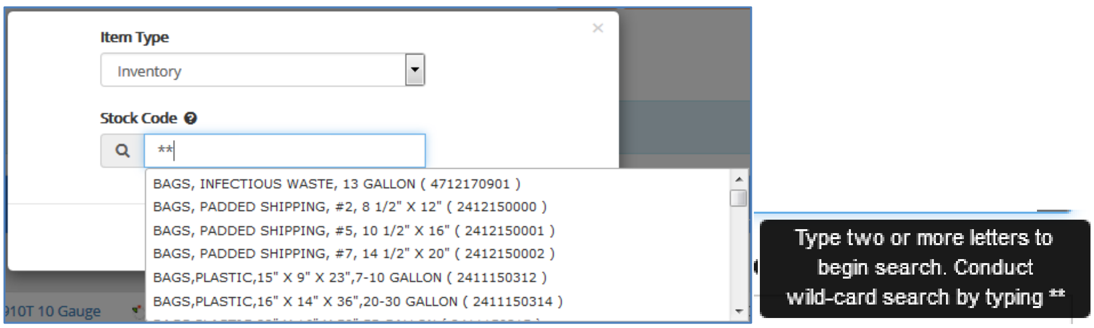
Ship To Listing – with Warehouse Code:

Organization Name	Address	Contact Name	Email	Telephone	FAX	Mail Stop	Warehouse Code	Action
OA State Warehouse	605 Howard Street Jefferson City, MO 65109-1732	Div of Accounting/Admin	wp.stage@perfect.com	573-751-2971	571-382-1005	Div of Accounting/Admin	W101	✔

Ship To Selected – with Warehouse Code:

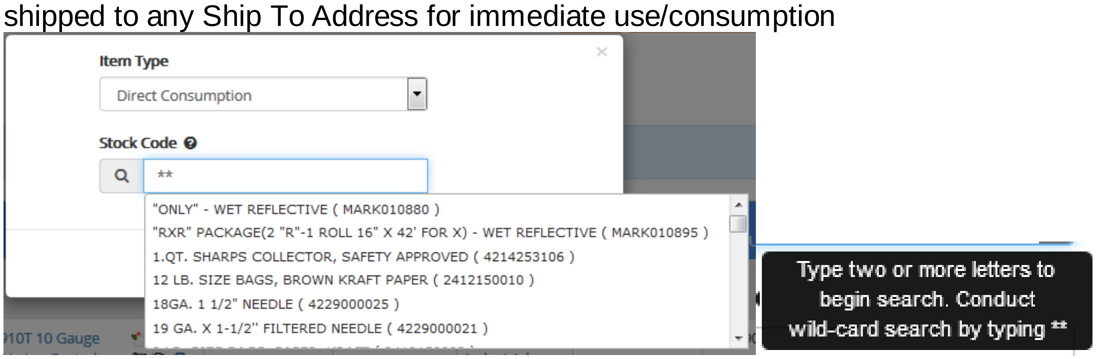


Then Reselect the Item type to choose your inventory stock code:



Note: Stock Codes are linked to a warehouse location. Some warehouses have hundreds of stock codes. Utilize the type ahead feature to search for a stock code by typing a key word of the stock code and select from the shorter list of matching codes.

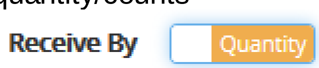
5d. Direct Consumption – Select/Enter the Inventory Stock Code
NOTE: Direct Consumption Items do not require a Warehouse Code, as they can be shipped to any Ship To Address for immediate use/consumption



Information Related to Fixed Assets and Inventory are in process of being added to the PO Print in future release.

Activity 5.10 Receive by Option

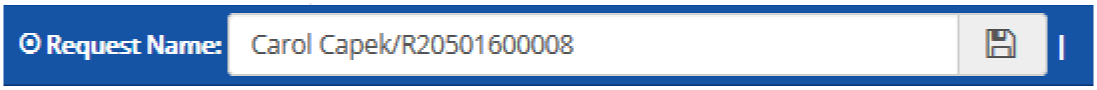
1. Defaults to Receive by Quantity for Commodity Requests or others received by quantity/counts



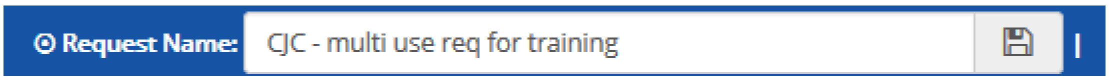
2. Toggle to Receive by Amount for Requests for Service or other requests received by dollar amounts

Activity 5.11 Change and Save Request Name

1. (Optional) Enter Details Specific to your Request in the **Request Name** field to change from the Default Name – which is the User Name/Request Number.
2. Click the Save icon next to the new name, to save the new Request name.
   Before:



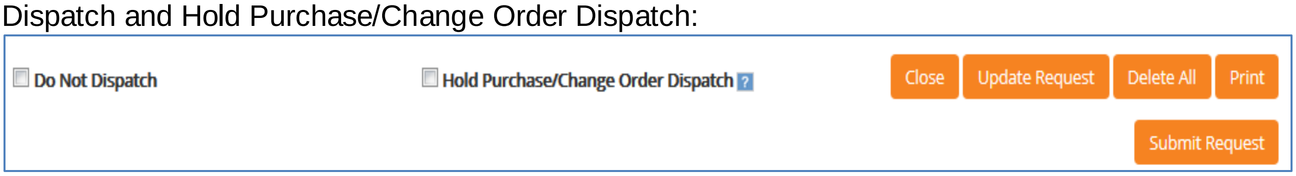
After:



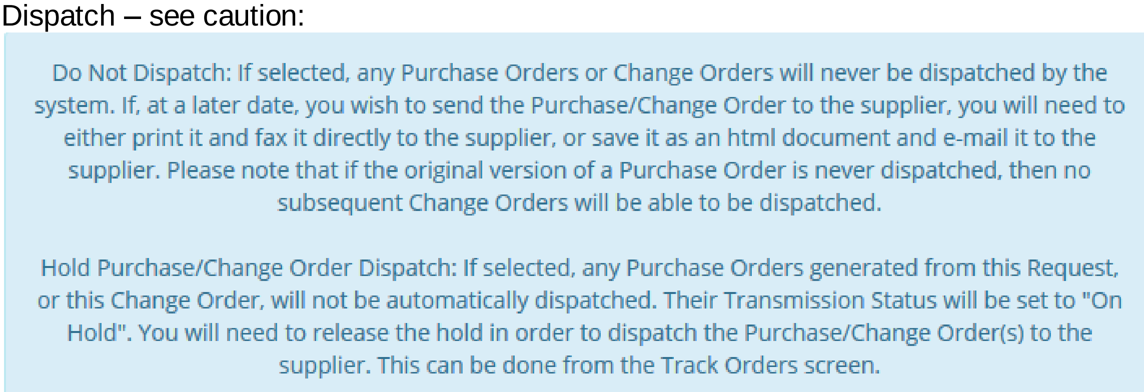
Please NOTE that once the document is submitted this field cannot be changed, modified, or removed. If the document changes enough that you want to change this field, you may need to cancel the request and start over.

Activity 5.12 Submit Request

1. Review Other Functions – based on Permissions you may not have the Do Not Dispatch and Hold Purchase/Change Order Dispatch:

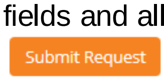


2. (Optional) If necessary, select the Do Not Dispatch or Hold Purchase/Change Order Dispatch – see caution:


Do Not Dispatch: If selected, any Purchase Orders or Change Orders will never be dispatched by the system. If, at a later date, you wish to send the Purchase/Change Order to the supplier, you will need to either print it and fax it directly to the supplier, or save it as an html document and e-mail it to the supplier. Please note that if the original version of a Purchase Order is never dispatched, then no subsequent Change Orders will be able to be dispatched.

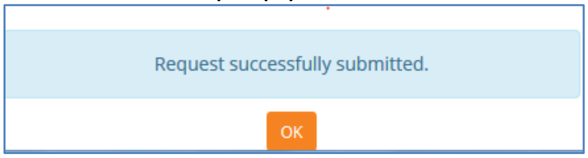
Hold Purchase/Change Order Dispatch: If selected, any Purchase Orders generated from this Request, or this Change Order, will not be automatically dispatched. Their Transmission Status will be set to "On Hold". You will need to release the hold in order to dispatch the Purchase/Change Order(s) to the supplier. This can be done from the Track Orders screen.

3. At this point, once you've reviewed all of your Header Level Fields, Your Detail Line fields and all parts of the document. If you are ready to proceed, Click the

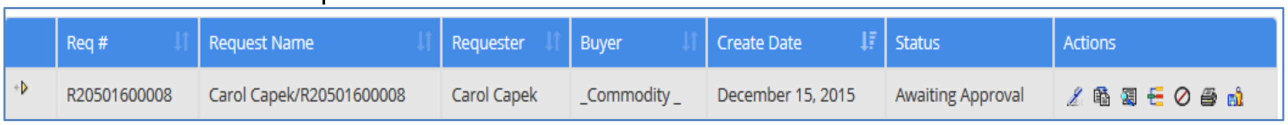


button.

4. Click OK on Pop-Up process button:



5. Returns to Track Requests Screen



	Req #	Request Name	Requester	Buyer	Create Date	Status	Actions
	R20501600008	Carol Capek/R20501600008	Carol Capek	_Commodity_	December 15, 2015	Awaiting Approval	

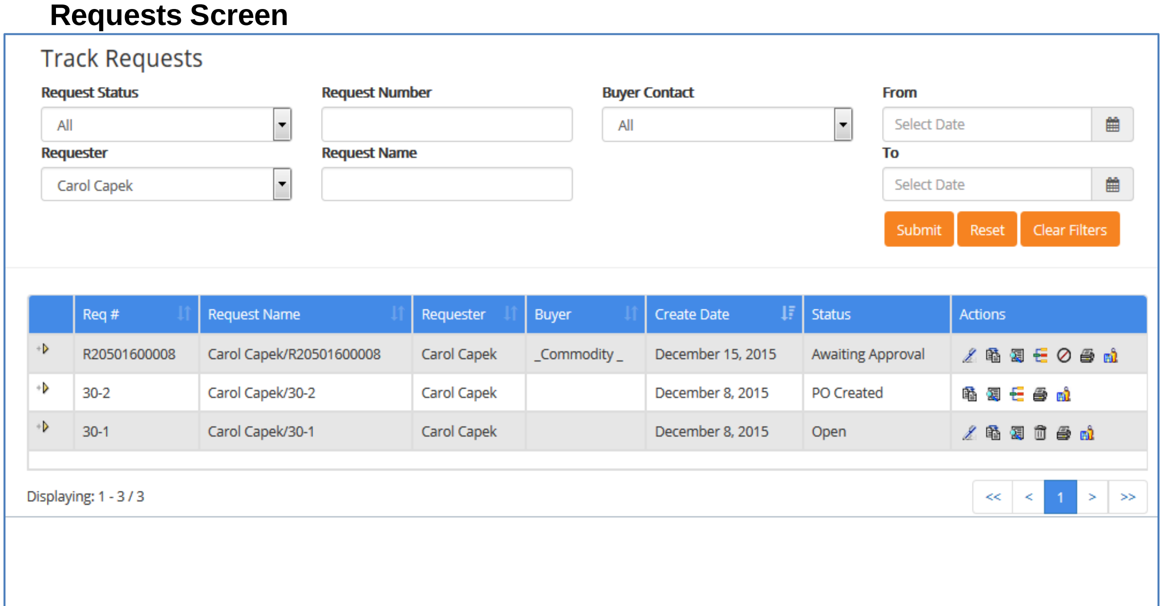
Note: All Purchase Documents will complete a pre-configured workflow based on a combination of user specific workflow configurations and agency workflow configurations. Based on these specific user and agency configurations, the system will generate an email notification to the immediate approver(s).

See Appendix for a list of the Statuses and definitions.

Activity 6 Create Templates

Activity 6.1 Create a Template

1. Select the Requests option on the **Home** page to Choose from the Drop Down for **Create New Request** (to initiate new requests) or **View All Requests** (to review or edit existing requests)**.** Click option to **View All Requests** to get to the **Track Requests Screen**

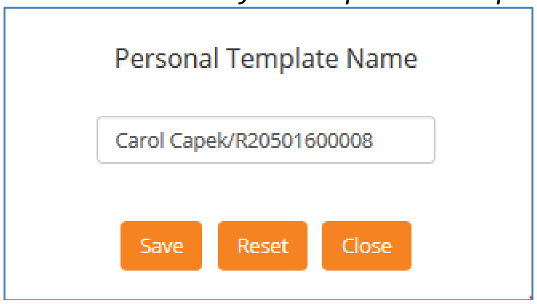


	Req #	Request Name	Requester	Buyer	Create Date	Status	Actions
	R20501600008	Carol Capek/R20501600008	Carol Capek	_Commodity_	December 15, 2015	Awaiting Approval	
	30-2	Carol Capek/30-2	Carol Capek		December 8, 2015	PO Created	
	30-1	Carol Capek/30-1	Carol Capek		December 8, 2015	Open	

2. Click the Save as Personal Template icon next to your Purchase Request to save it as a personal template.

Note: The complete Purchase Request and all its attributes will apply to the template being created. For example, if account code information is assigned to the Purchase Request prior to the Template being created, the Account Code information will be applied to a new Purchase Request that is created from the Template.

3. Enter a title i.e. "*My Description of Request*" in the **Template Name** text box.



4. Click Save
5. Click Close

Activity 6.2 Create a Request from a Template

1. Select the Requests ▾ option on the **Home** page to Choose from the Drop Down for **Create New Request** (to initiate new requests) or **View All Requests** (to review or edit existing requests)**.** Click option to **Create New Request**

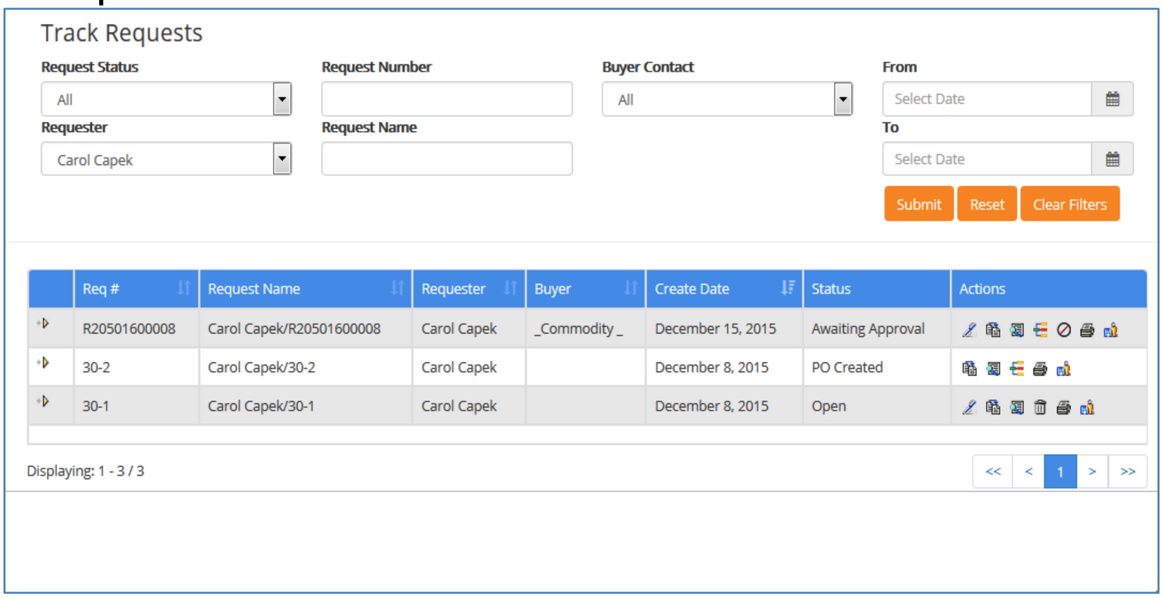
2. Select the **Templates** option from the Sub-Navigation bar.
3. Click the Create Request from Template icon in the **Actions** column to create a Request from the template you just created.
4. Click OK in the message box.
5. Change the quantity for the first line item to whatever is needed for this order.
6. Click Update Request
7. Click Submit Request
8. Click OK in the message box.

Note: If you order groups of items on a consistent basis, it is recommended that you create a personal template. You can quickly find the template in your Templates list and click the Create Request from Template icon. You can edit a request created by a template before submitting it.

Activity 7 Track Request and Orders/ Edit Open Request

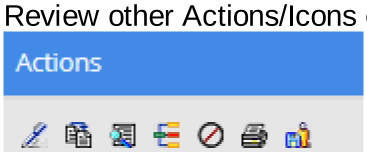
Activity 7.1 Track Request Status

Select the Requests option on the **Home** page to Choose from the Drop Down for **Create New Request** (to initiate new requests) or **View All Requests** (to review or edit existing requests)**.** Click option to **View All Requests** to get to the **Track Requests Screen**



Note: The User that is logged into the system will be the defaulted name for the **Filter by Requester** drop down box. The Purchase Requests displayed will be for your user—to view all Purchase Request for the Agency select the **All** option from the **Filter by Requester** drop down and click Submit.

1. Find your Purchase Request under the **Request Name** column and click the Open icon to view the document details.
2. View the Purchase Request details from the Expand view.
3. Check the new status of your Purchase Request.
4. Find a Purchase Request that is awaiting approval.
5. Click the View Approval Map icon in the **Actions** column to view the **Approval Map.**
6. Click Back
7. Review other Actions/Icons on Track Requests Screen:



Edit Request
Copy to a new request
History

View Approval Map
Cancel Request
Internal Print
Create Template

Activity 7.2 Edit Open Request

1. Click the Edit icon in the **Actions** column to edit your open Purchase Request.
2. Click the Edit off Catalog Request icon to edit your Off-Catalog Item.
3. Change the Quantity field and click Save
4. Click OK in the message box.
5. Click the Delete icon to delete a line item from the Purchase Request.

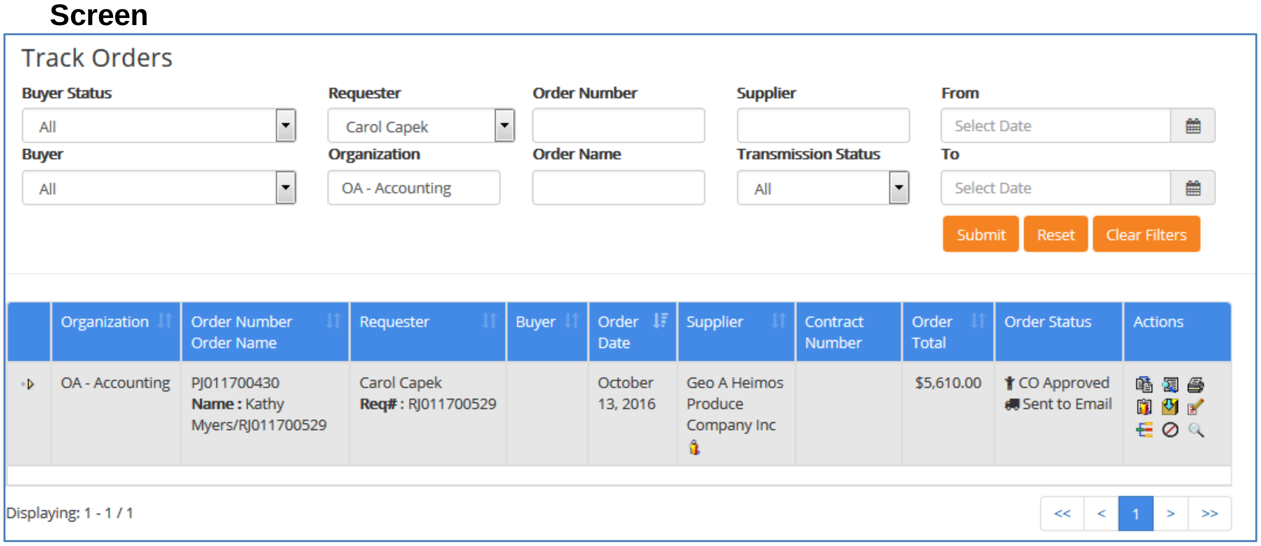
Note: An item from a Roundtrip Group can be deleted from the request. If modifications need to be made to the item within a Roundtrip Group then it will be necessary to delete the item currently on the Request and activate another Roundtrip session with the supplier by selecting the Roundtrip option RoundTrip from the Sub-navigation bar.

---

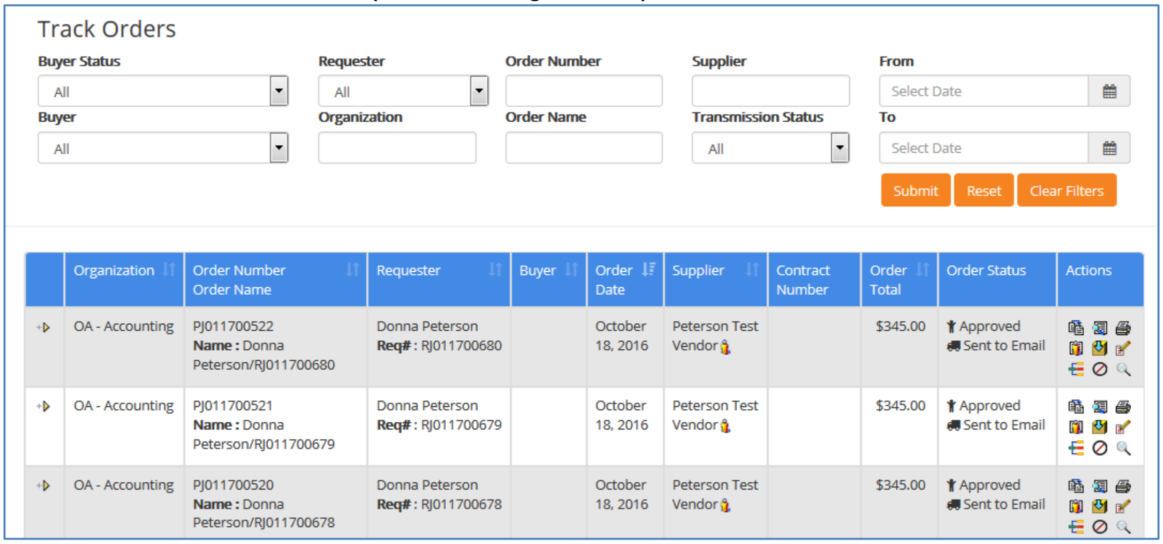
6. Click OK in the message box.
7. Change the quantity of a line item and click Update Request
8. Click Submit Request

Activity 7.3 Track Purchase Order Status

1. Select the Orders option on the **Home** page to Choose from the Drop Down for **View All Orders** (to review or edit Orders) or **Receive Against Orders** (to Receive against existing Orders)**.** Click option to **View All Orders** to get to the **Track Orders Screen**

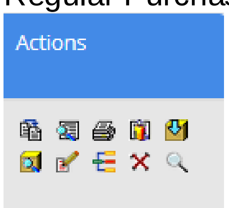


Click Clear Filters, Submit (to see all org Orders):



2. Locate a Purchase Order from the list.
3. Once the Purchase Order is located from the list, check the status of the Purchase Order in the **Order Status** column.
4. Review other Actions on the Track Orders Screen:

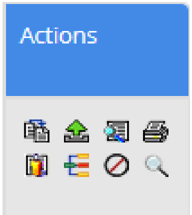
Regular Purchase Order:



Copy to a new request
History
Internal Print
Supplier Print
Receive
Receipt History
Create Change Order
View Approval Map
Close Order
Order Details

For an order which the user selected, Hold Do Not Dispatch, there is a different set of icons.

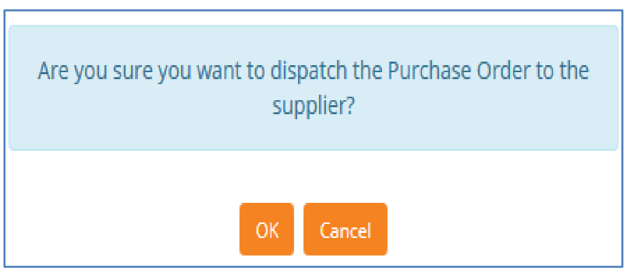
Order on Hold Icons:



Copy to a new request
Release Dispatch Hold
History
Internal Print
Supplier Print
View Approval Map
Cancel Order
Order Details

Activity 7.4 Dispatch a PO previously placed On-Hold

1. Locate a Purchase Order from the available list that is displaying the **Order Status** of **On Hold** with one of the available search filters.
2. Select the Release Dispatch Hold icon located in the **Actions** column to dispatch the Purchase Order.
3. A **System Confirmation** message will display as shown below:



4. Click the **OK** button to complete the dispatch of the selected order to the supplier.

Activity 7.5 Re-Submit a Failed Purchase Order

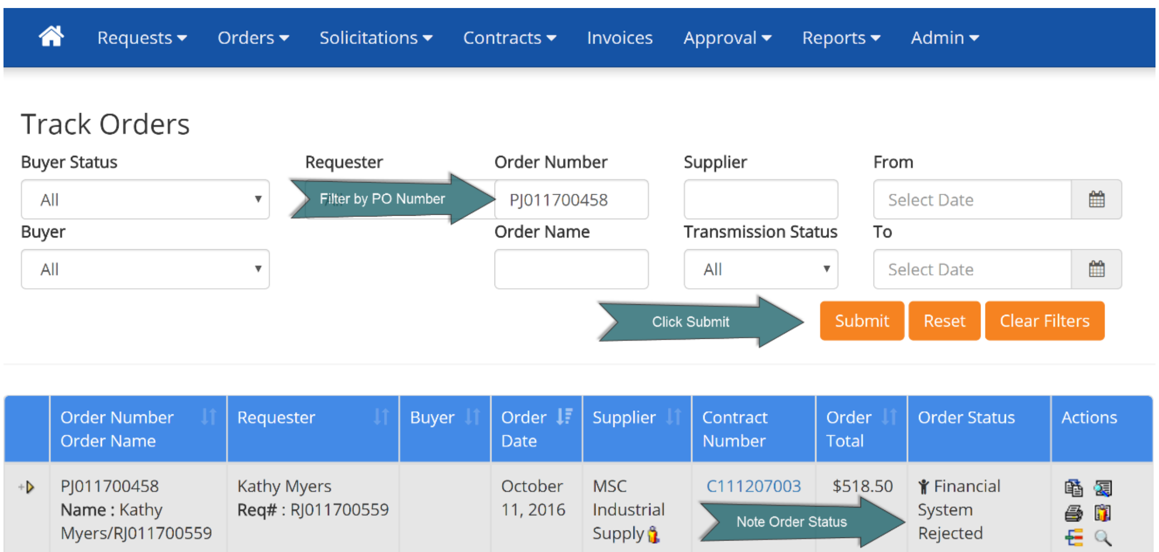
Note: If a Purchase Order does not pass integration with the financial system it will receive a **Financial System Rejected** status within the **Track Orders** page. A rejected Purchase Order document will result in a newly generated Purchase Request document with the original Purchase Order data. System generated notifications/emails will be dispatched to the Requestor/Originator and the final Agency Approver of the Purchase Order. The Notification/email will have the following information in the body of the email: The financial system rejection reason, original Purchase Order #, and the new Purchase Request name and number. This information will also appear in the History of the original Request.

***Note: The Requestor can choose to make the appropriate changes to the newly generated Purchase Request and resubmit the Purchase Request into the Approval workflow, or the Requestor can choose to not take any action on the New Purchase Request document.*

1. The submitter of the PO document will receive an email including the reasons behind the rejection. The email will contain the failed PO number as well as the new Request number created from the failure.

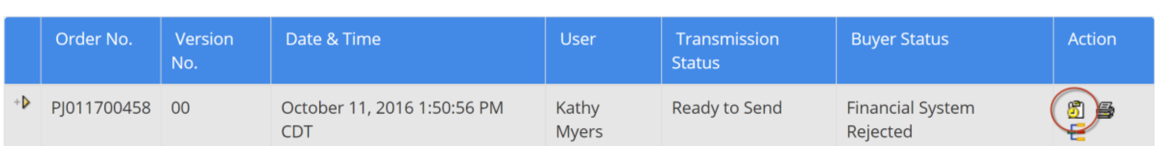
2. Select the Orders option on the **Home** page to Choose from the Drop Down for **View All Orders** (to review or edit Orders) or **Receive Against Orders** (to Receive against existing Orders)**.** Click option to **View All Orders** to get to the **Track Orders Screen**

3. Locate a Purchase Order from the list. Click on Clear Filters and type the PO number in to the "Filter by Order Number" field. Click on submit to search the POs.

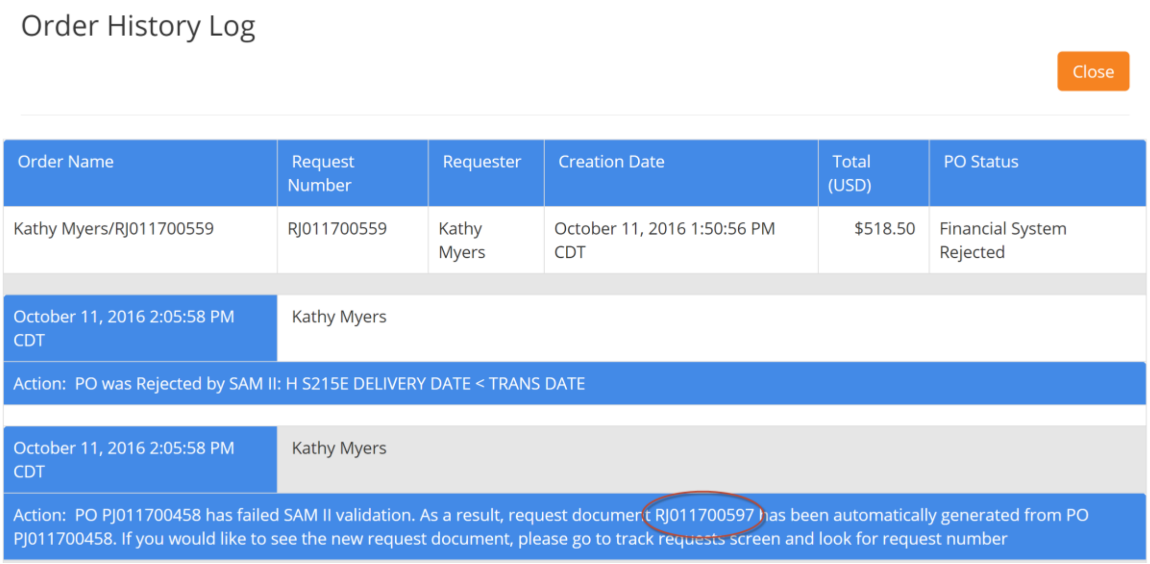


4. Click the PO Revision History icon to proceed to the log of the PO document.

5. Click on the View Order History icon. Here you can see the messages related to the Purchase Order.



6. The new requisition's history log will also reflect history of the failed PO document. Users do not need to take any further actions with their failed PO document and all that is required is resubmission of the new request document upon correction of the errors that reported for the failed PO.



Order History Log

Close

Order Name	Request Number	Requester	Creation Date	Total (USD)	PO Status
Kathy Myers/RJ011700559	RJ011700559	Kathy Myers	October 11, 2016 1:50:56 PM CDT	$518.50	Financial System Rejected

October 11, 2016 2:05:58 PM CDT	Kathy Myers
Action: PO was Rejected by SAM II: H S215E DELIVERY DATE < TRANS DATE	
October 11, 2016 2:05:58 PM CDT	Kathy Myers
Action: PO PJ011700458 has failed SAM II validation. As a result, request document RJ011700597 has been automatically generated from PO PJ011700458. If you would like to see the new request document, please go to track requests screen and look for request number	

7. Below is the newly created Request RJ011700597 for the failed PO shown in the above figure.

	RJ011700597	Kathy Myers/RJ011700559	Kathy Myers		October 11, 2016	Open	

Activity 7.6 Cancel or Close a Purchase Order

Note: A Purchase Order is either available for a Cancel transaction or a Close transaction. If receipt information or an invoice entered, then the Close transaction will be available for the Purchase Order. If there has been no receipt or invoice information entered, then the Cancel transaction will be available for the Purchase Order.

1. Select the Orders option on the **Home** page to Choose from the Drop Down for **View All Orders** (to review or edit Orders) or **Receive Against Orders** (to Receive against existing Orders)**.** Click option to **View All Orders** to get to the **Track Orders Screen**
2. Locate a Purchase Order from the list.
3. Once the Purchase Order is located from the list, click the Cancel icon or the Close icon from the **Actions** column.

Note: Once a Purchase Order is closed or canceled and accepted by the financial system, it cannot be reopened. Therefore, be sure that all receipts and invoices have been processed against the order before performing a PO Close.

4. A system message will display confirming that you want to continue with the Cancel/Close transaction.

5. Click OK to continue with the Cancel/Close transaction.

OR

6. Click Cancel to stop the Cancel/Close action and return to the **Track Orders** page.
7. The system will return you to the **Track Orders** page upon completion of the Cancel/Close transaction.
8. The status of the PO will change based on the Close/Cancel function and pending acceptance in SAM II. Once accepted in SAM II, the vendor will receive notification via email or fax of the cancellation or closure of the PO.

Note: A Cancel transaction or a Close transaction will be triggered to the financial system. The PO Status for the Order will update based on the response received from the financial system. If the response is a rejection, the reasons for the rejected returned by the financial system can be viewed on the **Purchase Order History** page, accessed by clicking the View PO History icon from the **Actions** column.

Activity 8 – Change Orders

Activity 8.1 Create a Change Order Draft Document

1. Click the Create Change Order icon from the **Actions** column on the **Track Orders** page for a Purchase Order requiring the action.
2. The **Change Order** page will display.
3. Perform one or more of the following edits/modifications to the Purchase Order:
   a. Change the Quantity for a line item.
   b. Increase Unit Price for one line item.

   Note: To update the **Quantity** field for a line item, type in the new quantity and then click Update Change Order to apply the updated quantity and the Purchase Order total.

   ---

   c. Decrease Unit Price for one line item.
   d. Delete a line item.
4. Click Close or Submit Change Order
5. The system will now return to the **Track Orders** page.

Activity 8.2 Edit Draft Change Order Document

1. From the **Actions** column of the **Track Orders** page click the Edit Change Order icon to display the **Change Order** page.
2. Perform one of the following actions to the Draft Change Order; Change Quantity of a line item, Delete a line item, or Add another Line item. To add another line item, follow the steps outlined in Activities 1.2 (Catalog Item), 2.1 (Off-Catalog) or 3.1 (Round Trip). See note below:

Note: Only items from the same contract and the same supplier that were included on the original Purchase Order can be utilized during the Change Order create process. A Change Order cannot result in an additional split of a Purchase Order.

---

3. To delete this Draft Change Order, click on Delete Draft otherwise, Click Submit Change Order
4. Click OK on the system message: Change Order successfully submitted.
5. The system will now return to the **Track Orders** page.

Note: The Change Order will process through the pre-configured Approval workflow. After the final Approver completes the approval of the Change Order, the Change Order interface with the financial system will trigger. If the Change Order receives a successful response from the financial system, the Change Order will dispatch to the supplier based on the dispatch type (email or fax) indicated by the supplier organization.

Activity 8.3 Approval Map for a Change Order

1. From the **Track Orders** page click the View Change Order Approval Map icon for the Purchase Order that you just submitted the Change Order version.

Note: The required approval for a Change Order follows the same Approval Workflow for all purchase request documents. The required Approval workflow is created from the Spending limit and Approval limit for the user that initiated the Change Order.

Activity 8.4 Accessing a Change Order

Note: The creation of an approved Change Order will replace the original version of the Purchase Order on the **Track Orders** page. The original Purchase Order version will still be accessible on the **Purchase Order History** page. The Change Order will contain the original PO number, the Change Order Number, the Change Order version, the date and time of the Change Order, and the Agency user that made the modification(s).

---

1. Click the View PO History icon from the **Actions** column of the **Track Orders** page for the Purchase Order that has had the Change Order initiated.

	PJ011700477 **Name :** Kathy Myers/RJ011700623	Kathy Myers **Req# :** RJ011700623		October 13, 2016	Geo A Heimos Produce Company Inc		$510.00	CO Approved Sent to Email	

2. The **Purchase Order History** page will display with the Order Version numbers listed.

	Select	Order No.	Version No.	Date & Time	User	Transmission Status	Buyer Status	Action
		PJ011700477	00	October 13, 2016 11:50:57 AM CDT	Kathy Myers	Sent to Email	Approved	
		PJ011700477	01	October 13, 2016 2:55:58 PM CDT	Kathy Myers	Sent to Email	CO Approved	

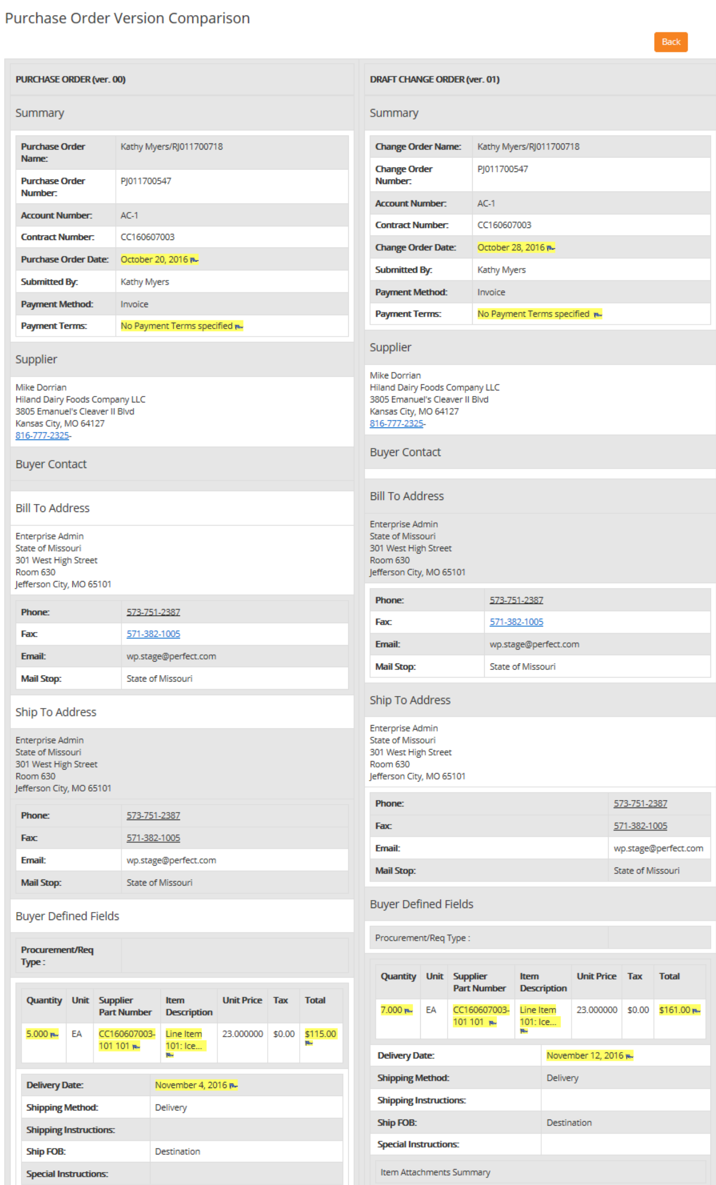
Compare Versions

3. Click the Expand icon for Order Version No. 00—view the entries.
4. Click the Expand icon for the Order Version No. 01—view the entries.

OR

5. Click the Select boxes next to the two Revision Numbers and click Compare Versions.

6. Differences between the two versions will be highlighted in a side by side comparison.

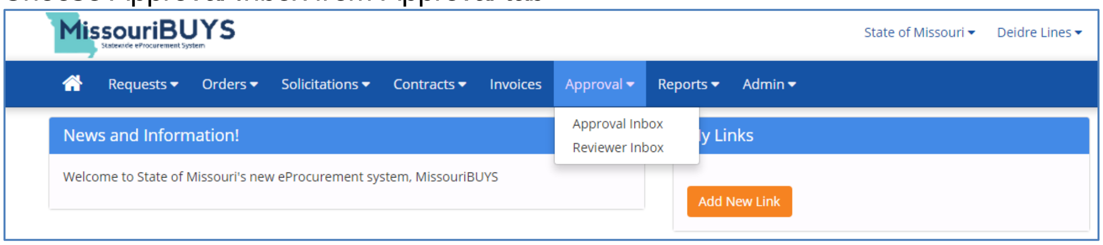


Activity 9 Approving Purchase Requests and Change Orders

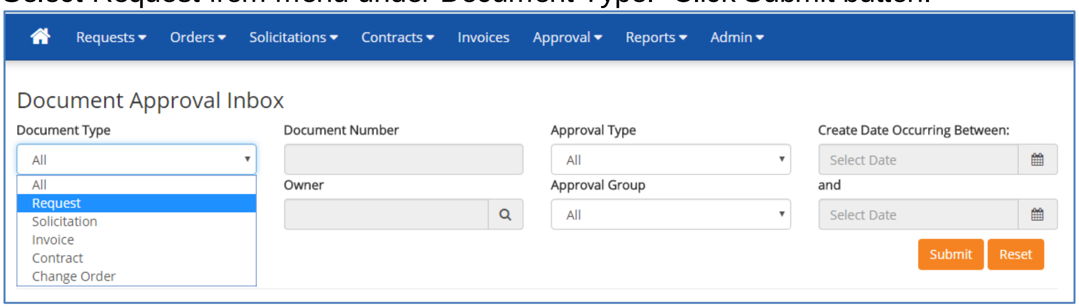
Note: Only users with the Request Approval role will be able to perform the functions in this section.

Activity 9.1 Filter Approval Inbox for Purchase Requests

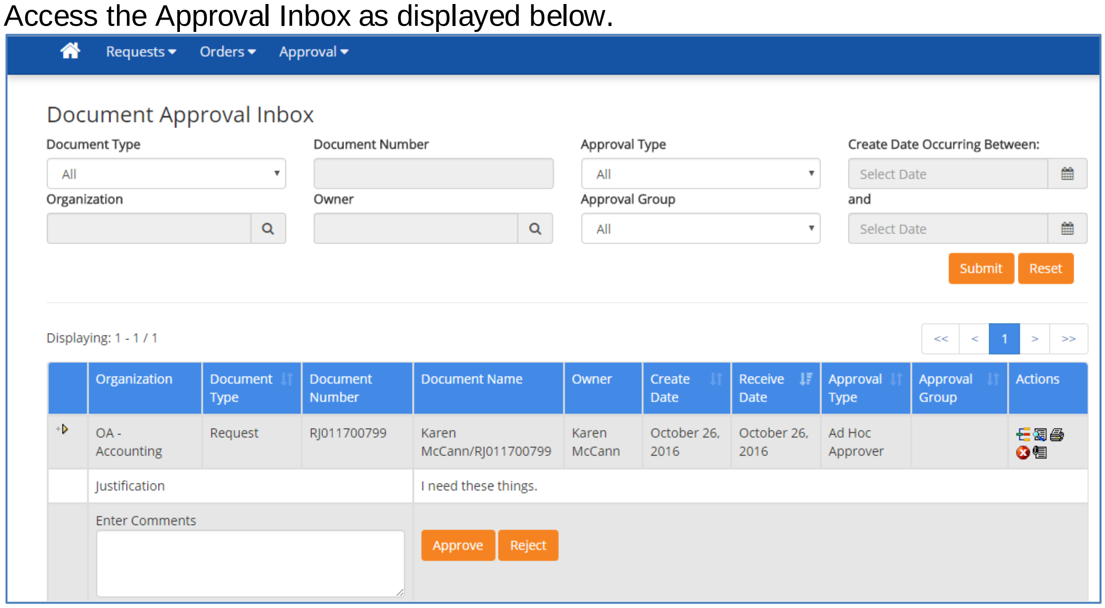
1. Log in with Approver Login ID and Password (password is case sensitive).
2. Choose Approval Inbox from Approval tab



3. Select Request from menu under Document Type. Click Submit button.

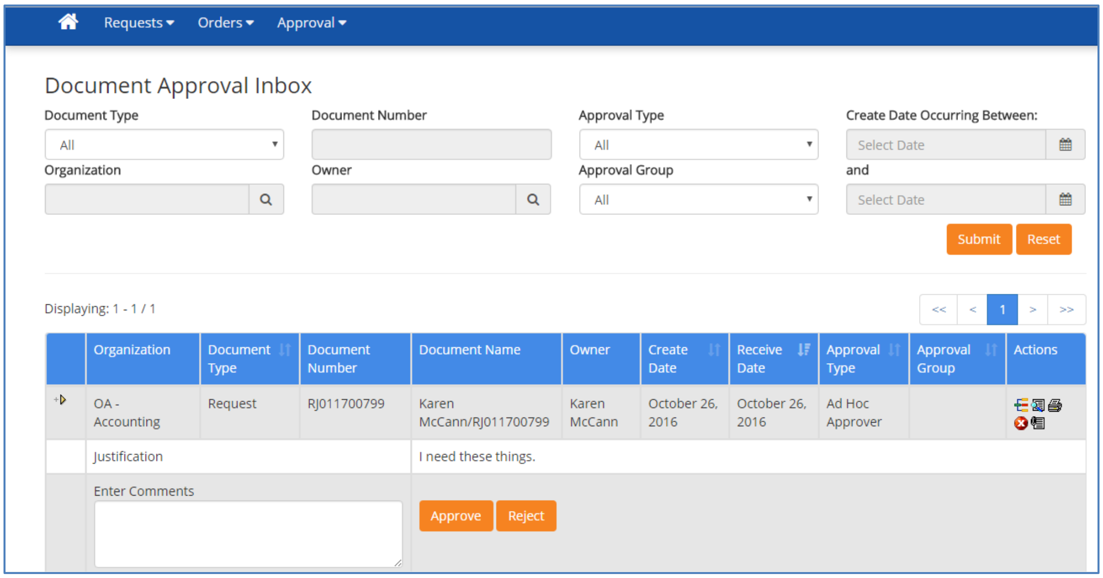


4. Access the Approval Inbox as displayed below.

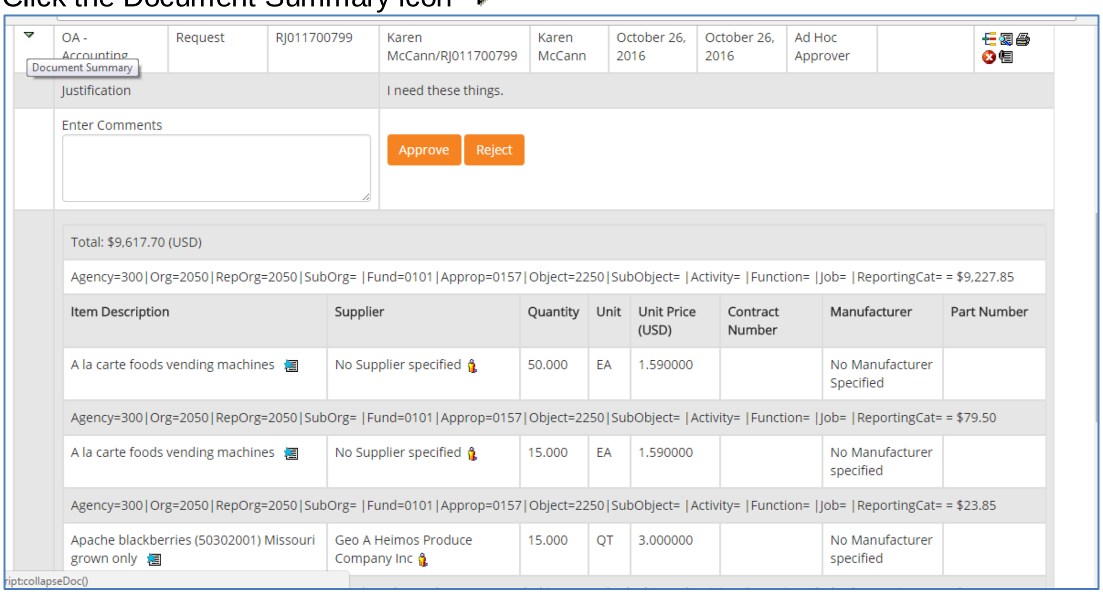


Activity 9.2 Approving a Purchase Request

1. Locate the Purchase Document awaiting your approval in the **Document Name** column.



2. Click the Document Summary icon



3. View the Request details from the expanded view. Note item details and account code information.

4. **Print**
   a. Click the Print icon in the **Actions** column for the Purchase Document.
   b. The Print Version will open, view the document.
   c. Close the window of the Purchase document.

5. **View Request History**
   a. Click The View Request History icon
   b. The Request History page will display. The log will contain all stages of the Request document for your review. Click Close button when finished.

Request History Log

History Workflow History

Request Name	Request Number	Requester	Date Created	Cost (USD)	Justification
Karen McCann/RJ011700799	RJ011700799	Karen McCann	October 26, 2016 11:30:59 AM CDT	$9,617.70	I need these things.
October 26, 2016 11:30:59 AM CDT	Karen McCann				
Status set to Open.					
October 26, 2016 11:53:56 AM CDT	Financial System				
Pre-Encumbrance issued from Requisition RJ011700799 has been sent to SAMII for validation.					
October 26, 2016 11:53:56 AM CDT	Financial System				
Requisition CREATE success					

6. **Approval Map**
   a. Click the View Approval Map icon

Approval Map

Clear Add Approver Add Reviewer Back

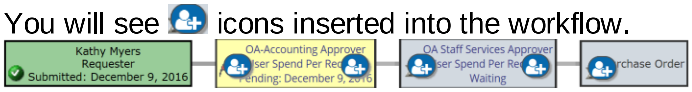
Organization	Document Type	Document Number	Document Name	Owner	Create Date	Receive Date	Approval Type	Approval Group	Cost (USD)	Actions
OA - Accounting	Request	RJ011701301	Kathy Myers/RJ011701301	Kathy Myers	December 9, 2016	December 9, 2016	User Spend Per Request	OA-Accounting Approver	$11,000.00	
Justification										

   b. When you view your approval routes, if you would like to add a Reviewer or an Additional Approver follow the steps below ***(if you select to add an Approver or Reviewer this cannot be undone).***

Note: An Approver must take an action in order for the request to continue in the workflow. If a Reviewer does not open and review a request, it will continue in its approval work flow.

Adding an Adhoc Approver

1. Click Add an Approver
2. You will see icons inserted into the workflow.



Click on the icon that represents where you will want to add an Approver.

3. Select **Individual Approver** or **Approver Group** option from the **Approver Type** drop down box.
4. Enter a double Asterisk (**) in the **AdHoc Approver** field to search for all approvers associated with the agency. Or start to type in the name of the group or individual and you will receive a short list of possible matches.
5. Click on the name or group name to be added to the workflow and click Select.
6. Your new Approver is displayed in the **Approval Map.** Click Close.

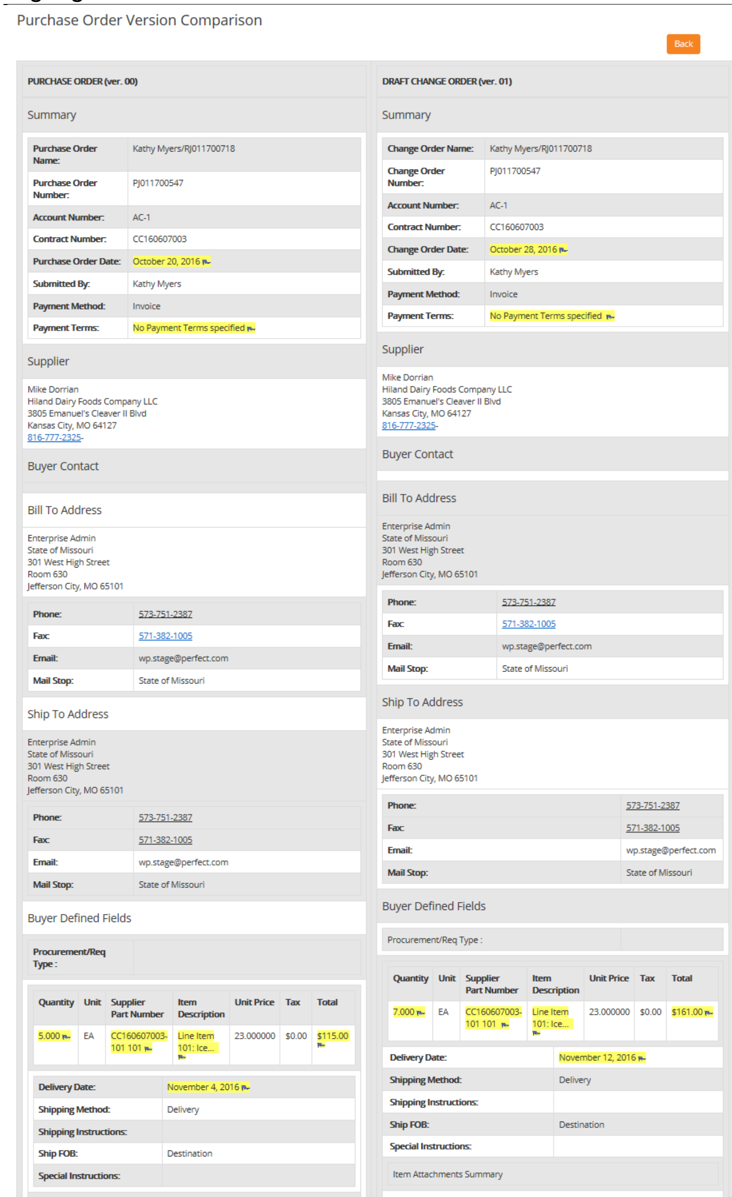
Adding a Reviewer

1. Click Add Reviewer.
2. Select **Individual Reviewer** or **Reviewer Group** option from the **Reviewer Type** drop down box.
3. Enter a double Asterisk (**) in the **Reviewer** field to search for all reviewers associated with the agency. Or type in the name of the group or individual and you will receive a short list of possible matches.
4. Click on the name or group name to be added to the workflow and click Select.
5. Your new Approver is displayed in the **Approval Map** below the approval workflow**.** Click Close.

Activity 9.3 Approving a Change Order Document

1. Locate a Change Order/PO Mod Document in the Approval Queue for Approval.
2. Click the Compare Versions with Last PO icon from the **Actions** column.
3. The **Compare Version** page will display:

Note: The modifications made from the current Purchase Order to the Change Order will be highlighted in Yellow.


Purchase Order Version Comparison

Back

PURCHASE ORDER (ver. 00)

Summary

Purchase Order Name:	Kathy Myers/RJ011700718
Purchase Order Number:	PJ011700547
Account Number:	AC-1
Contract Number:	CC160607003
Purchase Order Date:	October 20, 2016
Submitted By:	Kathy Myers
Payment Method:	Invoice
Payment Terms:	No Payment Terms specified

Supplier

Mike Dorrian
Hiland Dairy Foods Company LLC
3805 Emanuel's Cleaver II Blvd
Kansas City, MO 64127
816-777-2325

Buyer Contact

Bill To Address

Enterprise Admin
State of Missouri
301 West High Street
Room 630
Jefferson City, MO 65101

Phone:	573-751-2387
Fax:	571-382-1005
Email:	wp.stage@perfect.com
Mail Stop:	State of Missouri

Ship To Address

Enterprise Admin
State of Missouri
301 West High Street
Room 630
Jefferson City, MO 65101

Phone:	573-751-2387
Fax:	571-382-1005
Email:	wp.stage@perfect.com
Mail Stop:	State of Missouri

Buyer Defined Fields

Procurement/Req Type :	

Quantity	Unit	Supplier Part Number	Item Description	Unit Price	Tax	Total
5.000	EA	CC160607003-101 101	Line Item 101: Ice...	23.000000	$0.00	$115.00

Delivery Date:	November 4, 2016
Shipping Method:	Delivery
Shipping Instructions:	
Ship FOB:	Destination
Special Instructions:	

DRAFT CHANGE ORDER (ver. 01)

Summary

Change Order Name:	Kathy Myers/RJ011700718
Change Order Number:	PJ011700547
Account Number:	AC-1
Contract Number:	CC160607003
Change Order Date:	October 28, 2016
Submitted By:	Kathy Myers
Payment Method:	Invoice
Payment Terms:	No Payment Terms specified

Supplier

Mike Dorrian
Hiland Dairy Foods Company LLC
3805 Emanuel's Cleaver II Blvd
Kansas City, MO 64127
816-777-2325

Buyer Contact

Bill To Address

Enterprise Admin
State of Missouri
301 West High Street
Room 630
Jefferson City, MO 65101

Phone:	573-751-2387
Fax:	571-382-1005
Email:	wp.stage@perfect.com
Mail Stop:	State of Missouri

Ship To Address

Enterprise Admin
State of Missouri
301 West High Street
Room 630
Jefferson City, MO 65101

Phone:	573-751-2387
Fax:	571-382-1005
Email:	wp.stage@perfect.com
Mail Stop:	State of Missouri

Buyer Defined Fields

Procurement/Req Type :	

Quantity	Unit	Supplier Part Number	Item Description	Unit Price	Tax	Total
7.000	EA	CC160607003-101 101	Line Item 101: Ice...	23.000000	$0.00	$161.00

Delivery Date:	November 12, 2016
Shipping Method:	Delivery
Shipping Instructions:	
Ship FOB:	Destination
Special Instructions:	

Item Attachments Summary

4. Click Back to return to the approval queue.
5. Click the Document Summary icon to view the Change Order document details.
6. Click Approve.
7. The system will return you to the Approval queue view. The newly approved Change Order no longer appears on the list.

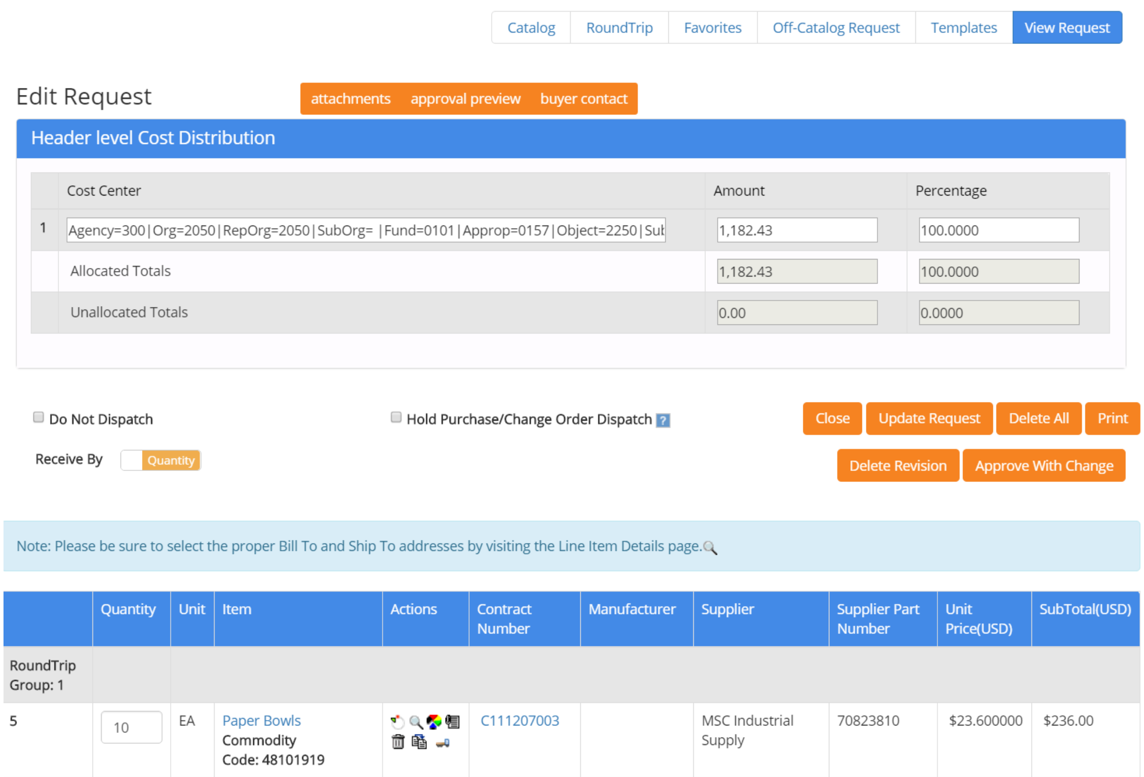
Activity 9.4 Rejecting a Purchase Request

1. Locate a Purchase Document in the Approval Queue for Approval.
2. Click the Document Summary icon
3. View the Request/Order details from the Expanded view.
4. Type the reason for the Rejection in the **Enter Comments** field for the Purchase document.
5. Click Reject.

Activity 9.5 Edit a Purchase Request as an Approver

NOTE: Approver Only Users Cannot Edit Requests in Approval – they can approve or reject only

1. Click the Edit icon from the **Actions** column.
2. The **Edit Request** page displays:



Note: At this point an Approver with Edit permissions has the same access to the Request as the Requestor. The approver can add items, assign Account Distribution codes, assign Bill to/Ship to address, etc. Be sure to click Update Request to save changes.

3. After Modifications are performed for a Request awaiting approval, there are two options available.
   a. To Approve the Request with modifications applied, click Approve With Change. The system will return to the Approval page with the Request cleared from the Approval queue.

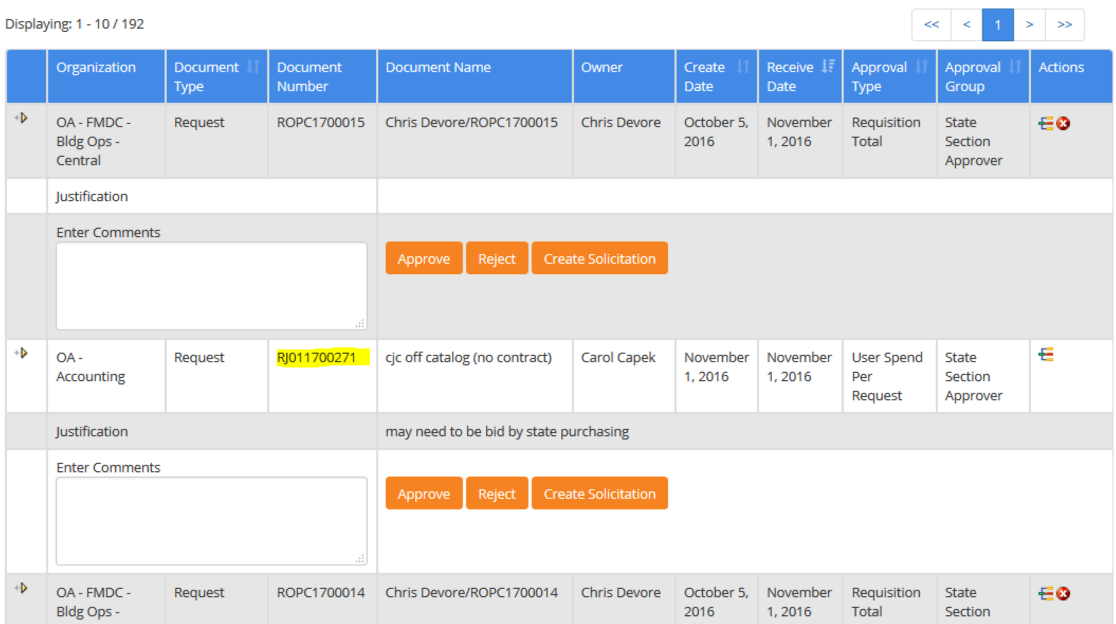
OR

b. Delete the Revision Delete Revision. The system will return to the Approval page. The request in its original state can be approved or rejected.

Activity 9.6 Create a Solicitation from a Request

NOTE: Only Users defined as Req Approvers and Solicitation Access will have this permission assigned to them.

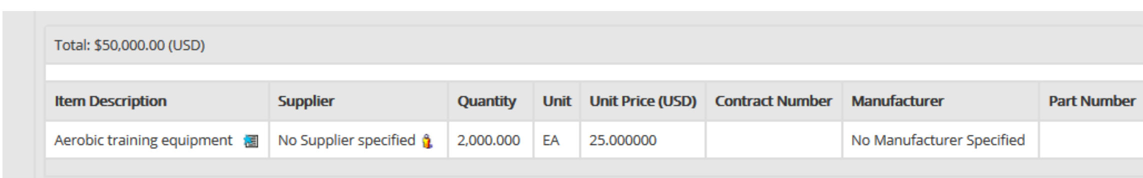
1. Locate the Request document for solicitation creation.



Displaying: 1 - 10 / 192 << < 1 > >>

	Organization	Document Type	Document Number	Document Name	Owner	Create Date	Receive Date	Approval Type	Approval Group	Actions
	OA - FMDC - Bldg Ops - Central	Request	ROPC1700015	Chris Devore/ROPC1700015	Chris Devore	October 5, 2016	November 1, 2016	Requisition Total	State Section Approver	
	Justification									
	Enter Comments			Approve Reject Create Solicitation						
	OA - Accounting	Request	RJ011700271	cjc off catalog (no contract)	Carol Capek	November 1, 2016	November 1, 2016	User Spend Per Request	State Section Approver	
	Justification			may need to be bid by state purchasing						
	Enter Comments			Approve Reject Create Solicitation						
	OA - FMDC - Bldg Ops -	Request	ROPC1700014	Chris Devore/ROPC1700014	Chris Devore	October 5, 2016	November 1, 2016	Requisition Total	State Section	

2. Click the Document Summary icon to see line details

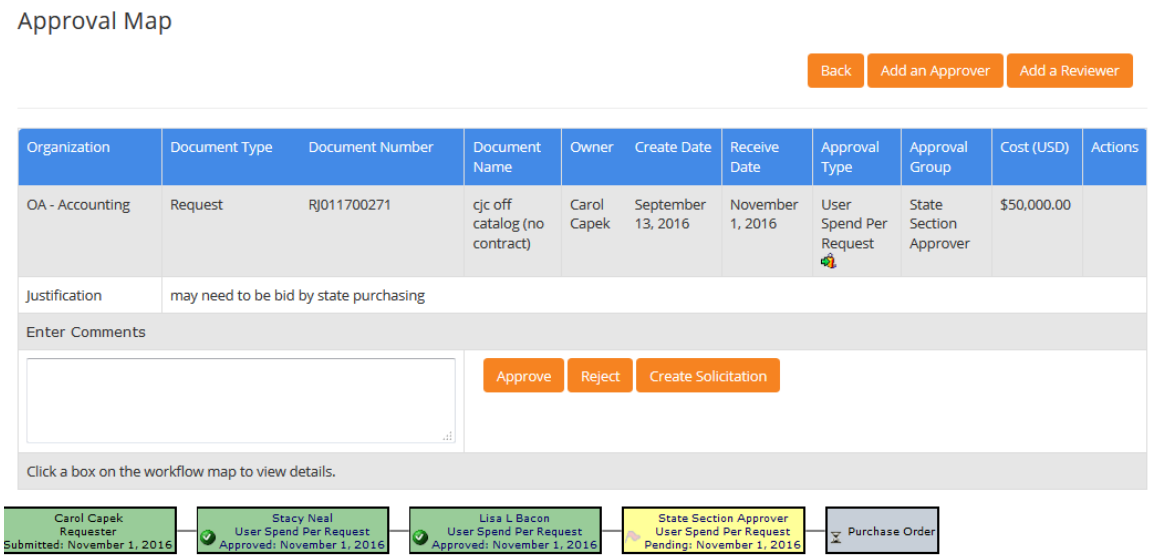


Total: $50,000.00 (USD)

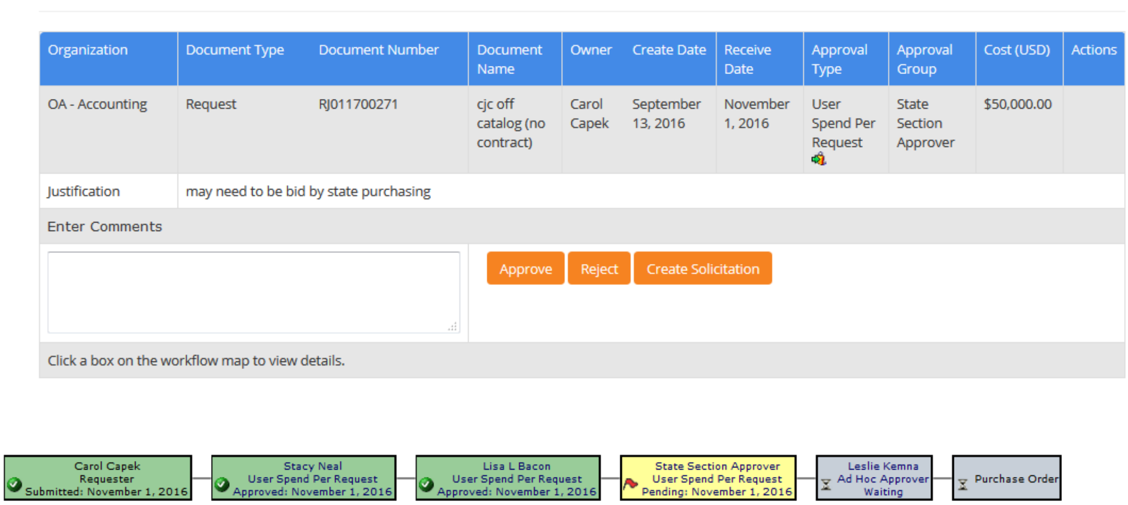
Item Description	Supplier	Quantity	Unit	Unit Price (USD)	Contract Number	Manufacturer	Part Number
Aerobic training equipment	No Supplier specified	2,000.000	EA	25.000000		No Manufacturer Specified	

3. Approver can either proceed to Create Solicitation or Review the Approval Map and Add a different Adhoc Approver/Buyer for them to proceed to Create Solicitation (for example this is a services request, so it could be assigned to a services Purchasing Buyer at the State to Bid)

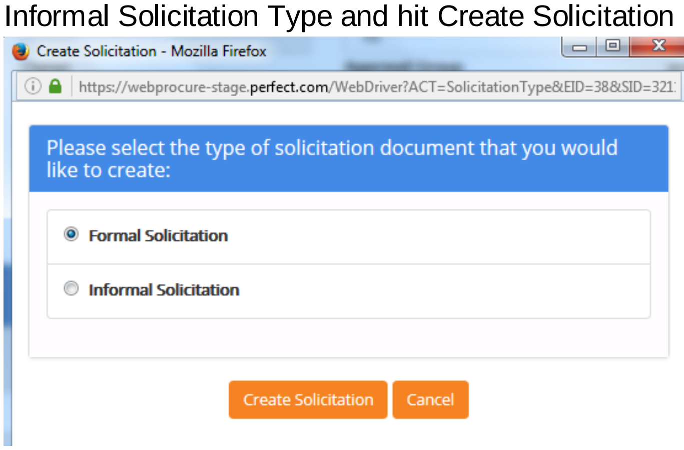
4. For Adhoc, choose the workflow icon and select to Add an Approver and proceed with the steps to add them



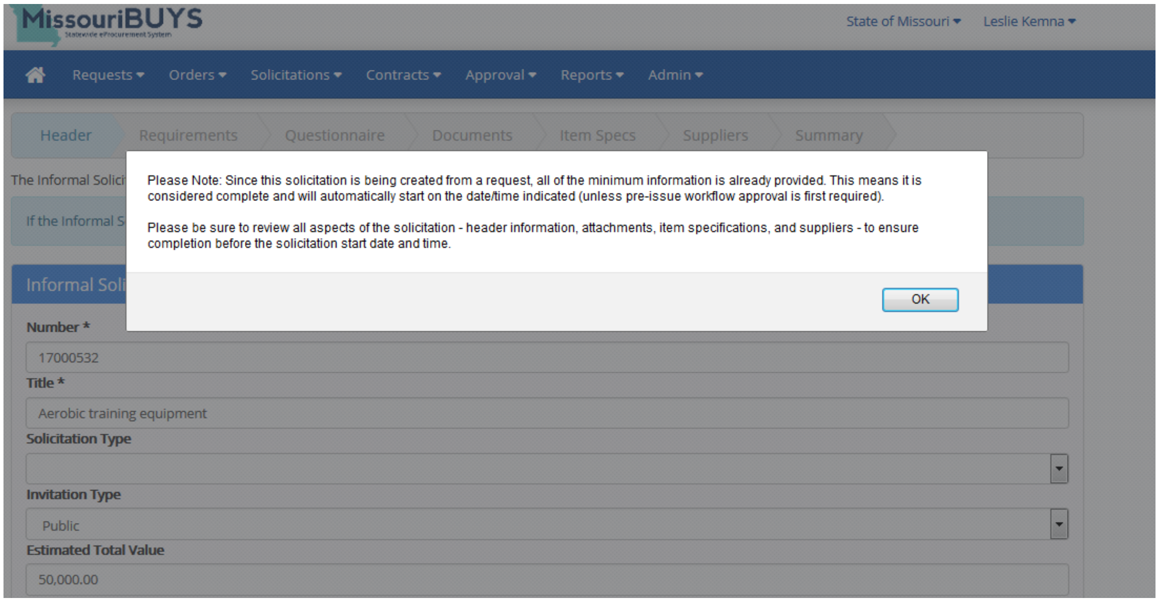
After Adhoc to Leslie – Approve so moves to her for processing:



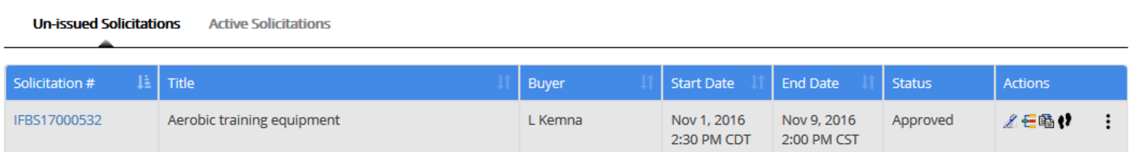
5. For Create Solicitation, click the Create Solicitation Button – Select Formal or Informal Solicitation Type and hit Create Solicitation on the pop-up:

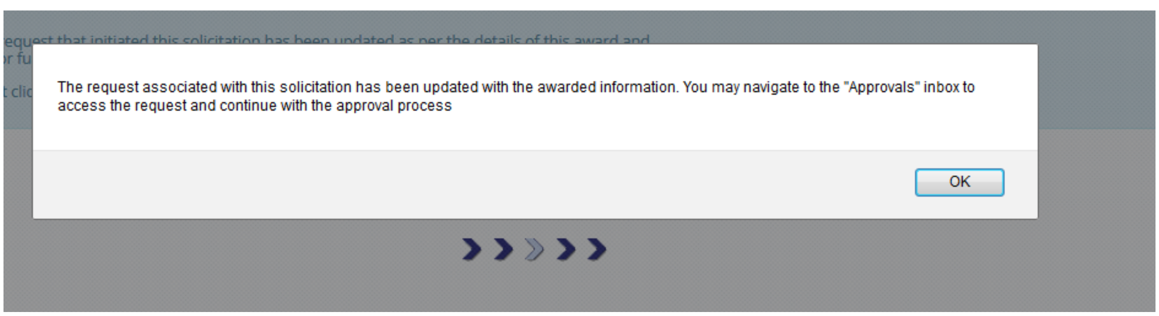


6. The solicitation creation will initiate and open with below message:

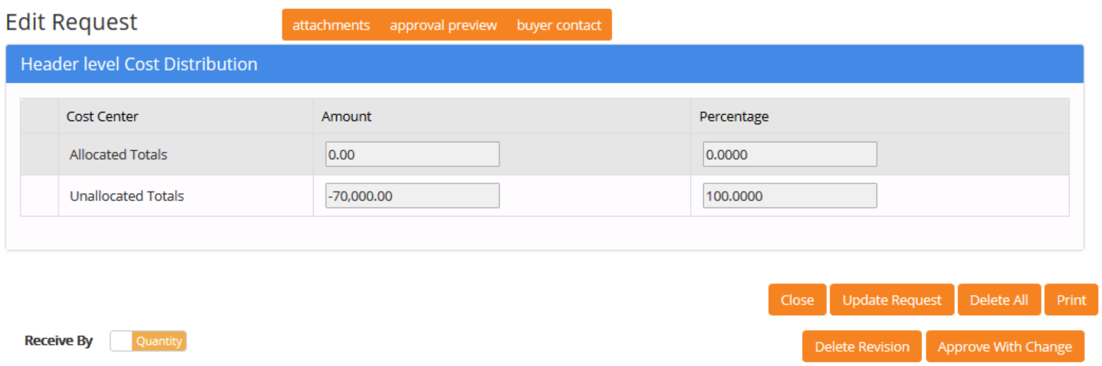


7. Buyer will proceed to create, submit, evaluate and award the solicitation as usual, and at the end of the process, they will go into the Archived Awarded Solicitation and then click the ‘Update Request’ and the request will go back thru workflow due to the change and one of the approvers will add the accounting to proceed to PO:

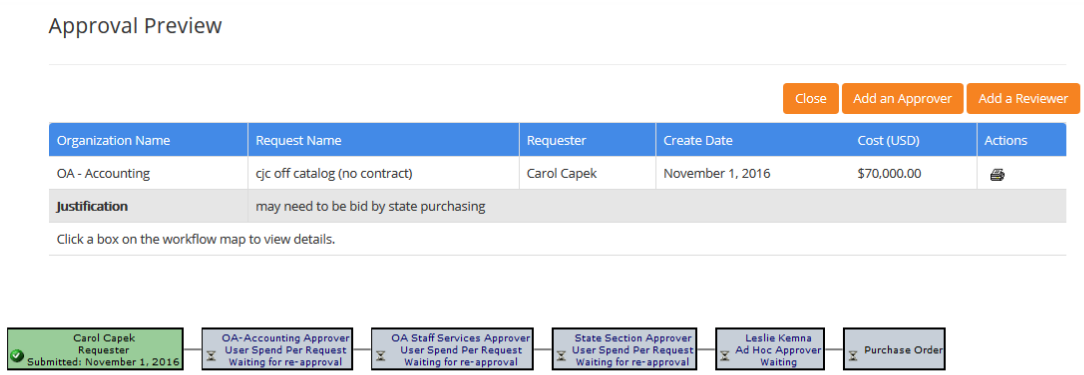




8. When the approver hits okay, it will open the updated Request in the Edit Request / Approve with Change



9. The Buyer/Bidder/Approver can view the revised workflow (by clicking the approval preview) and click close after reviewed:



10. From there, they can Approve with Change to restart the Changed Request workflow.

Appendix

Pop Up Blocker Instructions for Chrome and IE11

To add this pop up to Chrome:

1. Open Chrome.
2. In the top-right corner, click the Chrome menu ≡.
3. Click **Settings**.
4. Click **Show advanced settings**.
5. Under "Privacy," click **Content settings**.
6. Under "Pop-ups," select **Do not allow any site to show pop-ups (recommended)** or **Allow all sites to show pop-ups**.
    - Click on the **Manage Exceptions** button.
    - Add [*.]perfect.com to your list of trusted sites. You may also want to add [*.]missouriBUYS.com while you are there.

To add this to Internet Explorer:

1. Open Internet Explorer
2. Click on **Tools** in the upper right corner of the screen
3. Select **Pop up Blocker**, then **Pop up Blocker Settings**
4. Add help.perfect.com and missouriBUYS.com to the list of Allowed sites
5. Select Close

Track Request Status and Action icons

View Requests defaults to Track Requests page

Track Request Statuses

Awaiting Approval: The Purchase Request is in the Approval workflow preconfigured for the Requester and the Agency of the Requester. Modifications can be performed for the Purchase Request while in the Awaiting Approval status by both the Requester and workflow Approvers.

Approver Edit: An Approver within the Approval Workflow has performed modifications for the Purchase Request. The Purchase Request has a draft version based on these modifications made by a workflow approver. No user can access a Purchase Request with an Approver Edit status for modifications until the Approver that has created the draft version has completed their document modifications or deletes the draft version of the Purchase Request.

Cancelled: The Purchase Request was canceled while the document was in the designated Approval workflow. The Cancelled Purchase Request will remain in the Track Request history in the Cancelled status. This is for reporting history. The canceled Purchase Request can be copied, resulting in a new Purchase Request number and name. Edits can be made to the copied Purchase Request and submitted back into the designated workflow without having to start the Purchase Request from scratch.

Open: The Purchase Request is in the creation process and not submitted into the Approval workflow. The Requester of a Purchase Request can make any required edits to the document while it is in the Open status. Items can be added, items can be deleted, Account Distribution Allocation assigned, and payment and delivery information assigned to the Purchase Request while in the Open status. A Requester can start the creation process of a Purchase Request, come back to the Purchase Request days or weeks later, and continue to add or modify the Purchase Request while it is in the Open status.
Note: The Requester will then have the option to edit a rejected Purchase Request in Open status. The Requester can perform any necessary edits to the Purchase Request and resubmit it into the Approval workflow.

Financial System Pending: The Purchase Request has been submitted to SAM II is being validated or a pre-encumbrance is in process. While a document is in Financial System Pending status, no editing of the document will be available.

PO Created: The Purchase Request has completed the Approval workflow and a PO document created in MissouriBUYS and is in the process or has been validated in SAM II.

Rejected: The Purchase Request has received a rejection during the Approval workflow. There is a Rejection reason associated with the Purchase Request. The Requester can view the rejected Purchase Request, and view the Approver that rejected the document in the Rejected status by clicking on the View Approval Map icon and clicking on the Comments Exist icon for the rejected approval level. If the requester clicks on the Edit icon, the Request will change to the Open status and the work flow will be refreshed.

Note: The Requester will then have the option to edit the Purchase Request in the Rejected status. The Requester can perform any necessary edits to the Purchase Request and resubmit it into the Approval workflow.

Solicitation Created: The Purchase Request while in Approval Workflow has had the action of Create a Solicitation performed. Instead of an Approval action being received for the document, an Approver for the Purchase Request created a Solicitation for supplier response. Once the solicitation created from the Request document has been awarded to a supplier(s), the request document will receive an approval or rejection.

Solicitation Awarded: Use the drop down menu to filter for only those requests in which a solicitation has been awarded.

Track Request Action icons

Cancel

Once a Purchase Request has entered into the Approval workflow, the option to Cancel the Request is available. By clicking on the Cancel icon, the request will be canceled and removed from the Approval workflow. A Canceled Purchase Request is available from the Track Request page for editing and resubmission into workflow.

Copy to Request

The ability to Copy a Request is available for a Purchase Request regardless from status.

Delete

If a Purchase Request has the Open status, the ability to delete the Purchase Request is available. A Deleted Purchase Request is not accessible from the Track Request page once the deletion action has completed.

Edit

When a Request is in the Open and Awaiting Approval status the option to edit the Request is available to the Requester

Print

The ability to print the Purchase Request is available regardless of the status of the Purchase Request. The print icon will also allow you to view all attachments on the Request and Purchase Order if/when the document is approved/archived. Be sure to click the hyperlink "Show Attachments" once you are on the print page preview.

Save as Personal Template

The ability to save a Purchase Request as a Personal Template is available regardless of the status of the Purchase Request. A Personal Template is only available to the system user that saved the Purchase Request to template form.

View Approval Map

The ability to view the Approval workflow of the Purchase Request is always available. Click the View Approval Map icon to view the point of the Request in the required Approval Path.

View Request History

The ability to view the Request History of a Purchase Request is always available for a Request regardless of the Status of the Purchase Request.

View Pre-Encumbrance

Displays the details of the Pre-Encumbrance transaction for the Purchase Request

Purchase Order Statuses

Approved, Sent Email (or Fax); Purchase Request is approved and created within MissouriBUYS, and accepted by SAMII for creation and encumbrance of the funds. The Purchase Order sent to the supplier via the method in their profile (Email or Fax).

Financial System Rejected: SAM II has rejected the Purchase Request, the user will need to review the history file to find the reason for the rejection. It will also note the number of the new requisition automatically created from the rejected request.

Draft Change Order: When a user clicks on the Change Order icon, this message appears so that the user knows a change order draft was created but not yet submitted for approval.

CO Awaiting Approval: A Change Order that has entered workflow and awaiting processing by one or more approvers.

CO Approved, On Hold: An approved Change Order where the user selected Hold/Awaiting Manual Dispatch

CO Approved, Sent Email (or Fax): An approved Change Order sent to the supplier via the method they selected in their profile (Email or Fax).

CO Approved, Not Required Approved Change Order that did not require a dispatch to the Supplier (change of account code, adding comments, etc.)

Closed, Sent to Email (or Fax): A Purchase Order closed before complete fulfillment and the supplier has been sent the PO Close document.

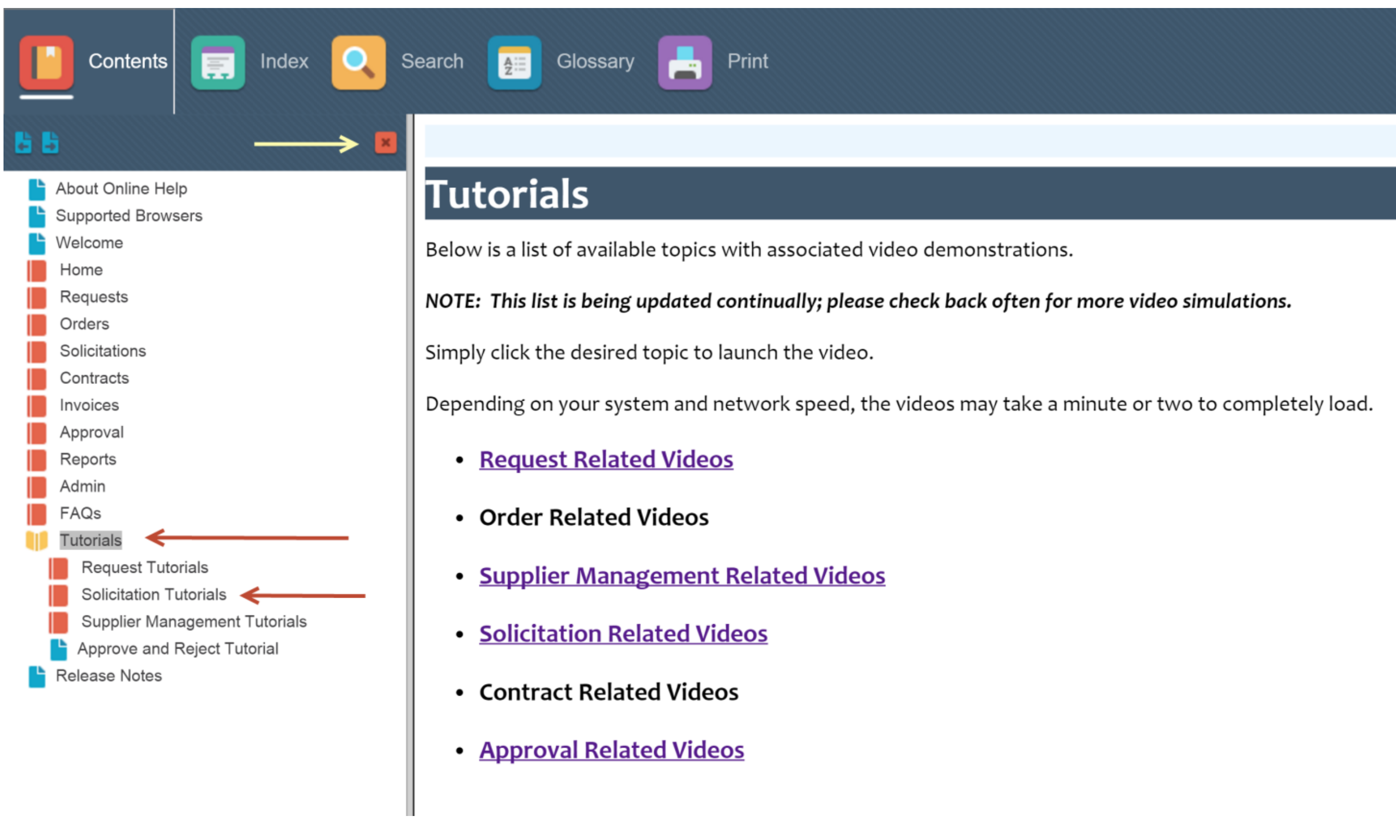
Cancelled, Sent to Email: A Purchase Order cancelled before items were received and the supplier has been sent a cancelled order document.

Accessing MissouriBUYS On-line Help

Tutorials are available through online help within MissouriBUYS. When you log on, select the box with your name in the upper right hand corner of the screen. In the drop down, you will see the option for Help. Select it and you are taken to the Help Screen (below).

Select **Tutorials** near the bottom of the list of options and then the function that you would like to review (Requests, Solicitations, etc.) If the online help fails to open you will need to add *.perfect.com and *.MissouriBUYS.com to your exceptions for pop up blockers. See above instructions on how to add this page to your trusted sites in both Internet Explorer and Google Chrome. If you are still unable to open Help, try using this Online Help Link or contact the ITSD Help Desk.

Once you have selected the desired Tutorial, then click on the  icon to hide the navigation panel so you will not have to scroll the page from side to side during the tutorials; or click, hold and slide the gray, vertical bar to the left.



MissouriBUYS Order Management Icon Glossary

The following icons and buttons are used to perform various functions within the MissouriBUYS **Order Management** module.

Add Reviewer

Add a reviewer- Opens the add reviewer page to add a reviewer to the Purchase documents approval workflow. Located on the Approval Map page

Add an Approver

Add an approver- Opens the add approver page to add an approver to the Purchase document approval workflow. Located on the Approval Map page

Add

Add- Adds a requested item to your Purchase document. Located on the Catalog, Off Catalog and Favorites pages

Add Account Assignment

Add Account Assignment- Opens the Account Distribution page for Account Code assignment. Located on the Item Cost Allocation page

+ Add Item

Add Items-Allows multiple items to be added to a Request document at one time. Located on the Catalog page

 **Add to favorites-** Adds selected item to your favorites list. Located on the Catalog and the Item Description page within the Action column

☐ Add to Favorites

Add to Favorite- Adds the Off Catalog item being created to the Favorite lists. Located the Off-Catalog Request page

 **Approved-** Indicates an approval by a workflow approver. Located on the Approval Map page

☐ Apply to all items

Apply to all Items—when selected will apply the value for the specific field to all other line items associated with the Purchase document. Located on the Line Item Detail and Account Distribution page

 **Apply Unit Discount** – Opens the Apply Discount to Unit Price window for discount entry. Located on the Process Request/View Request page

Approve With Change

Approve With Change – Approves a Change to a Purchase Request by an approver. Available for a Request when modifications are made after submission into approval workflow has occurred. Located on the Process Request page

Ask Supplier

Ask Supplier- Opens a window that allows you to email or fax the selected supplier with questions about an item. Located on the Item Description page accessible by clicking the Item description link on the Catalog page

Back

Back- Returns to the previous page of the MissouriBUYS application

Cancel

Cancel- Cancels changes made to the current page since the last Save action

Cancel- Cancels the selected Purchase Document. Located on within the Actions column on the Track Request and Track Orders page

Clear Filters

Clear Filters- removes all default options for search criteria. Located on Track Request and Track Orders page

Close

Close- Closes the current page

Close- Initiated a Close transaction for a Purchase document. Located in the Action column on the Track Orders page

Close- Closes the expanded view of the Purchase document details. Located on Track Request, Track Orders and Purchase Order History page

Comments exist- Indicates that an approver has included comments when they reviewed or took action (rejected) on a Purchase document. Located on the Approval Map page

Compare Versions

Compare Versions-displays the selected version No. of a Purchase Document side by side to comparison. Located on the Purchase Order History page

Complete: Indicates that the line items for a Purchase Order has a completed invoice entry performed. Located on the Receipt Entry page

Create Change Order-Open the Change Order page in order to create and submit a Change Order. Located in the Actions column on the Track Orders page

Copy Request

Copies a Purchase Request to a new Purchase Request.

Current- Indicates the approver in the workflow that is currently viewing the Purchase document within the Approval Workflow. Located on the Approval Map page

Delete- performs the Delete action for the selected document or line item. Located on the Track Request, Process Request and Change Order page

Delete All

Delete all- Deletes all line items from the current Purchase Request document. Located on the Process Request and Change Order page

Delete Draft

Delete Draft-Deletes the draft version of a Change Order. Located on the Change Order page

Delete Revision

Delete Revision- Available for a Request when modifications are made after submission into approval workflow has occurred. Located on the Process Request page

Distribute Evenly

Distribute Evenly- Applies a dollar value of the line item evenly between the associated Account codes. Located on the Account Distribution page

Edit- Allows you to edit the selected Purchase document including accessing a Change Order draft document. Located within the Action column on the Track Request and Track Order page

Edit Off-Catalog Item- Allows you to edit the selected off-catalog line item. Locate on the Process Request page

Edit RoundTrip Item: Allows you to edit the selected round-trip item. Locate on the Process Request page

First Page-Displays the first page of Search Results

? Help **Help-** Opens the online help tool. Located on the main navigation bar throughout the Order Mgmt module

Help on Do not Dispatch and Hold Dispatch: Displays text describing the system behavior when one of these two options is selected for a transaction document. Located on the Process Request page

Last Page- Displays the last page of search results

Line item attachment- Attaches a file to a line item which can then be viewed by the approvers. You can also elect for the attachment to be sent to the supplier. Located on the Process Request and Change Order page

Line item cost distribution- Allows access to the Account Code for Account Distribution. Located on the Process Request and Change Order page

Line Item Detail-Displays all line item detail for the Purchase document including Bill to/Ship to address, payment type, Shipping instructions, and Special Instructions fields. Located on the Process Request page

Logout **Logout-** Ends your current MissouriBUYS session, and returns you to the login page. Located on the main navigation bar throughout the Order Mgmt module

Next Page- Displays the next page of search results

New

New-Displays the search window for Document Attachment to a Purchase Request document and/or Line Item. Located on Document Attachment page

OK **OK-** Closes a system message window after you have read the contents

Open **Open-** Opens the selected file from your computer to upload documents

Open-Displays details of the selected Purchase document

Order Details- Displays the basic information for the order along with Item details. Locate on the Track Orders page.

Pending - Indicates that the Purchase document is awaiting action from the specified approver. Located on the Approval Map page

Save as a Personal Template- Creates a template from a Purchase Request document that will only be available for your use. Located in the Actions column on the Track Request page

Previous Page-Displays the Previous page of Search Results

Print- Generates a printed copy of the Purchase document. Located on the Track Request and Track Orders page. The print icon will also allow you to view all attachments on the Request and Purchase Order if/when the documents are approved/archived. Be sure to click the hyperlink "Show Attachments" once you are on the print page preview.

Print

Print- Generates a printed PDF copy of the Purchase document. Located on the Process Request page. Print will also allow you to view all attachments on the Request and Purchase Order if/when the documents are approved/archived. Be sure to click the hyperlink "Show Attachments" once you are on the print page preview.

Process Request

Process request- Displays to the Process Request page where you can make changes to your Purchase document and prepare for submission

Receive All

Receive all- Automatically enters the Receive Quantity and Packing Slip Quantity to indicate all items were received in full. Locate on the Receipt Entry page

Receive- Allows you to enter the receipt information for the selected purchase order

Rejected- Indicates that the selected Purchase document has been rejected. Located on the Approval Map page

Release Dispatch Hold- Triggers the dispatch of the Purchase Order to the supplier. Located on the Track Orders page.

Reset

Reset- Clears your selections and/or entries on a particular page

Retain Key Information

Retain Key Information- will apply data contained for an off catalog item to the next off catalog item without the need for reentry. Located on the Off Catalog Request page

Save

Save- Saves changes and/or entries.

Save Request Name-Saves the changes made to the default request name. Located along the bottom of the Order Mgmt module for a Request document

Search

Search- Searches for the specified criteria within the system. Located in the Commodity Code Search window.

Search- Searches for the specified criteria within the system. Located on the Approval Map: Add Approver/Reviewer page, Off Catalog Request page

Select- Selects your choice from the current search results list. Located throughout the application

Show All Suppliers- Will display all suppliers that provide the same catalog item. Located in the Actions column for a catalog item on the Catalog page

Submit

Submit- Performs a sort function or saves your entry. Submit button is available throughout the application.

Submit Request

Submit request- Submits the Purchase Request into a required workflow or to a Purchase Order if no workflow is required. Located on the Process Request page

Submit Change Order

Submit Change Order- Submits the Change Order version into a required workflow or to a Change Order transaction document if no workflow is required. Located on the Change Order Process Request page

Supplier Information- Displays contact information for selected supplier. Located throughout the application

Supplier Print – Creates a print out of the Purchase Order that was received by the Supplier

Suspended- Indicates that the selected Purchase document is in a suspended status due to a previous action. Located on the Approval Map page

Update Request

Update Request- Updates the Purchase document total to reflect changes made to line items. Locate on the Process Request page

Update Change Order

Update Change Order- Updates the Change Order document to reflect modifications made to line items. Located on the Change Order Process Request page

+ Upload

Upload – Uploads attachments to a receipt document. Located on the receipt window.

Value Search- Displays the Value Search page for Account Code segment assignment. Located on the Account Distribution page

View PO History- Displays the Purchase document's transaction history. Located on the Track Orders page

View Approval Map-Displays the Approval workflow map for the Purchase document. Located on the Track Request, Track Orders and Purchase Order History page

View Change Order Approval Map- Displays the approval workflow map for the Change Order document. Located on the on the Track Orders page and the Purchase Order History page

View Receipt History- Displays the receipt information for the selected Purchase order. Located on the Track Request page

View/Edit Unit Price Discount- Opens the Read-Only view of the View Discount Applied on Unit Price View page. Located on the Process Request page and apart of the document details for the Purchase document that has had a discount applied to a line item throughout the application

View Order History- Displays the workflow steps and the Financial system integration messages for the Purchase Document. Located on the Purchase Order History page

View Pre-Encumbrance- Displays details of the Pre-Encumbrance transaction. Located in the Actions column on the Track Request

View PO History- Displays the Purchase Order transactional history. Located in the Actions column on the Track Order

View Request History-Displays the Purchase Request transactional history. Located in the Actions column on the Track Request

Waiting- Indicates that the Purchase document requires further action by a prior user in the Approval workflow before action can be taken by the specified user. Located on the Approval Map page