

Creating Off-Contract Purchases

This document is a quick reference guide for procurement users who need to create an off-contract purchase in the Arizona Procurement Portal (APP.) If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO Website: <https://spo.az.gov/>.

Users create off-contract purchases for items not found in the hosted or punch-out catalogs. After the requisition is created, it is routed for approval and sourcing. If the Requisitioner has sourcing rights and the requisition is within the delegated authority, the requisition will go to the Requisitioner for sourcing. If the requisition is not within the delegated authority, it will go to the Procurement Officer for sourcing. Once the requisition is ready for sourcing, the supplier and supplier contact must be identified before it becomes a PO.

Creating an Off-Contract Purchase

1. From any page in the APP, navigate to the Procurement drop-down menu and select **Create**.
2. For Requisition Type, select "Off-contract".
3. Fill in Header information, including **Site**, **Name**, and **Fiscal Year**.
4. Click the **Save** button.

The screenshot shows the 'Create' page in the Arizona Procurement Portal. The top navigation bar includes 'Suppliers', 'Sourcing', 'Contracts', 'Shop', 'Procurement', 'Invoicing', 'Analytics', and 'Config'. The 'Procurement' menu is active, and the 'Create' page is displayed. The 'Header' section contains the following fields:

- Requisition Status: Draft
- Requisition Type: Off-Contract
- Name: Req. 3/3/2023
- Requester: REQ98 ADA
- Site: (dropdown menu)
- Special Purchase Type: (dropdown menu)
- Fiscal Year: 2023 - State of Arizona
- Set aside spend: (checkbox)
- Open Requisition: (checkbox)
- File(s): (upload button)
- PO Multi Year Funding: (checkbox, checked)

Numbered callouts in the image indicate: 3 points to the 'Requisition Type' dropdown; 4 points to the 'Header' section; and 5 points to the 'Save' button.

5. Complete the **Ship to** and **Bill To** fields.

6. Click the **Save** button.

The screenshot shows a requisition form titled "Requisition: REQ000616147 - Protective Gear (Draft)". At the top right, there is a search bar and a shopping cart icon. Below the title, there are two buttons: "Save" (highlighted with a blue box and a circled '7') and "Other Actions" (with a dropdown arrow). In the center, there are two columns of form fields: "Ship to" and "Bill To". The "Ship to" field has a dropdown menu. The "Bill To" field contains the text "State Procurement Office 100 N 15th Ave. Phoenix" and a dropdown menu. A circled '6' is placed above the "Bill To" field.

7. Scroll to the **Items & Services** section, select **+Add a free-text Line**, and complete the information on the **Item Details** page.

The screenshot shows the "Items & Services" section. At the top, there is a button "Add Additional Charges". Below it, there is a button "+ Add a free-text line" (highlighted with a blue box). Below that, there is a text area showing "0 Result(s)".

*Note: Complete the **Item Description**, **Estimate Commercial Costs**, and **Suggested Supplier** sections.*

8. Click the **Save** button.

9. Fill in the necessary **Budget Information**.

*Note: **Account Template** or **Function** are required fields for successful encumbrance. If these are left blank, then **Budget Fiscal Year**, **Unit**, **Fund**, **Appr Unit**, **Object**, **Task**, and **Department** must be entered.*

10. Click **Save & Close**.

11. Select **Submit for Approval**.

The screenshot shows the bottom navigation bar with four buttons: "Save", "Submit for Approval" (highlighted with a green box), "Reset Allocations", and "Other Actions" (with a dropdown arrow).