

Modifying Purchase Requisitions

This document is a quick-reference guide for procurement users who would need to add modifications to purchase requisitions before they are submitted 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/>.

Requisitioners can create the following modifications or changes to requisitions before they are submitted:

- **Modifying Budget Information:** requisitioners can input budget information before sending it for approval
- **Add Freight or Miscellaneous Charges:** requisitioners can add freight and/or miscellaneous line item charges to a requisition to account for additional charges.
- **Open Order:** requisitioners can generate multiple order releases with this functionality.
- **Subscription or Milestone Purchase:** utilized for recurring purchases.
- **Canceling a Requisition:** ability to cancel a requisition
- **Duplicating a Requisition:** ability to duplicate a requisition

Modifying Budget Information

Requisitioners must enter valid budget information for each line item before a requisition is submitted. After a requisition has been submitted, approvers will be able to modify budget information during the approval process.

The budget allocation string will be visible at the bottom of each line item screen to split the cost allocation across different axes.

1. Select the **Pencil Icon** to edit the item's budget information.

		Add Additional Charges		Delete Lines		Copy selected items		Edit Lines	
	#	Ref.	Item description	Supplier	Total Ordered Quantity	UOM	Price	Tax Amount	Total
1	1534-3	B1160-CA	laser printer B1160	(Mario Enterprises Pvt. Ltd.) Mario Enterprises Pvt. Ltd.	10.00	Each	70.00		700.00

2. Then, navigate to the **Budget Information** section in the pop-up window. Fill-in the necessary budget information.

Allocation Filled in : Percentage Amount To be allocated : 0 %

	%	Allocation ID	Pretax Amount (USD)	Object	Tax	Agency	Fiscal Year	Budget Fiscal Year	A
100.00	%	3225	100.00		...	DEPT OF CORREC

Please note that **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.

Modifying Budget Information (*continued*)

3. If you would like to split a line item's allocations across multiple line items, click the **+** **Allocation** button to add an additional allocation and then complete the required fields. Once you have entered the necessary information adjust the % column values to reflect how you would like to split the allocations.
4. Once you have finished entering the budget information for a line item, click the **Save & Close** button and continue to update the budget information for the remaining lines. Please note that as part of a future release you will be able to copy budget information from one line to another.

Adding Freight and/or Miscellaneous Charges

Before a requisition is submitted, requisitioners are able to add freight and/or miscellaneous charges to the requisition.

1. On the Requisition page, click the **Add Additional Charges** button.
2. Enter the **Short Description, Commodity** (Freight Fee or Miscellaneous), **Price**, and **Supplier**.
3. Click the **Save & Close** button.
4. Click the **Pencil** icon next to the line item you just added.
5. Complete the Budget Information for the charge. Please note that **Account Template** or **Function** are required fields for successful encumbrance.

Creating an Open Order

Creating an open order allows requisitioners to generate multiple order "releases", without recreating a new purchase requisition each time. The released amounts will create purchase orders that are sent to the supplier. Suppliers will only see information on the purchase order, not all approved quantities in the requisition.

1. When creating a requisition, navigate to the **Blanket Order** tab.
2. Select the **Open Order** checkbox.
3. Select **Save** and then submit the requisition.

Once the requisition has been submitted and approved, you will be able to create releases from the requisition. To do this, follow the steps below:

1. Open the approved requisition.
2. Click the **Open Order Release** button.
3. Select the line item(s) to be ordered, enter the **Quantity to be Released**, and then click **Order Selected**.

A PO will be created with the specified quantity. Once you have created releases for the entire quantity of the order, click the **Close Purchase Requisition** button at the top of the requisition.

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Creating a Subscription or Milestone Purchase

Milestone and subscription purchases are used for recurring purchases. A subscription purchase should be used when the recurring time is according to a general calendar. A milestone purchase should be used when order dates need to be customized. To create a subscription or milestone purchase:

1. Add items to your cart and then navigate to the Requisition page. From this page, navigate to the **Blanket Order** tab.
2. Select the **Create New Milestone or Subscription Condition** and fill out requested information in pop-up window.
3. If you are creating a Subscription, fill in a **Short Description**, **Condition Begin and End Date**, and **Frequency** of terms.
4. If you are creating a Milestone, fill in a **Short Description** and the **Condition End Date**.

The image shows two side-by-side screenshots of the application's 'Creation of terms' and 'Milestone / Subscription Condition' pop-up windows.

The left window, titled 'Creation of terms', has a 'Generate terms and close' button and a 'Close' button. It features a 'Type' selector with 'Milestone' selected and 'Subscription' unselected. The 'Items' dropdown is set to 'All'. The 'Short Description' field contains 'from {0} to {1}'. There are fields for 'Condition begin date' and 'Condition end date', both with calendar icons. A 'Frequency' dropdown is also present. At the bottom, there is a 'Prorated' checkbox and a 'Number of days' input field.

The right window, titled 'Milestone / Subscription Condition', has 'Save', 'Save & Close', 'Save & New', and 'Close' buttons. The 'Type' selector has 'Milestone' selected and 'Subscription' unselected. The 'Items' dropdown is set to 'All'. The 'Short Description' field is empty. There is a 'Condition end date' field with a calendar icon. Below this, there is a '%' field set to '100.00' and a 'Dollar Amount' input field.

5. Select **Save and Close** and then submit the requisition.

Canceling a Requisition

Purchase requisitions (PR) can be cancelled before submitting them for approval. Requisitions cannot be cancelled after a purchase order has been created for them.

1. From any page in the APP, navigate to the **Procurement** tab and select **Browse Requisitions** from the drop-down menu. Select the requisition you wish to modify by selecting the **Pencil Icon**.
2. From the purchase requisition page, navigate to the **Other Actions** drop down and select **Cancel Requisition**.

Duplicating a Requisition

Purchase requisitions (PR) can be duplicated, but there are important things to understand while doing so:

- If delivery date is after current date , the PR will be copied as is.
 - If delivery date is before current date or there is no delivery date, the automatic lead time will be 30 days.
 - Items or services that have been deleted or blocked will not be duplicated.
 - Modifications can be made to the duplicated PR.
 - Default name will be “Copy of “Initial Label””.
1. From any page in the APP, navigate to the **Procurement** tab and select **Browse Requisitions** from the drop-down menu. Select the requisition you wish to modify by selecting the **Pencil Icon**.
 2. From the purchase requisition page, navigate to the **Other Actions** drop down and select **Duplicate PR**.