ARIZONA DEPARTMENT OF ADMINISTRATION
STATE PROCUREMENT OFFICE

STANDARD PROCEDURE

DESCRIPTION

Title: Pricing in ProcureAZ   **Effective:** October 1, 2011

No. SP026   **Revision:** 0

Standard Procedure for ordering searchable, catalog and punch-out items through ProcureAZ for contracted, off-contract and Government to Business (G2B – Punch out) items.

The Standard Release procedure is used for on-contract purchases; Open Market is used for off-contract purchases or for contract purchase from contracts not yet loaded into ProcureAZ. Punch-out is available for use on selected contracts programmed for this use.

STANDARD PROCEDURE

1.   RELEASE REQUISITIONS AND PURCHASE ORDERS (PO)

1.1.   <u>Create a New Contract</u>. Contracts must be setup in ProcureAZ. Hover with your pointer over **Documents/Requisitions** and click on **New**. Creator finds on-contract items via search, selects an item and adds them to the requisition. Complete the required fields (*) on the General tab and **Save & Continue**.

   See: ProcureAZ Quick Reference Guide – General Navigation

   ProcureAZ Quick Reference Guide – On-Contract Ordering

1.2.   <u>Enter Data</u>. Work through the Tabs along the top of the document from left to right; complete all required fields (*). The Requisition is then routed through the established approval path for final approval and to convert to ProcureAZ Purchase Order (PO).

   See: ProcureAZ Quick Reference Guide – Approving a Document

1.3.   <u>Change PO (if needed)</u>. PO is then routed through the established approval path. Resulting PO can be changed via the change order process or cancelled (vendor cannot be changed) before sending to the vendor.

2.   OPEN MARKET REQUISITIONS AND PURCHASE ORDERS

2.1.   <u>Create a New Requisition</u>. Hover over Documents/Requisitions and click on New. Complete the Short Description field. Click **Save and Continue**.

   See: ProcureAZ Quick Reference Guide – Off-Contract Ordering

   ProcureAZ Quick Reference Guide – General Navigation

2.2. Add Item(s). Click on **Add Open Market Item**. To add a new item successfully to ProcureAZ, you must provide at least a Description, Quantity, Unit Cost, Unit of Measure and 5-digit NICP Class Code. Select **Save & Exit.**

2.3. Submit for Approval. Click Save & Add New button until you have completed your order. Once you've concluded adding items, select **Save & Exit,** go to Summary Tab and submit requisition through the approval process.

3. G2B REQUISITIONS AND PURCHASE ORDERS

3.1. Create G2B. Click the **G2B** Punchout icon from the Header Bar or hover over **Documents/Requisition/G2B Shopping** and click.

See: ProcureAZ Quick Reference Guide – Punchout Ordering

ProcureAZ Quick Reference Guide – General Navigation

3.2. Enter and Verify Shipping and Billing Information. Ensure the Ship To and Bill To addresses are correct before clicking on the Punchout tab.

3.3. Add to Order or Requisition. G2Bs will only provide items available on contract. Work through the various links to find the items you want to purchase and click **Add to Order** or **Add to Requisition**.

3.4. Close the Contractors' Webpage. Click **Yes** to this message "The webpage you are viewing is trying to close the window. Do you want to close this window" This will close the contractors' webpage. Hit **Save & Continue**, go to Summary Tab and submit requisition through the approval process.

4. Effective

This Technical Bulletin is hereby authorized and effective
this 1st day of October, 2011, unless otherwise revised or repealed.
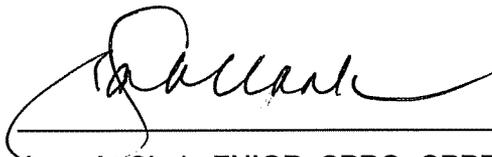
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