

do DEPARTMENT OF INFORMATION TECHNOLOGY

Reference Blanket Purchase Order User Guide
CATS II Contract



DoIT Service Desk
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ADPICS – Reference BPO Process

DoIT Training Department

BPO Header –

Original CATS II Blanket Purchase Order number – **060B9800035**

PCHL2342 V4.1 MD PRD	ADVANCED PURCHASING/INVENTORY	06/15/2009	3:02 PM
LINK TO:	BLANKET PURCHASE ORDER		
BPO/CONTRACT ID : 060B9800035	DEPT : 060P1	NOTE PAD : Y	
PURCHASING TYPE : I2	BID ID :	DGS BPO (Y/N): N	
ACTION INDICATOR: P	INTERFACE TYPE : BP	DBM BPO (Y/N): N	
STATUS : POST	AWARD :	DOIT BPO (Y/N): Y	
GSA CONTRACT NO :	POST DATE : 06/08/2009		
CONTRACT AMOUNT :	EFFECTIVE DATE : 06/01/2009		
EST CONTRACT AMT: 250,000,000.00	EXPIRATION DATE : 05/31/2014		
REMAINING VALUE :	FISCAL EFF DATE : 06/01/2009		
BUYER ID: 05SW NAME: SUE HOWELLS	PHONE: 4102607191 EXT:		
VENDOR: 4102607678 CATS II MASTER CONTRACT			
ADDRESS : 45 CALVERT ST			
ANNAPOLIS, MD 21401			
MULTI-VENDOR : Y			
MULTI-YEAR : Y	COMMODITY CTRL (F/P): F	LEVEL (1/2/3):	MINORITY SUB: N
RENEWAL :	OPTIONS :		
ORIGINAL BPO :	OPTION MAX: 0	ORIGINAL AMT:	
REFERENCE : N	ALLOW REF (Y/N): Y	LIMIT REF EXP DT (Y/N) Y	
F1-HELP F2-COPY BPO F3-DEL F4-OTHER KEYS F5-NEXT	F6-VIEW DOC F7-VEN SEL		
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB	ENTER-INQUIRE CL-EXIT		
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE			

The Department of Information Technology (DoIT) decided to utilize the reference Blanket Purchase Order (BPO) option in ADPICS to allow for more efficient State Stat reporting. A reference BPO makes Minority Business Enterprise (MBE) reporting easier and more efficient to track in FMIS over multiple fiscal years. Agencies will get the reference BPO approved by DoIT for the base task order as well as purchase orders required to encumber funds and make payments to the Master Contractor. Since a BPO has no accounting effect, agencies no longer have to encumber large amounts of money to be dispensed throughout the year.

ADPICS – Reference BPO Process

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IMPORTANT!

The CATS II Master Contract will run concurrently with the existing Consulting and Technical Services (CATS I) Master Contract, and will replace it upon its expiration date of December 31, 2010. During the remaining term of CATS I, CATS II will be used only if it is not reasonably anticipated that a TORFP/RFR will be completed by the CATS I contract expiration date.

Before the Reference BPO will be authorized by DoIT in FMIS, a copy of the fully executed task order agreement (TOA) is required.

Each Reference BPO Note Pad **MUST** have the following information:

- Dollar amount, start date & end date of base period of the task order.
- Dollar amount, start date and end date of option(s), if exercised.
- Number of proposals received.
- If there is a MBE Goal, indicate yes or no. If yes what is the percentage.
- List MBE subcontractors and dollar amount to each.

If your TORFP/ RFR has a MBE goal, then the subcontractor entry screen 2345 **MUST** be accurately entered with information.

Master Contractors responding to a TORFP/RFR containing an MBE goal shall complete, sign, without edits, and submit all required MBE documentation (TO Attachments D-1 (Certified MBE Utilization and Fair Solicitation Affidavit) and D-2 (MBE Participation Schedule) at the time of TO Proposal submission. Failure to do so will result in the State's rejection of the Master Contractor's proposal to the TORFP/RFR.

Each Master Contractor, once notified of the state's intent to award, (awarded a TOA) will be responsible for submitting the following forms to provide the State with ongoing monitoring of MBE Participation:

D-3 (Outreach Efforts Compliance Statement)

D-4 (Subcontractor Project Participation Statement, one for each named MBE)



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Each master contractor, once the task order is underway, is responsible for submitting the following form to the State each month:

D-5 (MBE Participation Prime Contract Paid/Unpaid MBE Invoice Report)

Waiver documentation – if a waiver was requested at the time of the Task Order submission.

Each master contractor shall also ensure that all MBE subcontractors submit the following form directly to the State each month:

D-6 (MBE Subcontractor/Master Contractor Unpaid MBE Invoice Report)

ADPICS BPO security will be required for anyone who is planning on creating Reference Blanket Purchase Orders. See your Agency FMIS coordinator to verify you have security or to fill out new forms. Make sure the Subcontractor Entry Screen 2345 and the Subcontractor Invoice Information screen 2355 are also included in your request.

If the vendor you chose is NOT currently on the BPO, email the Service Desk – servicedesk@doit.state.md.us and request the vendor be added (vendor must be on DoIT website as awarded a contract). Include the vendor's name, federal ID number and address.

ADPICS – Reference BPO Process

DoIT Training Department

Reference BPO

When purchasing from the CATS II contract a reference Blanket Purchase Order (BPO) will have to be created. This manual has the step by step instructions needed to complete this process. As with anything else, if there are questions, please contact the Service Desk at servicedesk@doit.state.md.us

For training purposes, we have tailored a document in our training region to resemble the CATS II BPO Contract. Not all vendors were added, however there are quite a few to represent the original CATS II BPO.

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    06/15/2009   3:09 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : 060B9800001  DEPT : 060P1      NOTE PAD      : Y
PURCHASING TYPE : BP           BID ID :             DGS BPO (Y/N): N
ACTION INDICATOR: P           INTERFACE TYPE : BP  DBM BPO (Y/N): N
STATUS          : POST        AWARD :             DOIT BPO (Y/N): Y
GSA CONTRACT NO :             POST DATE      : 06/15/2009
CONTRACT AMOUNT :             EFFECTIVE DATE : 06/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 05/31/2014
REMAINING VALUE :             FISCAL EFF DATE : 06/01/2009
BUYER ID: 05SW NAME: SUE HOWELLS      PHONE: 4102607191 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS          : 45 CALVERT STREET
                  ANNAPOLIS, MD 21401

MULTI-VENDOR     : Y
MULTI-YEAR       : Y   COMMODITY CTRL (F/P): F LEVEL (1/2/3):  MINORITY SUB: N
RENEWAL          :     OPTIONS          :
ORIGINAL BPO     :     OPTION MAX: 0    ORIGINAL AMT:

REFERENCE        : N      ALLOW REF (Y/N): Y    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO  F3-DEL F4-OTHER KEYS F5-NEXT      F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB  ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL TRANSACTION READY FOR UPDATE
```

Link to the **ADPICS 2342** screen and type in the CATS II BPO Contract id and press Enter. This should retrieve the document on to your screen. **Remember, the original CATS II BPO is on the previous page. This is just an example for training purposes.**

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    06/15/2009    3:54 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID 06089800001 DEPT : 060P1      NOTE PAD      : Y
PURCHASING TYPE : BP        BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: P        INTERFACE TYPE : BP   DBM BPO (Y/N): N
STATUS          : POST      AWARD :          DOIT BPO (Y/N): Y
GSA CONTRACT NO :          POST DATE : 06/15/2009
CONTRACT AMOUNT :          EFFECTIVE DATE : 06/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 05/31/2014
REMAINING VALUE :          FISCAL EFF DATE : 06/01/2009
BUYER ID: 05SW NAME: SUE HOWELLS      PHONE: 4102607191 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401

MULTI-VENDOR : Y
MULTI-YEAR   : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :          OPTIONS :
ORIGINAL BPO :          OPTION MAX: 0    ORIGINAL AMT:

REFERENCE : Y    ALLOW REF (Y/N): Y    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH DEPTS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9-LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
  
```

Your F5 key should display **F5-RENEW/REF**. If it does not, press the **F4-OTHER** key to change the functionality of the F5 key.

It is important to type over the **Effective Date** and **Fiscal Effective Date** with the current date. This will ensure your document will have the correct BPO number for the current fiscal year. If necessary, this date can be changed again prior to posting. **UPDATED 09/29/09**

Overtyping the **N** in the **REFERENCE** field with **Y** and pressing **F5-RENEW/REF** to create a reference BPO for your agency.

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    06/15/2009   4:26 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009  DEPT : R0013  NOTE PAD : N
PURCHASING TYPE : BP           BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N           INTERFACE TYPE : BP  DBM BPO (Y/N): N
STATUS : NOPT                 AWARD :          DOIT BPO (Y/N): N
GSA CONTRACT NO :            POST DATE :
CONTRACT AMOUNT :            EFFECTIVE DATE : 06/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 05/31/2014
REMAINING VALUE :            FISCAL EFF DATE : 06/01/2009
BUYER ID: 05SW NAME: SUE HOWELLS  PHONE: 4102607191 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401
MULTI-VENDOR : Y
MULTI-YEAR : Y  COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL :
ORIGINAL BPO : 060B9800001  OPTION MAX: ORIGINAL AMT: 250,000,000.00
REFERENCE : Y  ALLOW REF (Y/N): N  LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH USERS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9-LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
```

A new Blanket Purchase Order for your agency referencing the CATS II Blanket Purchase Order has now been created. Notice the Original BPO field is now populated with the CATS II BPO and the Reference field now has a letter Y for Yes.

Submit Your TORFP/RFR

Using the Contract ID or the Agency BPO document ID you are ready to submit your TORFP/RFR to the vendors for the Functional Areas or commodities for which you are requesting pricing. Follow the instructions on the DoIT website. After the bids have been received and a decision has been made return to this document to continue the ADPICS process.

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    06/15/2009    4:26 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009  DEPT : R0013          NOTE PAD : N
PURCHASING TYPE : BP           BID ID :              DGS BPO (Y/N): N
ACTION INDICATOR: N           INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS : NOPT                AWARD :              DOIT BPO (Y/N): N
GSA CONTRACT NO :            POST DATE :
CONTRACT AMOUNT :            EFFECTIVE DATE : 06/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 05/31/2014
REMAINING VALUE :            FISCAL EFF DATE : 06/01/2009
BUYER ID: 05SW NAME: SUE HOWELLS  PHONE: 4102607191 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401

MULTI-VENDOR : Y
MULTI-YEAR : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL :        OPTIONS :
ORIGINAL BPO : 060B9800001  OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y      ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH USERS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9-LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
```

There are specific fields that will default from the original BPO. Several of these will need to be modified to reflect your agency's information. **This is an important step.**

BPO/CONTRACT ID – This is your Agency's BPO number which will be use when submitting the Task Order Request for Proposal (TORFP/RFR).

Purchasing Type – this field will actually direct this document through an approval path within your agency. It is important to know what the Purchasing Type should be and make the necessary changes **BEFORE** posting this document.

Effective Date – This should be changed to a current date that reflects when you expect this BPO to be effective.

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    06/15/2009    4:26 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013    NOTE PAD : N
PURCHASING TYPE : BP            BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N            INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS : NOPT                  AWARD :          DDIT BPO (Y/N): N
GSA CONTRACT NO :             POST DATE :
CONTRACT AMOUNT :             EFFECTIVE DATE : 06/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 05/31/2014
REMAINING VALUE :             FISCAL EFF DATE : 06/01/2009
BUYER ID: 05SW NAME: SUE HOWEELS    PHONE: 4102607191 EXT:
VENDOR: 1102607670 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401

MULTI-VENDOR : Y
MULTI-YEAR : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL :
ORIGINAL BPO : 060B9800001    OPTIONS :
                                OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y    ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH USERS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9-LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
  
```

Fiscal Effective Date - This should be changed to a current date that reflects when you expect this BPO to be fiscally effective.

Expiration Date – This defaults from the original BPO. This date should be changed to reflect the expiration date of the contract. This date cannot exceed the current expiration date for the original BPO.

Buyer ID – This currently defaults from the original BPO. This must be changed to reflect a buyer within your agency.

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  06/15/2009  4:59 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013    NOTE PAD : N
PURCHASING TYPE : I2             BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N             INTERFACE TYPE : BP  DBM BPO (Y/N): N
STATUS : NOPT                   AWARD :          DOIT BPO (Y/N): N
GSA CONTRACT NO :              POST DATE :
CONTRACT AMOUNT :              EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE :              FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401

MULTI-VENDOR : Y
MULTI-YEAR : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL :          OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX:          ORIGINAL AMT: 250,000,000.00

REFERENCE : Y          ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH USERS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9-LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
RECORD UPDATED
```

In this example we have changed the Purchasing Type, the Effective, Expiration, and Fiscal Effective Dates and the Buyer ID. After verifying the changes are correct, press **F10-SAVE** to confirm your changes.

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      06/15/2009      4:59 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009      DEPT : R0013      NOTE PAD      : N
PURCHASING TYPE : I2                BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N                INTERFACE TYPE : BP  DBM BPO (Y/N): N
STATUS          : NOPT              AWARD :          DOIT BPO (Y/N): N
GSA CONTRACT NO :                  POST DATE :          :
CONTRACT AMOUNT :                  EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00    EXPIRATION DATE : 06/30/2010
REMAINING VALUE :                  FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13        PHONE: 4102607778 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401
MULTI-VENDOR : Y
MULTI-YEAR : Y      COMMODITY CTRL (F/P): F LEVEL (1/2/3):  MINORITY SUB: N
RENEWAL :          OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX:      ORIGINAL AMT: 250,000,000.00

REFERENCE : Y      ALLOW REF (Y/N): N      LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH USERS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9-LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
RECORD UPDATED
```

Remember, a reference BPO is similar to the copy function on a Requisition, Purchase Order or a Direct Purchase Order. Commodities and vendors copy over from the original document. Currently, there are 17 commodity lines and approximately 100 vendors that have been added to the CATS II BPO.

Vendor selection will be discussed later in the manual.

The commodities will now need to be selected for your Reference BPO.

The F6 key should display **F6-VIEW DOC**. If it does not, press the **F4-OTHER** key to change the functionality of the F6 key.

ADPICS – Reference BPO Process

DoIT Training Department

Creating a Reference BPO

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/01/2009    4:50 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013        NOTE PAD      : N
PURCHASING TYPE : I2              BID ID :             DGS BPO (Y/N): N
ACTION INDICATOR: N              INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS          : NOPT           AWARD :             DOIT BPO (Y/N): N
GSA CONTRACT NO :                POST DATE :
CONTRACT AMOUNT : 50,000.00      EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00     FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401

MULTI-VENDOR : Y
MULTI-YEAR   : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :      OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y          ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO  F3-DEL F4-OTHER KEYS F5-NEXT  F6-VIEW DOC F7-VEN SEL
F8-ELEM  F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB ENTER INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
```

Press **F6-VIEW DOC** to view the existing commodities that are attached to this Reference BPO.

ADPICS – Reference BPO Process

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Choosing Your Commodities

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/01/2009      4:53 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009 CONTRACT AMOUNT:                ALL: I/D:
VENDOR ID   : 4102607678 CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)      F/P:      AMOUNT:                PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY  UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001  0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ELECDM      0002  0002
ELECTRONIC DOCUMENT MANAGEMENT (CATS)
92020-GISCAT      0003  0003
GEOGRAPHICAL INFORMATION SYSTEM (CATS)
92020-SOFTW      0004  0004
SOFTWARE ENGINEERING (CATS)
92020-SYSFMM      0005  0005
SYSTEMS/FACILITIES MANAGEMENT AND MAINTENANCE (CATS)
92020-ASPCAT      0006  0006
APPLICATION SERVICE PROVIDER (CATS)

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL
```

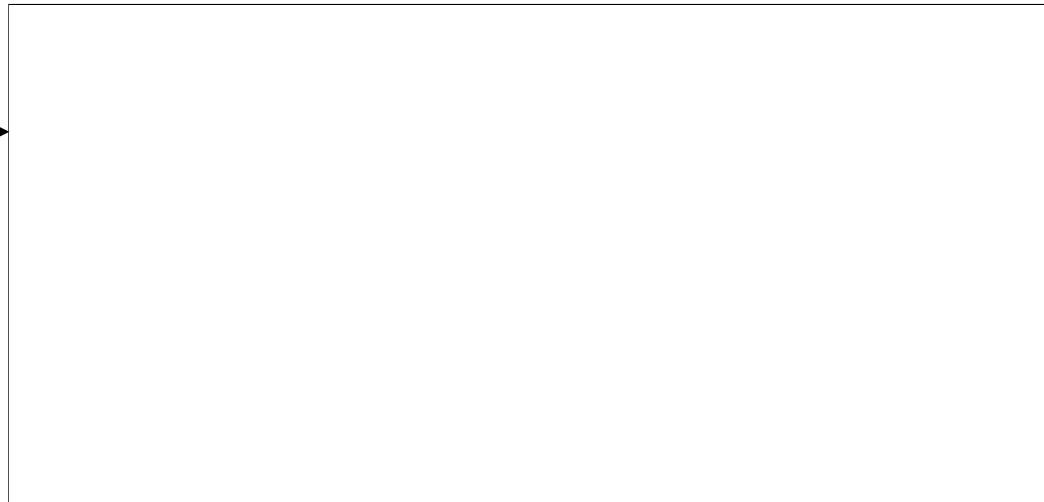
When **F6-VIEW DOC** is selected the system links to the 2348 Blanket Purchase Order Detail screen. This screen lists all of the commodities that are attached to this BPO. **F8-NEXT PAGE** will advance to the next page of commodities. **F8-NEXT PAGE** may have to be pressed several times to reach the end of the list of commodities.

F7-PRIOR PAGE returns back one screen at a time.

ADPICS – Reference BPO Process

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Choosing Your Commodities



```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/01/2009   4:53 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R0089200009 CONTRACT AMOUNT:                ALL: I/D:
VENDOR ID   : 4102607678 CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)      F/P: AMOUNT:                    PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001  0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ELECDM      0002  0002
ELECTRONIC DOCUMENT MANAGEMENT (CATS)
92020-GISCAT      0003  0003
GEOGRAPHICAL INFORMATION SYSTEM (CATS)
92020-SOFTW      0004  0004
SOFTWARE ENGINEERING (CATS)
92020-SYSFMM      0005  0005
SYSTEMS/FACILITIES MANAGEMENT AND MAINTENANCE (CATS)
92020-ASPCAT      0006  0006
APPLICATION SERVICE PROVIDER (CATS)

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL
```

The Consulting and Technical Services Contract Functional Areas for the CATS II contract are located on the DoIT website.

<http://doit.maryland.gov/contracts/Pages/CATSIIFunctionalAreas.aspx>

These are similarly shown as commodities on the 2348 screen. For example, Functional Area 1 – Enterprise Service Provider (ESP) is the same as the first line item on the BPO commodity ID 92020-CATSEP ENTERPRISE SERVICE PROVIDER (CATS). Not all of the commodities on the web site match up exactly line by line with the Blanket Purchase Order; however, they are all included.

ADPICS – Reference BPO Process

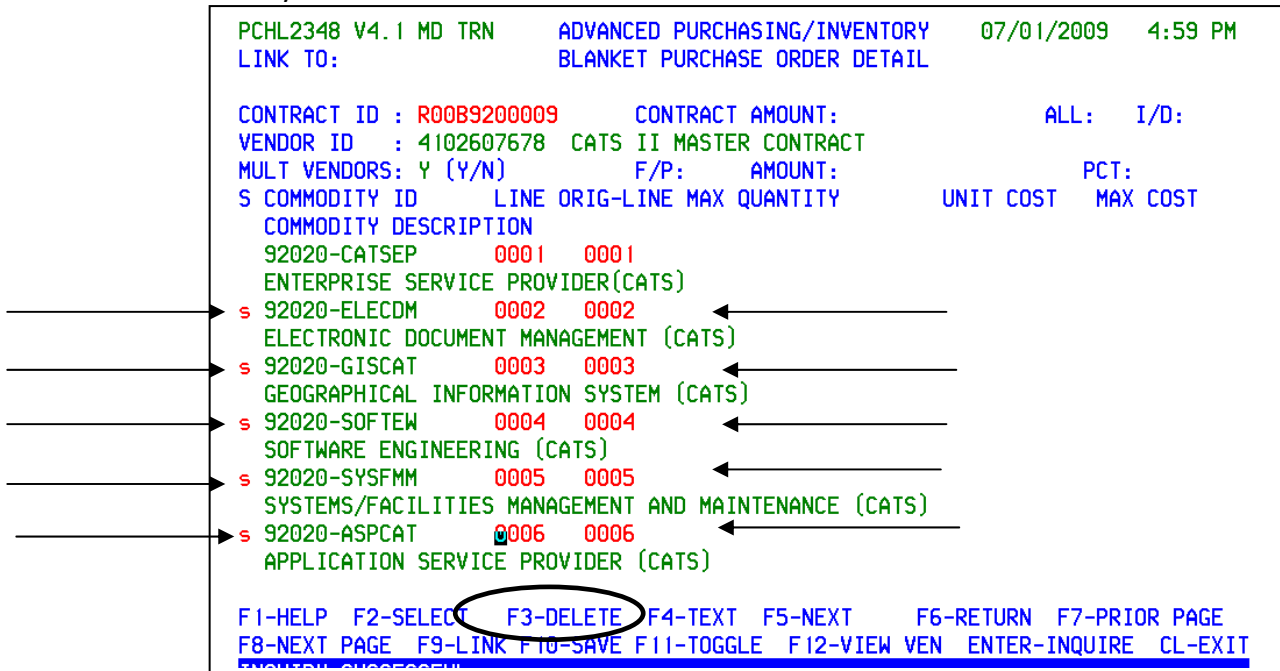
DoIT Training Department

Choosing Your Commodities

Determine which commodity line items will be utilized. The commodity lines that will not be used should be deleted.

For this example, we will be ordering from **Functional Area 1** (Enterprise Service Provider (ESP) and **Functional Area 7** (Information System Security). As stated previously, these have been identified from the CATS II website. Remember, they may NOT be in the same order on the BPO as on the website. Please read each line item and use care when choosing line items.

Functional Area 1 is line item 0001 of our BPO example. Functional Area 7 is line item 0013 of our BPO example. We will want to delete all other line items from this BPO. It is **IMPORTANT** that you pay close attention to the commodity lines you are deleting. If you delete the wrong line number by mistake, you can add it back; however you **MUST** know the exact line number that the commodity was attached to. Please use care when using the delete function. See the FAQ section of this manual for instructions on adding a commodity line back in after it was inadvertently deleted.



PCHL2348 V4.1 MD TRN ADVANCED PURCHASING/INVENTORY 07/01/2009 4:59 PM
LINK TO: BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009 CONTRACT AMOUNT: ALL: I/D:
VENDOR ID : 4102607678 CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N) F/P: AMOUNT: PCT:
S COMMODITY ID LINE ORIG-LINE MAX QUANTITY UNIT COST MAX COST
COMMODITY DESCRIPTION

92020-CATSEP	0001	0001		
ENTERPRISE SERVICE PROVIDER(CATS)				
s 92020-ELECDM	0002	0002		
ELECTRONIC DOCUMENT MANAGEMENT (CATS)				
s 92020-GISCAT	0003	0003		
GEOGRAPHICAL INFORMATION SYSTEM (CATS)				
s 92020-SOFTW	0004	0004		
SOFTWARE ENGINEERING (CATS)				
s 92020-SYSFMM	0005	0005		
SYSTEMS/FACILITIES MANAGEMENT AND MAINTENANCE (CATS)				
s 92020-ASPCAT	0006	0006		
APPLICATION SERVICE PROVIDER (CATS)				

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT

Tab down to the second line item and type the letter **s** in the select field. Continue selecting the line items that should not be included on your BPO. Press **F3-DELETE** when this information has been verified.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Commodities

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/01/2009  5:07 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009      CONTRACT AMOUNT:                ALL:  I/D:
VENDOR ID   : 4102607678      CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)          F/P:  AMOUNT:                PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001      0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ITFACS      0007      0007
IT AND TELECOMMUNICATIONS FINANCIAL AND AUDITING CONSULTING SERVICES(CA
92020-IMCSCS      0008      0008
IT MANAGEMENT CONSULTING SERVICES(CATS)
92020-BPCSCS      0009      0009
BUSINESS PROCESS CONSULTING SERVICES (CATS)
92020-PPTSCS      0010      0010
PREPARATION FOR PROPOSED TOWER SITE (CATS)
92020-EBTCAT      0011      0011
ELECTRONIC BENEFITS TRANSFER (CATS)

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
COMMODITIES DELETED
```

Those line items have now been deleted and the line items from the next page have been brought forward.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Commodities

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/01/2009   5:07 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009      CONTRACT AMOUNT:                ALL:   I/D:
VENDOR ID   : 4102607678      CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)          F/P:    AMOUNT:                PCT:
S COMMODITY ID   LINE ORIG-LINE MAX QUANTITY      UNIT COST   MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001   0001
ENTERPRISE SERVICE PROVIDER(CATS)
s 92020-ITFACS      0007   0007
IT AND TELECOMMUNICATIONS FINANCIAL AND AUDITING CONSULTING SERVICES(CA
s 92020-IMSCS      0008   0008
IT MANAGEMENT CONSULTING SERVICES(CATS)
s 92020-BPCSCS      0009   0009
BUSINESS PROCESS CONSULTING SERVICES (CATS)
s 92020-PPTSCS      0010   0010
PREPARATION FOR PROPOSED TOWER SITE (CATS)
s 92020-EBTCAT      0011   0011
ELECTRONIC BENEFITS TRANSFER (CATS)

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
COMMODITIES DELETED
```

Repeat the steps selecting just the commodity line items that should not be included on the BPO. Press **F3-DELETE** when this information has been verified.

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/01/2009   5:16 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009      CONTRACT AMOUNT:                ALL:   I/D:
VENDOR ID   : 4102607678      CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)          F/P:    AMOUNT:                PCT:
S COMMODITY ID   LINE ORIG-LINE MAX QUANTITY      UNIT COST   MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001   0001
ENTERPRISE SERVICE PROVIDER(CATS)
s 92020-DTWCAT      0012   0012
DOCUMENTATION AND TECHNICAL WRITING (CATS)
92020-ISSCAT      0013   0013
FA7 INFORMATION SYSTEM SECURITY
s 92020-FA0013      0014   0014
TOWER INSTALLATION, FA13
s 92020-FA0014      0015   0015
TOWER EQUIPMENT INSTALLATION & SERVICES, FA14
s 92020-FA0017      0016   0016
WEB & INTERNET SERVICES, FA2

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
COMMODITIES DELETED
```

Repeat the steps selecting just the commodity line items that should not be included on the BPO. Press **F3-DELETE** when this information has been verified.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Commodities

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/01/2009   5:24 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200010    CONTRACT AMOUNT:                ALL:   I/D:
VENDOR ID   : 4102607678    CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)       F/P:   AMOUNT:                PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001  0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ISSCAT      0013  0013
FA7 INFORMATION SYSTEM SECURITY
S 92020-FA0018     0017  0017
MEDIA & TRAINING CENTER SUPPORT, FA16

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL
```

Repeat the steps selecting just the commodity lines items that should not be included on the BPO. Press **F3-DELETE** when this information has been verified.

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/01/2009   5:29 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:                ALL:   I/D:
VENDOR ID   : 4102607678    CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)       F/P:   AMOUNT:                PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001  0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ISSCAT      0013  0013
FA7 INFORMATION SYSTEM SECURITY

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
COMMODITIES DELETED
```

The only commodities that should remain are the ones that are going to be part of your procurement. If a commodity line has been deleted by mistake, refer to the FAQ section of the manual for instructions on adding a commodity line or functional area back to the BPO.

ADPICS – Reference BPO Process

DoIT Training Department

Contract Amount

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/06/2009  2:12 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009  CONTRACT AMOUNT:  50,000.00 ALL  I/D:
VENDOR ID   : 4102607678  CATS II MASTER CONTRACT
MULT VENDORS: Y (Y/N)      F/P:   AMOUNT:           PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP    0001  0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ISSCAT    0013  0013
FA7 INFORMATION SYSTEM SECURITY

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT  F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
BLANKET PURCHASE ORDER SAVED
```

Enter the Contract Amount and press **F10-SAVE** when completed. The message 'Blanket Purchase Order Saved' should appear at the bottom of the screen.

Press **Escape** to return to the 2342 BPO Header screen.

ADPICS – Reference BPO Process

DoIT Training Department

Vendor Selection

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/06/2009  2:22 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013          NOTE PAD      : N
PURCHASING TYPE : I2              BID ID :              DGS BPO (Y/N): N
ACTION INDICATOR: N              INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS          : NOPT           AWARD :              DOIT BPO (Y/N): N
GSA CONTRACT NO :                POST DATE :
CONTRACT AMOUNT : 50,000.00      EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00     FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 4102607678 CATS II MASTER CONTRACT
ADDRESS : 45 CALVERT STREET
          ANNAPOLIS, MD 21401

MULTI-VENDOR : Y
MULTI-YEAR   : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :      OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y    ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO F3-DEL F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
```

The vendor who won the TORFP will be the vendor that will be placed on this reference BPO.

The F11 key should display **F11-VEN SELECT**. If it does not, press the **F4-OTHER** key to change the functionality of the F11 key.

Press **F11-VEN SELECT** to view the list of vendors that were carried over from the original CATS II BPO.

IMPORTANT – Check to see if the vendor you have awarded the TORFP to is in fact on this BPO. Not all of the 400 vendors were added. If you do not see your vendor, email the Service Desk – servicedesk@doit.state.md.us and request they be added. See the FAQ section in this manual for additional information.

ADPICS – Reference BPO Process

DoIT Training Department

Vendor Selection

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/06/2009  2:40 PM
LINK TO:                   BPO VENDOR SELECTION          PAGE 01 OF 04

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME      D M ADDR
I C CODE    AMOUNT RELEASED
1010676569  ROSS TECHNICAL SERVICES INC  N
1232106195  SUNGUARD PLANNING SOLUTIONS      Y
1251672754  L ROBERT KIMBALL & ASSOC INC      N
1520941428  DATA PROCESSING SOLUTIONS        Y
1520955232  MACRO INTERNATIONAL INC           Y
1521209369  JACOB & SUNDSTROM INC             Y
1521238007  SYSCOM INC                       Y
1521306137  COMPUTER TECHNOLOGY SERVICES      N
1521360413  A&T SYSTEMS INC                   N
1521448157  STATIC POWER CONVERSION SERVICES INC Y
1521469198  SCIENTIFIC SYSTEMS & SOFTWARE INTERNAT N
1521541086  DALY COMPUTERS                    Y
1521603280  ALLIED TECHNOLOGY GROUP INC        N
1521604386  KCI TECHNOLOGIES                  Y

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

When F11-VEN SELECT is selected, the system links to the 2349 BPO Vendor Selection screen. This screen lists all of the vendors that are attached to this BPO. **F8-NEXT PAGE** will advance to the next page of vendors. **F8-NEXT PAGE** may have to be pressed several times to reach the end of the list of vendors.

F7-PRIOR PAGE returns back one screen at a time.

Vendors are in numeric order not alphanumeric.

Notice there are four pages of active vendors attached to this BPO. (Remember this is an example. There may actually be more vendors on the original CATS II BPO.)

ADPICS – Reference BPO Process

DoIT Training Department

Vendor Selection

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/06/2009  2:45 PM
LINK TO:                   BPO VENDOR SELECTION          PAGE 01 OF 04

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME      D M ADDR
I C CODE    AMOUNT RELEASED
1010676569 ROSS TECHNICAL SERVICES INC      N
1232106195 SUNGUARD PLANNING SOLUTIONS      Y
1251672754 L ROBERT KIMBALL & ASSOC INC      N
1520941428 DATA PROCESSING SOLUTIONS      Y
1520955232 MACRO INTERNATIONAL INC          Y
1521209369 JACOB & SUNDSTROM INC            Y
1521228007 SYSCOM INC                      Y
1521306137 COMPUTER TECHNOLOGY SERVICES     N
1521360413 A&T SYSTEMS INC                  N
1521448157 STATIC POWER CONVERSION SERVICES INC Y
1521469198 SCIENTIFIC SYSTEMS & SOFTWARE INTERNAT N
1521541086 DALY COMPUTERS                   Y
1521603280 ALLIED TECHNOLOGY GROUP INC      N
1521604386 KCI TECHNOLOGIES                 Y

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

Determine which vendor this contract is to be awarded. Locate the vendor by pressing **F8-NEXT PAGE** or **F7-PRIOR PAGE**. Remember the vendors are in numerical order.

For this example we will use vendor 1521306137 – Computer Technology Services which is located on the first page of the list of available vendors.

All remaining vendors should be deleted from this BPO.

It is IMPORTANT that you pay close attention to the vendors you are deleting. If you delete the wrong vendor by mistake, you can add it back; however you **MUST** know the exact vendor number. Please use care when using the delete function. See the FAQ section of this manual for instructions on adding a vendor back to the BPO after it was deleted.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/06/2009   3:11 PM
LINK TO:                   BPO VENDOR SELECTION              PAGE 01 OF 04

BPO ID : R0089200009

S VENDOR ID  VENDOR NAME      D M ADDR
I C CODE    AMOUNT RELEASED
S 1010676569 ROSS TECHNICAL SERVICES INC      N
S 1232106195 SUNGUARD PLANNING SOLUTIONS      Y
S 1251672754 L ROBERT KIMBALL & ASSOC INC      N
S 1520941428 DATA PROCESSING SOLUTIONS      Y
S 1520955232 MACRO INTERNATIONAL INC          Y
S 1521209369 JACOB & SUNDSTROM INC            Y
S 1521238007 SYSCOM INC                      Y
S 1521306137 COMPUTER TECHNOLOGY SERVICES     N
S 1521360413 A&T SYSTEMS INC                  N
S 1521448157 STATIC POWER CONVERSION SERVICES INC Y
S 1521469198 SCIENTIFIC SYSTEMS & SOFTWARE INTERNAT N
S 1521541086 DALY COMPUTERS                   Y
S 1521603280 ALLIED TECHNOLOGY GROUP INC      N
S 1521604386 KCI TECHNOLOGIES                 Y

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

Tab down to the first vendor and type the letter **s** in the select field. Continue selecting the vendors that should not be included on your BPO. Press **F3-DELETE** when this information has been verified.

Use care in not selecting the vendor to whom you have awarded the TORFP.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

```

PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/06/2009    3:22 PM
LINK TO:                  BPO VENDOR SELECTION              PAGE 01 OF 04

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME                                D M ADDR
I C CODE    AMOUNT RELEASED
1010676569 ** VENDOR DELETED **                          N
1232106195 ** VENDOR DELETED **                          Y
1251672754 ** VENDOR DELETED **                          N
1520941428 ** VENDOR DELETED **                          Y
1520955232 ** VENDOR DELETED **                          Y
1521209369 ** VENDOR DELETED **                          Y
1521238007 ** VENDOR DELETED **                          Y
1521306137 COMPUTER TECHNOLOGY SERVICES                  N
1521360413 ** VENDOR DELETED **                          N
1521448157 ** VENDOR DELETED **                          Y
1521469198 ** VENDOR DELETED **                          N
1521541086 ** VENDOR DELETED **                          Y
1521603280 ** VENDOR DELETED **                          N
1521604386 ** VENDOR DELETED **                          Y

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
VENDOR SELECTION RECORD DELETED
  
```

Once F3-DELETE is pressed the screen should be similar to the above. Each vendor that was selected now shows deleted. The vendor that we chose, Computer Technology Services has not been deleted.

Press Enter to bring forward the next page of vendors.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

PCHL2349 V4.1 MD TRN ADVANCED PURCHASING/INVENTORY 07/06/2009 3:24 PM
LINK TO: BPO VENDOR SELECTION **PAGE 01 OF 03**

BPO ID : R00B9200009

S	VENDOR ID	V E N D O R N A M E	D M ADDR	I C CODE	AMOUNT RELEASED
→	1521306137	COMPUTER TECHNOLOGY SERVICES	N		
	1521620451	BOGDAN COMPUTER SERVICES INC	Y		
	1521647302	SYSTEMS SUPPORT ALTERNATIVES INC	N		
	1521696006	ENTERPRISE INFORMATION SOLUTIONS INC	N		
	1521725777	SOFTWARE CONSORTIUM INC	N		
	1521735303	MS TECHNOLOGIES	N		
	1521738885	INGENIUM CORP	N		
	1521750987	SOFTWARE ARCHITECTS INC	N		
	1521776740	PRO-TECH COMPUTER SERVICES INC	Y		
	1521783329	MANSAI CORPORATION	N		
	1521811163	SYSTEMS ALLIANCE INC	N		
	1521847265	PRISM COMMUNICATIONS INC	N		
	1521852877	KHAN & HILL INC	N		
	1521872098	CLIENT NETWORK SERVICES INC	N		

F1-HELP F2-SELECT F3-DELETE F4-ADDR F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-SEL VEN ENTER-INQUIRE CLEAR-EXIT
INQUIRY SUCCESSFUL

The vendor we chose has been moved to the top because the vendors appear in numerical order.

Notice there are now three pages of active vendors attached to this BPO. (Remember this is an example. There may actually be more vendors on the original CATS II BPO.)

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/06/2009  4:24 PM
LINK TO:                   BPO VENDOR SELECTION              PAGE 01 OF 03

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME      D M ADDR      I C CODE  AMOUNT RELEASED
1521306137  COMPUTER TECHNOLOGY SERVICES  N
S 1521620451  BOGDAN COMPUTER SERVICES INC    Y
S 1521647302  SYSTEMS SUPPORT ALTERNATIVES INC N
S 1521696006  ENTERPRISE INFORMATION SOLUTIONS INC N
S 1521725777  SOFTWARE CONSORTIUM INC          N
S 1521735303  MS TECHNOLOGIES                  N
S 1521738885  INGENIUM CORP                    N
S 1521750987  SOFTWARE ARCHITECTS INC          N
S 1521776740  PRO-TECH COMPUTER SERVICES INC   Y
S 1521783329  MANSAI CORPORATION               N
S 1521811163  SYSTEMS ALLIANCE INC             N
S 1521847265  PRISM COMMUNICATIONS INC         N
S 1521852877  KHAN & HILL INC                  N
S 1521872098  CLIENT NETWORK SERVICES INC      N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

Repeat the steps selecting the vendors that should not be included on the BPO. Press **F3-DELETE** when this information has been verified.

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/06/2009  4:33 PM
LINK TO:                   BPO VENDOR SELECTION              PAGE 01 OF 03

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME      D M ADDR      I C CODE  AMOUNT RELEASED
1521306137  COMPUTER TECHNOLOGY SERVICES  N
1521620451  ** VENDOR DELETED **          Y
1521647302  ** VENDOR DELETED **          N
1521696006  ** VENDOR DELETED **          N
1521725777  ** VENDOR DELETED **          N
1521735303  ** VENDOR DELETED **          N
1521738885  ** VENDOR DELETED **          N
1521750987  ** VENDOR DELETED **          N
1521776740  ** VENDOR DELETED **          Y
1521783329  ** VENDOR DELETED **          N
1521811163  ** VENDOR DELETED **          N
1521847265  ** VENDOR DELETED **          N
1521852877  ** VENDOR DELETED **          N
1521872098  ** VENDOR DELETED **          N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
VENDOR SELECTION RECORD DELETED
```

Once **F3-DELETE** is pressed the screen should be similar to the above. Each vendor that was selected now shows deleted. The vendor that we chose, Computer Technology Services has not been deleted.

Press Enter to bring forward the next page of vendors.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/06/2009  4:57 PM
LINK TO:                   BPO VENDOR SELECTION          PAGE 01 OF 02

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME                                D M ADDR
I C CODE    AMOUNT RELEASED
1521306137  COMPUTER TECHNOLOGY SERVICES                N
1521878091  NETWORK SPECIALTY GROUP INC                      N
1521922822  PLEXUS INSTALLATIONS INC                            N
1521947282  SPATIAL SYSTEMS                                       N
1521964594  LOGIWARE LLC                                           N
1521975808  EXCEPTIONAL SOFTWARE                                   N
1521985409  MARICOM SYSTEMS INC                                   N
1522003386  PERFORMANCE TECHNOLOGY GROUP INC                     N
1522005249  SOFT-CON ENTERPRISES INC                             N
1522010575  TEKSYSTEMS                                             N
1522016043  INNOTION ENTERPRISES INC                             N
1522028501  WOOD CONSULTING SERVICES INC                         N
1753163589  THE KERR COMPANY LLC                                  N
1770264541  AURIGA CORPORATION LLC                               N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

The vendor we chose still remains at the top because the vendors appear in numerical order.

Notice there are now two pages of active vendors attached to this BPO. (Remember this is an example. There may actually be more vendors on the original CATS II BPO.)

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/06/2009    4:37 PM
LINK TO:                  BPO VENDOR SELECTION              PAGE 01 OF 02

BPO ID : R00B9200009

S VENDOR ID VENDOR NAME      D M ADDR
I C CODE  AMOUNT RELEASED
1521306137 COMPUTER TECHNOLOGY SERVICES      N
S 1521878091 NETWORK SPECIALTY GROUP INC      N
S 1521922822 PLEXUS INSTALLATIONS INC        N
S 1521947282 SPATIAL SYSTEMS                  N
S 1521964594 LOGIWARE LLC                     N
S 1521975808 EXCEPTIONAL SOFTWARE             N
S 1521985409 MARICOM SYSTEMS INC              N
S 1522003386 PERFORMANCE TECHNOLOGY GROUP INC N
S 1522005249 SOFT-CON ENTERPRISES INC         N
S 1522010575 TEKSYSTEMS                      N
S 1522016043 INNOTION ENTERPRISES INC         N
S 1522028501 WOOD CONSULTING SERVICES INC     N
S 1753163589 THE KERR COMPANY LLC             N
S 1770264541 AURIGA CORPORATION LLC          N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

Repeat the steps selecting the vendors that should not be included on the BPO. Press **F3-DELETE** when this information has been verified.

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/06/2009    4:42 PM
LINK TO:                  BPO VENDOR SELECTION              PAGE 01 OF 02

BPO ID : R00B9200009

S VENDOR ID VENDOR NAME      D M ADDR
I C CODE  AMOUNT RELEASED
1521306137 COMPUTER TECHNOLOGY SERVICES      N
1521878091 ** VENDOR DELETED **              N
1521922822 ** VENDOR DELETED **              N
1521947282 ** VENDOR DELETED **              N
1521964594 ** VENDOR DELETED **              N
1521975808 ** VENDOR DELETED **              N
1521985409 ** VENDOR DELETED **              N
1522003386 ** VENDOR DELETED **              N
1522005249 ** VENDOR DELETED **              N
1522010575 ** VENDOR DELETED **              N
1522016043 ** VENDOR DELETED **              N
1522028501 ** VENDOR DELETED **              N
1753163589 ** VENDOR DELETED **              N
1770264541 ** VENDOR DELETED **              N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
VENDOR SELECTION RECORD DELETED
```

Once **F3-DELETE** is pressed the screen should be similar to the above. Each vendor that was selected now shows deleted. The vendor that we chose, Computer Technology Services has not been deleted.

Press Enter to bring forward the next page of vendors.

ADPICS – Reference BPO Process

DoIT Training Department

Deleting Unnecessary Vendors

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/06/2009      4:46 PM
LINK TO:                   BPO VENDOR SELECTION              PAGE 01 OF 01

BPO ID : R00B9200009

S VENDOR ID VENDOR NAME      D M ADDR
1521306137 COMPUTER TECHNOLOGY SERVICES      N
$ 1840938521 POLICY STUDIES INC                N
$ 1911725305 MTG MANAGMENT CONSULTANTS LLC    N
$ 1912105883 ASCENTIUM CORPORATION            N
$ 1920170715 GEONORTH LLC                     N
$ 1953630868 SCIENCE APPLICATIONS INTRNTL CORP Y
$ 1954148514 TETRA TECH                       Y
$ 4102607678 CATS II MASTER CONTRACT          N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

Repeat the steps selecting the vendors that should not be included on the BPO. Press **F3-DELETE** when this information has been verified.

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/06/2009      4:50 PM
LINK TO:                   BPO VENDOR SELECTION              PAGE 01 OF 01

BPO ID : R00B9200009

S VENDOR ID VENDOR NAME      D M ADDR
1521306137 COMPUTER TECHNOLOGY SERVICES      N
1840938521 ** VENDOR DELETED **              N
1911725305 ** VENDOR DELETED **              N
1912105883 ** VENDOR DELETED **              N
1920170715 ** VENDOR DELETED **              N
1953630868 ** VENDOR DELETED **              Y
1954148514 ** VENDOR DELETED **              Y
4102607678 ** VENDOR DELETED **              N

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
VENDOR SELECTION RECORD DELETED
```

Once **F3-DELETE** is pressed the screen should be similar to the above. Each vendor that was selected now shows deleted. The vendor that we chose, Computer Technology Services has not been deleted.

Press Enter to refresh the screen showing the remaining vendor that was awarded the TORFP/RFR.

ADPICS – Reference BPO Process

DoIT Training Department

Copy Remaining Vendor

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/06/2009  4:57 PM
LINK TO:                   BPO VENDOR SELECTION          PAGE 01 OF 01

BPO ID : R00B9200009

S VENDOR ID  VENDOR NAME      D M ADDR
521306137    COMPUTER TECHNOLOGY SERVICES      N
I C CODE AMOUNT RELEASED

F1-HELP  F2-SELECT  F3-DELETE  F4-ADDR  F5-NEXT  F6-RETURN  F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK  F10-SAVE  F11-SEL VEN  ENTER-INQUIRE  CLEAR-EXIT
INQUIRY SUCCESSFUL
```

The vendor on the header 2342 will need to be replaced with the last remaining vendor – the one that won the TORFP/RFR. You can copy and paste this number or make note of it and type over the original vendor on the header screen.

Press **Escape** to exit to the 2342 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Paste or Type Over Current Vendor ID

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/06/2009    5:03 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013        NOTE PAD      : N
PURCHASING TYPE : I2             BID ID :           DGS BPO (Y/N): N
ACTION INDICATOR: N             INTERFACE TYPE : BP   DBM BPO (Y/N): N
STATUS          : NOPT          AWARD :           DOIT BPO (Y/N): N
GSA CONTRACT NO :               POST DATE :           EST CONTRACT AMT: 250,000,000.00
CONTRACT AMOUNT : 50,000.00      EFFECTIVE DATE : 07/01/2009
REMAINING VALUE : 50,000.00      EXPIRATION DATE : 06/30/2010
BUYER ID: RB13 NAME: A60T13      FISCAL EFF DATE : 07/01/2009
VENDOR: 1521306137 COMPUTER TECHNOLOGY SERVICES    PHONE: 4102607778 EXT:
ADDRESS : 1700 ROCKVILLE PIKE
          ROCKVILLE, MD 20852

MULTI-VENDOR : N
MULTI-YEAR   : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :      OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y    ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO F3-DEL F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB ENTER-INQUIRE CL-EXIT
RECORD UPDATED
```

After you paste or type over the existing vendor with the vendor who won the TORFP, press **F10-SAVE** to update the 2342 BPO header screen. This should overwrite the original vendor with your vendor's information.

ADPICS – Reference BPO Process

DoIT Training Department

Additional Elements Screen

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/06/2009    5:03 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013        NOTE PAD      : N
PURCHASING TYPE : I2              BID ID :             DGS BPO (Y/N): N
ACTION INDICATOR: N              INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS          : NOPT           AWARD :             DOIT BPO (Y/N): N
GSA CONTRACT NO :                POST DATE :
CONTRACT AMOUNT : 50,000.00    EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00    FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 1521306137 COMPUTER TECHNOLOGY SERVICES
ADDRESS : 1700 ROCKVILLE PIKE
          ROCKVILLE, MD 20852

MULTI-VENDOR : N
MULTI-YEAR   : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :      OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y          ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO F3-DEL F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB ENTER-INQUIRE CL-EXIT
RECORD UPDATED
```

Additional Elements will need to be entered before posting your document. Your F8 key should display **F8-ELE**. If it does not, press the **F4-OTHER** key to change the functionality of the F8 key.

Press **F8-ELE** to view the Additional Elements screen.

ADPICS – Reference BPO Process

DoIT Training Department

Additional Elements Screen

```
PCHL2353 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/06/2009  5:18 PM
LINK TO:                  CONTRACT ADDITIONAL ELEMENTS
CONTRACT ID : R00B9200009  TYPE: FP      MODAL:      NOTE: N
REVISION ID : 0000 TITLE: CONSULTING AND TECHNICAL SERVICES II  DEL IND:
CONTRACT ADMINISTR : MIKE BALDERSON      LOCATION :      SBR: N
PROCUREMENT OFFICER : SUE HOWELLS      CONST PROJ # :
ENGINEERS ESTIMATE :      ADVERTISE DATE:
PROCUREMENT METHODS : R      AWARD DATE : 05/20/2009
CATEGORY OF WORK : ITS      AWARD AUTH. : BPW
NON VISUAL ACCESS : N      HIRING SERVICES: N
SANCTION CODE :      MBE GOAL :      COMMITMENT :
MBE WAIVER: N  MBE WAIVER %: 000.00 FED WAIVER:  FED WAIVER DATE:
REQ DT:      AMT:      APRV DT:      AMT :
DESC: MULTIPLE AWARD, INDEFINITE QUANTITY, TASK ORDER BASED MASTER CONTRACT TO
      PROVIDE STATEWIDE INFORMATION TECHNOLOGY (IT) TECHNICAL AND CONSULTING
      SERVICES FOR 17 FUNCTIONAL AREAS.
BPW: Y AGENDA DATE: 05/20/2009 ITEM NO : 3-IT      APRVL DATE: 05/20/2009
TPSSB AGENDA DATE:      ITEM NO :      APRVL DATE:
WORK CMP DATE:      CONTROL SOLICITATION DATE:
RENEWAL CODE :      CONTROL APPROVAL DATE :
NUMBER OF BIDS      PREFERENCES SUI: CSW: BIS:
TOT: 000 SB: 000 MBE: 000 RECYCLED: N SB: REV PROD: ENERGY SAV:
F1-HELP F3-DEL F4-OTH F5-NEXT F9-LINK F10-SAVE F11-LAST REV ENTER-INQ CL-EXIT
INQUIRY SUCCESSFUL
```

When **F8-ELE** is selected the system links to the 2353 screen. This screen was copied from the original CATS II BPO when you created the reference BPO and will need to be updated with your agency information.

ADPICS – Reference BPO Process

DoIT Training Department

Updating the Additional Elements Screen

The screenshot shows the 'CONTRACT ADDITIONAL ELEMENTS' screen in ADPICS. Arrows point to the following fields for update:

- CONTRACT ADMINISTRATOR: YOUR AGENCY INFO
- PROCUREMENT OFFICER: YOUR AGENCY INFO
- AWARD DATE: 07/20/2009
- AWARD AUTH.: DIT
- DESC: TITLE OF THE TORFP/RFR AND A BRIEF DESCRIPTION. REMOVE THE REMAINING INFORMATION FROM THIS AREA.
- BPW: N
- TPSSB AGENDA DATE: (field to be deleted)
- ITEM NO: (field to be deleted)
- APRVL DATE: (field to be deleted)

Other visible fields include: PCHL2353 V4.1 MD TRN, ADVANCED PURCHASING/INVENTORY, 07/17/2009 3:28 PM, LINK TO: CONTRACT ADDITIONAL ELEMENTS, CONTRACT ID: R0089200009, TYPE: FP, MODAL: NOTE: N, REVISION ID: 0002, TITLE: CONSULTING AND TECHNICAL SERVICES II, DEL IND: , CONTRACT ADMINSTR: YOUR AGENCY INFO, LOCATION: , SBR: N, ENGINEERS ESTIMATE: , CONST PROJ #: , ADVERTISE DATE: , PROCUREMENT METHODS: TOR, AWARD DATE: 07/20/2009, CATEGORY OF WORK: ITS, AWARD AUTH.: DIT, NON VISUAL ACCESS: N, HIRING SERVICES: N, SANCTION CODE: , MBE GOAL %: , 0.00 COMMITMENT: 000.00, MBE WAIVER: N, MBE WAIVER %: , FED WAIVER: , FED WAIVER DATE: , REQ DT: , AMT: , APRV DT: , AMT: ,

The Contract Administrator and Procurement Officer need to be updated with your agency information.

Procurement Method should be TOR for Task Order Release.

The Description field needs to be updated with the title of particular TORFP/RFR and a brief description. Remove any other information that is left in this field by pressing your delete or end keys on your computer keyboard.

Some additional 2353 updates that must be made:

- Award date: Date TORFP/RFR award approved by DoIT Procurement
- Award Auth: DoIT (DIT) since approval on a task order level.
- MBE Goal: if necessary enter valid %
- BPW: enter N
- Agenda Date: delete this field
- Item No.: delete this field
- Approval Date: delete this field

Once this has been entered, press **F10-SAVE** to overwrite and save this screen. Press **Escape** to exit to the 2342 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Agency BPO Security

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/07/2009  10:14 AM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013        NOTE PAD      : N
PURCHASING TYPE : I2             BID ID :                DGS BPO (Y/N): N
ACTION INDICATOR: N             INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS          : NOPT          AWARD :                DOIT BPO (Y/N): N
GSA CONTRACT NO :                POST DATE :                EFFECTIVE DATE : 07/01/2009
CONTRACT AMOUNT : 50,000.00      EXPIRATION DATE : 06/30/2010
EST CONTRACT AMT: 250,000,000.00 FISCAL EFF DATE : 07/01/2009
REMAINING VALUE : 50,000.00
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 1521306137 COMPUTER TECHNOLOGY SERVICES
ADDRESS : 1700 ROCKVILLE PIKE
          ROCKVILLE, MD 20852

MULTI-VENDOR : N
MULTI-YEAR   : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :                OPTIONS :
ORIGINAL BPO : 060B9800001     OPTION MAX:          ORIGINAL AMT: 250,000,000.00

REFERENCE : Y    ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-AUTH USERS F3-DEL F4-OTHER KEYS F5-RENEW/REF F6-VIEW RLS F7-BPO AUX
F8-TERMS F9 LINK F10-SAVE F11-VIEW ACCTG F12-PRINT ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
  
```

In order to complete the BPO, you need to select users who are authorized to make releases against your BPO and specify the authorization amount per user.

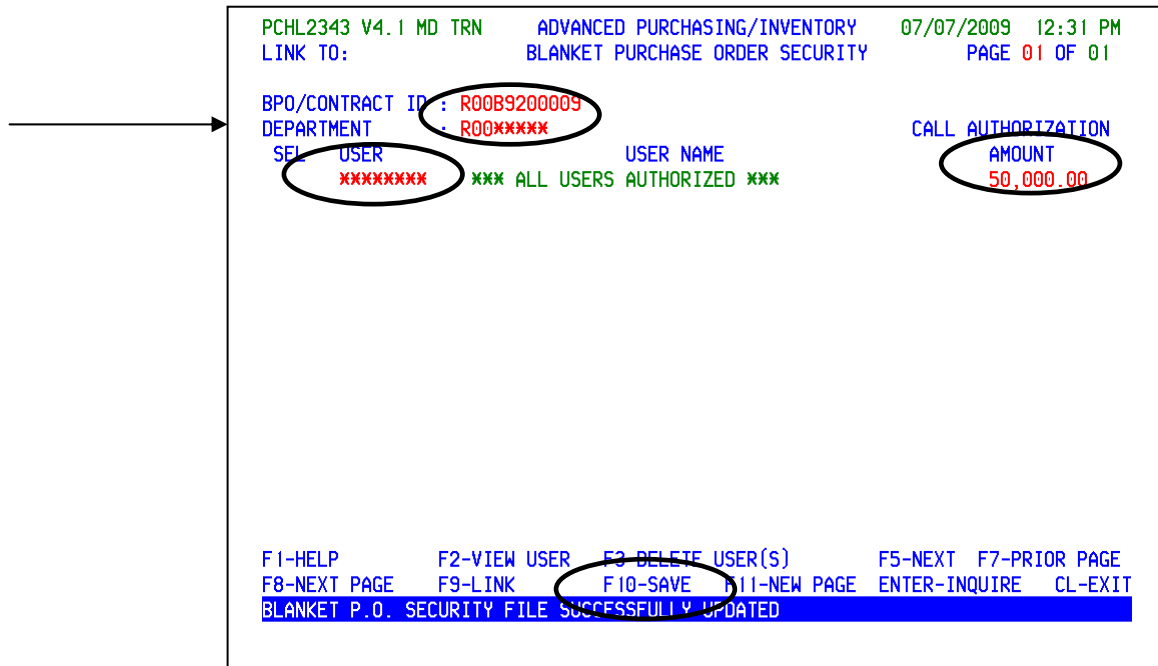
The F2 key should display **F2-AUTH USERS**. If it does not, press the **F4-OTHER** key to change the functionality of the F2 key.

Press **F2-AUTH USERS** to view the BPO Security 2343 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Agency BPO Security



The screenshot shows the ADPICS BPO Security screen. A black arrow points to the 'BPO/CONTRACT ID' field. Several fields are circled in black: 'BPO/CONTRACT ID', 'DEPARTMENT', 'SEL', 'CALL AUTHORIZATION', and 'F10-SAVE'. The screen displays the following information:

```
PCHL2343 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/07/2009 12:31 PM
LINK TO:                   BLANKET PURCHASE ORDER SECURITY    PAGE 01 OF 01

BPO/CONTRACT ID : R00B9200009
DEPARTMENT      : R00XXXXXX
SEL USER       : XXXXXXXX      USER NAME                  CALL AUTHORIZATION
                                *** ALL USERS AUTHORIZED ***  AMOUNT
                                                                50,000.00

F1-HELP      F2-VIEW USER  F3-DELETE USER(S)      F5-NEXT F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK      F10-SAVE      F11-NEW PAGE ENTER-INQUIRE CL-EXIT
BLANKET P.O. SECURITY FILE SUCCESSFULLY UPDATED
```

We recommend that your department use wild card by using asterisks (*) at the lowest departmental level. An example of this is if the departments start with R0012345 vs. R123456. For R123456 in the department field you would enter R***** to make sure you encompass your entire organization.

After the information has been verified, press **F10-SAVE** to save the security record.

Press **Escape** to return back to the 2342 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Subcontractor Information

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/09/2009    8:09 AM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013    NOTE PAD : N
PURCHASING TYPE : I2            BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N            INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS : NOPT                  AWARD :          DOIT BPO (Y/N): N
GSA CONTRACT NO :              POST DATE :
CONTRACT AMOUNT : 50,000.00    EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00    FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13    PHONE: 4102607778 EXT:
VENDOR: 1521306137 COMPUTER TECHNOLOGY SERVICES
ADDRESS : 1700 ROCKVILLE PIKE
          ROCKVILLE, MD 20852

MULTI-VENDOR : N
MULTI-YEAR : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB:
RENEWAL :        OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y    ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO F3-DEL F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
  
```

If your TORFP has a MBE goal, then the subcontractor entry screen 2345 **MUST** be accurately entered.

The F12 key should display **F12-SEL SUB**. If it does not, press the **F4-OTHER** key to change the functionality of the F12 key.

Press **F12-SEL SUB** to view the Subcontractor Entry 2345 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Subcontractor Entry

```
PCHL2345 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/07/2009  2:49 PM
LINK TO:                  SUBCONTRACTOR ENTRY              PAGE 01 OF 01

BPO/CONTRACT ID: R00B9200009  CONTRACT AMOUNT:          50,000.00 ACTION IND: N
TOTAL PAID:
S  VENDOR ID      VENDOR NAME      VENDOR STATUS CODES  SUBCONTRACT AMOUNT
DESCRIPTION                                     ACTUAL
▶ 1521672115    A&T ASSOCIATES INC MBE      PG          002          1,000.00 ◀
```

```
F1-HELP      F2-VIEW VENDOR      F3-DELETE      F4-IVC DATA      F5-NEXT
F7-PRIOR PAGE F8-NEXT PAGE      F9-LINK      F10-SAVE      ENTER-INQUIRE      CL-EXIT
SUBCONTRACTOR RECORD(S) SAVED
```

If you know your subcontractor information (vendor's federal ID number) you can tab and enter it in the Vendor ID and the Subcontract Amount. Press **F10-SAVE** to update this screen.

ADPICS – Reference BPO Process

DoIT Training Department

Subcontractor Entry

PCHL2345 V4.1 MD TRN ADVANCED PURCHASING/INVENTORY 07/07/2009 2:49 PM
LINK TO: SUBCONTRACTOR ENTRY PAGE 01 OF 01

BPO/CONTRACT ID: R00B9200009 CONTRACT AMOUNT: 50,000.00 ACTION IND: N
TOTAL PAID:

S	VENDOR ID	VENDOR NAME	VENDOR	STATUS	CODES	SUBCONTRACT AMOUNT
	DESCRIPTION					ACTUAL
-	1521672115	A&T ASSOCIATES INC	MBE	PG	002	1,000.00
S						
-						
-						
-						

F1-HELP F2-VIEW VENDOR F3-DELETE F4-IVC DATA F5-NEXT
F7-PRIOR PAGE F8-NEXT PAGE F9-LINK F10-SAVE ENTER-INQUIRE CL-EXIT
SUBCONTRACTOR RECORD(S) SAVED

If you don't know your subcontractor vendor's federal ID number you can tab to the first available line type the letter **s** in the select field and press **F2-VIEW VENDOR**.

ADPICS – Reference BPO Process

DoIT Training Department

Subcontractor Entry

PCHL1200 V4.1 MD TRN		ADVANCED PURCHASING/INVENTORY		07/07/2009	3:25 PM
LINK TO:		VENDOR TABLE INQUIRY			
S	VENDOR NAME	MC	ID	STATUS CODES	
s	SYSCOM SERVICES, INC.	N	1521668212	MBE	MO RB 001
	SYSCOM, INC	Y	1521238007		BA RB
	SYSTEMMODULE DIV-GENERAL E	N	1640366456		
	SYSTEM ANALYTICS, INC.	N	1521807500		
	SYSTEM AUTOMATION CORP	Y	1520889870		MO RB
	SYSTEM CONCEPTS INC	N	1870304836		
	SYSTEM CONFIGURATION & MA	N	1521851451	NCM	BA 002
	SYSTEM DESIGN & ANALYSIS	N	1521776389		HO
	SYSTEM SOURCE	Y	1237073182		
	SYSTEM SOURCE	Y	1521202799		
	SYSTEM SOURCE	N	521202799		
	SYSTEM SOURCE COMPUTERLAN	Y	1410333442		BC
	SYSTEM TECHNOLOGY #1	Y	1860630022		
	SYSTEM 3X/4X WAREHOUSE IN	N	1752131043		
	SYSTEM 3X/4XX WAREHOUSE,	N	1521310437		
	SYSTEMHOUSE INC	Y	1541091238		
	SYSTEMS & COMPUTER TECHNO	N	1230701520		
F1-HELP	F2-SELECT	F4-1210	F6-RETURN	CL-EXIT	
F7-PRIOR PAGE	F8-NEXT PAGE	F9-LINK	ENTER-INQUIRE		
INQUIRY SUCCESSFUL					

Locate your vendor, tab to the select field, type the letter **s** and press **F6-RETURN** to return the vendor back to the 2345 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Subcontractor Entry

PCHL2345 V4.1 MD TRN		ADVANCED PURCHASING/INVENTORY		07/07/2009 3:30 PM	
LINK TO:		SUBCONTRACTOR ENTRY		PAGE 01 OF 01	
BPO/CONTRACT ID: R00B9200009		CONTRACT AMOUNT:		50,000.00 ACTION IND: N	
		TOTAL PAID:			
S	VENDOR ID	VENDOR NAME	VENDOR	STATUS CODES	SUBCONTRACT AMOUNT
	DESCRIPTION				ACTUAL
-	1521668212	SYSCOM SERVICES INC MBE	MO	RB 001	1,000.00
-	1521672115	A&T ASSOCIATES INC MBE	PG	002	1,000.00
-					
-					
-					
F1-HELP F2-VIEW VENDOR F3-DELETE F4-IVC DATA F5-NEXT					
F7-PRIOR PAGE F8-NEXT PAGE F9-LINK F10-SAVE ENTER-INQUIRE CL-EXIT					
SUBCONTRACTOR RECORD(S) SAVED					

After you have entered the Subcontract Amount press **F10-SAVE**.

Press **Escape** to return back to the 2342 screen.

ADPICS – Reference BPO Process

DoIT Training Department

Posting Your Document

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/18/2009    2:50 PM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013    NOTE PAD : N
PURCHASING TYPE : I2            BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: P            INTERFACE TYPE : BP    DBM BPO (Y/N): N
STATUS : POST                  AWARD :          DOIT BPO (Y/N): N
GSA CONTRACT NO :              POST DATE : 07/18/2009
CONTRACT AMOUNT : 50,000.00    EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00    FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13    PHONE: 4102607778 EXT:
VENDOR: 1521306137 COMPUTER TECHNOLOGY SERVICES
ADDRESS : 1700 ROCKVILLE PIKE
MBE : ROCKVILLE, MD 20852
MULTI-VENDOR : N
MULTI-YEAR : Y    COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: Y
RENEWAL :          OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX: ORIGINAL AMT: 250,000,000.00

REFERENCE : Y    ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO F3-DEL F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK F10-SAVE F11-VEN SELECT F12-SEL SUB ENTER-INQUIRE CL-EXIT
BLANKET PURCHASE ORDER POSTED
```

After the document has been reviewed for accuracy, tab to the Action Indicator and type P to Post your document. Your document should go through the necessary approval paths associated not only with DoIT, but also your agency.

ADPICS – Reference BPO Process

DoIT Training Department

Entering Subcontractor Payment Information

PCHL2345 V4.1 MD TRN ADVANCED PURCHASING/INVENTORY 07/18/2009 3:00 PM
 LINK TO: SUBCONTRACTOR ENTRY PAGE 01 OF 01

BPO/CONTRACT ID: R00B9200009 CONTRACT AMOUNT: 50,000.00 ACTION IND: P
 TOTAL PAID:

S	VENDOR ID	VENDOR NAME	VENDOR	STATUS	CODES	SUBCONTRACT AMOUNT
DESCRIPTION						ACTUAL
-	1521668212	SYSCOM SERVICES INC MBE	MO	RB	001	1,000.00
s	1521672115	A&T ASSOCIATES INC MBE	PG		002	1,000.00
-						
-						
-						

F1-HELP F2-VIEW VENDOR F3-DELETE F4-IVC DATA F5-NEXT
 F7-PRIOR PAGE F8-NEXT PAGE F9-LINK F10-SAVE ENTER-INQUIRE CL-EXIT
 INQUIRY SUCCESSFUL

It is necessary to enter the subcontractor payment information on the 2355 screen for invoices verified as paid by the MBE subcontractor. MBE subcontractor payment reports should be received at least by the 15th of each month for the prior month's invoices. The Invoice Number, Invoice Date and Invoice Amount should be recorded for each subcontractor. Subcontractor payment entry on the 2355 screen *cannot be entered and saved until the BPO has been posted.*

Tab down to the line item of the vendor you want to record a payment and type the letter **s** in the select field. Press **F4-IVC DATA**.

ADPICS – Reference BPO Process

DoIT Training Department

Entering Subcontractor Payment Information

```
PCHL2355 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/18/2009  3:06 PM
LINK TO:                   SUBCONTRACTOR INVOICE INFORMATION  PAGE 01 OF 00

BPO/CONTRACT ID: R00B9200009  VENDOR STATUS CODES: MBE      PG      002
VENDOR ID      : 1521672115  A&T ASSOCIATES INC
SUBCONTRACTOR COMMITMENT:    1,000.00      ACTUAL:      500.00
-----
S  INVOICE NUMBER      INVOICE DATE      INVOICE AMOUNT
   071409              07/14/09              500.00

F1-HELP      F3-DELETE      F5-NEXT      F7-PRIOR PAGE
F8-NEXT PAGE  F9-LINK      F10-SAVE     ENTER-INQUIRE  CL-EXIT
SUBCONTRACTOR INVOICE INFORMATION ADDED
```

Enter in the invoice number or an identifying number that your agency has decided to use. Tab to the Invoice Date. This date should reflect the date the subcontractor entered on the D-6 payment report.

Press **F10-SAVE**.

ADPICS – Reference BPO Process

DoIT Training Department

FAQs

What happens if I accidentally delete a commodity line? How do I add it back in?

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/09/2009  11:12 AM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:      50,000.00 ALL:   I/D:
VENDOR ID   : 1521306137    COMPUTER TECHNOLOGY SERVI
MULT VENDORS: N (Y/N)        F/P:      AMOUNT:          PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001    0001
ENTERPRISE SERVICE PROVIDER(CATS)

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
COMMODITIES DELETED
```

Remember, if a commodity line was accidentally deleted, the original commodity ID and original line item must be obtained from the original BPO.

```
PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    07/09/2009  11:20 AM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:      50,000.00 ALL:   I/D:
VENDOR ID   : 1521306137    COMPUTER TECHNOLOGY SERVI
MULT VENDORS: N (Y/N)        F/P:      AMOUNT:          PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001    0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-isscat      0013
```

Enter both the commodity **and** line item then press **F10- SAVE** when you have verified the information.

ADPICS – Reference BPO Process

DoIT Training Department

```

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/09/2009  11:26 AM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:      50,000.00 ALL:   I/D:
VENDOR ID   : 1521306137    COMPUTER TECHNOLOGY SERVI
MULT VENDORS: N (Y/N)        F/P:      AMOUNT:          PCT:
S COMMODITY ID   LINE ORIG-LINE MAX QUANTITY      UNIT COST   MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001   0001
ENTERPRISE SERVICE PROVIDER(CATS)
92020-ISSCAT      0019   0013
FA7 INFORMATION SYSTEM SECURITY

F1-HELP F2-SELECT F3-DELETE F4-TEXT F5-NEXT F6-RETURN F7-PRIOR PAGE
F8-NEXT PAGE F9-LINK F10-SAVE F11-TOGGLE F12-VIEW VEN ENTER-INQUIRE CL-EXIT
BLANKET PURCHASE ORDER SAVED
  
```

When **F10-SAVE** is pressed your previously deleted commodity line now appears.

I am trying to add the commodity line back on my document and I keep getting an error – *All lines of a reference BPO must have an original BPO line number.* What does this mean?

```

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/09/2009  12:49 PM
LINK TO:                   BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:      50,000.00 ALL:   I/D:
VENDOR ID   : 1521306137    COMPUTER TECHNOLOGY SERVI
MULT VENDORS: N (Y/N)        F/P:      AMOUNT:          PCT:
S COMMODITY ID   LINE ORIG-LINE MAX QUANTITY      UNIT COST   MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001   0001
ENTERPRISE SERVICE PROVIDER(CATS)
A 92020-ISSCAT      ■
FA7 INFORMATION SYSTEM SECURITY
  
```

This means you forgot to add the line number when you added the commodity number. Your cursor should be blinking letting you know where the error is. Enter the correct line number and press **F10-SAVE**.

ADPICS – Reference BPO Process

DoIT Training Department

I entered my commodity id and line number and received the following error: *Commodity and Line # are not on BPO*. What does this mean?

```
PCHL2348 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    07/09/2009    1:10 PM
LINK TO:                BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:    50,000.00 ALL:    I/D:
VENDOR ID   : 1521306137    COMPUTER TECHNOLOGY SERVI
MULT VENDORS: N (Y/N)        F/P:    AMOUNT:                PCT:
S COMMODITY ID    LINE ORIG-LINE MAX QUANTITY        UNIT COST    MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001    0001
ENTERPRISE SERVICE PROVIDER(CATS)
A 92020-ISSCAT      222
FA7 INFORMATION SYSTEM SECURITY
```

This means you have an incorrect commodity id OR line number when you added the commodity number. Your cursor should be blinking letting you know where the error is. Enter the correct line number and press **F10-SAVE**.

I entered my commodity id and line number and received the following error: *Commodity not on file and Commodity and Line # are not on BPO*. What does this mean?

```
PCHL2348 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    07/09/2009    1:17 PM
LINK TO:                BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B9200009    CONTRACT AMOUNT:    50,000.00 ALL:    I/D:
VENDOR ID   : 1521306137    COMPUTER TECHNOLOGY SERVI
MULT VENDORS: N (Y/N)        F/P:    AMOUNT:                PCT:
S COMMODITY ID    LINE ORIG-LINE MAX QUANTITY        UNIT COST    MAX COST
COMMODITY DESCRIPTION
92020-CATSEP      0001    0001
ENTERPRISE SERVICE PROVIDER(CATS)
A 92020-CATSEX      0018
COMMODITY NOT ON FILE
```

Double check your commodity id. A typing error has probably occurred.

ADPICS – Reference BPO Process

DoIT Training Department

What happens if the vendor who won the TORFP is NOT on the original BPO?

If the vendor you chose is not on the original BPO email the Service Desk –
servicedesk@doit.state.md.us

Let us know you are referring to the CATS II contract. Give the Vendor's name, address and federal ID number. The Service Desk will forward this information to the CATS II Project Office and they will get back in touch with you when the vendor has been added to the contract.

Once the CATS II Project Office has added the vendor to the BPO, how do I add it to my reference BPO?

After you get notification back from the CATS II Project Office that your vendor has been added to the original BPO, you should be able to type over the current vendor on the header and press **F10-SAVE** to make your change. See example below.

PCHL2342 V4.1 MD TRN	ADVANCED PURCHASING/INVENTORY	07/09/2009 10:56 AM
LINK TO:	BLANKET PURCHASE ORDER	
BPO/CONTRACT ID : R00B9200009	DEPT : R0013	NOTE PAD : N
PURCHASING TYPE : I2	BID ID :	DGS BPO (Y/N): N
ACTION INDICATOR: N	INTERFACE TYPE : BP	DBM BPO (Y/N): N
STATUS : NOPT	AWARD :	DOIT BPO (Y/N): N
GSA CONTRACT NO :	POST DATE :	
CONTRACT AMOUNT : 50,000.00	EFFECTIVE DATE : 07/01/2009	
EST CONTRACT AMT: 250,000,000.00	EXPIRATION DATE : 06/30/2010	
REMAINING VALUE : 50,000.00	FISCAL EFF DATE : 07/01/2009	
BUYER ID: RB13 NAME: A60T13	PHONE: 4102607778 EXT:	
VENDOR: 1521306137 COMPUTER TECHNOLOGY SERVICES		
ADDRESS : 1700 ROCKVILLE PIKE		
ROCKVILLE, MD 20852		

Current vendor is shown above.

ADPICS – Reference BPO Process

DoIT Training Department

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/09/2009 10:56 AM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013      NOTE PAD      : N
PURCHASING TYPE : I2              BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N              INTERFACE TYPE : BP   DBM BPO (Y/N): N
STATUS          : NOPT           AWARD  :          DOIT BPO (Y/N): N
GSA CONTRACT NO :                 POST DATE :          :
CONTRACT AMOUNT : 50,000.00       EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00       FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 1521735303 COMPUTER TECHNOLOGY SERVICES
ADDRESS : 1700 ROCKVILLE PIKE
          ROCKVILLE, MD 20852
```

Type over existing vendor on header with new vendor ID and press F10-SAVE when information has been verified.

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      07/09/2009 11:06 AM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B9200009    DEPT : R0013      NOTE PAD      : N
PURCHASING TYPE : I2              BID ID :          DGS BPO (Y/N): N
ACTION INDICATOR: N              INTERFACE TYPE : BP   DBM BPO (Y/N): N
STATUS          : NOPT           AWARD  :          DOIT BPO (Y/N): N
GSA CONTRACT NO :                 POST DATE :          :
CONTRACT AMOUNT : 50,000.00       EFFECTIVE DATE : 07/01/2009
EST CONTRACT AMT: 250,000,000.00 EXPIRATION DATE : 06/30/2010
REMAINING VALUE : 50,000.00       FISCAL EFF DATE : 07/01/2009
BUYER ID: RB13 NAME: A60T13      PHONE: 4102607778 EXT:
VENDOR: 1521735303 MS TECHNOLOGIES
ADDRESS : 18504 OFFICE PARK
          GAITHERSBURG, MD 20879
MULTI-VENDOR : N
MULTI-YEAR   : Y   COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: Y
RENEWAL      :          OPTIONS :
ORIGINAL BPO : 060B9800001    OPTION MAX:          ORIGINAL AMT: 250,000,000.00

REFERENCE    : Y          ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO  F3-DEL F4-OTHER KEYS F5-NEXT    F6-VIEW DOC F7-VEN SEL
F8-ELEM F9-LINK  F10-SAVE F11-VEN SELECT F12-SEL SUB  ENTER-INQUIRE CL-EXIT
RECORD UPDATED
```

When **F10-SAVED** is pressed the information is overwritten with the new vendor and the message **RECORD UPDATED** will appear at the bottom of the screen.

The banner features a background image of a hand holding a pen, writing on a document. The text is overlaid on this image.

ADPICS – Reference BPO Process

DoIT Training Department

Why do I have to delete the unused vendors off of the Reference BPO?

If the unused vendors are not deleted from your BPO, when your agency runs the ADPICS Standard Report 710, they WILL NOT receive credit for this entire BPO. The 710 report is designed to pick up only those BPOs with a single vendor attached to it.

Another reason to delete unused vendors and commodities is related to printing your new Reference BPO. If the unused vendors and commodities remain, then the system will print the BPO for each of the vendors, therefore wasting paper.

When I create a release does that purchase order still need to have DoIT approval?

Yes. All PO releases must have DoIT approval. The approval is set by the commodity code. No special approval paths are needed to send the document to the DoIT approval mailbox. However, internal approval paths are still needed.

Is there information that I have to place on the note pad of the Reference BPO?

Yes, refer to page two of this document for specific information.

Is there information that I have to place on the note pad of the purchase order release?

You should enter the same information in the PO note pad as what is in your Reference BPO's notepad. You should be able to utilize the copy and paste function so this won't take long.

What should my delivery date be set to on my releases?

The delivery date is really an estimate of when the goods or services will be delivered. The delivery date may also represent a specific date that your agency and the vendor have agreed upon. A problem can arise when the delivery date is less than the post date. This can happen if the document takes longer than expected to post. DoIT may have to reject your document for an update to the delivery date field. We usually recommend you put at least 30 days out for approval purposes.

ADPICS – Reference BPO Process

DoIT Training Department

What information should I use on the additional elements for a purchase order release?

```
PCHL2356 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/18/2009  3:37 PM
LINK TO:                   PURCHASE ORDER ADDITIONAL ELEMENTS

PURCHASE ORDER ID : R00P0400003      AMOUNT : 6.00
VENDOR NO       : 1521306137      COMPUTER TECHNOLOGY SERVICES

LOCATION          :                      SBR :
PROCUREMENT METHODS : R
CATEGORY OF WORK : ITS      NON VISUAL ACCESS : N
AWARD AUTHORITY   : DIT      HIRING SERVICES  : N
MBE WAIVER: N    MBE WAIVER %: .00    MBE GOAL %: 0.00
RECYCLED CONTENT-PRE: POST: COMMITMENT: 0.00
DESC: THIS IS FOR COMPUTER EQUIPMENT FOR WESTERN MARYLAND

NUMBER OF SOLICITATIONS      NUMBER OF BIDS
TOT: SB: MBE:                TOT: 000 SB: 000 MBE: 000
PREFERENCES
RECYCLED: SB: REV PROD: ENERGY SAV: SUI: CSW: BUI:

F1-HELP  F5-NEXT  F9-LINK  F10-SAVE  ENTER-INQ  CL-EXIT
INQUIRY SUCCESSFUL
```

For agency releases from the reference BPO, please make sure the above information is correctly entered.

Procurement Methods – R for Release from a BPO

Category of Work – ITS for Information Technology Services

Award Authority – DIT for Department of Information Technology

Description: Enter a brief description of this purchase.

Non Visual Access – enter Y or N

Hiring Services – enter Y or N

ADPICS – Reference BPO Process

DoIT Training Department

MBE Waiver – enter Y or N

MBE Waiver % - enter the percentage of waiver granted. If none, leave blank.

MBE Goal % - enter the actual percentage of MBE participation to which contractor has committed (after waiver, if a waiver has been granted; full MBE goal if no waiver requested/granted; or greater MBE commitment percentage if applicable [Ex. MBE goal in RFP, 25%; Contractor's commitment, 28%. Procurement Officer would enter 28% in the MBE Goal % field]).

Commitment: This will equal the dollar amount equivalent to the percentage of MBE participation.

What if I made a mistake on the procurement method of the Purchase Order release and used SP instead of R? Can this be fixed?

Yes. If you make any errors on your additional elements screen 2356 you can just type over the existing field with the correct information and press **F10-SAVE** to over write. This can be done on a posted or unposted purchase order or direct purchase order.

What if I made a mistake on the Reference BPO additional elements screen 2353 and used some wrong coding? Can this be fixed?

Yes. After the Reference BPO has been posted, a Blanket Purchase Order Change Order (8710 screen) will need to be created. Function key **F11-ADD ELE** should be used to make any changes to the 2353 Additional Elements Screen. However if the Reference BPO has not been posted yet, any changes can be made directly to the 2353 screen. Remember to press **F10 SAVE**.

Why aren't the MBE subcontractor payments showing up on my reports? I am entering the payments on the 2355 screen.

You will need to verify that you have the correct security to enter the data on the Subcontractor Invoice Information screen 2355. See your Agency FMIS coordinator to verify you have security.



ADPICS – Reference BPO Process

DoIT Training Department

I have had problems in the past trying to pay for a commodity with multiple lines of accounting. Is there a specific way I should be creating my Reference BPO or PO Release?

If you are going to be paying for one line item with multiple accounting codes it is sometimes much easier when creating the PO Release to have multiple line items of the **same** commodity code with **different** accounting codes.

If you have one commodity code with multiple accounting lines attached to it, when payment time occurs you are limited and do not have the flexibility to pick and choose which accounting line will be charged. If all accounting is attached to a commodity line, then each line of accounting will need to be charged something.

However, if you have several commodity lines – of the same commodity code – but each line has its own line of accounting, you have the flexibility of choosing which line item or accounting line you wish to charge. This way gives you much more flexibility. Both of these are still considered multiple accounting.

Let's take a look at some examples on the next page.

ADPICS – Reference BPO Process

DoIT Training Department

Multiple Accounting using one commodity, but entered as different lines of the PO.

PCHL2346 V4.1 MD TRN		ADVANCED PURCHASING/INVENTORY		07/18/2009	4:48 PM		
LINK TO:		PURCHASE ORDER/CONTRACT DETAILS					
PO/CONTR ID: R00P0400009		ITB/BID ID:		TOT AMT:			
				WAREHOUSE:			
S	REQ	LINE NO	U/M	QUANTITY	UNIT COST	%DCT TAXES	TOTAL
COMM ID/PART NO		COMM NAME/PART NAME					
	R00P0400009	001	EA	1.00	100.0000		100.00
	92020-CATSEP			(CATS) ENTERPRISE SERV			
	R00P0400009	002	EA	1.00	100.0000		100.00
	92020-CATSEP			(CATS) ENTERPRISE SERV			
	R00P0400009	003	EA	1.00	100.0000		100.00
	92020-CATSEP			(CATS) ENTERPRISE SERV			

PCHL2344 V4.1 MD TRN		ADVANCED PURCHASING/INVENTORY		07/20/2009 12:18 PM							
LINK TO:		PO/CONTRACT ACCOUNTING INFORMATION SUMMARY									
PO/CONTRACT ID: R00P0400009		ACCT TOTAL:		300.00							

S SF	SFX	TOTAL	AGY YR INDEX	PCA	OBJ	AOBJ	GRANT/PH	PROJ/PH	AG1	AG2	E
01		100.00	R00 10		10015	0808					
02		100.00	R00 10		11015	0808					
03		100.00	R00 10		11015	0809					

PCHL2365 V4.1 MD TRN		ADVANCED PURCHASING/INVENTORY		07/20/2009	12:13 PM							
LINK TO:		DIRECT PURCHASE ORDER DETAIL ENTRY										
PURCHASE ORDER : R00P0400009		LINE NO.:	001	BUYER: N/A	WHSE :							
COMMODITY : 92020-CATSEP		(CATS) ENTERPRISE SERV		BPO LINE NO: 0001								
PART NO :												
QUANTITY : 1.00		STATE TAX :	LOCAL TAX :									
PURCHASE U/M: EA		UNIT COST:	100.0000	TOTAL COST:	100.00							
ACCOUNTING INFORMATION-												
SF	AGY	YR	INDEX	PCA	OBJ	AOBJ	GRANT/PH	PROJ/PH	AG1	AG2	AG3	AMOUNT
01	R00	10		10015		0808						100.00

ADPICS – Reference BPO Process

DoIT Training Department

```

PCHL2365 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/20/2009  12:41 PM
LINK TO:                  DIRECT PURCHASE ORDER DETAIL ENTRY

PURCHASE ORDER : R00P0400009  LINE NO.: 002  BUYER: N/A      WHSE :
COMMODITY      : 92020-CATSEP  (CATS) ENTERPRISE SERV  BPO LINE NO: 0001
PART NO       :
QUANTITY      :          1.00  STATE TAX :          LOCAL TAX :
PURCHASE U/M: EA  UNIT COST:          100.0000 TOTAL COST:          100.00

ACCOUNTING INFORMATION-
SF AGY YR INDEX PCA  OBJ  AOBJ GRANT/PH PROJ/PH  AG1 AG2 AG3  AMOUNT
02 R00 10          11015  0808                                100.00
  
```

```

PCHL2365 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  07/20/2009  12:42 PM
LINK TO:                  DIRECT PURCHASE ORDER DETAIL ENTRY

PURCHASE ORDER : R00P0400009  LINE NO.: 003  BUYER: N/A      WHSE :
COMMODITY      : 92020-CATSEP  (CATS) ENTERPRISE SERV  BPO LINE NO: 0001
PART NO       :
QUANTITY      :          1.00  STATE TAX :          LOCAL TAX :
PURCHASE U/M: EA  UNIT COST:          100.0000 TOTAL COST:          100.00

ACCOUNTING INFORMATION-
SF AGY YR INDEX PCA  OBJ  AOBJ GRANT/PH PROJ/PH  AG1 AG2 AG3  AMOUNT
03 R00 10          11015  0809                                100.00
  
```

Notice that each commodity line has a different line of account. There are three line items, all the same commodity, however different account. This way allows for easier payment options and also is easier to rollover at the end of the year if necessary.

ADPICS – Reference BPO Process

DoIT Training Department

Multiple Accounting using one commodity line with all lines of accounting attached to the one commodity line.

PCHL2346 V4.1 MD TRN	ADVANCED PURCHASING/INVENTORY	07/18/2009	4:50 PM
LINK TO:	PURCHASE ORDER/CONTRACT DETAILS		
PO/CONTR ID: R00P0400010	ITB/BID ID:	TOT AMT:	300.00
		WAREHOUSE:	
S REQ LINE NO U/M	QUANTITY	UNIT COST	%DCT TAXES
COMM ID/PART NO	COMM NAME/PART NAME		TOTAL
R00P0400010 001 EA	3.00	100.0000	300.00
92020-CATSEP	(CATS) ENTERPRISE SERV		

PCHL2344 V4.1 MD TRN	ADVANCED PURCHASING/INVENTORY	07/20/2009	12:36 PM
LINK TO:	PO/CONTRACT ACCOUNTING		
	INFORMATION SUMMARY		
PO/CONTRACT ID: R00P0400012	ACCT TOTAL:	300.00	

S SF	SFX	TOTAL	AGY YR INDEX PCA OBJ AOBJ GRANT/PH PROJ/PH AG1 AG2 E
01		100.00	R00 10 10015 0808
02		100.00	R00 10 11015 0808
03		100.00	R00 10 10015 0809

PCHL2365 V4.1 MD TRN	ADVANCED PURCHASING/INVENTORY	07/20/2009	12:35 PM
LINK TO:	DIRECT PURCHASE ORDER DETAIL ENTRY		
PURCHASE ORDER : R00P0400012	LINE NO.: 001	BUYER: N/A	WHSE :
COMMODITY : 92020-CATSEP	(CATS) ENTERPRISE SERV	BPO LINE NO: 0001	
PART NO :			
QUANTITY :	3.00	STATE TAX :	LOCAL TAX :
PURCHASE U/M: EA	UNIT COST:	100.0000	TOTAL COST: 300.00
ACCOUNTING INFORMATION-			
SF AGY YR INDEX PCA OBJ	AOBJ GRANT/PH PROJ/PH	AG1 AG2 AG3	AMOUNT
01 R00 10 10015 0808			100.00
02 R00 10 11015 0808			100.00
03 R00 10 10015 0809			100.00



Questions Asked During CATS II Conference – **UPDATED 09/29/09**

Q. If an agency has a need for special expertise and the contractor will not be on site, is the Request for Resume (RFR) still limited to 6 months?

A. Yes.

Q. Does the Request for Resume (RFR) form have to be sent to every Master Contractor in the functional area?

A. Yes, but the MC can sub.

Q. If you knew a particular sub contractor you were interested in how can that be arranged?

A. Only Master Contractors can sub.

Q. Will the slides be on the web site?

A. Yes, in the Service Center tab - <http://doit.maryland.gov/contracts/Pages/CATSIIConference.aspx>

Q. What if PMO services are needed for 12 - 18 months?

A. Complete a task order. If it is for a PM supporting an MITDP, use RFR.

Q, What about an exception for a PM support a MITDP

A NEED ASSISTANCE WITH ANSWER

Q. If staff augmentation needed, using the RFR and cost over \$25,000, is more than 20 days notice needed?

A. Not necessary.

The banner features a background of overlapping geometric shapes in shades of orange, yellow, and grey, with faint, illegible script text overlaid. The title is centered in a large, black, serif font.

ADPICS – Reference BPO Process

DoIT Training Department

Q. Is RFR subject to MBE goals?

A. Yes if you have two or more, MBE goals apply. In addition, we recommend SBR only.

Q. What if there is no response to RFR/SBR?

A. Put it out again non-SBR.

Q. How is the 6 month period measured - calendar or level of effort?

A. 6 calendar months from date of award.

Q. Can the same person reapply?

N. No.

Q. What turnaround can the agencies expect from DoIT?

A. On document approvals XXXXXXXX and on vendor adds to the CATS II BPO XXXXXX.

Q. After a vendor is awarded, how do you delete all other vendors from the reference BPO?

A. Refer to user guide in Service Center.

Q. What about approval paths?

A. DoIT document approval are based on the commodity code within the CATS II BPO. The document will automatically be sent to DoIT for approval AFTER Agency approval has taken place.

Q. How do I know where the document is located within the approval path?

A. ADPICS 9220 will show where the document currently is and where it still need to go for approvals. The 9230 screen shows where the document has been.



ADPICS – Reference BPO Process

DoIT Training Department

Q. Is the Reference BPO to cover base only?

A. Yes.

Q. What about additional option years?

A. If options are needed, a new Reference BPO will have to be created to cover that particular option period.

Q. If more than one functional area, are multiple Reference BPOs or one created?

A. If the same vendor is being utilized for both functional area you have a choice to use one reference BPO or one per functional area. However, if more than one vendor is selected, you will need a reference BPO for each vendor and the functional they are associated with.

Q. If the BPO is approved by DoIT, is the purchase order also approved by DoIT?

A. Yes.

Q. What is the impact of a MC that is acquired by another MC?

A. Order of novation is used, but it depends on how long it takes to go through.

Q. Will there be an effort to remove a MC that does not respond?

A. Agencies will collect feedback forms. Removal process is TBD.