

# DOIT TRAINING CENTER OFFICE OF INFORMATION TECHNOLOGY



## PBX IV Reference BPO User Guide

Updated Oct 2011

## Financial Management Information System

DoIT Service Desk  
45 Calvert Street  
Annapolis, MD 21401  
(410) 260-7778  
[servicedesk@doit.state.md.us](mailto:servicedesk@doit.state.md.us)



# ADPICS – Reference BPO Process

## DoIT Training Department

### BPO Header –

PBX III Blanket Purchase Order number – **060B1400048**

```

PCHL2342 V4.1 MD PRD      ADVANCED PURCHASING/INVENTORY      04/05/2011  11:50 AM
LINK TO:                   BLANKET PURCHASE ORDER

BPO/CONTRACT ID : 060B1400048      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  : 03/30/2011
CONTRACT AMOUNT :                   EFFECTIVE DATE : 03/23/2011
EST CONTRACT AMT: 48,000,000.00     EXPIRATION DATE : 03/31/2015
REMAINING VALUE :                   FISCAL EFF DATE : 03/23/2011
BUYER ID: 05CI NAME: CHARLES IVES   PHONE: 4107670966 EXT:
VENDOR: 4102607970 PBX 111
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: 2      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 DoIT Training Department

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

Master Contractors responding to a PORFP containing an MBE goal shall complete, sign, without edits, and submit all required MBE documentation (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 PORFP.

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)



## ADPICS – Reference BPO Process DoIT Training Department

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.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Reference BPO

When purchasing from the PBX III 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](mailto:servicedesk@doit.state.md.us)

Be aware that this is a User Guide and the **actual document numbers are not the same** as what you will be using. Not all vendors were added, however there are quite a few to represent the PBX III BPO.

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/18/2011  11:42 AM
LINK TO:                  BLANKET PURCHASE ORDER

BPO/CONTRACT ID : 060B1400053  DEPT : 060      NOTE PAD      : N
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   : 03/18/2011
CONTRACT AMOUNT :            EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT: 10,000,000.00 EXPIRATION DATE : 06/30/2015
REMAINING VALUE :            FISCAL EFF DATE : 02/01/2011
BUYER ID: 05CI NAME: CHUCK IVES      PHONE: 4102607970 EXT:
VENDOR: 4102607970 PBX III
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: 2   ORIGINAL AMT:

REFERENCE       : N          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
    
```

Link to the **ADPICS 2342** screen and type in the PBX III BPO Contract id and press Enter. This should retrieve the document on to your screen. **Remember, the original PBX III BPO is one of the previous pages. 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    03/25/2011  12:24 PM
LINK TO:                  BLANKET PURCHASE ORDER

BPO/CONTRACT ID : 060B1400053  DEPT   : 060          NOTE PAD      : N
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  : 03/18/2011
CONTRACT AMOUNT :              EFFECTIVE DATE : 04/01/2011
EST CONTRACT AMT: 10,000,000.00 EXPIRATION DATE : 06/30/2015
REMAINING VALUE :              FISCAL EFF DATE : 04/01/2011
BUYER ID: 05CI NAME: CHUCK IVES          PHONE: 4102607970 EXT:
VENDOR: 4102607970 PBX III
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: 2    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 ACCTS 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 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.**

Overtpe the **N** in the **REFERENCE** field with **Y** and press **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      03/18/2011  11:45 AM
LINK TO:                  BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B1400004  DEPT : R00      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 : 02/01/2011
EST CONTRACT AMT:  10,000,000.00  EXPIRATION DATE : 06/30/2015
REMAINING VALUE :             FISCAL EFF DATE : 02/01/2011
BUYER ID: 05CI NAME: CHUCK IVES      PHONE: 4102607970 EXT:
VENDOR: 4102607970 PBX III
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   : 060B1400053  OPTION MAX:          ORIGINAL AMT:  10,000,000.00
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
BPO 060B1400053 SUCCESSFULLY CREATED REFERENCE R00B140000 4
    
```

A new Blanket Purchase Order for your agency referencing the PBX III Blanket Purchase Order has now been created. Notice the Original BPO field is now populated with the PBX III BPO and the Reference field now has a letter Y for Yes. This shows that this particular BPO is a reference BPO.



### Submit Your PORFP

After DoIT has approved your PORFP template, you are ready to submit your template 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    03/18/2011  11:45 AM
LINK TO:                  BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B1400004  DEPT : R00          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 : 02/01/2011
EST CONTRACT AMT: 10,000,000.00 EXPIRATION DATE : 06/30/2015
REMAINING VALUE :           FISCAL EFF DATE : 02/01/2011
BUYER ID: @5CI NAME: CHUCK IVES      PHONE: 4102607970 EXT:
VENDOR: 4102607970 PBX III
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  : @60B14000053  OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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 PORFP.

**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. NOTE: If BPO is a future date, releases will not be able to be posted until that date is reached.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Creating a Reference BPO

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    03/18/2011  11:55 AM
LINK TO:                  BLANKET PURCHASE ORDER

BPO/CONTRACT ID : R00B1400004    DEPT   : R00          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 : 02/01/2011
EST CONTRACT AMT: 10,000,000.00 EXPIRATION DATE : 06/30/2015
REMAINING VALUE :              FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER    PHONE: 4102607778 EXT:
VENDOR: 4102607970 PBX III
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  : 060B1400053    OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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
    
```

**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  03/23/2011  1:33 PM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD    : N
                                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    : 20,000.00      EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT   : 10,000,000.00  EXPIRATION DATE : 06/30/2015
REMAINING VALUE    : 20,000.00      FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER          PHONE: 4102607778 EXT:
VENDOR: 4102607970 PBX III
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     : 060B1400053      OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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
  
```

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

Beware of your purchasing type. In this example we have left the Purchasing Type default. This may not be what your agency will use. Please check with your fiscal officer or functional coordinator before posting your document to ensure the proper purchasing type is used. This will determine the approval path within your agency this document will take.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Creating a Reference BPO

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  03/23/2011  1:33 PM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD    : N
                                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 :          20,000.00    EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT:          10,000,000.00 EXPIRATION DATE : 06/30/2015
REMAINING VALUE :          20,000.00    FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER          PHONE: 4102607778 EXT:
VENDOR: 4102607970 PBX III
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    : 060B1400053    OPTION MAX:          ORIGINAL AMT: 10,000,000.00

REFERENCE        : Y          ALLOW REF (Y/N): N    LIMIT REF EXP DT (Y/N) Y
F1-HELP F2-COPY BPO  F3-DE 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
  
```

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 3 commodity lines and approximately 20 vendors that have been added to the PBX III 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    03/23/2011    1:50 PM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD      : N
                                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    :          20,000.00    EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT   :          10,000,000.00 EXPIRATION DATE : 06/30/2015
REMAINING VALUE    :          20,000.00    FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER      PHONE: 4102607778 EXT:
VENDOR: 4102607970 PBX III
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      : 060B1400053    OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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

## DoIT Training Department

### Choosing Your Commodities

```

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/18/2011  12:01 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B1400004      CONTRACT AMOUNT:                ALL:  I/D:
VENDOR ID   : 4102607970 PBX III
MULT VENDORS: Y (Y/N)         F/P:    AMOUNT:                PCT:
S COMMODITY ID   LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
99789-PBX181     0004  0004
PBX 111,FUNCTIONAL AREA 1- HARDWARE, SOFTWARE, AND LICENSES
99789-PBX182     0005  0005
PBX 111,FUNCTIONAL AREA 2-MAINTENANCE SERVICES
99789-PBX183     0006  0006
PBX 111,FUNCTIONAL AREA 3- -TIME & MAINTENANCE SERVICESNSSES

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. If there are additional commodities, **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 DoIT Training Department

## Choosing Your Commodities

**Telecommunications Equipment and Services (PBXIII)  
Master Contract**

**Blanket Purchase Order (BPO) Number: 060B1400048**

The Department of Information Technology (DoIT) has established this Master Contract to procure telecommunications hardware, software, and licenses and related maintenance and labor services.

The scope of this contract encompasses three functional areas, as follows:

- Functional Area 1 - Hardware, Software, and Licenses
- Functional Area 2 - Maintenance Services
- Functional Area 3 - Time and Material Labor

Listed as right are documents that explain how to use the Telecommunications Equipment and Services (PBX III) Contract. Any questions or concerns about this Master Contract should be directed to [PBXIII@doit.state.md.us](mailto:PBXIII@doit.state.md.us).

```

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/21/2011      1:03 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B1400004      CONTRACT AMOUNT:      20.000.00 ALL:      I/D:
VENDOR ID   : 4102607970      PBX III
MULT VENDORS: Y (Y/N)         F/P:      AMOUNT:      PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST      MAX COST
COMMODITY DESCRIPTION
99789-PBX181    0004    0004
PBX 111.FUNCTIONAL AREA 1- HARDWARE, SOFTWARE, AND LICENSES
99789-PBX182    0005    0005
PBX 111.FUNCTIONAL AREA 2-MAINTENANCE SERVICES
99789-PBX183    0007    0006
PBX 111.FUNCTIONAL AREA 3- -TIME & MAINTERIAL LABOR

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
    
```

The PBX III Functional Areas are located on the DoIT website.

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

These are similarly shown as commodities on the 2348 screen. For example, Functional Area 1 – Hardware, Software and Licenses is the same as the first line item on the BPO commodity ID 99789-PBX181 FUNCTIONAL AREA 1 – HARDWARE, SOFTWARE AND LICENSE. The commodities on the web site *may* not 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. Any commodity lines that will not be used should be deleted.

For this example, we will be ordering from **Functional Area 1** (Hardware, Software and License) and **Functional Area 3** (Time and Material). As stated previously, these have been identified from the DoIT III 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 0004 of our BPO example. Functional Area 3 is line item 006 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   03/24/2011   7:11 AM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B1400004   CONTRACT AMOUNT:                ALL:   I/D:
VENDOR ID   : 4102607970   PBX III
MULT VENDORS: Y (Y/N)      F/P:    AMOUNT:                PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY    UNIT COST  MAX COST
COMMODITY DESCRIPTION
99789-PBX181   0004  0004
PBX 111,FUNCTIONAL AREA 1- HARDWARE, SOFTWARE, AND LICENSES
S 99789-PBX182  0005  0005
PBX 111,FUNCTIONAL AREA 2-MAINTENANCE SERVICES
99789-PBX183  0007  0006
PBX 111,FUNCTIONAL AREA 3--TIME & MAINTIERIAL LABOR

F1-HELP F2-SELECT F3-DELETE F4-NEXT 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
  
```

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      03/24/2011      7:28 AM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B1400004      CONTRACT AMOUNT:                ALL:   I/D:
VENDOR ID   : 4102607970 PBX III
MULT VENDORS: Y (Y/N)          F/P:      AMOUNT:                PCT:
S COMMODITY ID      LINE ORIG-LINE MAX QUANTITY      UNIT COST      MAX COST
COMMODITY DESCRIPTION
→ 99789-PBX181      0004      0004
PBX 111,FUNCTIONAL AREA 1- HARDWARE, SOFTWARE, AND LICENSES
→ 99789-PBX183      0007      0006
PBX 111,FUNCTIONAL AREA 3- -TIME & MAINTERIAL LABOR

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

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/24/2011      7:28 AM

```

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.

For our example, we were ordering from Functional Area 1 and Functional Area 3.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Contract Amount

```

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY   03/26/2011   1:24 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : B00B1400004  CONTRACT AMOUNT:    20,000.00  A/L:  I/D:
VENDOR ID   : 1161337624  VERIZON
MULT VENDORS: N (Y/N)      F/P:    AMOUNT:                PCT:
S COMMODITY ID  LINE ORIG-LINE MAX QUANTITY      UNIT COST  MAX COST
COMMODITY DESCRIPTION
99789-PBX181    0004  0004                                15,000.00
PBX 111,FUNCTIONAL AREA 1- HARDWARE, SOFTWARE, AND LICENSES
99789-PBX183    0007  0006                                5,000.00
PBX 111,FUNCTIONAL AREA 3- -TIME & MAINTERIAL LABOR

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**, **Max Cost** for each line item 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      03/24/2011  7:48 AM
LINK TO:                  BLANKET PURCHASE ORDER

                                EPT   : R00                NOTE PAD    : N
                                ID 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 : 20,000.00 EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT: 10,000,000.00 EXPIRATION DATE : 03/30/2015
REMAINING VALUE : 20,000.00 FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER          PHONE: 4102607778 EXT:
VENDOR: 4102607970 PBX III
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   : 060B1400053   OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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 PORFP 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 PBX III BPO.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Vendor Selection

```

PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  03/24/2011  7:51 AM
LINK TO:                   BPO VENDOR SELECTION                PAGE 01 OF 01

BPO ID : R00B1400004

S VENDOR ID  VENDOR NAME      D M ADDR  I C CODE  AMOUNT RELEASED
1161337624  VERIZON                      Y          Y
1251272662  BLACK BOX CORP OF PA        Y          Y
1521382877  CHESAPEAKE TELEPHONE SYSTEMS INC  Y          Y
1522060067  ALLIANCE TECHNOLOGY GROUP LLC    N          N
1912016177  INTERTEL EXECUTONE          N          N
4102607970  PBX III                      N          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
  
```

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. With the PBX III contract, there are two pages of vendors.

Vendors are in numeric order not alphanumeric.

(Remember this is an example. There may actually be more vendors on the original PBX III BPO.)

# ADPICS – Reference BPO Process DoIT Training Department

## Vendor Selection

```

PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    03/24/2011    7:51 AM
LINK TO:                  BPO VENDOR SELECTION                                PAGE 01 OF 01

BPO ID : R00B1400004

S VENDOR ID  VENDOR NAME  D M ADDR  I C CODE  AMOUNT RELEASED
1161337624  VERIZON                 Y
1251272662  BLACK BOX CORP OF PA   Y
1521382877  CHESAPEAKE TELEPHONE  Y
                SYSTEMS INC
1522060067  ALLIANCE TECHNOLOGY  N
                GROUP LLC
1912016177  INTERTEL EXECUTONE    N
4102607970  PBX III                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
    
```

Determine which vendor this contract is to be awarded.

For this example we will use vendor 1161337624 – Verizon.

**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   03/24/2011   7:51 AM
LINK TO:                BPO VENDOR SELECTION           PAGE 01 OF 01

BPO ID : R00B1400004

S VENDOR ID  VENDOR NAME                                D M ADDR
I C CODE AMOUNT RELEASED
-----
s 1161337624 VERIZON                                    Y
s 1251272662 BLACK BOX CORP OF PA                      Y
s 1521382877 CHESAPEAKE TELEPHONE SYSTEMS INC          Y
s 1522060067 ALLIANCE TECHNOLOGY GROUP LLC             N
s 1912016177 INTERTEL EXECUTONE                        N
s 4102607970 PBX III                                   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
```

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 PORFP.**

# ADPICS – Reference BPO Process

## DoIT Training Department

### Deleting Unnecessary Vendors

```

PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    03/24/2011    8:08 AM
LINK TO:                   BPO VENDOR SELECTION                PAGE 01 OF 01

BPO ID : R00B1400004

S VENDOR ID  VENDOR NAME          D M ADDR
I C CODE    AMOUNT RELEASED
-----
1161337624  VERIZON                          Y
1251272662  ** VENDOR DELETED **            Y
1521382877  ** VENDOR DELETED **            Y
1522060067  ** VENDOR DELETED **            N
1912016177  ** VENDOR DELETED **            N
4102607970  ** 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. If there were additional pages of vendors, these have been brought forward.

Repeat the steps in selecting the vendors that should not be included in the BPO. Again, be sure not to delete the vendor that was chosen for the PORFP. **Press F3-DELETE** when the information has been verified.

The remaining vendor should be the one you chose. The vendor that we chose, Verizon has not been deleted.

Press **Enter** to refresh the screen showing the remaining vendor that was awarded the PORFP.

# ADPICS – Reference BPO Process DoIT Training Department

## Copy Remaining Vendor

```
PCHL2349 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    03/24/2011  8:19 AM
LINK TO:                  BPO VENDOR SELECTION                PAGE 01 OF 01

BPO ID : R00B1400004

S VENDOR ID  VENDOR NAME      D M ADDR      I C CODE  AMOUNT RELEASED
1161337624  VERIZON                      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
```

The vendor on the header 2342 will need to be replaced with the last remaining vendor – the one that won the PORFP. 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   03/24/2011   8:35 AM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD     : N
                                3ID 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    :      20,000.00    EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT   :     10,000,000.00 EXPIRATION DATE : 03/30/2015
REMAINING VALUE    :      20,000.00    FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER          PHONE: 4102607778 EXT:
VENDOR: 1161337624 VERIZON
ADDRESS PBX :      PO BOX 101956
                ATLANTA, GA 30392
MULTI-VENDOR      : N
MULTI-YEAR        : Y      COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL           :                   OPTIONS       :
ORIGINAL BPO     : 060B1400053      OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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 PORFP, press **F10-SAVE** to update the 2342 BPO header screen. This should overwrite the original vendor with your vendor’s information. NOTE: Some vendors have address codes attached to them. If that is the case be sure to also include that information on the 2342 for the vendor you choose.

```

PCHL2349 V4.1 MD PRD      ADVANCED PURCHASING/INVENTORY   07/27/2011  11:08 AM
LINK TO:                  BPO VENDOR SELECTION                PAGE 01 OF 02

BPO ID : 060B1400048

S VENDOR ID  VENDOR NAME          D M ADDR          I C CODE  AMOUNT RELEASED
1061502254  CAROUSEL INDUSTRIES            N                89.47
1161337624  VERIZON                         Y PBX            53,865.00
1200532706  BLACK BOX NETWORK SERVICES      Y PBX            152,302.02
1200665337  NEC CORPORATION OF AMERICA      Y PBX            10,000.00
1262722137  SIEMENS ENTERPRISE COMMUNICATIONS,INC N
  
```

# ADPICS – Reference BPO Process DoIT Training Department

## Additional Elements Screen

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    03/24/2011    9:00 AM
LINK TO:                  BLANKET PURCHASE ORDER

                                : R00          NOTE PAD      : N
                                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 :    20,000.00 EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT:   10,000,000.00 EXPIRATION DATE : 03/30/2015
REMAINING VALUE :    20,000.00 FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER          PHONE: 4102607778 EXT:
VENDOR: 1161337624 VERIZON
ADDRESS : PO BOX 101956
          ATLANTA, GA 30392
MULTI-VENDOR : N
MULTI-YEAR   : Y   COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL      :          OPTIONS :
ORIGINAL BPO : 060B1400053 OPTION MAX: ORIGINAL AMT: 10,000,000.00

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
  
```

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      03/26/2011      1:32 PM
LINK TO:                  CONTRACT ADDITIONAL ELEMENTS
CONTRACT ID : R00B1400004_  TYPE: FP          MODAL:          NOTE: N
REVISION ID : 0000 TITLE: PBX III          DEL IND:
CONTRACT ADMINISTR : ALAN SABOL           LOCATION       :          SBR: N
PROCUREMENT OFFICER : ED BANNAT           CONST PROJ #   :
ENGINEERS ESTIMATE  :                     ADVERTISE DATE:
PROCUREMENT METHODS : R                   AWARD DATE    : 03/01/2011
CATEGORY OF WORK    : ITS                 AWARD AUTH.   : DIT
NON VISUAL ACCESS   : N                   HIRING SERVICES: N
SANCTION CODE       :                     MBE GOAL %: 25.00   COMMITMENT $: 0.00
MBE WAIVER: N      MBE WAIVER %: 0.00 FED WAIVER: FED WAIVER DATE:
REQ DT:            AMT:                    APRV DT:        AMT: 1,250.00
DESC: PROVIDE PUBLIC BRANCH EXCHANGE (PBX) TELECOMMUNICATIONS EQUIPMENT AND
      RELATED SERVICES FOR THE STATE OF MARYLAND. MBE GOAL ONLY IN FA2 & FA3.

BPW: Y AGENDA DATE: 03/23/2011 ITEM NO : 3-IT          APRVL DATE: 03/23/2011
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: SB: REV PROD: ENERGY SAV:
F1-HELP F3-DEL F4-OTH F5-NEXT F9-LINK F10-SAVE F11-LAST REV ENTER-INO CL-EXIT
  
```

When **F8-ELE** is selected the system links to the 2353 screen. This screen was copied from the original PBX III BPO when you created the reference BPO and will need to be updated with your agency information. There are also fields that will need to be modified.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Updating the Additional Elements Screen

```

PCHL2353 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/26/2011  2:05 PM
LINK TO:                  CONTRACT ADDITIONAL ELEMENTS
CONTRACT ID : R00B1400004  TYPE: FP          MODAL:          NOTE: N
REVISION ID : 0000 TITLE: PBX III          DEL IND:
CONTRACT ADMINISTR : YOUR AGENCY INFO      LOCATION       :          SBR: N
PROCUREMENT OFFICER : YOUR AGENCY INFO     CONST PROJ #   :
ENGINEERS ESTIMATE  :                     ADVERTISE DATE:
PROCUREMENT METHODS : TOR                  AWARD DATE    : 03/01/2011
CATEGORY OF WORK    : ITE                  AWARD AUTH.   : DIT
NON VISUAL ACCESS   : N                   HIRING SERVICES: N
SANCTION CODE       :                     MBE GOAL %: 25.00 ←
MBE WAIVER: N       MBE WAIVER %: 0.00    FED WAIVER:   FED WAIVER DATE:
REQ DT:             AMT:                   APRV DT:       AMT:
DESC: NEW PHONES FOR WESTERN MD LOCATION FUNCTIONAL AREA 1 ALSO TRAINING ON NEW
      PHONE SYSTEM FUNCTIONAL AREA 3
BPW: N AGENDA DATE:   ITEM NO :          APRVL DATE:
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: SB: REV PROD: ENERGY SAV:
F1-HELP F3-DEL F4-OTH F5-NEXT F9-LINK F10-SAVE F11-LAST REV ENTER-INQ CL-EXIT
RECORD SAVED
  
```

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

**Procurement Method** should be **TOR** for Task Order Release.

**Category of Work** should be one of the following: ITS – Information Technology Services, ITE – Information Technology Hardware or ITW - Information Technology Software. Choose one that best represents your total PORFP.

**Commitment\$:** should be the 25% of the total dollar amount of Functional Area 2 and 3.

The **Description** field needs to be updated with the functional area of this purchase. Remove any other information that is left in this field by pressing your delete or end keys on your computer keyboard.



## ADPICS – Reference BPO Process DoIT Training Department

Some additional 2353 updates that must be made:

- Award date: Date agency plans on submitting to DoIT Procurement
- Award Auth: DoIT (DIT)
- MBE Goal: defaults to 25%. If necessary, this can be modified.
- 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    03/24/2011    9:43 AM
LINK TO:                  BLANKET PURCHASE ORDER

                                EPT   : R00                NOTE PAD      : N
                                ID 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 :          20,000.00    EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT:          10,000,000.00 EXPIRATION DATE : 03/30/2015
REMAINING VALUE :          20,000.00    FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER      PHONE: 4102607778 EXT:
VENDOR: 1161337624 VERIZON
ADDRESS         :          PO BOX 101956
                  ATLANTA, GA 30392

MULTI-VENDOR    : N
MULTI-YEAR      : Y          COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: N
RENEWAL         :          OPTIONS        :
ORIGINAL BPO    : 060B1400053    OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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

```

PCHL2343 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/24/2011  9:44 AM
LINK TO:                  BLANKET PURCHASE ORDER SECURITY      PAGE 00 OF 00

BPO/CONTRACT ID : R00B1400004
DEPARTMENT      : R00      TRAINING DEPARTMENT      CALL AUTHORIZATION
SEL  USER      USER NAME      AMOUNT

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
RECORD DOES NOT EXIST, PLEASE TRY AGAIN
  
```

**DEPARTMENT** - Enter the department ID allowed to make releases against this blanket purchase order. Wildcards are allowed in this field by using asterisks (\*). For example, if the DEPARTMENT field contained "R00\*\*", this would indicate that all departments that started with "R00" followed by up to 2 additional characters would be able to make releases against the blanket purchase order.

**USER** - Wildcards are allowed in this field by using asterisks (\*). Eight asterisks in this field would indicate all users within the specified department are authorized to release against the blanket purchase order. (You may enter the user ID of all users allowed to make releases against this blanket purchase order, but it is highly NOT recommended. This is too limiting to an agency.)

**CALL AUTHORIZATION AMOUNT** - Enter a numeric call authorization amount for each user. This amount limits the specified user to this amount for each release.

# ADPICS – Reference BPO Process DoIT Training Department

## Agency BPO Security

```
PCHL2343 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/24/2011   9:47 AM
LINK TO:                  BLANKET PURCHASE ORDER SECURITY      PAGE 01 OF 01

BPO/CONTRACT ID : R00B1400004
DEPARTMENT       : R00*****
SEL  USER              USER NAME              CALL AUTHORIZATION
*****          *** ALL USERS AUTHORIZED ***          10,000.00

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    03/25/2011  12:59 PM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD     : N
                                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   :      20,000.00    EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT  :    10,000,000.00  EXPIRATION DATE : 03/31/2015
REMAINING VALUE   :      20,000.00    FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER          PHONE: 4102607778 EXT:
VENDOR: 1161337624 VERIZON
ADDRESS           :   PO BOX 101956
                  :   ATLANTA, GA 30392
MULTI-VENDOR     : N
MULTI-YEAR       : Y   COMMODITY CTRL (F/P): F LEVEL (1/2/3):  MINORITY SUB: N
RENEWAL          :                   OPTIONS      :
ORIGINAL BPO     : 060B1400053        OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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 SELEC F12-SEL SUB ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL, TRANSACTION READY FOR UPDATE
  
```

If your PORFP 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   03/25/2011   1:05 PM
LINK TO:                SUBCONTRACTOR ENTRY                PAGE 01 OF 01

BPO/CONTRACT ID: R00B1400004   CONTRACT AMOUNT:      20,000.00 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    03/25/2011    1:05 PM
LINK TO:                  SUBCONTRACTOR ENTRY                PAGE 01 OF 01

BPO/CONTRACT ID: R00B1400004    CONTRACT AMOUNT:      20,000.00 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    03/26/2011    2:14 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
        SYSTAMODULE 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      04/05/2011      1:32 PM
LINK TO:                  SUBCONTRACTOR ENTRY                          PAGE 01 OF 01

BPO/CONTRACT ID: R00B1400004      CONTRACT AMOUNT:      20,000.00 ACTION IND: P
TOTAL PAID:
S  VENDOR ID      VENDOR NAME      VENDOR STATUS CODES      SUBCONTRACT AMOUNT
DESCRIPTION                                     MBE              PG              002
- 1521668212      SYSCOM SERVICES INC MBE      MO      RB 001      1,000.00 ←
- 1521672115      A&T ASSOCIATES INC MBE      PG              002      250.00 ←
-
-
-
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**. If you receive the message 'Record already exists on file, **PRESS F10 TO REPLACE**'. Press **F10-SAVE** again. You should see the message - **SUBCONTRACTOR RECORD(S) SAVED**

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

NOTE: Subcontractor amount should be 25% of the total dollar amount of Functional Area 2 and 3.

# ADPICS – Reference BPO Process DoIT Training Department

## Posting Your Document

```
PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/25/2011      1:24 PM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD       : N
                                BID ID  :                  DGS BPO (Y/N): N
                                INTERFACE TYPE : BP          DBM BPO (Y/N): N
                                AWARD   :                  DOIT BPO (Y/N): N
GSA CONTRACT NO :
CONTRACT AMOUNT :          20,000.00  EFFECTIVE DATE : 02/01/2011
EST CONTRACT AMT:    10,000,000.00  EXPIRATION DATE : 03/31/2015
REMAINING VALUE :          20,000.00  FISCAL EFF DATE : 02/01/2011
BUYER ID: RB13 NAME: YOUR AGENCY BUYER      PHONE: 4102607778 EXT:
VENDOR: 1161337624 VERIZON
ADDRESS      :      PO BOX 101956
              :      ATLANTA, GA 30392
MULTI-VENDOR : N
MULTI-YEAR   : Y      COMMODITY CTRL (F/P): F LEVEL (1/2/3):  MINORITY SUB: Y
RENEWAL      :
ORIGINAL BPO : 060B1400053  OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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
```

Before posting your document, remove the 'EST CONTRACT AMT' and press **F10-SAVE**.

**NOTE: BE SURE YOU VERIFY THE FISCAL AND EFFECTIVE DATE BEFORE POSTING.**

# ADPICS – Reference BPO Process

## DoIT Training Department

### Posting Your Document

```

PCHL2342 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      03/29/2011  12:00 PM
LINK TO:                  BLANKET PURCHASE ORDER

                                DEPT   : R00                NOTE PAD    : N
                                BID ID  :                  DGS BPO   (Y/N): N
                                INTERFACE TYPE : BP          DBM BPO   (Y/N): N
ACTION INDICATOR: P        AWARD    :                  DOIT BPO  (Y/N): N
STATUS              : POST        POST DATE   : 03/29/2011
GSA CONTRACT NO :                EFFECTIVE DATE : 03/29/2011
CONTRACT AMOUNT  : 20,000.00     EXPIRATION DATE : 03/31/2015
EST CONTRACT AMT:                FISCAL EFF DATE : 03/29/2011
REMAINING VALUE  : 20,000.00
BUYER ID: RB13 NAME: YOUR AGENCY BUYER      PHONE: 4102607778 EXT:
VENDOR: 1161337624 VERIZON
ADDRESS          : PO BOX 101956
                  ATLANTA, GA 30392
MULTI-VENDOR    : N
MULTI-YEAR      : Y      COMMODITY CTRL (F/P): F LEVEL (1/2/3): MINORITY SUB: Y
RENEWAL         :                OPTIONS      :
ORIGINAL BPO   : 060B1400053      OPTION MAX:          ORIGINAL AMT: 10,000,000.00

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.

After your reference BPO has been posted, you can now create Purchase Order releases against it. We suggest you use a Direct Purchase Order for your PO releases. Direct Purchase Order instructions are available later in this document.

# 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 15<sup>th</sup> 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

## Creating a Direct Purchase Order Release

```
PCHL2360 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      04/05/2011      1:53 PM
LINK TO:                   DIRECT PURCHASE ORDER      GRAPHICAL PRINT:  (Y/N)
PRINTER ID: NEOP          VENDOR CHG: Y  NOTE:      PRINT SWITCH:  (R/C)
PURCHASE ORDER :         DEPT: R00      INTF TYPE : DP   CREATE:
PURCHASING TYPE: DP      MATCH TYPE:      EFF DATE:      UPDATE:
ACTION IND   : N  WAREHOUSE:  BUYER:      FILTER IND:    POST:
CONTRACT AMOUNT:         REMAINING BAL:      STATUS:
VENDOR       :          EXPEDITOR   :
ADDRESS      :          TRACK CODE  :
              :          DATE       :
              CITY:          ST:      ZIP:
DELIVER TO NAME: SERVICE DESK          BPO ID :
ADDRESS       : 45 CALVERT ST          EXPR DATE:
              SECOND FLOOR          FOB POINT: DEST
              CITY: ANNAPOLIS          ST: MD ZIP: 21401
BILL TO NAME   :          BILL TO ADDRESS CODE:      QUOTE:
DIST METHOD: S  DELIVERY DATE:          DISC TERMS: NET      SUBCONTR:
SF AGY YR INDEX PCA  OBJ  AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT

F1-HELP F2-COPY F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS F9-LINK F10-SAVE F11-VIEW ACCT F12-PRINT ENTER-INQ CL-EXIT
DIRECT PO DOES NOT EXIST, PLEASE TRY AGAIN
```

Once your Reference BPO is completed, you are ready to create a Direct Purchase Order release. Link to the 2360 Direct Purchase Order screen.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Creating a Direct Purchase Order Release

```

PCHL2360 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  04/05/2011  1:53 PM
LINK TO:                  DIRECT PURCHASE ORDER      GRAPHICAL PRINT:  (Y/N)
PRINTER ID: NEOP          VENDOR CHG: Y  NOTE:       PRINT SWITCH:  (R/C)
PURCHASE ORDER :         DEPT: R00      INTF TYPE : DP   CREATE:
PURCHASING TYPE: DP      MATCH TYPE:    EFF DATE:    UPDATE:
ACTION IND   : N  WAREHOUSE:    BUYER:      FILTER IND:    POST:
CONTRACT AMOUNT:        REMAINING BAL:    STATUS:
VENDOR       :
ADDRESS      :
CITY:
DELIVER TO NAME: SERVICE DESK          BPO ID : r00b1400004
ADDRESS      : 45 CALVERT ST          EXPR DATE:
              SECOND FLOOR            FOB POINT: DEST
CITY: ANNAPOLIS                      ST: MD ZIP: 21401
BILL TO NAME :
DIST METHOD: S  DELIVERY DATE:        DISC TERMS: NET    SUBCONTR:
SF AGY YR INDEX PCA  OBJ  AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3    PERCENT

F1-HELP  F2-COPY   F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS  F9-LINK F10-SAVE  F11-VIEW ACCT F12-PRINT  ENTER-INQ CL-EXIT
DIRECT PO DOES NOT EXIST, PLEASE TRY AGAIN
  
```

Tab to the BPO ID field and enter in your reference BPO that was created from the original PBX III BPO and press **F10** to bring forward the BPO information.

Enter your match type and press **F10**.

# ADPICS – Reference BPO Process

## DoIT Training Department

### Creating a Direct Purchase Order Release

```

PCHL2360 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      04/05/2011  2:22 PM
LINK TO:                  DIRECT PURCHASE ORDER      GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NEOP          VENDOR CHG: Y NOTE:      PRINT SWITCH: R (R/C)
PURCHASE ORDER :         DEPT: R0013      INTF TYPE : DP      CREATE:
PURCHASING TYPE: DP      MATCH TYPE: AB      EFF DATE: 04/04/2011  UPDATE:
ACTION IND   : N      WAREHOUSE:      BUYER:      FILTER IND:      POST:
CONTRACT AMOUNT:          REMAINING BAL:          STATUS:
VENDOR       : 1161337624 VERIZON          EXPEDITOR   :
ADDRESS      : PO BOX 101956              TRACK CODE  :
:                                                  DATE       :
CITY: ATLANTA          ST: GA ZIP: 30392
DELIVER TO NAME: SUSAN RUTHERFORD          BPO ID : R00B1400004
ADDRESS      : 45 CALVERT ST              EXPR DATE:
:                                                  FOB POINT: DEST
CITY: ANNAPOLIS          ST: MD ZIP: 21401
BILL TO NAME :          BILL TO ADDRESS CODE:          QUOTE:
DIST METHOD: S      DELIVERY DATE: 12/25/2011  DISC TERMS: NET      SUBCONTR:
SF AGY YR INDEX  PCA  OBJ  AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3      PERCENT
r00 11          10015      0808

F1-HELP F2-COPY F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS F9-LINK F10-SAVE F11-VIEW ACCT F12-PRINT ENTER-INQ CL-EXIT
SINGLE ACCOUNTING LINE REQUIRED, RECORD NOT UPDATED
  
```

Enter in the delivery date and accounting information. Remember, the delivery date must be greater than the current date and should be far enough in the future to compensate for the document being routed through approval paths.



# ADPICS – Reference BPO Process

## DoIT Training Department

### Direct Purchase Order – Selecting a Commodity

```

PCHL2348 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY    04/05/2011    3:26 PM
LINK TO:                  BLANKET PURCHASE ORDER DETAIL

CONTRACT ID : R00B1400004    REMAINING VALUE:      20,000.00 ALL:    I/D:
VENDOR ID   : 1161337624    VERIZON
MULT VENDORS: N (Y/N)      F/P:    AMOUNT:      PCT:
S COMMODITY ID  LINE ORIG-LINE QTY AVLBL          UNIT COST    TOTAL AVAIL
COMMODITY DESCRIPTION
s 99789-PBX181    0004    0004                                15,000.00
PBX 111,FUNCTIONAL AREA 1- HARDWARE, SOFTWARE, AND LICENSES
99789-PBX183    0007    0006                                5,000.00
PBX 111,FUNCTIONAL AREA 3- -TIME & MAINTIERIAL LABOR

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 system advances you to the 2348 Blanket Purchase Order Detail screen. Tab to the first commodity you wish to purchase and type the letter **s** in the select column and press **F6-RETURN** to return the selected commodity back to your direct purchase order.



# ADPICS – Reference BPO Process

## DoIT Training Department

### Direct Purchase Order – Selecting a Commodity

```

PCHL2365 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      04/05/2011   3:54 PM
LINK TO:                  DIRECT PURCHASE ORDER DETAIL ENTRY
PURCHASE ORDER: R00P1400010  LINE NO.: 002  BUYER: N/A          WHSE :
COMMODITY       : 99789-PBX183  TIME AND MATERIAL      BPO LINE NO: 0007
PART NO        :
QUANTITY       : 20              STATE TAX :          LOCAL TAX :
PURCHASE U/M   : hr             UNIT COST: 25.00      TOTAL COST:          0.00
BLOCK FUNCTION: (SPEC ID TO COPY, ISRT, DLET, DUP)
SPECIFICATION INFO          BLOCK 001 OF 001
Installation of 10 phones in building 1 maintenance area. Not to
exceed 20 hours.
<
<
<
<
<
<
<
<
<
<
SPEC IDS:
F1-HELP F2-SEL COMM F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-PRIOR BLK
F8-NEXT BLK F9-LINK F10-SAVE F11-BLOCK FUNC F12-LINE ACNTG
ENTER-INQUIRE CL-EXIT
  
```

Create your next line and add the detail information and press F10-SAVE. If there are no additional lines to enter, press escape to return to the header 2360 screen. You can press F6-VIEW DOC to view your document and double check your work.

```

PCHL2346 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      04/05/2011   4:18 PM
LINK TO:                  PURCHASE ORDER/CONTRACT DETAILS
PO/CONTR ID: R00P1400010  ITB/BID ID:
TOT AMT: 2,000.00
WAREHOUSE:
S  REQ  LINE NO U/M  QUANTITY  UNIT COST  %DCT TAXES  TOTAL
COMM ID/PART NO  COMM NAME/PART NAME
R00P1400010 001 EA  10.00  150.0000  1,500.00
99789-PBX181  HARDWARE, SOFTWARE
R00P1400010 002 HR  20.00  25.0000  500.00
99789-PBX183  TIME AND MATERIAL

F1-HELP      F2-SELECT    F4-ADD LINE      F5-NEXT      F6-SPECS
F7-PRIOR PAGE F8-NEXT PAGE  F9-LINK          ENTER-INQUIRE CL-EXIT
INQUIRY SUCCESSFUL
  
```

# ADPICS – Reference BPO Process DoIT Training Department

## Direct Purchase Order Release – Additional Elements

```

PCHL2360 V4.1 MD TRN   ADVANCED PURCHASING/INVENTORY   04/05/2011  4:19 PM
LINK TO:                DIRECT PURCHASE ORDER          GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NEOP        VENDOR CHG: Y NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P1400010 DEPT: R0013   INTF TYPE : DP   CREATE: 04/05/11
PURCHASING TYPE: DP    MATCH TYPE: A2   EFF DATE: 04/04/2011 UPDATE: 04/05/11
ACTION IND   : N   WAREHOUSE:          BUYER:          FILTER IND:          POST:
CONTRACT AMOUNT:      2,000.00 REMAINING BAL:      2,000.00 STATUS: NOPT
VENDOR       : 1161337624 VERIZON                EXPEDITOR   :
ADDRESS      : PO BOX 101956                      TRACK CODE  :
                                                    DATE       :
CITY: ATLANTA                                ST: GA ZIP: 30392
DELIVER TO NAME: SUSAN RUTHERFORD              BPO ID : R00B1400004
ADDRESS      : 45 CALVERT ST                   EXPR DATE:
                                                    FOB POINT: DEST
CITY: ANNAPOLIS                             ST: MD ZIP: 21401
BILL TO NAME :                               BILL TO ADDRESS CODE:   QUOTE: N
DIST METHOD: S   DELIVERY DATE: 12/25/2011   DISC TERMS: NET        SUBCONTR: N
SF AGY YR INDEX PCA  OBJ  AOBJ GRANT/PH  PROJ/PH AG1 AG2 AG3   PERCENT
01 R00 11      10015      0808

F1-HELP F2-ADD ELE F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-VEN LST
F8-QUOTE F9-LINK F10-SAVE F11-SEL ACCT F12-SEL SUB ENTER-INQ CL-EXIT
  
```

Additional Elements will need to be entered before posting your document. Your F2 key should display **F2-ADD ELE**. If it does not, press the **F4-OTHER** key to change the functionality of the F2 key.

Press **F2-ADD ELE** to view the Additional Elements screen.

# ADPICS – Reference BPO Process DoIT Training Department

## Direct Purchase Order Release – Additional Elements

```

PCHL2356 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  04/05/2011  4:40 PM
LINK TO:                   PURCHASE ORDER ADDITIONAL ELEMENTS

PURCHASE ORDER ID : R00P1400010          AMOUNT :          2,000.00
VENDOR NO         : 1161337624          VERIZON

LOCATION           :                      SBR :
PROCUREMENT METHODS : R
CATEGORY OF WORK  : ITS      NON VISUAL ACCESS : N
AWARD AUTHORITY   : DIT      HIRING SERVICES  : N
MBE WAIVER: N    MBE WAIVER %: 0.00  MBE GOAL %: 25.00
RECYCLED CONTENT-PRE:  POST:      COMMITMENT $: 125.00
DESC:  INSTALLATION OF 10 NEW PHONE FOR BUILDING 1 MAINTENCE AREA

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
    
```

**Procurement Method** should be **R** for Release.

**Category of Work** should be one of the following: ITS – Information Technology Services, ITE – Information Technology Hardware or ITW - Information Technology Software. Choose one that best represents your total PORFP.

**Commitment\$:** should be the 25% of the total dollar amount of Functional Area 2 and 3.

The **Description** field needs to be updated with the functional area of this purchase.

Once this has been entered, press **F10-SAVE** to overwrite and save this screen. Press **Escape** to exit to the 2360 screen.

# ADPICS – Reference BPO Process DoIT Training Department

## Direct Purchase Order Release – Posting Your Document

```

PCHL2360 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY      04/05/2011  4:44 PM
LINK TO:                  DIRECT PURCHASE ORDER      GRAPHICAL PRINT: Y (Y/N)
PRINTER ID: NEOP          VENDOR CHG: Y NOTE: N PRINT SWITCH: R (R/C)
PURCHASE ORDER : R00P1400010 DEPT: R0013 INTF TYPE : DP CREATE: 04/05/11
PURCHASING TYPE: DP      MATCH TYPE: A2 EFF DATE: 04/04/2011 UPDATE: 04/05/11
ACTION IND   : P WAREHOUSE: BUYER: FILTER IND: POST:
CONTRACT AMOUNT: 2,000.00 REMAINING BAL: 2,000.00 STATUS: NOPT
VENDOR       : 1161337624 VERIZON EXPEDITOR :
ADDRESS      : PO BOX 101956 TRACK CODE :
              : DATE :
              CITY: ATLANTA ST: GA ZIP: 30392
DELIVER TO NAME: SUSAN RUTHERFORD BPO ID : R00B1400004
ADDRESS      : 45 CALVERT ST EXPR DATE:
              : FOB POINT: DEST
              CITY: ANNAPOLIS ST: MD ZIP: 21401
BILL TO NAME : BILL TO ADDRESS CODE: QUOTE: N
DIST METHOD: S DELIVERY DATE: 12/25/2011 DISC TERMS: NET SUBCONTR: N
SF AGY YR INDEX PCA OBJ AOBJ GRANT/PH PROJ/PH AG1 AG2 AG3 PERCENT
01 R00 11 10015 0808

F1-HELP F2-COPY F3-DELETE F4-OTHER KEYS F5-NEXT F6-VIEW DOC F7-SELECT VEN
F8-SEL TERMS F9-LINK F10-SAVE F11-VIEW ACCT F12-PRINT ENTER-INQ CL-EXIT
MBE GOAL PCT > ZERO - F12 SEL SUB OR F10 TO OVERRIDE
    
```

Post your document and it will be submitted into the approval path of your Agency. After approved by your agency, the document will be automatically submitted to DoIT. DoIT will final approval/post your document.

Press **F10** to over ride the MBE goal at the bottom of the screen.

# 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      0222
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

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

There are two reasons. The first reason is 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.

The second 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.

### What happens I accidentally deleted the vendor from my reference BPO? How do I add it back?

You should be able to type over the current vendor on the header and press **F10-SAVE** to make your change. See example below. NOTE: The vendor id **MUST** be on the original BPO. If there is a mail code then you must include this also.

```
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.

# ADPICS – Reference BPO Process DoIT Training Department

## 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.

## 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.

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

```

PCHL2356 V4.1 MD TRN      ADVANCED PURCHASING/INVENTORY  04/11/2011  1:02 PM
LINK TO:                  PURCHASE ORDER ADDITIONAL ELEMENTS

PURCHASE ORDER ID :  R00P1400010      AMOUNT :          2,000.00
VENDOR NO         :  1161337624      VERIZON

LOCATION           :                    SBR :
PROCUREMENT METHODS :  R
CATEGORY OF WORK  :  ITS      NON VISUAL ACCESS :  N
AWARD AUTHORITY   :  DIT      HIRING SERVICES   :  N
MBE WAIVER: N     MBE WAIVER %:    0.00  MBE GOAL %:  25.00
RECYCLED CONTENT-PRE:  POST:      COMMITMENT $:    125.00
DESC:  INSTALLATION OF 10 NEW PHONE FOR BUILDING 1 MAINTENCE AREA

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



## ADPICS – Reference BPO Process DoIT Training Department

**Category of Work** should be one of the following: ITS – Information Technology Services, ITE – Information Technology Hardware or ITW - Information Technology Software. Choose one that best represents your total PORFP.

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

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**.



## ADPICS – Reference BPO Process DoIT Training Department

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

It could be the invoice date you are entering on the 2355 screen. Reports are run monthly and depending on the invoice date and the time it was entered into the system, it may not be captured during the current monthly reporting cycle. However, it will be included in the yearly reporting cycle. **NOTE:** If you enter information from a previous FY, you lose the reporting for that contract for that particular time period since the prior FY would be considered closed.

**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. **NOTE: Even though the examples on the following pages refer to the CATS contract, they are applicable to the PBX III contract.**

# 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
  
```

```

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
  
```

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      TOTAL
  COMM ID/PART NO      COMM NAME/PART NAME
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
  
```