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Department of Information Technology 07/01/2010
Telephone Service Request (TSR) Process

Effective July 1, 2010, a new Telephone Service Request, (TSR) process will be in effect. There are two manuals to assist you in this new process. Direct Purchase Order Processing and Requisition / Purchase Order Processing. Both of these manuals also include Change Orders.

The following pages will reflect the new procedures needed to accomplish this process.

In the past, DoIT created Purchase Order for agencies upon submission of a requisition to the 060T1 ADPICS mailbox. DoIT was responsible for printing and sending the Purchase Order to the appropriate vendor.

The new process will give agencies the ability to create their own purchase orders. The suggested and preferred method is using the Direct Purchase Order instead of the use of Requisitions to Purchase Orders. A Direct Purchase Order completely bypasses the requisition process. Agencies can, however, continue to create Requisitions and Purchase Orders. It should be noted that changes to these documents are timely and cumbersome. For this reason, we suggest the Direct Purchase order method.

Once the agency creates the TSR Purchase Order or Purchase Order Change Order, the documents should go through an Agency internal approval path. After the Agency approval path is complete, the TSR Purchase Order or Purchase Order Change Order will be directed to DoIT for final approval. DoIT will be the final poster.

If there is an issue with your request, the TSR Purchase Order or Purchase Order Change Order will always be rejected back to the Initiator. DoIT Telecommunications Department will enter information in the note pad of the Purchase Order or Change Order to ensure that the initiator will be able to make the necessary corrections. After corrections are made, the initiator will submit the document back into the approval process.

It is the Agency’s responsibility to monitor their Purchase Order or Change Orders to determine if the document has been posted. You can monitor on the ADPICS 2340, 2360, 9230 or 2410 screens.
Things you need to know before creating a TSR after July 1, 2010

Decide within your agency if the Agency Telecommunication Coordinators or your procurement department will be creating the Purchase Orders.

If the Telecommunication Coordinators will be creating the purchase orders, security must be obtained. Currently, some Telecommunication Coordinators (TCs) have only the capability to create requisitions. You must see your FMIS Security Officer to have your security modified. If you do not know who that is, contact the DoIT Service Desk for assistance or go to http://doit.maryland.gov/support/Pages/ASMSecurityForms.aspx for a complete listing of Agency Security Officers and Coordinators.

Agencies are responsible for maintaining their own internal approval paths for TSR’s. Previous TSR approval paths will not necessarily be valid.

No specific Doc Type is necessary for TSR processing.

**Agencies are responsible for printing out the purchase order and submitting to correct vendor. Vendor contact and faxing information will be available on each of the DoIT Telecommunications BPO’s websites.**

Existing Blanket Purchase Orders have all been expired and new Blanket Purchase Orders have been created. Refer to the crosswalk at the end of this manual and also on our website (link below). http://doit.maryland.gov/contracts/Pages/TelecommContracts.aspx

There are several way of processing a TSR. Location and Agency drives which process you will use. Some agencies may utilize all of the processes. Refer to our e Learning module on the DoIT website for further clarification. The link to the training website is http://asm.dbm.state.md.us/training/. Call the Service Desk for a logon ID and password.
Requisition

After logging into FMIS from the ADPICS Main Menu either link to the 2100 screen or press F2 to advance you to the Procurement Transaction menu.

Press F1 to advance to Requisition Processing.
Requisition BPO ID

When you create your Requisition, you will need to choose the correct BPO for the good or services you are requesting.

A listing of current BPO’s are at the end of this manual and also on the DoIT website. Visit our website at - doit.maryland.gov for additional information. Website information is most current.

Enter your BPO and press F10 SAVE to pull your information forward.
Requisition Doc Types

If your agency decides to continue using requisitions to create a TSR, then you may want to continue using the previously established Document Types related specifically to the TSR process. These were the N1 – N9, T1 – T9 and Q1 – Q9. By using these document types your requisitions will follow previously establish agency approval paths, excluding DoIT.

You may let the document type default to RQ. Be aware, which ever document type you choose to use, approval paths should be set up prior to placing your requisition into the approval process.

It is important to note there may be TSR approval paths that are internal to your agency currently set up. DoIT modified existing paths and deleted any indication of the 060T1 mailbox.
Requisition Processing

The following information will need to be entered on your Requisition header 2100 screen:

Enter the appropriate Buyer Code if necessary.

Enter the appropriate accounting information.

Press F10 to Save.
Selecting the Commodity

Once F10 SAVE is pressed, the system advances you to the 2110 Requisition Detail Entry. A Requisition ID has now been established. The cursor should be blinking on the commodity field. Press F2 – SEL COMM to select the appropriate commodity from the BPO you choose.
Selecting the Commodity - continued

The system advances you to the **2348 Blanket Purchase Order Detail screen**. Tab to the commodity line item you which to choose and tag the line item with the letter S.

Press F6-RETURN to return this line item back to your requisition.

Be sure that the screen shows 2348 Blanket Purchase Order Details screen. If it does not, chances are the BPO was not entered on the header screen for the Requisition. Your commodities MUST be selected from the 2348 screen. If you have questions, contact the Service Desk.
Selecting the Commodity - continued

Enter the appropriate Quantity, U/M and Unit Cost for the item. Specific instructions should be noted in the Specifications Info section. Press F10 to save your entry.

Once F10 SAVE is pressed, the system advances you to line number 002. Enter additional requests, if necessary, and press F10 to save your entry. If there are no additional requests, then press Esc to return to the 2100 Requisition Header Entry page.
Requisition Specification/Terms

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Specific Terms must be added to your document before Posting or placing into an approval path. From the Header page, press F8-SEL TERMS.
Requisition Specification/Terms - continued

The system takes you to the 2126 Specifications/Terms Selection screen. You will need to insert a predefined set of terms into your document.

Press F4-BLOCK FUNC to move your cursor to the Block Function field.
Enter the name of the predefined (or saved) set of terms in the Block Function field. The name of this term is **fts1**. Press F4-BLOCK FUNC again to bring the file forward.
Enter the appropriate information and press F10-SAVE when complete. Press Escape to return to the Requisition Header Entry screen.
Adding a Note to Your Requisition

You have the ability to attach a note to your document. A note assist you in keeping track of specific items related to the TSR document. If a document has a note attached to it, it will display the letter Y in the NOTE PAD field.

From the header page, press your Home key to move your cursor to the LINK TO field. Enter the word note and press F9-LINK to advance to the Electronic NOTE PAD 9100 screen.
Adding a Note to Your Requisition - continued

From the 9100 screen enter in any information you feel is pertinent for this document and press F10 to Save.

Once F10-SAVE is pressed your note pad entry changes to all capital letters and the message NOTEPAD ENTRY SAVED appears at the bottom of your screen. Press Escape to return to the Requisition Header Entry screen.
Adding a Note to Your Requisition - continued

Once the note pad has been saved, the NOTE PAD field will display the letter Y for ‘Yes, there is a note attached to this document.’ You can read the note pad at anytime, just by linking to the 9100 screen or by placing the word NOTE in the LINK TO field and pressing F9-LINK.
Posting Your Requisition

Your document is now ready to Post, or place into the Approval path depending on your Agency. A good habit to get into before posting is to check the F6-VW DOC, F8-SEL TERMS and F11-VW ACCT. This is a way of verifying the information you are requesting to order is accurate and the accounting information you are using is correct.

After you have double checked these areas, tab to the ACTION IND and type over the N with the letter P for Post and press F10-SAVE.

Depending on your Agency’s approval path and your security, after posting your requisition may automatically turn into a purchase order. If that is the case, skip over the next page, ‘Monitoring Your Requisitions’ and move to the following page, ‘Purchase Order Additional Elements.’

Once a requisition that is buying or releasing off of a Blanket Purchase Order (BPO) final posts, it automatically generates a Purchase Order. If you are not the final poster, you will need to monitor your requisitions to determine when they have posted.

Monitoring can be done by using the 2410 Requisitions By Department (see location of Department above), 9220 Document Authorization Tracking – Active or 9230 Document Authorization Tracking – Archive.
Monitoring Your Requisitions

You will be able to monitor your requisitions and see when a purchase order has been created by using the 2410 Requisitions By Department screen.

Enter the department that you used to create your requisition in the Department Field. If you are unsure what department you used, link back to the 2100 Requisition Header to verify.

The STATUS field should be set to POST.

The date range defaults to the past 30 days. You can change this if you choose.

Press Enter to inquire on all the requisitions in the specified department created within the designated date range.

If you can't locate your document it may be on another page. F8-NEXT PAGE advances you forward one page at a time. F7-PRIOR PAGE will take you back one page at a time.

If a Purchase Order has been created, it will display in the PO/ITB PO column and the TYPE column will display PO.

Make a note of the purchase order ID so it can be viewed on the 2340 screen.
Purchase Order Additional Elements

The 2340 is the Purchase Order screen in ADPICS. Depending on your individual security, you may have the ability to create a Purchase Order directly once the requisition has been posted.

If not, you may have to link to the 2340 and retrieve the purchase order that was created from your requisition.

Before the purchase order can be posted, additional elements must be filled in on the additional elements screen. This is procurement information pertaining to the way in which the contract was actually procured.

From the Purchase Order Header 2340 screen, press F2-ADD ELE to advance to the 2356 screen.

If you do not have F2-ADD ELE appearing on your header screen, press F4-OTHER to change the functionality of your function keys.
The above Additional Elements 2356 Screen is an example of the correct information that needs to be filled out when you create either a PO or a DPO.

The following fields need to be entered –

1. Procurement Method = R (Release)
2. Category of Work = ITS (Information Technology Services)
3. Non Visual Access = N (No)
4. Award Authority = DIT (Department of Information Technology)
5. Hiring Services = N (No)
6. Description

Press F10-SAVE when the ADDITIONAL ELEMENTS SCREEN has been completed.

Press Escape to return back to the Purchase Order/Contract Header screen.
It should be noted, when a requisition is taken to a Purchase Order neither the note pad nor the terms are carried forward. The information in your note pad will have to be recreated. Adding a note to a Purchase Order is similar to adding a note to a Requisition.

From the header page, press your Home key to move your cursor to the LINK TO field. Enter the word note and press F9-LINK to advance to the Electronic NOTE PAD 9100 screen.
Purchase Order Note Pad - continued

From the 9100 screen enter in any information you feel is pertinent for this document and press F10-SAVE when complete.

Once F10-SAVE is pressed your note pad entry changes to all capital letters and the message NOTEPAD ENTRY SAVED appears at the bottom of your screen. Press Escape to return to the Purchase Order Header Entry screen.
Purchase Order Note Pad - continued

Once the note pad has been saved, the NOTE PAD field will display the letter ‘Y’ for ‘Yes, there is a note attached to this document.’ You can read the note pad at anytime, just by linking to the 9100 screen or by placing the word NOTE in the LINK TO field and pressing F9-LINK.
## Purchase Order Specifications and Terms

Specific Specifications/Terms must be added to your document before Posting or placing into an approval path. Specifications and Terms do not carry forward from the Requisition. From the Header page, press F8-SEL TERMS.
The system takes you to the 2126 Specifications/Terms Selection screen. You will need to insert a predefined set of terms into your document.

Press F4-BLOCK FUNC to move your cursor to the Block Function field.
Purchase Order Specifications and Terms - continued

Enter the name of the predefined (or saved) set of terms in the Block Function field. The name of this term is **ftsr1**. Press F4-BLOCK FUNC again to bring the file forward.
Purchase Order Specifications and Terms - continued

Enter appropriate information and press F10-SAVE when complete. Press Escape to return to the Purchase order Header Entry screen.
Purchase Order Match Type

For both Purchase Orders and Direct Purchase Order documents, a valid Match Type must be entered. Check with your procurement and accounting departments to determine which match type you should use. For this example we are using AB, which is a progressive payment match type. NOTE: This is for our example only – please realize this will most likely change at your agency.

The match type is important because it determines how payments can be made and also determines when a voucher will be created so the bill can be paid. Some match types require receiving reports and some do not. If your agency does not use receiving reports, then you want to make sure you do not choose a match type that requires one.

Additional Match Type information can be obtained on the 1310 screen in ADPICS.

After entering your Match Type press F10-SAVE to save this information to your document.
Your document is now ready to Post, or place into the Approval path depending on your Agency. A good habit to get into before posting is to check the F6-VW DOC, F8-SEL TERMS and F11-VW ACCT. This is a way of verifying the information you are requesting to order is accurate and the accounting information you are using is correct.

After you have double checked these areas, tab to the ACTION IND and type over the N with the letter P for Post and press F10-SAVE.
Your TSR document will be going through your Agency’s approval path and then moving to the DoIT commodity approval path. You will need to monitor your document so you know when it has been final approved (posted). Once final approved, your Agency can print the purchase order and send to the specified vendor.
The ADPICS 9220 Document Authorization Tracking – Active screen will display the exact location your document is residing. This screen displays how many days the document has been in each mailbox.

DoIT will be the last stop, or final approval for the document.

You can also monitor your purchase order to see when it has posed by using the 2455 Purchase Orders By Department screen.

Enter the department that was used to create your Purchase Order in the Department Field.

The date range defaults to the past 30 days. You can change this if you choose.

Press Enter to inquire on all the purchase orders in the specified department created within the designated date range.

If the Purchase Order has been posted, it will be displayed as POST under the STATUS column.
Occasionally a document will be rejected back to the agency. If a document has been rejected, it will appear on your ADPICS Main Menu page at the bottom of the screen. The message also notifies you of the page to link to.
Return Notification Mailbox

From the 9212 Return Notification Mailbox screen you can select a document to view by tabbing to the document and tagging it with the letter S in the select column and pressing F2-SELECT.
Return Notification Mailbox - continued

When F2 is pressed the system takes you to the 2150 Purchase Order Document Inquiry Screen. Press F6-HEADER to transfer to the Purchase Order header 2340 screen.
Purchase Order Rejected Back to Agency

When documents are rejected back to the Agency, link to the NOTE PAD to find out the reason why.

At the LINK TO field type in the word NOTE and press F9-LINK.
The reason a document has been rejected should be in the Note Pad of your document.
Resubmit Purchase Order Back Into Approval Process

After the requested changes have been made, repost your document placing it back in the approval process.

Track your document either on the 2455 screen or the 9230 screens.

Once final approved, your Agency can print the purchase order and send to the specified vendor. Refer to the DoIT website for specific contact information for the TSR vendors.
### BPO CROSS-OVER FOR TSR’s

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Requisition Change Orders

After logging into FMIS from the ADPICS Main Menu either link to the particular Change Order Screen you want to create or press F8 – Change Order Processing Menu to advance to the 8000 Change Order Menu screen.

Press F2 to advance to Requisition Change Menu.
Requisition Change Order Menu

From the 8001 Requisition Change Order Menu, press F1 to advance to the Requisition – Accounting Change 8100 screen.
Requisition - Accounting Change - continued

The Requisition Accounting Change screen (8100) allows the user to create a Change Order that modifies the accounting distribution of a posted Requisition.

**DOC REF:** You will always enter “000” in this field.

**REQUISITION ID:** Enter the requisition ID number of the requisition you want to change.

**LINE NO:** Enter the line number of the requisition you want to change.

If the accounting distribution method is “S” (single) or “P” (percentage), you will always enter “000”. Three zeros “000” indicate that the accounting changes apply to the entire document.

If the accounting distribution method is “M” (multiple), you will enter the line number assigned to the detail entry record that you want to change.

Press **F10-SAVE** to bring forward the requisition information.
Requisition - Accounting Change - continued

Once your document is saved, a Change Order ID is assigned to your document. The system brings forward all the accounting information from the original Requisition.

Make your appropriate accounting change and press F10-SAVE to save your changes.

The screen displays the requisition accounting lines that were entered for the requisition. Notice that each accounting line is repeated. If you press Tab to move through the screen, you will notice that the first time the accounting line is displayed the information is protected. Changes are made on the second line displayed. This enables you to easily see what changes were made.

Notice the MORE ACCTG field in the upper right corner of the screen. If this field displays “Y” (yes), the accounting distribution method is “M” (multiple) and more than six accounting lines have been entered for this requisition detail entry.

If the MORE ACCTG field displays “Y”, press F4-ACCTG to view the additional accounting information. When F4-ACCTG is pressed, the system transfers to the Accounting Change Order Accounting Detail (8101) screen.

Notice that the suffix of the changed accounting line changed to “02” when the change request was saved. Whenever you change the accounting distribution, the system assigns the next sequential suffix. This enables the system to liquidate the encumbrance established by suffix “01”, and create a new encumbrance for suffix “02”.
Once your changes have been made, change the Action IND to P for Post and press F10-SAVE.

Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path. Change Orders on Requisitions DO NOT have to go through DoIT for approval.
Requisition - Commodity Change

From the 8001 Requisition Change Order Menu, press F2 to advance to the Requisition – Commodity Change 8200 screen.
Requisition - Commodity Change

The Requisition Commodity Change screen is used to change the commodity information originally entered on the Requisition Detail Entry screens.

**DOC REF:** You will always enter “000” in this field.

**REQUISITION ID:** Enter the ID of the requisition you wish to change.

**LINE NO:** Enter the line number of the requisition you want to change.

Press **F10-SAVE** to bring forward the requisition information.
Requisition - Commodity Change

Once your document is saved, a Change Order ID is assigned to your document. The system brings forward all the commodity information from the original Requisition.

You can cancel an existing requisition detail entry using this screen. However, if you want to add a line to a posted requisition, access the Document - Commodity Add (8450) screen.

If the accounting distribution method associated with the requisition is “M” (multiple), the amount allocated to each existing accounting distribution line can also be changed using this screen.

To change the commodity information on this screen, type over any displayed information that is not protected. This information is located under the NEW or right side of the screen. If necessary, a new amount should be entered to reflect the change. Press F10 to Save.

Note the message at the bottom of the screen. Press F10-SAVE again to replace and save your change order.
Requisition – Commodity Change

If you forget to enter in the new amount, the system will prompt you with a message -

**NEW AMOUNT NOT NUMERIC**. Once amount is entered, press **F10-SAVE** to save your change order.

Change the Action IND to P for Post and press **F10-SAVE**.
Your change order will be going through your Agency’s approval path and then moving to the DoIT commodity approval path.

Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path. Change Orders on Requisitions **DO NOT** have to go through DoIT for approval.
Direct Purchase Order Change Orders - Commodity Add

From the 8001 Requisition Change Order Menu, press F1 to advance to the Document – Commodity Add 8450 screen.
Requisition – Commodity Add

The Document Change Order Commodity Add Header (8450) screen is used to add another detail line to posted Requisitions or posted Purchase Orders.

**DOCUMENT ID:** Enter the document id that corresponds with the Requisition you want to add a line to.

**DOCUMENT INDICATOR:** Enter the document type you want to add a line to: REQ (Requisition) or POC (Purchase Order).

**DOC REF:** You will always enter “000” in this field.

Press **F10-SAVE** to save the information and transfer to the Document Change Order Commodity Add Detail (8455) **accounting** screen.
Requisition - Commodity Add

To add a commodity to this change order press F2-SEL COMM.

NOTE:
Entering data on this screen is very similar to entering data onto a requisition when the multiple distribution method is used. Screen 8455 has two screen formats that you will use. Initially, you are transferred to the accounting format where the accounting information is entered. Once you enter the required information, you are transferred to the specification format where you can enter specification data. The F12 key allows you to toggle between the two formats.
Requisition - Commodity Add

The system takes you to the Blanket Purchase Order Detail screen of the BPO you are ordering from. Locate a commodity that you want to add to your purchase order. If the commodity you are looking for is not displayed on the screen, use the **F8-NEXT** and **F7-PRIOR** function keys to scroll through the pages.

Be sure that the screen shows 2348 Blanket Purchase Order Details screen. If it does not, chances are you have entered the wrong Requisition number. If you have questions, contact the Service Desk.

When you locate the commodity you want to request, press **Tab** until the cursor is positioned to the left of the commodity name.

Type an “S” next to the commodity name to select it.

Press **F6-RETURN** to transfer the selected commodity to the Commodity Add Detail (8455) accounting screen.
The commodity you choose is returned back to your change order document. You will need to enter the quantity, purchase U/M and unit cost.

**NOTE:**

Enter the amount for each line of accounting. The total for all lines must equal the EST. TOTAL COST or the Change Order will not post. You will receive the above error message if you do not have the amount filled in on the accounting line.

Press **F10-SAVE** to save the commodity information to your change order.
Requisition - Commodity Add

Once **F10-SAVE** is pressed, the system transfers you to the specification side of the screen. Enter the specification information for this commodity and press **F10-SAVE** to save the information to your change order.

Entering data on this screen is very similar to entering data onto a requisition when the multiple distribution method is used. Screen 8455 has two screen formats that you will use. Initially, you are transferred to the accounting format where the accounting information is entered. Once you enter the required information, you are transferred to the specification format where you can enter specification data. The F12 key allows you to toggle between the two formats.
Requisition - Commodity Add

When **F10-SAVE** is pressed the system automatically transfers you to a new screen allow for additional commodities to be added. Press the ESCAPE or CL-EXIT key if there are no additional commodities to add.
The system returns you to the 8450 screen. Tab to the ACTION IND and type over the N with the letter P for Post and press **F10-SAVE**.
Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path. Change Orders on Requisitions DO NOT have to go through DoIT for approval.
Requisition - Document Cancellation

From the 8000 Change Order Menu, press F3 to advance to the Document Cancellation 8500 screen.
Requisition - Document Cancellation - continued

The Document Cancellation (8500) screen is used to cancel posted documents. This screen cancels a posted requisitions, solicitations, bids, purchase orders, invoices, receiving reports or vouchers.

When a document is canceled, all accounting related to the document is liquidated. For example, if you cancel a posted purchase order, the system will liquidate the encumbrance created by that purchase order.

**DOCUMENT ID**: Enter the ID of the document you want to cancel

**DOCUMENT INDICATOR**: Enter the indicator that defines the type of document you are canceling.

**DOC REF**: Enter “000” in this field.

Press **F10-SAVE** to save the information.
Requisition - Document Cancellation - continued

Remember – changes made by the change order do not take effect until after the change order is posted. Change order will be posted after it has gone through the Agency approval path. Change Orders on Requisitions DO NOT have to go through DoIT for approval.