DOIT TRAINING CENTER

OFFICE OF INFORMATION TECHNOLOGY

PBX IV Reference BPO User Guide

Financial Management Information System

DoIT Service Desk
45 Calvert Street
Annapolis, MD 21401
(410) 260-7778
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.

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)

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.

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

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.*

Department of Information Technology
UPDATED 10/2011

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.**

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

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.

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
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.

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.

Department of Information Technology
UPDATED 10/2011

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.

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
```

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.

Department of Information Technology
UPDATED 10/2011

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 DI (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.

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 SERVICESNSES




  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.

Department of Information Technology
UPDATED 10/2011

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.

```
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.

Department of Information Technology
UPDATED 10/2011

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.

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.

Department of Information Technology
UPDATED 10/2011

Deleting Unnecessary Commodities
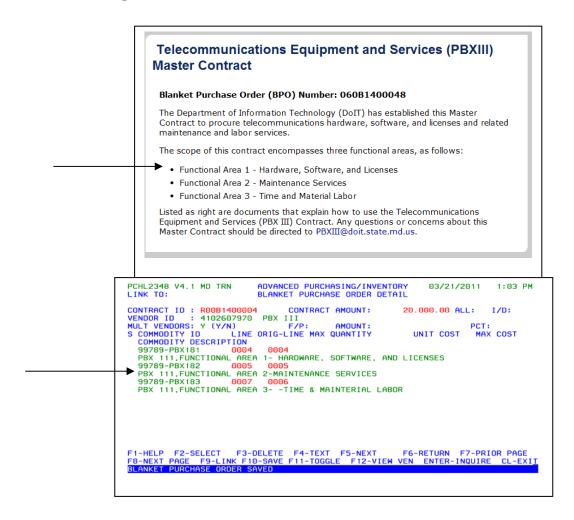
```
PCHL2348 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY   03/24/2011  7:28 AM
LINK TO:                BLANKET PURCHASE ORDER DETAIL

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.

Department of Information Technology
UPDATED 10/2011

Contract Amount

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

CONTRACT ID : R00B1400004      CONTRACT AMOUNT:      20,000.00 AL:   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.

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.

Department of Information Technology
UPDATED 10/2011

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
                                                    D M ADDR
S VENDOR ID  V E N D O R   N A M E                  I C  CODE  AMOUNT RELEASED
   1161337624 VERIZON                                 Y
   1251272662 BLACK BOX CORP OF PA                    Y
   1521382877 CHESAPEAKE TELEPHONE SYSTEMS INC        Y
   1522060067 ALLIANCE TECHNOLOGY GROUP LLC           N
   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
```

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.)

Department of Information Technology
UPDATED 10/2011

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
                                             D M ADDR
S VENDOR ID  V E N D O R   N A M E           I C  CODE  AMOUNT RELEASED
  1161337624 VERIZON                           Y
  1251272662 BLACK BOX CORP OF PA              Y
  1521382877 CHESAPEAKE TELEPHONE SYSTEMS INC  Y
  1522060067 ALLIANCE TECHNOLOGY GROUP LLC     N
  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.

Department of Information Technology
UPDATED 10/2011

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
                                              D M ADDR
S VENDOR ID  V E N D O R   N A M E            I C  CODE  AMOUNT RELEASED
  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
```
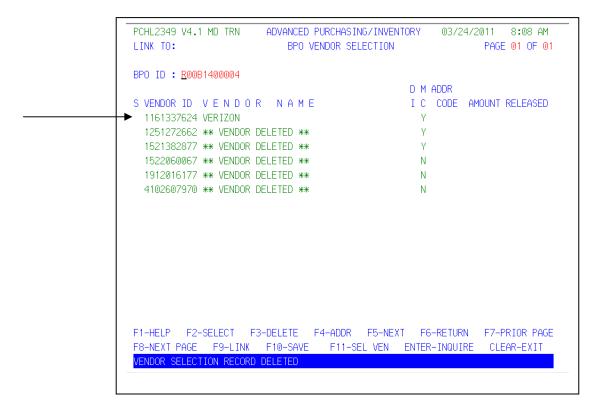
Tab down to the first vendor and type the letter **s** in the select field. Continue selecting the vendors that should not be included on your BPO. Press **F3-DELETE** when this information has been verified.

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

Department of Information Technology
UPDATED 10/2011

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

                                               D M ADDR
S VENDOR ID  V E N D O R   N A M E             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.

Department of Information Technology
UPDATED 10/2011

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
                                               D M ADDR
S VENDOR ID  V E N D O R   N A M E             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.

Department of Information Technology
UPDATED 10/2011

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
                                   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 : 03/30/2015
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
                                          D M ADDR
S VENDOR ID  V E N D O R   N A M E        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
```

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.

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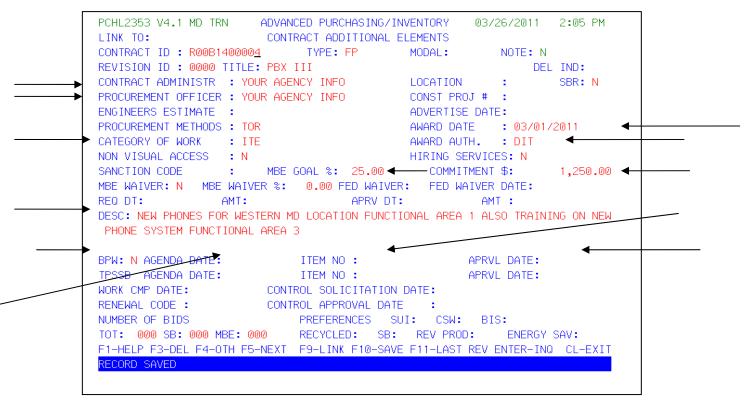
When **F8-ELE** is selected the system links to the 2353 screen.   This screen was copied from the original PBX III BPO when you created the reference BPO and will need to be updated with your agency information. There are also fields that will need to be modified.

Department of Information Technology
UPDATED 10/2011

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      COMMITMENT $:      1,250.00
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.

Department of Information Technology
UPDATED 10/2011

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.

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.

Department of Information Technology
UPDATED 10/2011

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.

Department of Information Technology
UPDATED 10/2011

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*****                          CALL AUTHORIZATION
  SEL   USER                    USER NAME              AMOUNT
        *******    *** 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.

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.

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.

Department of Information Technology
UPDATED 10/2011

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**.

Department of Information Technology
UPDATED 10/2011

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.

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                                                   ACTUAL
_   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.

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
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: 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
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.

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
ACTION INDICATOR: P               INTERFACE TYPE  : BP  DBM BPO  (Y/N): N
STATUS        : POST              AWARD  :             DOIT BPO (Y/N): N
GSA CONTRACT NO :                 POST DATE     : 03/29/2011
CONTRACT AMOUNT :      20,000.00  EFFECTIVE DATE  : 03/29/2011
EST CONTRACT AMT:                 EXPIRATION DATE : 03/31/2015
REMAINING VALUE :      20,000.00  FISCAL EFF DATE : 03/29/2011
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       :                  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. You 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.

Entering Subcontractor Payment Information

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

BPO/CONTRACT ID: R00B9200009    CONTRACT AMOUNT:     50,000.00 ACTION IND: P
                               TOTAL PAID:
S   VENDOR ID    VENDOR NAME        VENDOR  STATUS CODES  SUBCONTRACT AMOUNT
DESCRIPTION                                                 ACTUAL
_   1521668212   SYSCOM SERVICES INC MBE     MO     RB  001      1,000.00


s   1521672115   A&T ASSOCIATES INC  MBE     PG         002      1,000.00



_



_



_

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

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

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

Department of Information Technology
UPDATED 10/2011

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**.

Department of Information Technology
UPDATED 10/2011

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: ROO       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.

Department of Information Technology
UPDATED 10/2011

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 : r00b1400004
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
```

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**.

Department of Information Technology
UPDATED 10/2011

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.

Creating a Direct Purchase Order Release

```
PCHL2365 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    04/05/2011   2:34 PM
LINK TO:              DIRECT PURCHASE ORDER DETAIL ENTRY
PURCHASE ORDER: R00P1400010    LINE NO.: 001   BUYER:            WHSE :
COMMODITY    :                                    BPO LINE NO:
PART NO      :
QUANTITY     :                STATE TAX :      LOCAL TAX :
PURCHASE U/M  :       UNIT COST:         0.0000  TOTAL COST:          0.00
BLOCK FUNCTION:       (SPEC ID TO COPY, ISRT, DLET, DUP)
SPECIFICATION INFO                              BLOCK 001 OF 001
                                                       <
                                                       <
                                                       <
                                                       <
                                                       <
                                                       <
                                                       <
                                                       <
                                                       <
                                                       <

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
PLEASE ENTER DETAILS FOR DIRECT PO LINE
```

The system advances you to the 2365 Direct Purchase Order Detail Entry Screen.   Press **F2-SEL COMM** to select the commodity you will be ordering.

Department of Information Technology
UPDATED 10/2011

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 & 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
```

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.

Department of Information Technology
UPDATED 10/2011

Direct Purchase Order – Selecting a Commodity

```
PCHL2365 V4.1 MD TRN    ADVANCED PURCHASING/INVENTORY    04/05/2011   3:33 PM
LINK TO:              DIRECT PURCHASE ORDER DETAIL ENTRY
PURCHASE ORDER: R00P1400010    LINE NO.: 001   BUYER: N/A        WHSE :
COMMODITY    : 99789-PBX181      HARDWARE, SOFTWARE       BPO LINE NO: 0004
PART NO      :
QUANTITY     : 10              STATE TAX :      LOCAL TAX :
PURCHASE U/M : EA    UNIT COST: 150.00          TOTAL COST:          0.00
BLOCK FUNCTION:      (SPEC ID TO COPY, ISRT, DLET, DUP)
SPECIFICATION INFO                              BLOCK 001 OF 001
10 NEC phones for building 1 maintenance department to be delivered    <
by July 1 as per the porfp request.                                    <
                                                                       <
                                                                       <
                                                                       <
                                                                       <
                                                                       <
                                                                       <
                                                                       <
                                                                       <
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
```

Press F10-SAVE to save line 001 and advance to line 002.

Department of Information Technology
UPDATED 10/2011

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
```

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Department of Information Technology
UPDATED 10/2011

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.

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.

Department of Information Technology
UPDATED 10/2011

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.

Department of Information Technology
UPDATED 10/2011

FAQs

What happens if I accidently 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 accidently 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.

Department of Information Technology
UPDATED 10/2011

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**.

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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            2222
  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.

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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 accidently 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.

Department of Information Technology
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```
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.

Department of Information Technology
UPDATED 10/2011

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

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.**

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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.

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
```

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DoIT Training Department

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

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

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

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

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

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

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

Department of Information Technology
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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
```

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