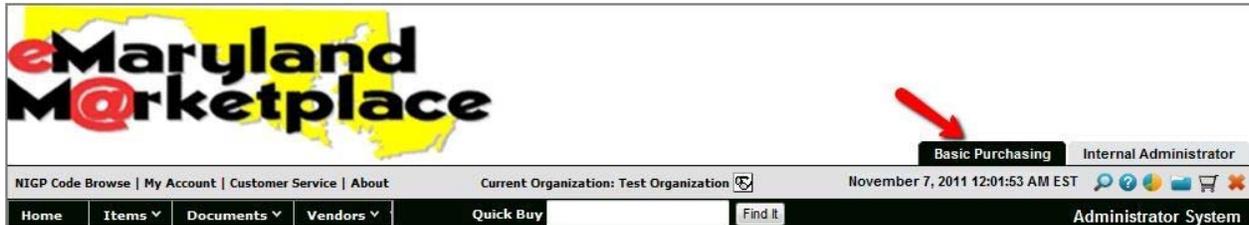


State of Maryland eProcurement Project

- **STEP 1: Login as a Procurement Officer and confirm your role.**
 - If role tabs appear along the top-right, make sure that the **Basic Purchasing** tab is highlighted. If not, click that tab.



Step 1: **Expected Results:** The current screen closes and the “Basic Purchasing” Home page screen appears like the image below.

Step 1: **Actual Results:**

- **STEP 2: Create a new Blanket Purchase Order document**
 - From the toolbars, hover your mouse over **Documents**, then **Purchase Orders**, then click **New**.



- The **Create a New Purchase Order** screen will appear.
- Select the **Create a purchase order from scratch** option.
- Select "Blanket" in the **PO Type of the New Purchase Order** box.
- Click **Continue**.

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- The **General** tab of the New PO document will appear.

Step 2: **Expected Results:** The **General** tab of the New PO document will appear.

Step 2: **Actual Results:**

- **STEP 3: Complete the General tab of the Purchase Order**
 - Click the **General** tab of the Purchase Order document.
 - There are four fields to complete on the top part of the screen:
 - Short Description – The title of the contract
 - Department – The Department that manages the contract.
 - P-Card Enabled – Check if a P-Card can be used to order against this contract.
 - Type Code – Select the appropriate Purchase Type.

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New PO

General | Items | Vendor | Routing | Attachments | Notes | Change Orders | Reminders | Summary

PO Number: _____

Short Description*: _____

Purchaser: System, Administrator

Fiscal Year: 2012

Department*: TEST - Test Department

Location*: TEST - Test Location

P-Card Enabled:

Type Code: _____

Catalog: _____

Entered Date: _____

Print Dest Detail: _____

Release: 0

Status: 3PI - In Progress

Receipt Method: Quantity

PO Type: Blanket

Organization: Test Organization

Print Format*: _____

Release Type: Direct Release

Alternate ID: _____

- Scroll down to the bottom of the screen.
- Complete the fields on the bottom part of the screen, starting with **Match Type**.
- Click **Save & Continue**.

Match Type: _____

Procurement Method*: _____

Category Of Work*: _____

Award Authority*: _____

Contract Type: _____

Multi-Year*: Yes

Option Max: _____

Allow Reference*: Yes

Limit Ref Exp Date: _____

Date Last Updated: 11/10/2011 10:06:18 AM

User last Updated: Administrator System

Save & Continue

- The screen will refresh, and the Purchase Order will have been assigned a number and report a status of "In Progress."

Master Blanket Purchase Order AGENCY12-000006 Status: 3PI - In Progress

General | Items | Vendor | Routing | Control | Attachments | Notes | Change Orders | Reminders | Summary

PO Number: AGENCY12-000006

Short Description*: test

Purchaser: System, Administrator

Fiscal Year: 2012

Release: 0

Status: 3PI - In Progress

Receipt Method: Quantity

PO Type: Blanket

Step 3: Expected Results: The **General** tab is saved, document number is assigned and the status becomes "In Progress."

Step 3: Actual Results:

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- **STEP 4: Enter the contract line-items.**
 - Click on the **Items** tab.
 - A red validation error will appear that there are no items.
 - Click the **Add Item** button on the bottom of the screen.

Master Blanket Purchase Order AGENCY12-000006

General **Items** Routing Control Attachments Notes Change Orders Reminders Summary

General Notes

General Item Information Validation Errors

- This document has no normal/orderable items.

There are no items. Please click 'Add Item' or 'Search Items' below to add an item.

Search Inventory Items Search Items **Add Item** Exit

- **Add Item:** Enter a description, quantity, unit cost, unit of measure and commodity code (NIGP Class and Class Item).

Master Blanket Purchase Order AGENCY12-000006 Status: 3PI - In Progress

General **Items** Vendor Routing Control Attachments Notes Change Orders Reminders Summary

General Notes

Item #: Print Sequence*: 1.0 Item Type: Normal

Item Status: 3PI - In Progress Minimum Order Quantity: 0.00 Stock Item Number:

Description:

Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
Quantity	0.0	0.00	\$0.00	EA	0.0	0.00	\$0.00

NIGP Class:

NIGP Class Item: **Click to perform a search for commodity codes.**

Tax Rate:

Tax Amount: \$0.00

Extended Amount: \$0.00

- To search for a commodity code by keyword, click the eyeglass icon as shown above.
- A pop-up with the **Commodity and Service Codes Search** screen will appear.
- Enter a **NIGP Keyword** and click **Search**.

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Commodity and Service Codes

Search

NIGP Class

NIGP Class Item

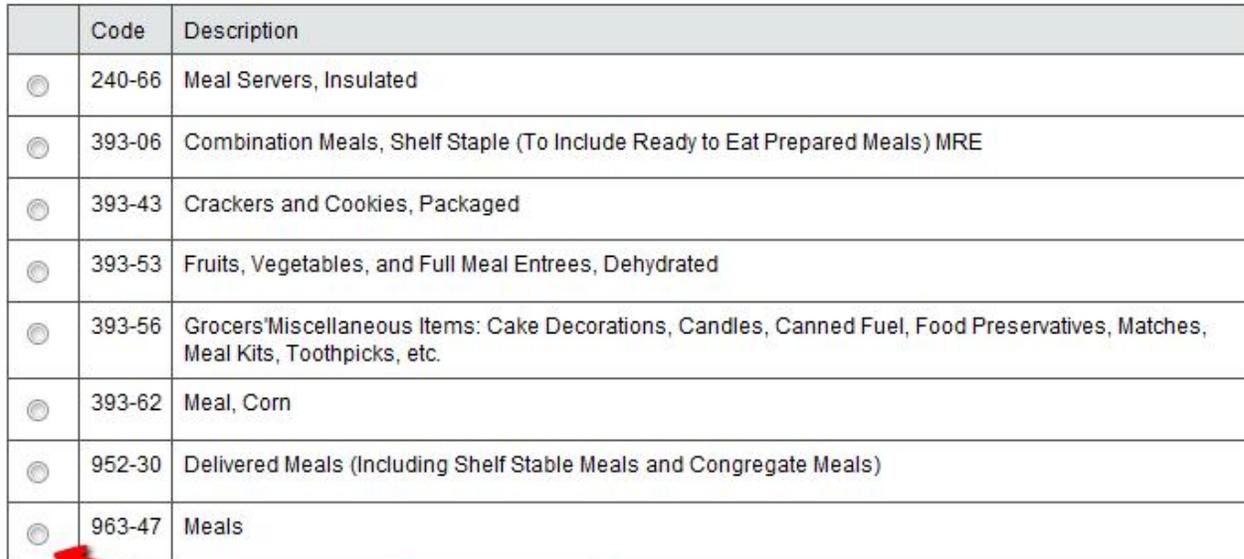
NIGP Keyword

Search using ALL of the criteria



- The matching results will appear below.
- Click the button for the code you would like to use and click **Save & Exit**.

	Code	Description
<input type="radio"/>	240-66	Meal Servers, Insulated
<input type="radio"/>	393-06	Combination Meals, Shelf Staple (To Include Ready to Eat Prepared Meals) MRE
<input type="radio"/>	393-43	Crackers and Cookies, Packaged
<input type="radio"/>	393-53	Fruits, Vegetables, and Full Meal Entrees, Dehydrated
<input type="radio"/>	393-56	Grocers' Miscellaneous Items: Cake Decorations, Candles, Canned Fuel, Food Preservatives, Matches, Meal Kits, Toothpicks, etc.
<input type="radio"/>	393-62	Meal, Corn
<input type="radio"/>	952-30	Delivered Meals (Including Shelf Stable Meals and Congregate Meals)
<input type="radio"/>	963-47	Meals



- The Item-detail screen will re-appear.
- To add another line-item, click **Save & Add New**, then repeat this step.
- If you're finished adding items, click **Save & Exit**.

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Master Blanket Purchase Order AGENCY12-000006 Status: 3PI - In Progress

General **Items** Vendor Routing Control Attachments Notes Change Orders Reminders Summary

General Notes

Item #: 1 Print Sequence*: 1.0 Item Type: Normal

Item Status: 3PI - In Progress Minimum Order Quantity: 0.0 Stock Item Number:

Description*:

Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
Quantity	500.0	10.00	\$10.00	EA	0.00	0.00	\$5000.00

NIGP Class: 963 963 - NON-BIDDABLE MISCELLANEOUS ITE... Tax Rate: Tax Amount: \$0.00 Extended Amount: \$5000.00

NIGP Class Item: 47 47 - Meals

Manufacturer: Brand: Model: Make: Packaging:

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

- Review your items from the **Items** tab.
- If desired, edit your list of items.

Master Blanket Purchase Order AGENCY12-000006 Status: 3PI - In Progress

General **Items** Vendor Routing Control Attachments Notes Change Orders Reminders Summary

General Notes

Sort by Column: Print Sequence Sort Descending Go

Item #	Print Sequence	Item Description								Total Cost	Delete
		Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate		
1	1.0	(963 - 47) test item								\$5000.00	<input type="checkbox"/>
		Quantity	500.0	\$10.00	\$10.00	EA - Each	0.00	\$0.00			
Total										\$5000.00	

Please save before sorting. Otherwise, your changes will be lost.

Save & Continue Search Inventory Items Search Items Add Item Cancel & Exit

Step 4: **Expected Results:** Items have been successfully added to the Master Blanket Purchase Order document.

Step 4: **Actual Results:**

- **STEP 5: Search for and select the contractor.**

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- Click the **Vendor** tab.
- A red validation error will appear reporting that there is no vendor for the PO.
- Click **Lookup & Add Vendor** along the bottom of the screen.

Master Blanket Purchase Order AGENCY12-000006

General Items **Vendor** ~~Printing~~ ~~Control~~ Attachments Notes Change Orders Reminders Summary

General Subcontractors Distributors

Vendor Validation Errors

- No PO Vendor.

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method
No vendor found for this Purchase Order.			

Lookup & Add Vendor

- A pop-up window with the **Lookup & Add Vendor** screen will appear.
- Search using the **Vendor Name** field and click **Find It**.

Lookup & Add Vendor - Master Blanket Purchase Order AGENCY12-000006

Search Using: ALL of the criteria

Find It Clear

Search Fields:

Vendor ID	<input type="text"/>	Vendor Name	<input type="text"/>
Vendor Tax ID	<input type="text"/>	Vendor Legal Name	<input type="text"/>
Vendor Keyword	<input type="text"/>	Alternate ID	<input type="text"/>
ZIP Code	<input type="text"/>	County	<input type="text"/>

- Scroll down to the bottom of the screen.
- Select the button next to the vendor that will be the contractor.
- Click the **Add Vendor** button.

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone
<input checked="" type="radio"/>	00000002	Test Vendor				Address Line 1	City	MD	Test Vendor	(555) 555-5555

Add Vendor Close Window

- Select the various contract terms - Payment, Freight, etc.

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- Click **Save & Continue** .

Master Blanket Purchase Order AGENCY12-000006

General Items **Vendor** Routing Control Attachments Notes Change Orders Reminders Summary

General Subcontractors Distributors

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Address
00000002		Test Vendor	Email	Test Vendor Address Line 1 City, MD 55555 US Email: charris@goperiscope.com Phone: (555)555-5555

Payment Terms: Net 30 Freight Terms: Freight Allowed

Shipping Method: Best Way Shipping Terms: Cost and Freight

Save & Continue Apply Vendor Terms to PO Lookup & Change Vendor

Step 5: **Expected Results:** The vendor has been selected and contract terms saved.

Step 5: **Actual Results:**

- STEP 6: Set the contract dates and controls.**
 - Click the **Control** tab of the Purchase Order document.
 - Pick a date in the past for the **Master Blanket/Contract Begin Date**.
 - Pick a date in the future for the **Master Blanket/Contract End Date**.
 - Next, click the eyeglass icon in the **Department** column below.

Master Blanket Purchase Order AGENCY12-000006 Status: 3PI - In Progress

General Items Vendor Routing **Control** Attachments Notes Change Orders Reminders Summary

Master Control Validation Errors

- At least one control is required for master blankets/contracts.

Master Blanket/Contract Begin Date*: Master Blanket/Contract End Date*:

Cooperative Purchasing Allowed

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
AGENCY - Test Organization	Add New: <input type="text"/> 	0.0	\$0.00	0.0

i Dollar Limit set to 0 indicates no limit.

Save & Continue Reset

- Another window will open with the **Department Lookup** screen.
- Click the button in the **Select** column for the “Agency Umbrella Master Control” option. This means all parts of your agency can order against the contract.
- Click the **Select** button on the bottom of the screen.

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Department Lookup for Organization: Test Organization

Select	Department ID	Department Name	Status
<input type="radio"/>	AGY	Agency Umbrella Master Control	Active
<input type="radio"/>	TEST	Test Department	Active

- The **Control** tab will re-appear.
- Enter the Contract Total in the **Dollar Limit** field. This sets the amount that can be spent against the contract.
- Click **Save & Continue**.

Master Blanket Purchase Order AGENCY12-000004 Status: 3PI - In Progress

General Items Vendor Routing **Control** Attachments Notes Change Orders Reminders Summary

Master Control Validation Errors

- At least one control is required for master blankets/contracts.

Master Blanket/Contract Begin Date*: 11/09/2011 Master Blanket/Contract End Date*: 11/10/2012

Cooperative Purchasing Allowed

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
AGENCY - Test Organization	Add New: AGY - Agency Umbrella Master Control <input type="text"/>	20000.00 <input type="text"/>	\$0.00	0.00 <input type="text"/>

Dollar Limit set to 0 indicates no limit.

Step 6: **Expected Results:** The contract begin and end date is saved. The agency and departments that can order against the contract are set, as well as the total amount that can be spent against the contract.

Step 6: **Actual Results:**

- **STEP 7: Add any contract attachments.**
 - Click the **Attachments** tab of the Purchase Order document.
 - Click the **Add Attachment** button.

Master Blanket Purchase Order AGENCY12-000006

General Items Vendor Routing Control **Attachments**

Click Add Attachment to add attachments.

No Attachments

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- The **Add File** screen will appear.
- Click the **Browse** button to bring up a directory of your computer.
- Double-click the first file you wish to attach or click the file once, then click **Open**.

Add File

i Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*:

Description:

File*: **Browse...**

Location: vendor/00000002/quote

Save & Exit Save & Continue Reset Cancel & Exit

- The file directory will then close and the **Add File** screen will re-appear with your file name listed.
- If you wish to attach another file, click **Save & Continue**, then repeat this step. If not, click **Save & Exit** to review the file(s) you've attached and move forward.

Add File

i Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*: Evaluation Criteria

Description:

File*: C:\Users\charris\My Dropbox\Work\Maryland\EM logo.PNG **Browse...**

Location: agency

Save & Exit Save & Continue Reset Cancel & Exit

- Once back on the **Attachments** tab, the list of your attachments will appear.
- Note the **Show Vendor** check box next to each attachment. When **Show Vendor** is checked, it ensures the attachment is visible to contractor as well as the public when accessing the contract.
- If you make any changes on this screen, click **Save & Continue**.

Master Blanket Purchase Order AGENCY12-000006 Status: 3PI - In Progress

General Items Vendor Routing Control **Attachments(1)** Reminders Summary

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Terms and Conditions.docx		<input checked="" type="checkbox"/>	Administrator System	11/11/2011	<input type="checkbox"/>

Save & Continue Add Attachment

Step 7: **Expected Results:** Attachments are added to the Master Blanket Purchase Order document.

Step 7: **Actual Results:**

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- STEP 8: **Submit the contract for approval.**
 - Click the **Summary** tab.
 - Review the document.

Master Blanket Purchase Order AGENCY12-000002 Status: 3PI - In Progress

General Items Vendor Routing Control Attachments(3) Notes Change Orders Reminders **Summary**

Header Information

Purchase Order Number:	AGENCY12-000002	Release Number:	0	Short Description:	Parachutes
Status:	3PI - In Progress	Purchaser:	Administrator System	Receipt Method:	Quantity
Fiscal Year:	2012	PO Type:	Blanket	Minor Status:	
Organization:	Test Organization	Location:	TEST - Test Location	Type Code:	Capital Funds
Department:	TEST - Test Department	Entered Date:	11/10/2011 10:06:17 AM	Control Code:	
Alternate ID:		Retainage %:	0.00%	Discount %:	0.00%
Days ARO:	0				
Print Dest Detail:	If Different				

- Click the **Submit for Approval** button on the bottom of the screen.

Print Sequence # 3.0, Item # 3: Safety Helmet 3PI - In Progress

NIGP Code: 345-56
Hats and Helmets, Safety (Incl. Fire Helmets)

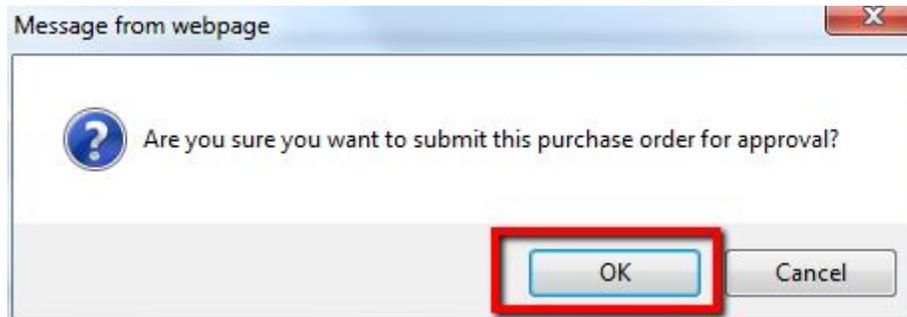
Bid # / Bid Item #: AGENCY12-000010 / 3 Quote # / Quote Item #: 00000004-R1 / 3

Receipt Method	Qty	Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
Quantity	100.0	\$0.00	PC - Piece	0.00	\$0.00		\$0.00	\$0.00

Manufacturer: Ace Brand: Model:
Make: Packaging:

Submit for Approval Cancel PO Clone PO Print Print Vendor Copy

- A pop-up message will appear asking you to confirm submission of the award recommendation. Click **OK**.



- Next, manually add an approver to review and approve your Bid.

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- Ensure **Manually add approvers** is selected, then choose yourself as the approver and click **Add Approver**.
- Finally, click **Save & Continue**.

Open Market Bid AGENCY12-000001 Status: 2BI - In Progress

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver: System, Administrator Add Approver

Save & Continue Cancel & Exit

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- The **Summary** tab of the Master Blanket Purchaser Order document will display. The status is now “Ready for Approval.”

Master Blanket Purchase Order AGENCY12-000002 Status: 3PRA - Ready for Approval

General Items Vendor Routing Control Attachments(3) Notes Change Orders Reminders **Summary**

Header Information

Purchase Order Number:	AGENCY12-000002	Release Number:	0	Short Description:	Parachutes
Status:	3PRA - Ready for Approval	Purchaser:	Administrator System	Receipt Method:	Quantity
Fiscal Year:	2012	PO Type:	Blanket	Minor Status:	
Organization:	Test Organization				

Step 8: **Expected Results:** The Master Blanket Purchase Order has been submitted for approval and is in “Ready for Approval” status.

Step 8: **Actual Results:**