ERP Job Aid
RI Enterprise Resource Planning

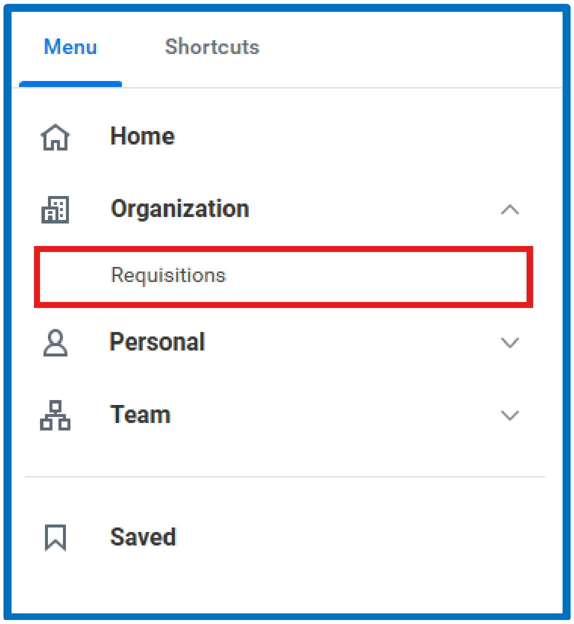
Release PO from Award

Requisition Type: Release PO from Award

Requisition Use: This requisition type is designated for a release from an awarded Contract or Purchase Order.

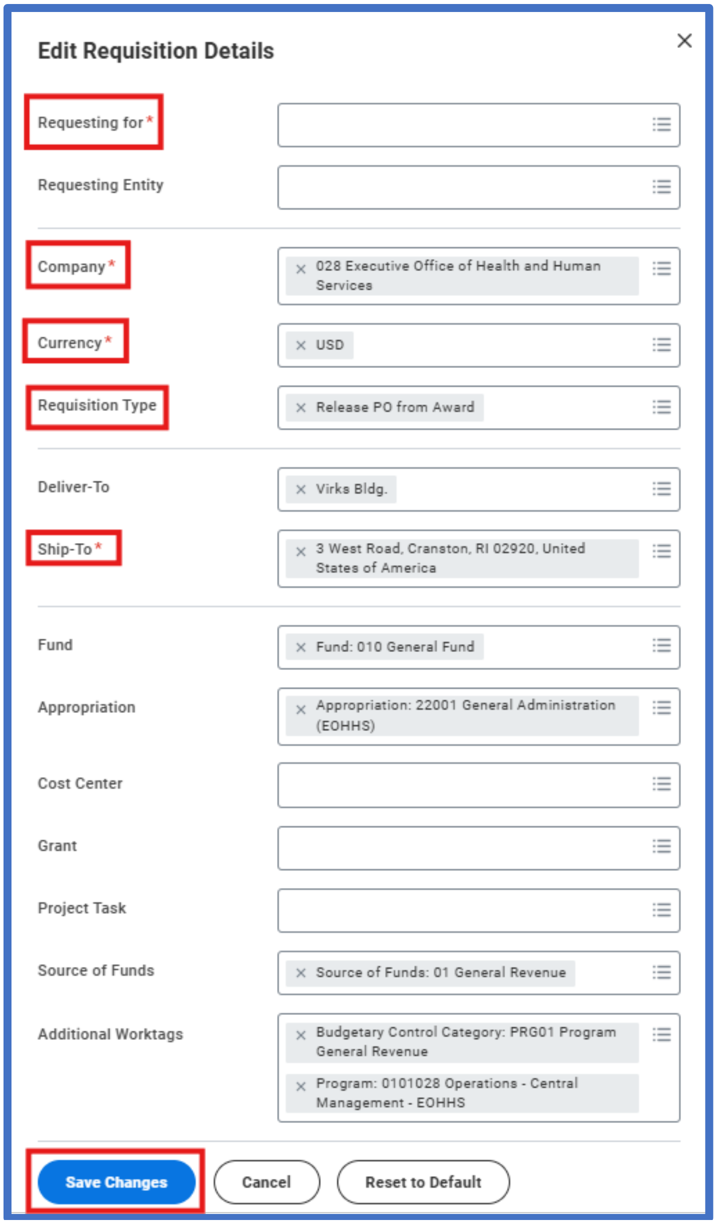
Process for Submitting a Release PO from Award Requisition (Purchase Order)

1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
2. Under Organization, select Requisitions
(**Note**: *If the 'Requisitions' app is not listed in your **Menu**, select **(+) Add** > type 'Requisitions' in the **Find Apps** field > select the plus-sign > select **Back to Menu**.)*



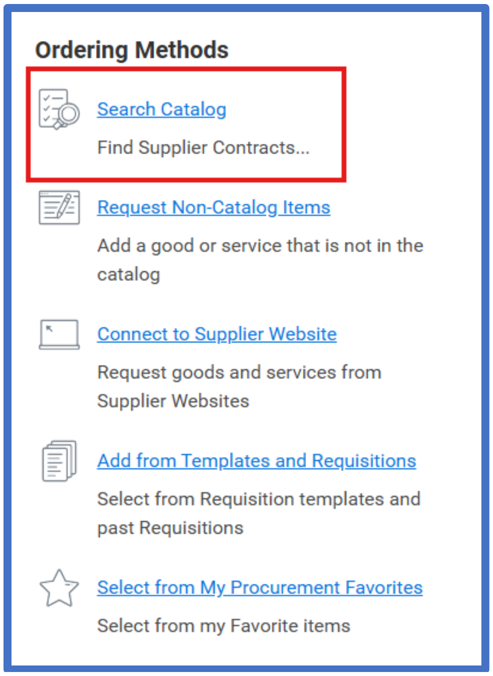
Requisition Details

3. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details**, select **Edit Details**.
4. The **Requesting for** name defaults to your name. To select a different **Requesting for** name, type in a name, select enter to search, and then make your selection.
5. **Company** name defaults to your **Company**.
6. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies**, and then making your selection.
7. To select a **Requisition Type**, select the menu icon, and then select **Release PO from Award**.
(**Note**: *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.)*
8. To select a **Ship-To** location, select the menu icon, and then select the appropriate option to make your selection.
(**Note:** *This is the address that the Supplier will see on the Printed Purchase Order.)*
9. Select **Save Changes.**
(**Note**: *Required fields are indicated by a red asterisk.)*



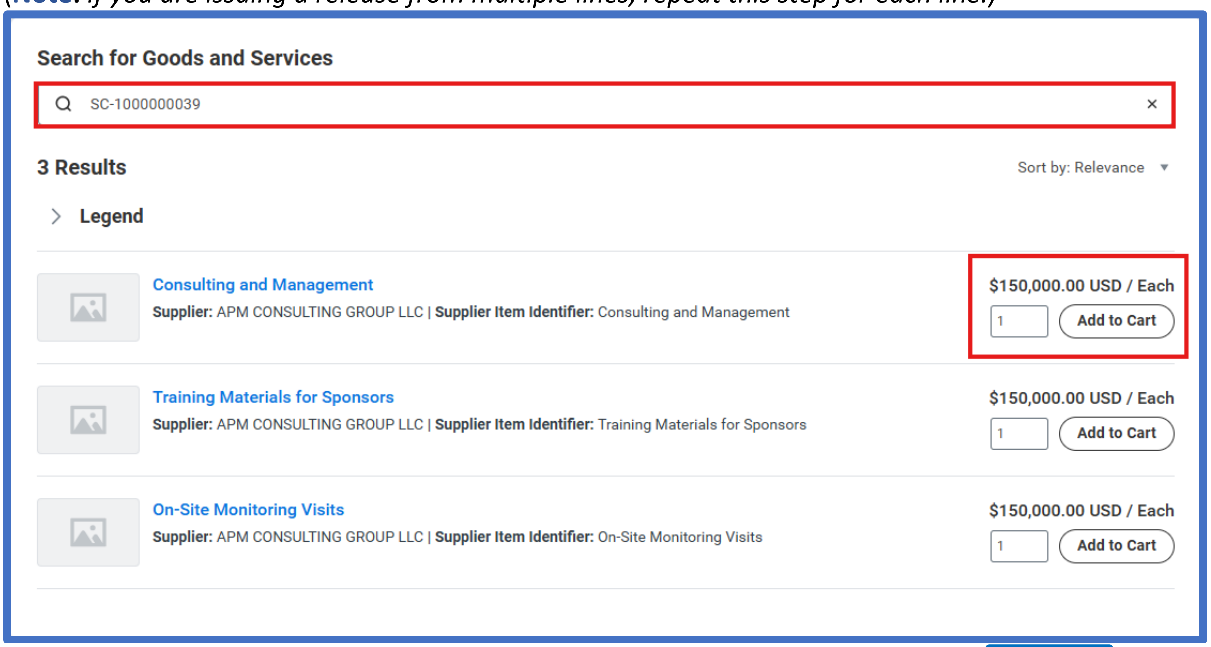
Ordering Methods

10. Under the heading, **Ordering Methods**, select **Search Catalog**.



Search for Goods and Services

11. In the 'Find equipment, supplies, and more' field, enter the **APA** or **Supplier Contract Number** and select **Enter**.
12. Enter the quantity in the designated number field for the line you are issuing a release from, then select **Add to Cart**.
(**Note**: *If you are issuing a release from multiple lines, repeat this step for each line.)*



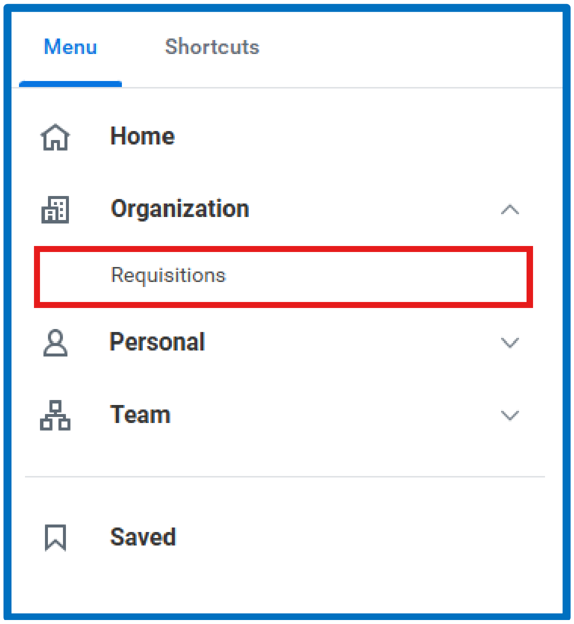
13. Select the shopping cart icon in the upper right hand corner.
14. Review the contents of the cart, and once ready, select **Checkout**.
15. Select **Submit**.

Approval Process

Once submitted, your requisition follows an approval workflow to view the workflow you can select the action button next to the requisition number, select view, and then select the Process History tab.

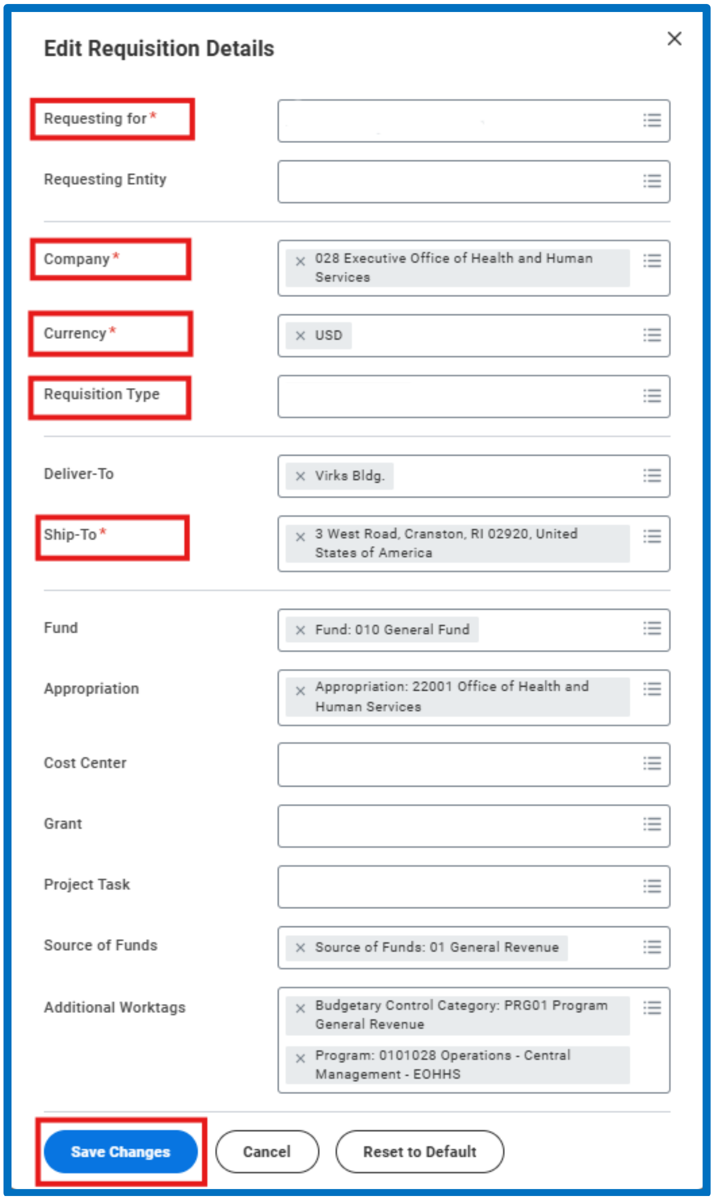
Process for Submitting a Release PO from: Contract

1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
2. Under Organization, select Requisitions
   (**Note:** *If the 'Requisitions' app is not listed in your* ***Menu,*** *select* ***(+) Add*** *> type 'Requisitions' in the* ***Find Apps*** *field > select the plus-sign > select* ***Back to Menu.****)*



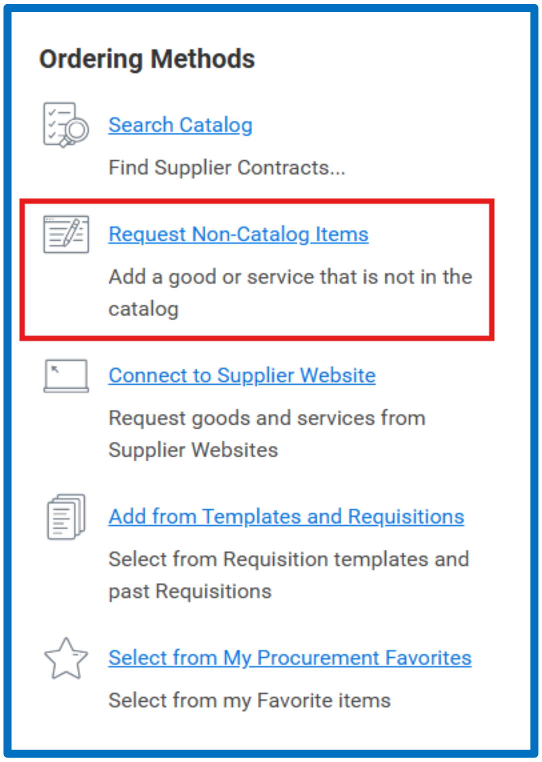
Requisition Details

3. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details,** select **Edit Details.**
4. The **Requesting for** name defaults to your name. To select a different **Requesting for** name, type in a name, select enter to search, and then make your selection.
5. **Company** name defaults to your **Company.**
6. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies,** and then making your selection.
7. To select a **Requisition Type,** select the menu icon, and then select your requisition type.
   (**Note:** *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.)*
8. To select a **Ship-To** location, select the menu icon, and then select the appropriate option to make your selection.
   (**Note:** *This is the address that the Supplier will see on the Printed Purchase Order.)*
9. Select **Save Changes.**
   (**Note:** *Required fields are indicated by a red asterisk.)*



Ordering Methods

10. Under the heading, **Ordering Methods**, select **Request Non-Catalog Items**.

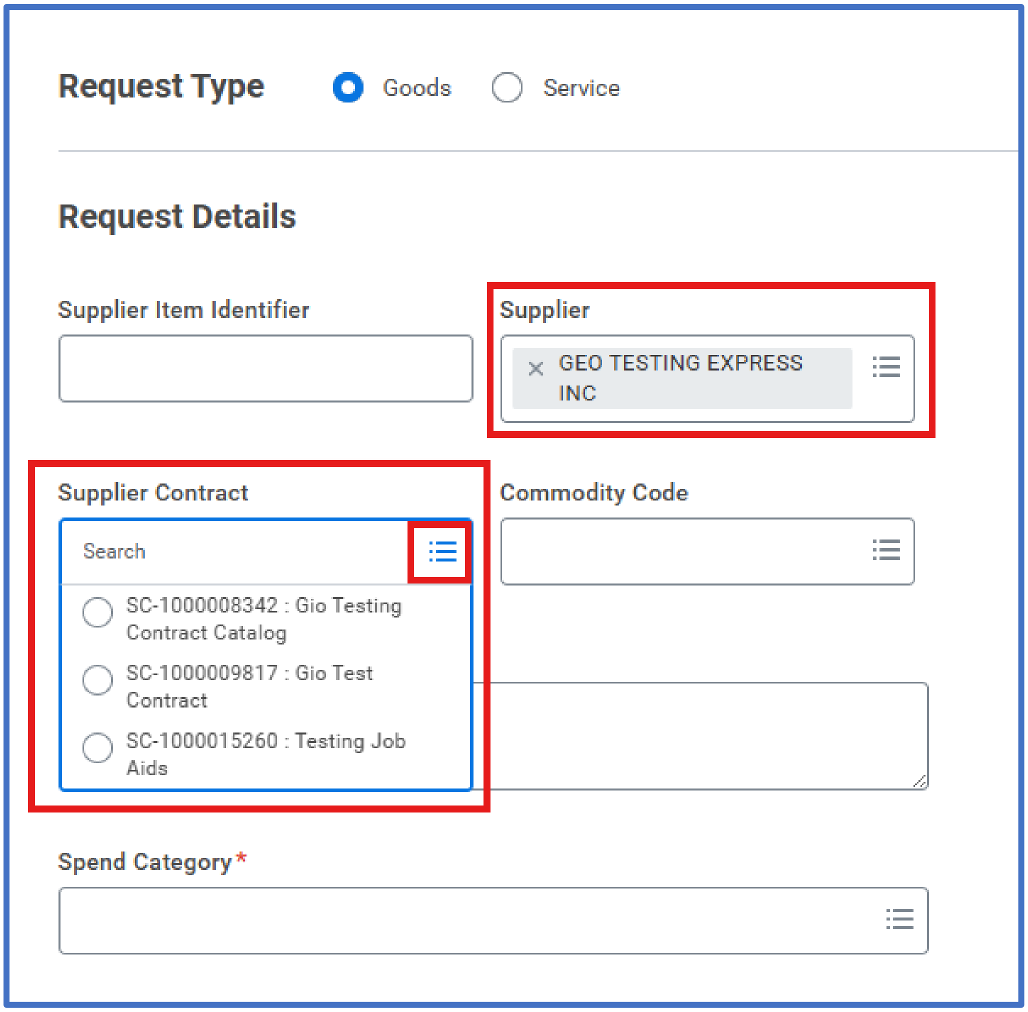


Request Type

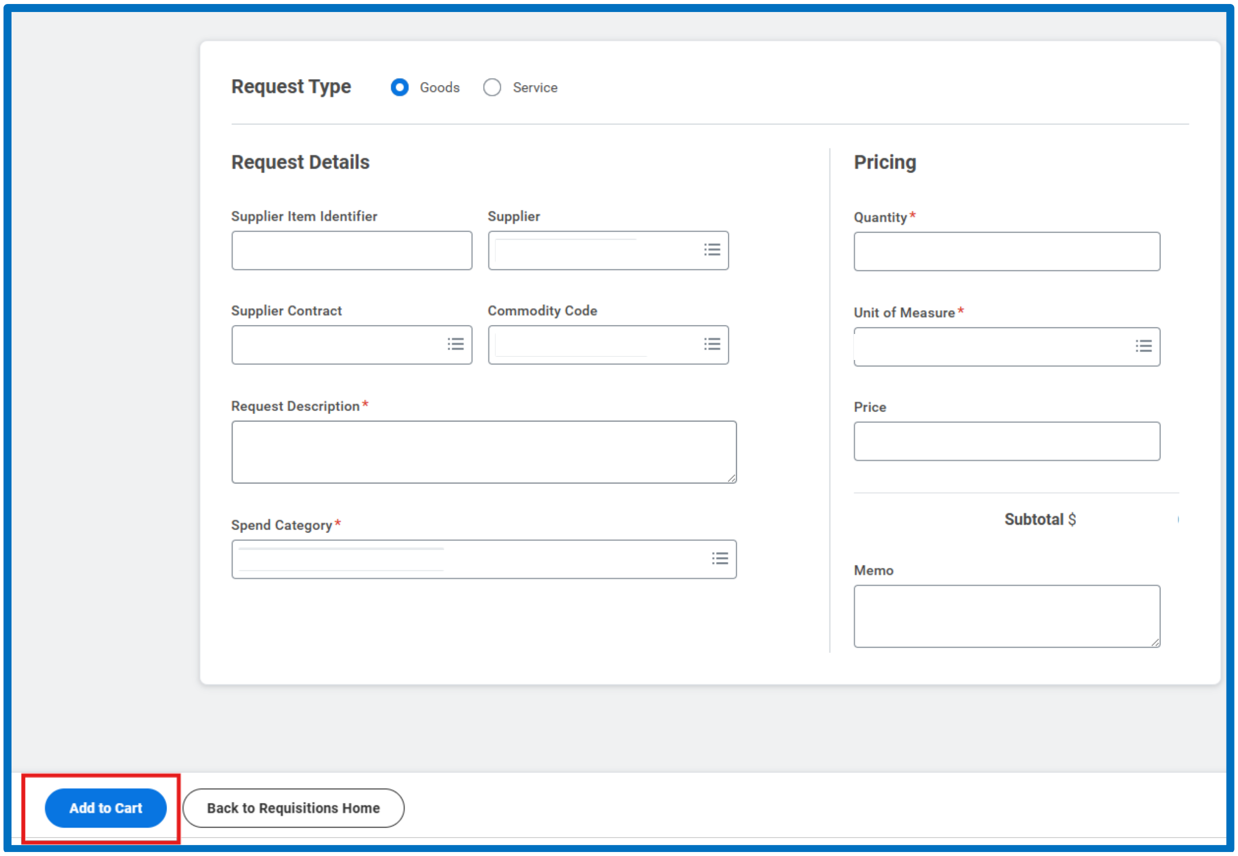
11. Specify whether this request type is a **Goods** item or a **Service.**

Request Details

12. Under the heading **Request Details,** to select a **Supplier**, select the menu icon, select **Suppliers by Supplier Group,** select a group, and then make your selection.
    (**Note:** *Alternatively, type in a* ***Supplier,*** *select* enter *to search, and then make your selection from the search results.)*
13. To initiate a release from a **Supplier Contract**, select the menu icon, then choose the appropriate **Supplier Contract** from the list.



14. To select a **Commodity Code**, select the menu icon, select **Commodity Code by Type**, select UNSPSC, and then make your selection.
    (**Note**: *By selecting a* ***Commodity Code*** *the field* ***Spend Category*** *will auto populate.)*
15. To specify **what you need**, type in a **Description.**
16. Type in a **Quantity**.
17. Type in a **Unit of Measure.**
18. Type in a **Price.**
    (**Note**: *Please enter numbers only, no dollar signs.)*
19. Optionally, type a comment in the **Memo** field.
20. Select **Add to Cart.**



21. To add more items to the cart, type in **What you need to order** for the second item and repeat the steps above. Otherwise, if finished, select the shopping cart icon in the upper right corner.
(**Note:** *To start a new requisition, and to search and select more goods or services, select **Edit Details**, and repeat the steps above.)*

22. Review the contents of the cart, and once ready, select **Checkout.**
(**Note:** *An error message may generate to remind you that an attachment is required.)*

Requisition Information

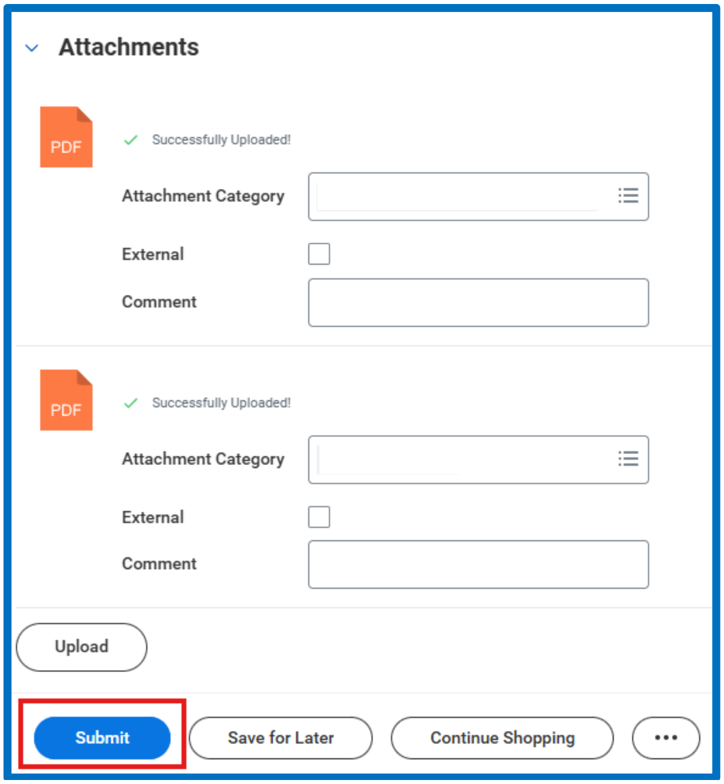
23. Review, and if necessary, edit the **Request Date.**
24. Review, and if necessary, edit **Currency.**
25. Review, and if necessary, edit **Requisition Type,** and then scroll down.
(**Note:** *Required fields are indicated by a red asterisk.)*

Goods

26. Under the heading, **Goods,** review the information that you entered and then, if necessary, edit.
(**Note:** *To add a new row, for additional Goods, select the plus sign icon. To remove a row, select the minus-sign icon.)*
(**Note:** *You may need to use the horizontal scroll bar to view the entire row.)*
27. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
28. Select the menu icon and make your selection.
29. Use the horizontal scroll bar to navigate to the **Appropriation** field.
30. To specify an **Appropriation,** type in an **Appropriation** and then select *enter* to search.
(**Note:** *Alternatively, select the menu icon, select **Active Appropriations by Appropriation Hierarchy,** select an Appropriations Hierarchy, and then continue selecting options to ultimately make your selection. (For example, select Active Appropriations by Appropriation Hierarchy > SORI Appropriation > Education > 026 Rhode Island Council on the Arts > 31002 Film Commission.)*
(**Note:** *Once an **Appropriation** is selected, the **Fund** may automatically populate even if you entered a different **Fund** prior to selecting an **Appropriation.** Once an **Appropriation** is selected, **Program** and **Source of Funds** may also automatically populate.)*

(**Note:** *Alternatively, to select an* ***Appropriation****, select the menu icon, then, if available, select* ***My Worktags,*** *and then make your selection.)*

31. If applicable, to select a **Cost Center** select the menu icon, select **Active Cost Centers**, and then make your selection.
    (**Note:** *Alternatively, type in the name or number of a* ***Cost Center*** *and then select* enter *to search.)*
32. If the **Source of Funds** did not automatically populate from the **Appropriation** selected above, to specify a **Source of Funds,** select the menu icon, and then make your selection.
33. Select **Submit.**



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