

Release PO from Award

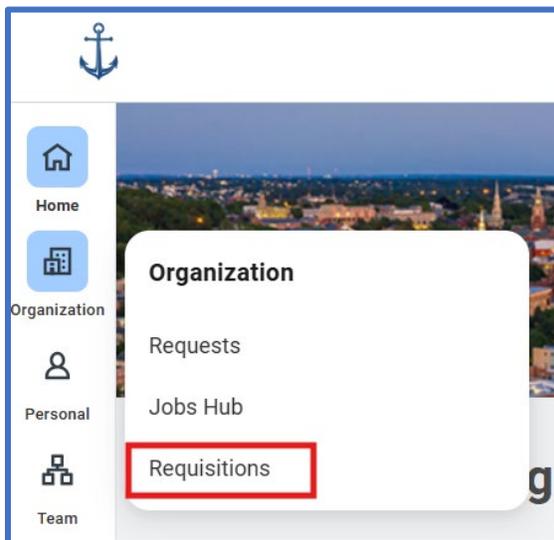
Requisition Type: Release PO from Award

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

Note: If the Release PO from Award is from a Punchout supplier (Dell Marketing LP, Fastenal Company, W W Grainger Inc, SID Tool Co, WB Mason Co Inc) you **must** change the Order-From Connection to the “- Print” option.

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

1. In the ERP system, hover over Organization on the left panel toolbar.
2. Under Organization, select Requisitions.
(**Note:** If the ‘Requisitions’ app is not listed in your **Menu**, select **Customize** > Add Menu Items > type ‘Requisitions’ in the **Find Menu Items** field > select the plus-sign > select **Add Item** > select **Save Changes** > select **Save Changes**.)



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.)

The screenshot shows a web form titled "Edit Requisition Details" with a close button (X) in the top right corner. The form contains several fields, each with a dropdown menu icon (three horizontal lines) on the right side. The following fields are highlighted with red boxes, indicating they are required:

- Requesting for*
- Company*
- Currency*
- Requisition Type
- Ship-To*
- Save Changes (button)

The other fields are:

- Requesting Entity
- 028 Executive Office of Health and Human Services
- USD
- Release PO from Award
- Virks Bldg.
- 3 West Road, Cranston, RI 02920, United States of America
- Fund: 010 General Fund
- Appropriation: 22001 General Administration (EOHHS)
- Cost Center
- Grant
- Project Task
- Source of Funds: 01 General Revenue
- Additional Worktags: Budgetary Control Category: PRG01 Program General Revenue; Program: 0101028 Operations - Central Management - EOHHS

At the bottom of the form, there are three buttons: "Save Changes" (highlighted in red), "Cancel", and "Reset to Default".

Ordering Methods

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

Ordering Methods

-  [Search Catalog](#)
Find Supplier Contracts...
-  [Request Non-Catalog Items](#)
Add a good or service that is not in the catalog
-  [Connect to Supplier Website](#)
Request goods and services from Supplier Websites
-  [Add from Templates and Requisitions](#)
Select from Requisition templates and past Requisitions
-  [Select from My Procurement Favorites](#)
Select from my Favorite items

Search for Goods and Services

- In the 'Find equipment, supplies, and more' field, enter the **APA** or **Supplier Contract Number** and select **Enter**.
- 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.*)

Search for Goods and Services

Q SC-1000000039

3 Results Sort by: Relevance ▾

> Legend

	Consulting and Management Supplier: APM CONSULTING GROUP LLC Supplier Item Identifier: Consulting and Management	\$150,000.00 USD / Each 1 <input type="button" value="Add to Cart"/>
	Training Materials for Sponsors Supplier: APM CONSULTING GROUP LLC Supplier Item Identifier: Training Materials for Sponsors	\$150,000.00 USD / Each 1 <input type="button" value="Add to Cart"/>
	On-Site Monitoring Visits Supplier: APM CONSULTING GROUP LLC Supplier Item Identifier: On-Site Monitoring Visits	\$150,000.00 USD / Each 1 <input type="button" value="Add to Cart"/>

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

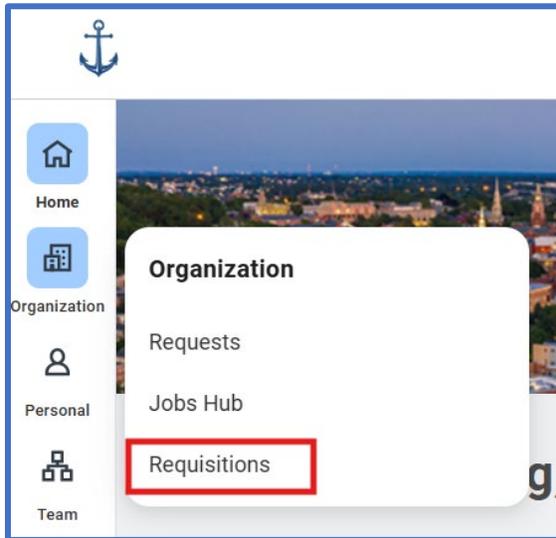


Approval Process

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, hover over Organization on the left panel toolbar.
2. Under Organization, select Requisitions.
(**Note:** If the 'Requisitions' app is not listed in your **Menu**, select **Customize** > Add Menu Items > type 'Requisitions' in the **Find Menu Items** field > select the plus-sign > select **Add Item** > select **Save Changes** > select **Save Changes**.)



Requisition Details

1. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details**, select **Edit Details**.
2. 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.
3. **Company** name defaults to your **Company**.
4. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies**, and then making your selection.
5. 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.)
6. 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.)
7. Select **Save Changes**.
(**Note:** Required fields are indicated by a red asterisk.)

Edit Requisition Details ×

Requesting for *	<input type="text"/>
Requesting Entity	<input type="text"/>
Company *	<input type="text" value="028 Executive Office of Health and Human Services"/>
Currency *	<input type="text" value="USD"/>
Requisition Type	<input type="text"/>
Deliver-To	<input type="text" value="Virks Bldg."/>
Ship-To *	<input type="text" value="3 West Road, Cranston, RI 02920, United States of America"/>
Fund	<input type="text" value="Fund: 010 General Fund"/>
Appropriation	<input type="text" value="Appropriation: 22001 Office of Health and Human Services"/>
Cost Center	<input type="text"/>
Grant	<input type="text"/>
Project Task	<input type="text"/>
Source of Funds	<input type="text" value="Source of Funds: 01 General Revenue"/>
Additional Worktags	<input type="text" value="Budgetary Control Category: PRG01 Program General Revenue"/> <input type="text" value="Program: 0101028 Operations - Central Management - EOHHS"/>

Ordering Methods

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

Ordering Methods

-  [Search Catalog](#)
Find Supplier Contracts...
-  [Request Non-Catalog Items](#)
Add a good or service that is not in the catalog
-  [Connect to Supplier Website](#)
Request goods and services from Supplier Websites
-  [Add from Templates and Requisitions](#)
Select from Requisition templates and past Requisitions
-  [Select from My Procurement Favorites](#)
Select from my Favorite items

Request Type

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

Request Details

1. 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.*)
2. To initiate a release from a **Supplier Contract**, select the menu icon, then choose the appropriate **Supplier Contract** from the list.
(**Note:** *The **Order-From Connection** will auto-populate from the Supplier Contract selected.*)

Request Type Goods Service

Request Details

Supplier Item Identifier

Supplier

Supplier Contract

- SC-1000008342 : Gio Testing Contract Catalog
- SC-1000009817 : Gio Test Contract
- SC-1000015260 : Testing Job Aids

Commodity Code

Spend Category*

3. 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.)*
4. To specify **what you need**, type in a **Description**.
5. Type in a **Quantity**.
6. Type in a **Unit of Measure**.
7. Type in a **Price**.
(Note: Please enter numbers only, no dollar signs.)
8. Optionally, type a comment in the **Memo** field.
9. Select **Add to Cart**.

Request Type Goods Service

Request Details

Supplier Item Identifier Supplier

Supplier Contract Commodity Code

Request Description*

Spend Category*

Pricing

Quantity*

Unit of Measure*

Price

Subtotal \$

Memo

Add to Cart

- 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.)
- 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

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

Goods

- 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.)
- Use the horizontal scroll bar to navigate to the **Appropriation** field.
- 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.)

4. 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.*)
5. 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.
6. Select **Submit**.

The screenshot displays the 'Attachments' section of a web application. It features two identical attachment cards. Each card shows a PDF icon, a green checkmark, and the text 'Successfully Uploaded!'. Below each card are three input fields: 'Attachment Category' with a dropdown menu icon, 'External' with an unchecked checkbox, and 'Comment' with a text area. At the bottom of the section, there is an 'Upload' button and a row of four buttons: 'Submit' (highlighted with a red box), 'Save for Later', 'Continue Shopping', and a three-dot menu icon.

Approval Process

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