Revised 10/15/2019

PURPOSE

The purpose of this quick reference guide is to illustrate the steps in the Advantage system for creating a requisition (RQS).

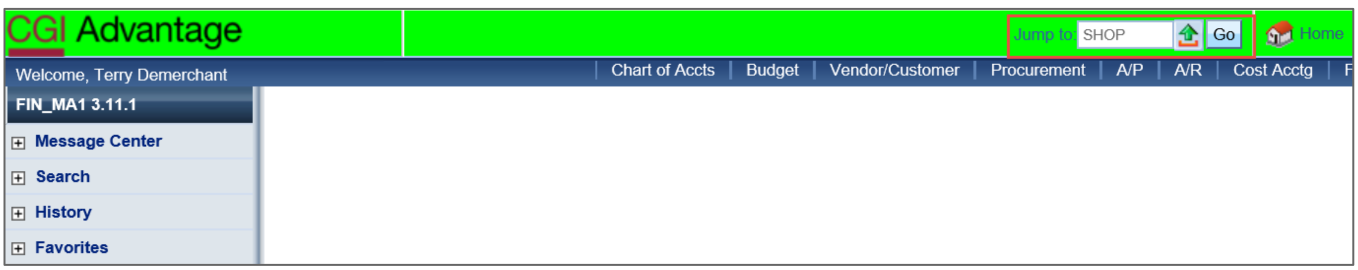
A requisition is created to procure items that are not part of an established master agreement (MA). Please see the Division of Procurement Services Master Agreements webpage for a list of existing MAs: https://www.maine.gov/dafs/bbm/procurementservices/reports/contract-search

You will need to create an RQS for these purposes:

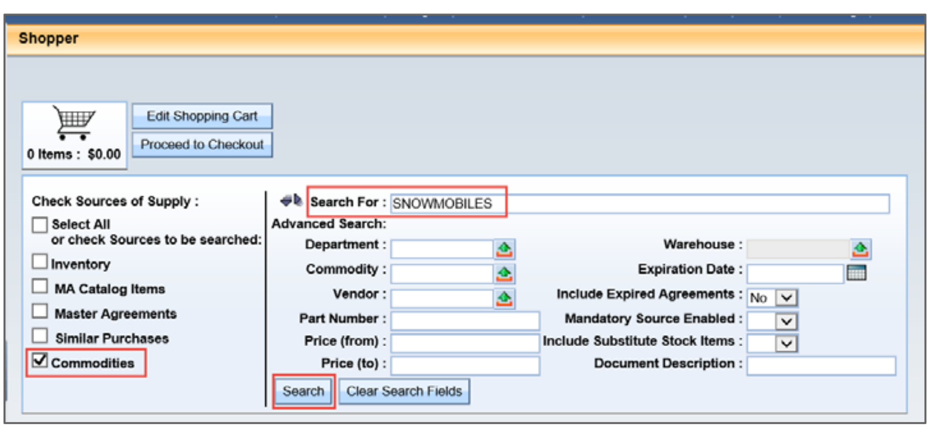
- Submitting a confirmation order (a vendor quote or invoice and a Waiver of Competitive Bid [WCB] must be attached); or
- For bidding purposes (detailed specifications must be attached).

STEPS FOR CREATING A REQUISITION

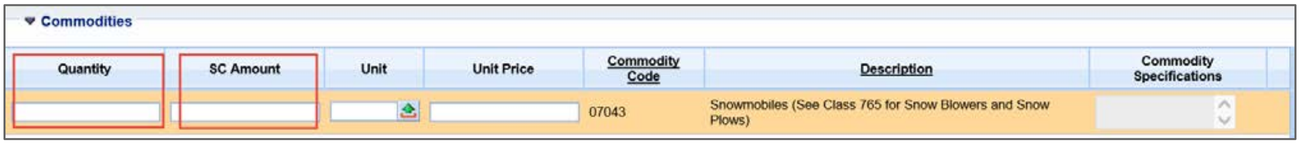
1. Log into Advantage. In the **Jump To** field, enter **SHOP** and click **Go**.



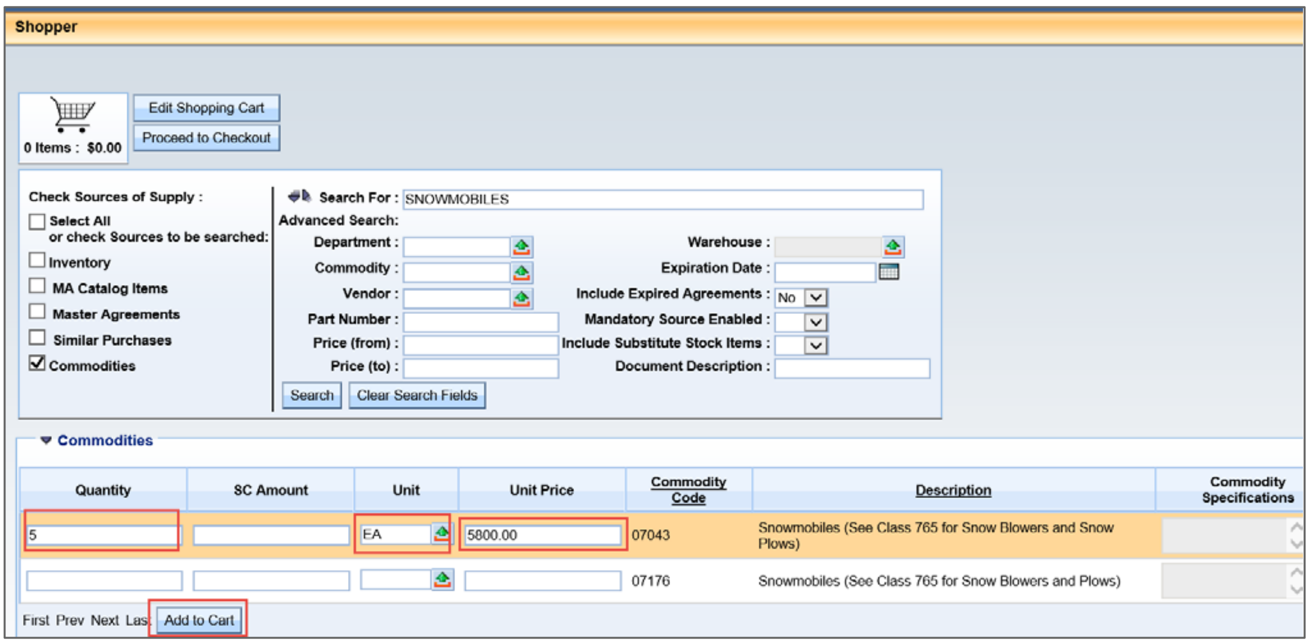
2. On the Shopper page, under the **Check Sources of Supply** column, <u>un</u>check all <u>except</u> Commodities. Then enter your search criteria in the **Search For** field by entering either a key word, commodity code, or vendor name; and click **Search**. (The example below is for ordering snowmobiles for bidding purposes.)



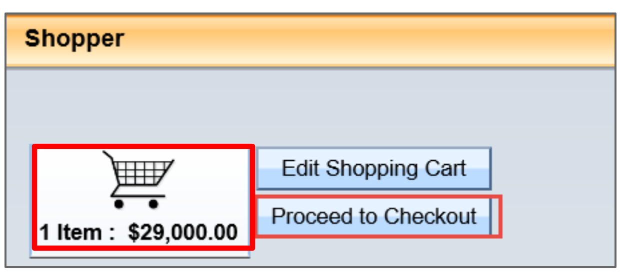
NOTE: In the results, you will notice that both the Quantity and the SC Amount are options. The SC Amount is an option in cases where you have an order with a service line, such as for a software subscription.



3. Once you have identified the line that you want to order from, enter a **Quantity, Unit** and the **Unit Price**. If the RQS is for bidding purposes and you don't know the price, enter an estimated amount. Once you have selected all the commodity lines that you want to order from, scroll to the bottom of the page and click **Add to Cart**.

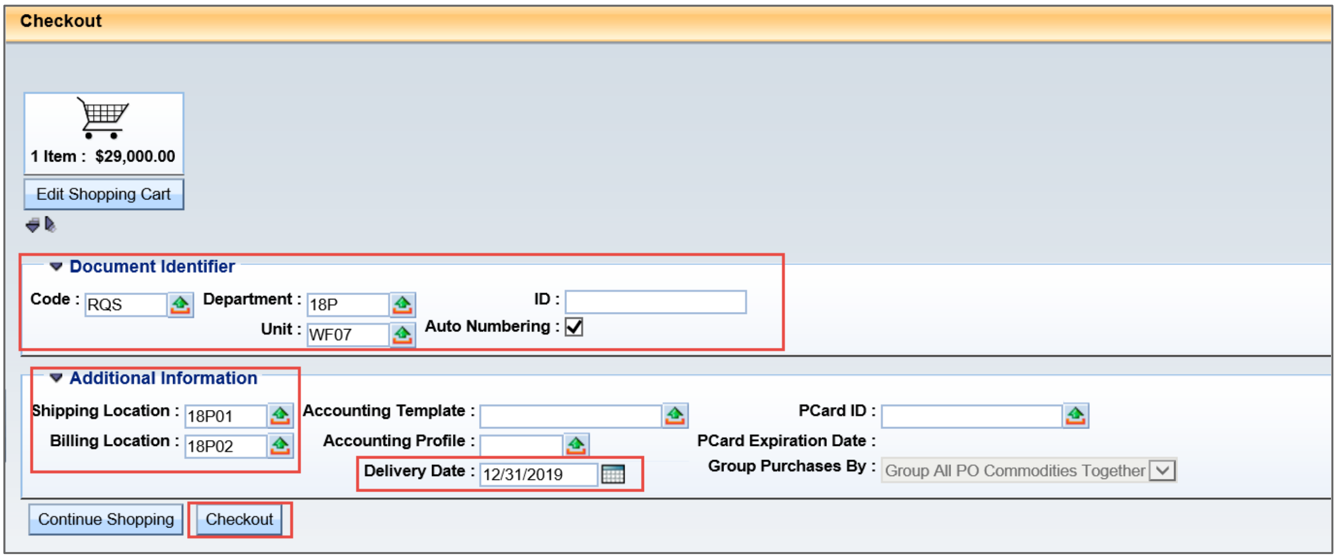


4. The page will refresh, and the cart will show the amount added. (Note that it will reflect how many lines you selected and not the total quantity.) Then click **Proceed to Checkout.**

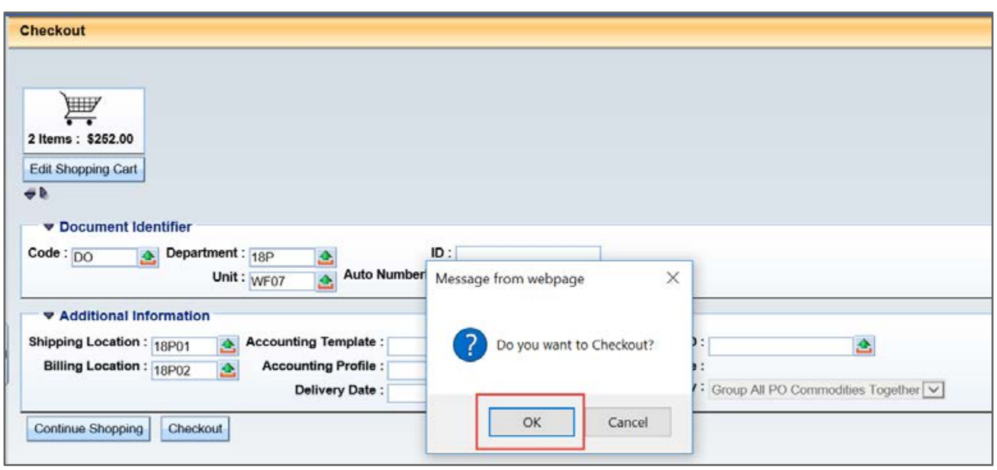


5. On the Checkout screen, verify the **Document Code** and **Document Department** defaulted are correct. Enter your workflow for your Department Number in the **Unit** field. Leave **Auto Numbering** checked. Under **Additional Information**, enter your shipping and billing location codes. You may choose to enter in a **Delivery Date**, but if you do, take into consideration that the bid will be out for two weeks and there will be a 15-day appeal period after evaluation. Please leave enough time for the bid process to be completed.

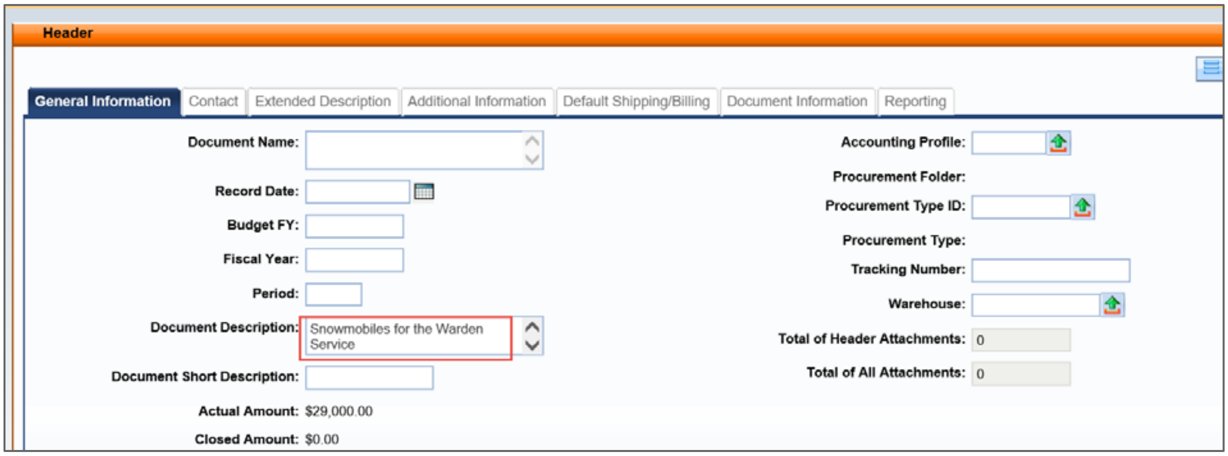
   Then click **Checkout**.



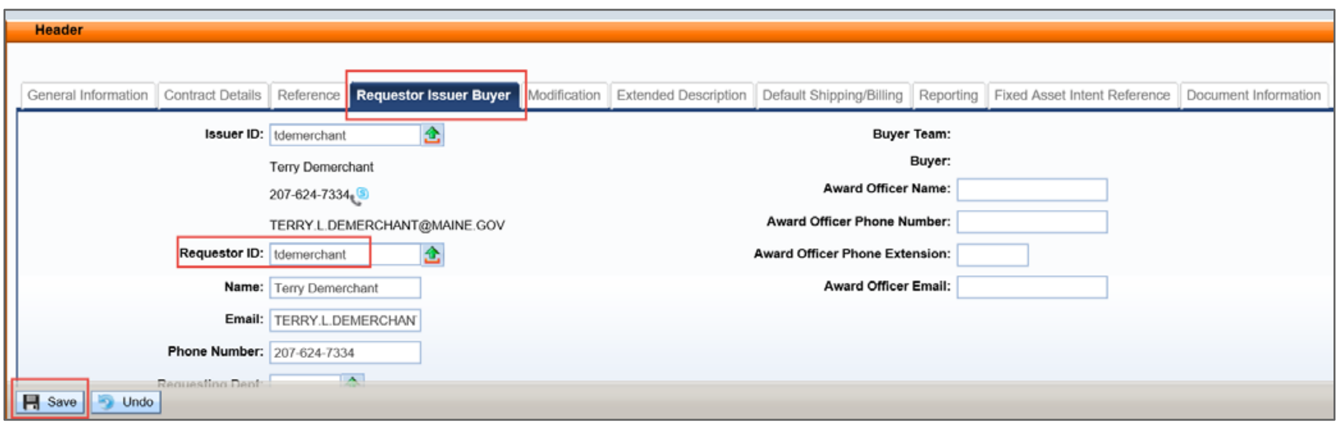
6. A pop-up box will display asking “Do you want to Checkout?” Click **OK**.



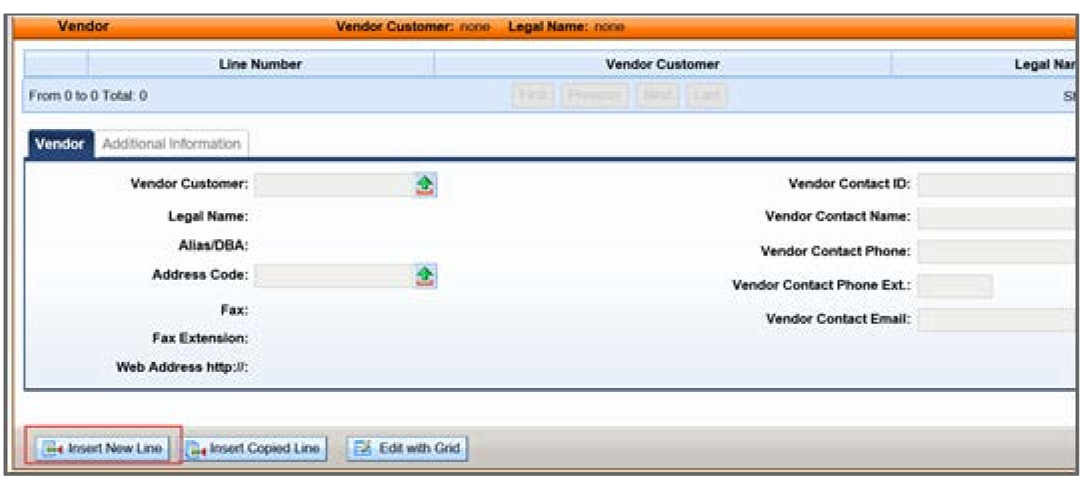
7. The RQS document is now created and will open on the Header section. From this screen, enter the **Document Description**.



8. Select the **Requestor Issuer Buyer** tab and enter the **Requestor ID**; then click **Save** to bring in all the information for the Requester.

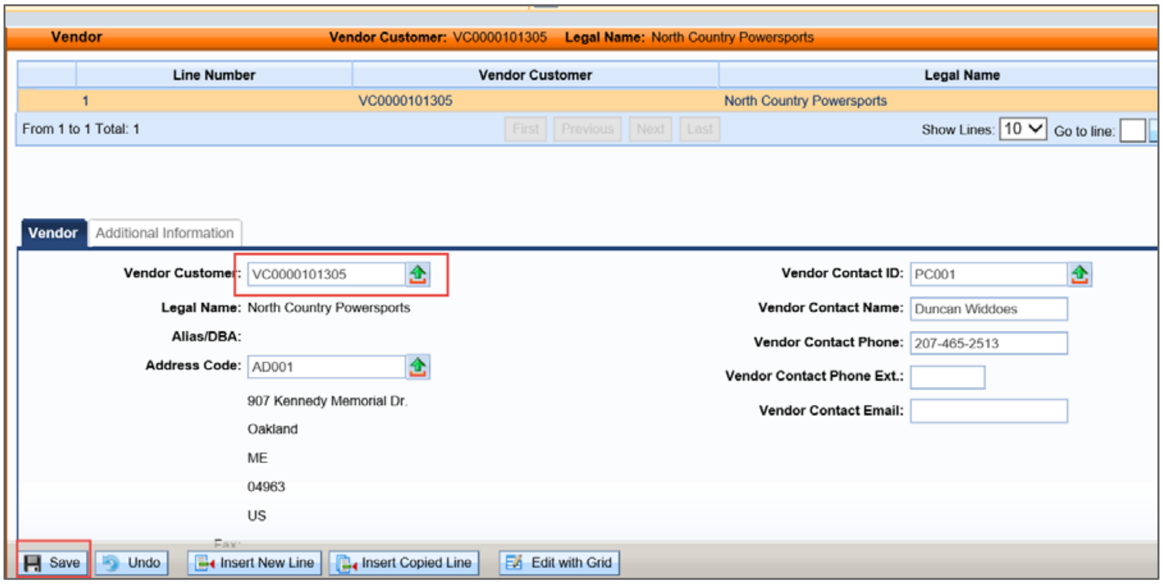


9. If the RQS is for a confirmation order or a sole source order, you must enter a vendor. To enter a vendor, click on **Vendor** and click **Insert New Line**. Then proceed to step 10.

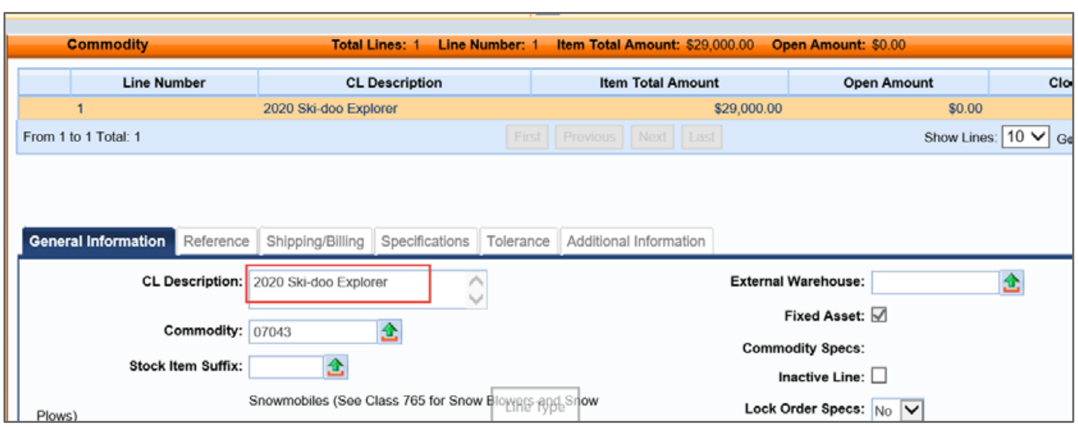


If the RQS is for bidding, do not enter in a vendor and continue to step 11 **(Commodity)**.

10. Go to **Vendor Customer** and enter the **vendor customer number** or click on the picklist to search for your vendor. Once you have selected your vendor, click **Save** to bring in all the vendor information.



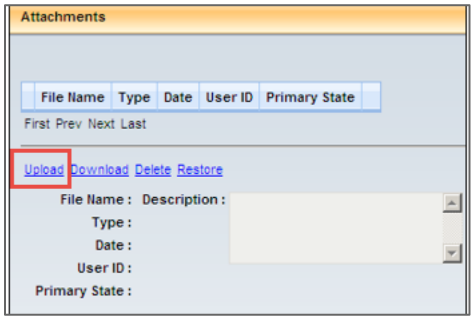
11. Go to **Commodity**. Find the **CL Description**; change the description to what you are looking for and hit **Save.**



ATTACHING DOCUMENTS

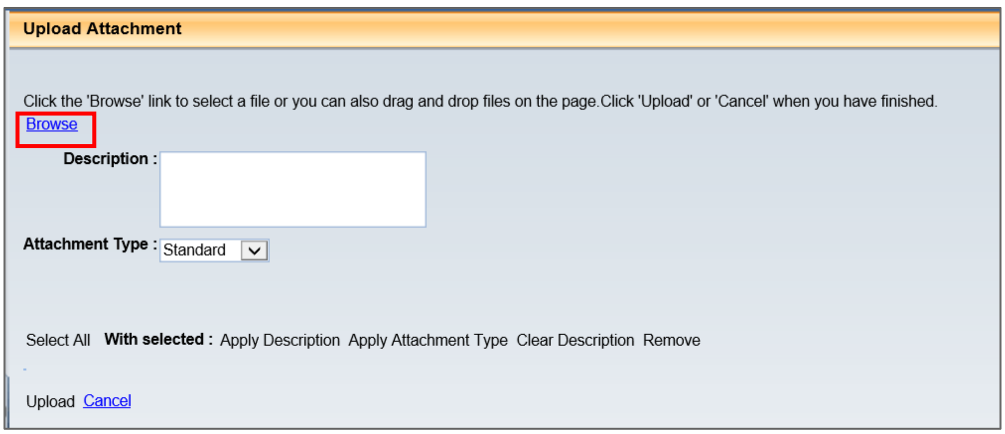
12. To attach documents to an RQS, such as the detailed specifications: Go to the lower right and find the File button, click **File**, then **Attachments**.

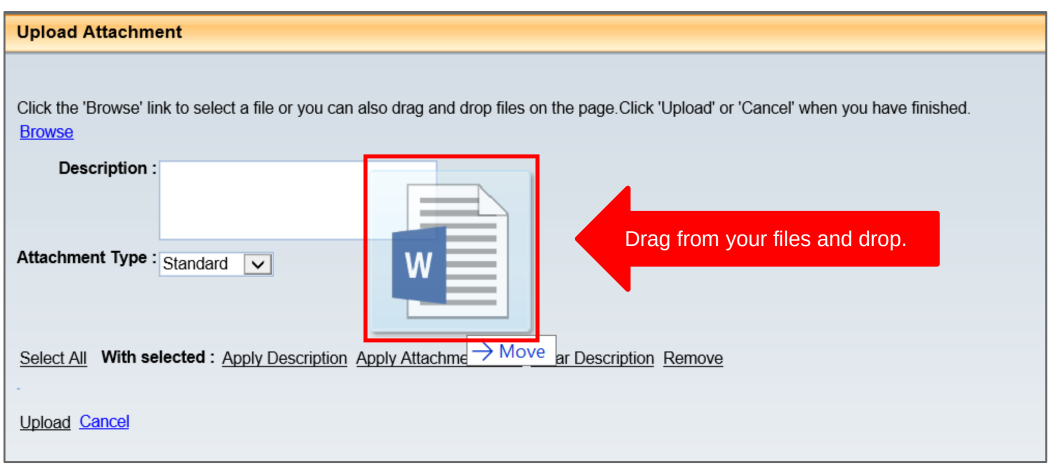
13. Click **Upload**.



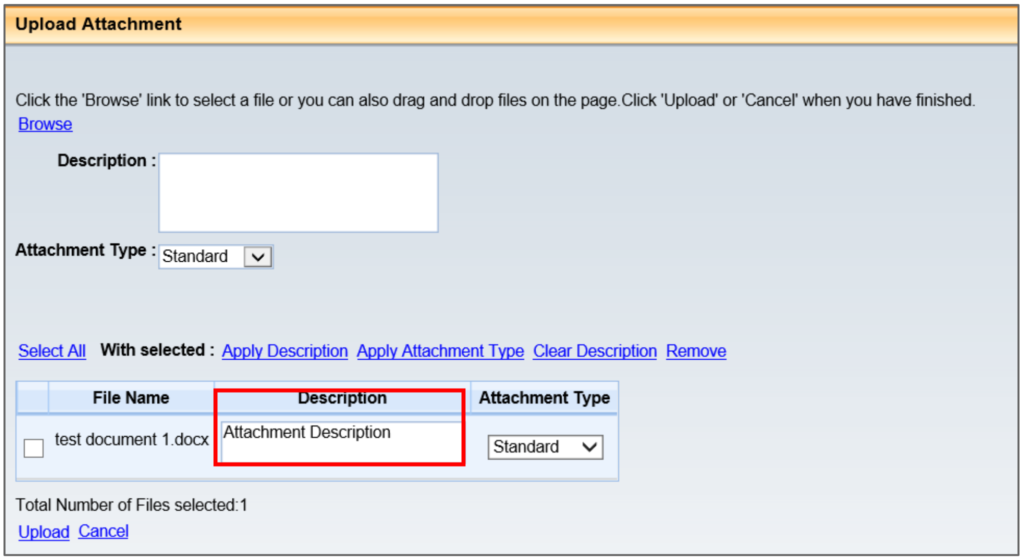
14. Click **Browse** to attach the file(s); or click and drag/drop your files (see second screenshot).

    NOTE: Dragging/dropping files will allow you to select multiple files at once.

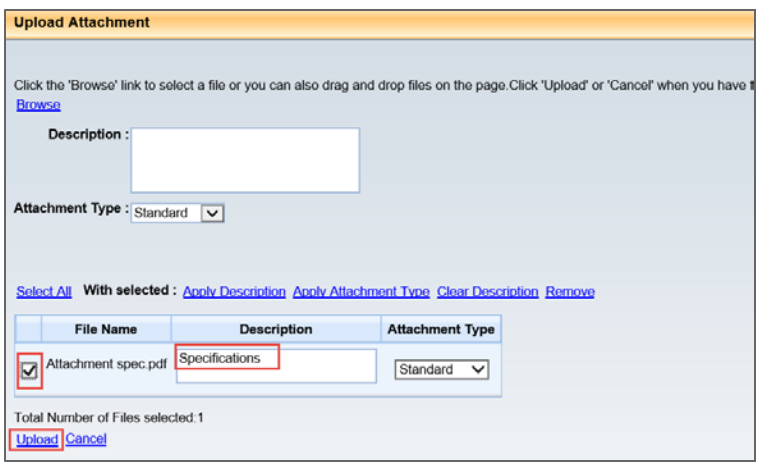




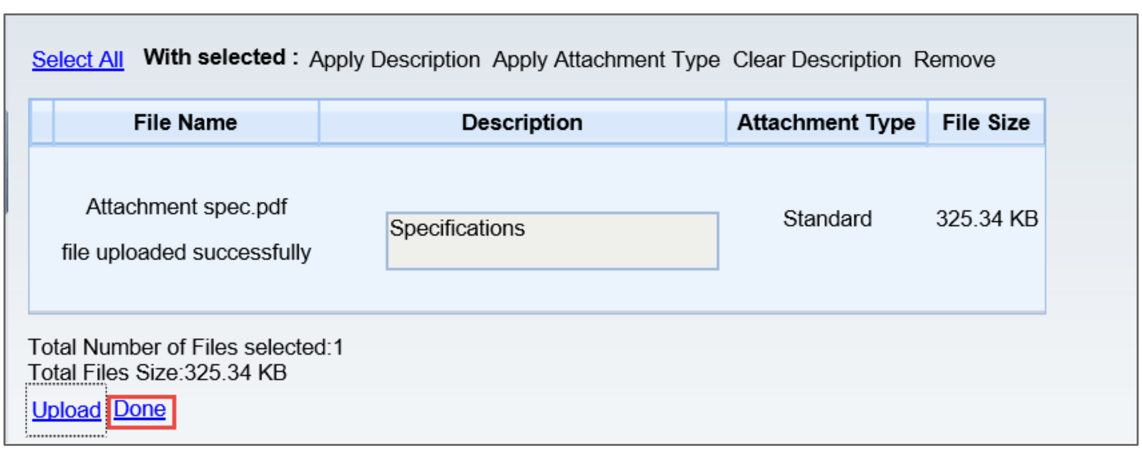
15. After you have attached all your files through either method, the selected documents will show in a list and you can enter a **Description** for each attachment.



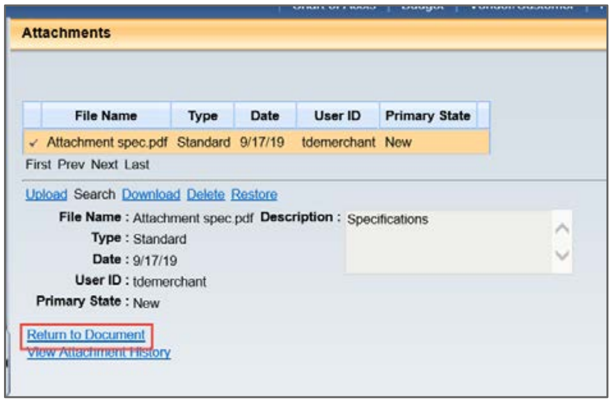
16. Once all desired files have been added, check the boxes next to each file name and select **Upload.**

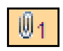


17. After the upload is complete, click **Done**.



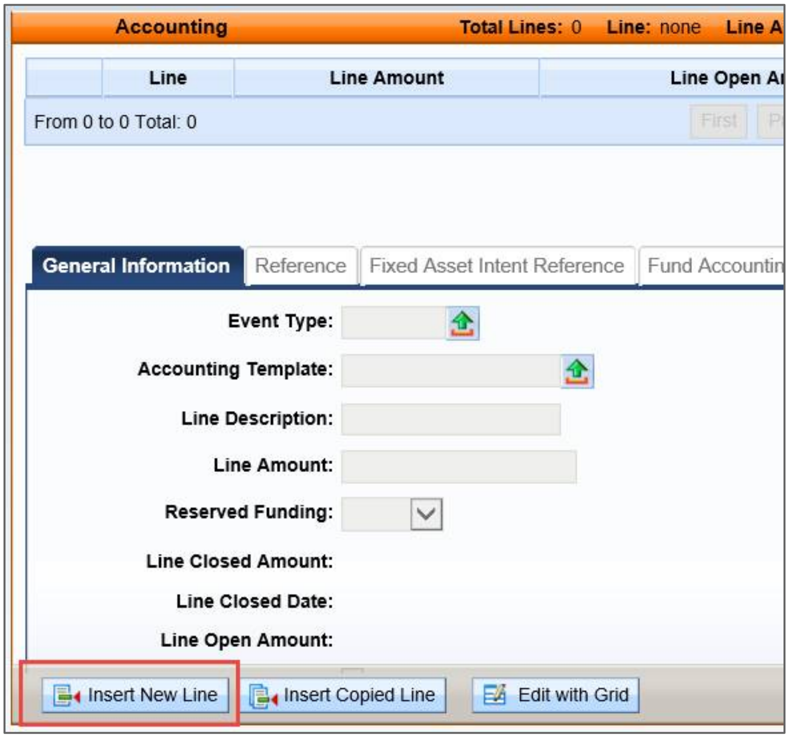
18. This will take you back to the Attachments page. Click on the **Return to Document** link.



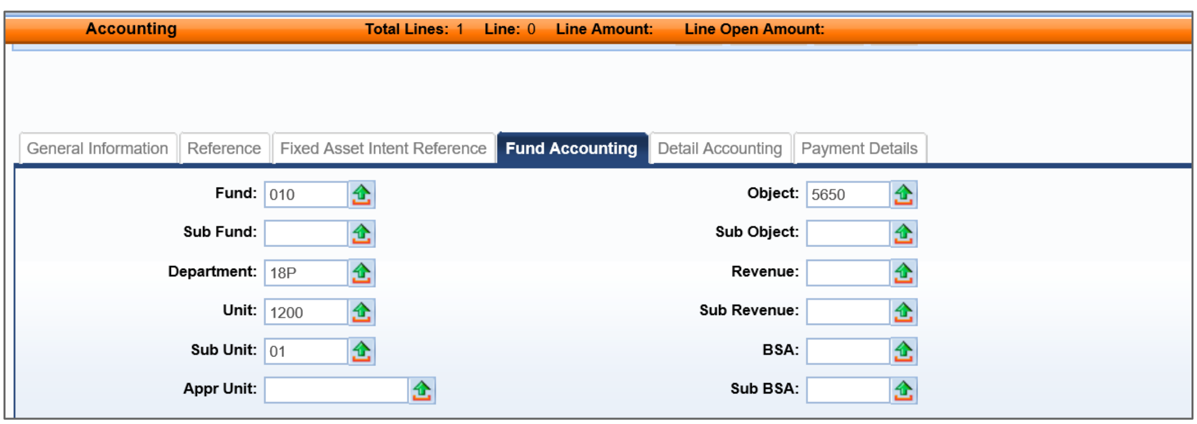
19. Notice that a paper clip icon and a number  appear on the header accordion bar. This signifies that there is an attachment associated with this section.

20. Click **Accounting** from the Document Navigator on the left-hand menu.

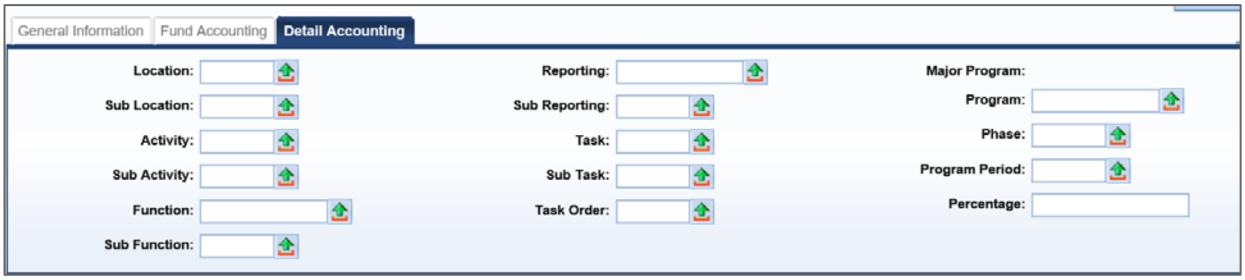
21. Click **Insert New Line.**



22. Enter your account codes:
    a. Fund
    b. Department
    c. Unit
    d. Sub Unit
    e. Object (or BSA – Fleet, Ferry, STAR and Facilities ONLY)



23. Optional: If you have detailed accounting that you want to use, you can enter it on the **Detail Accounting** tab.

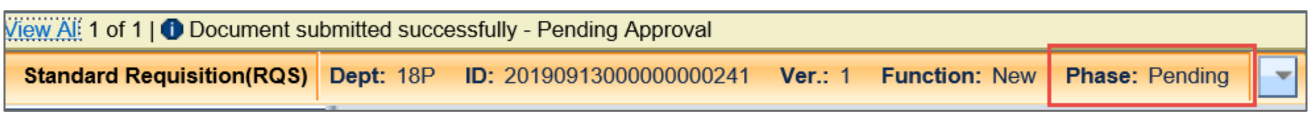


24. Save, validate and check for errors.

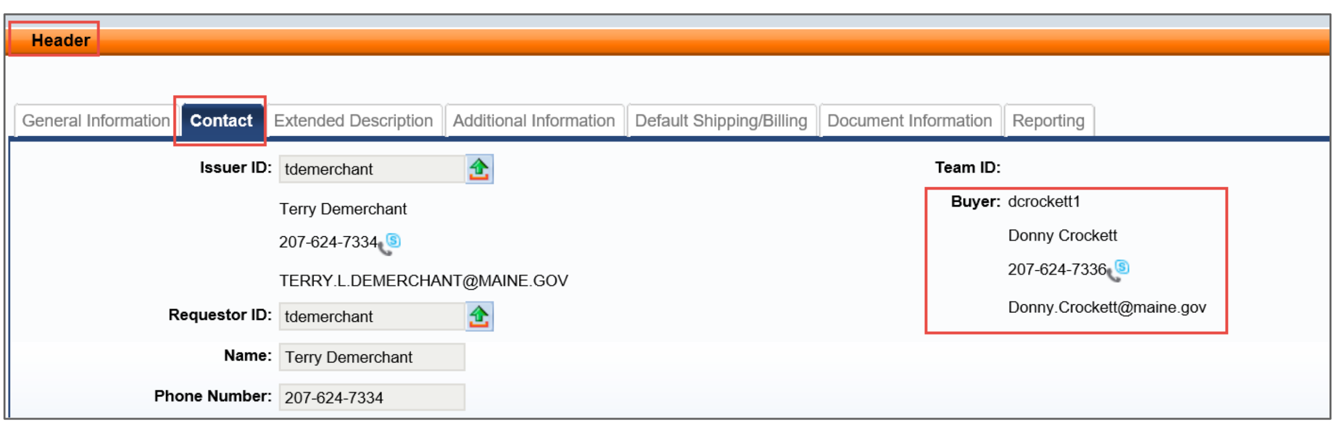
SUBMITTING THE RQS

25. Once all the above steps are complete and any errors have been resolved, click **Submit.**

NOTE: The top of the page will say "Document submitted successfully" and the submitted RQS will show as **Pending**.



26. Once all approvals have been completed on your end, the RQS will have a final status and will route to the buyer that is associated with the commodity code you have chosen. To see who that buyer is, go back to the header and click the Contact tab. The buyer information will be displayed on the right.



ADDITIONAL RESOURCES

- Advantage 302 Procurement Commodities Training Guide

Questions? *Contact Terry Demerchant in the Division of Procurement Services.*