Attachment: J-6a
Purchase Request User's Guide

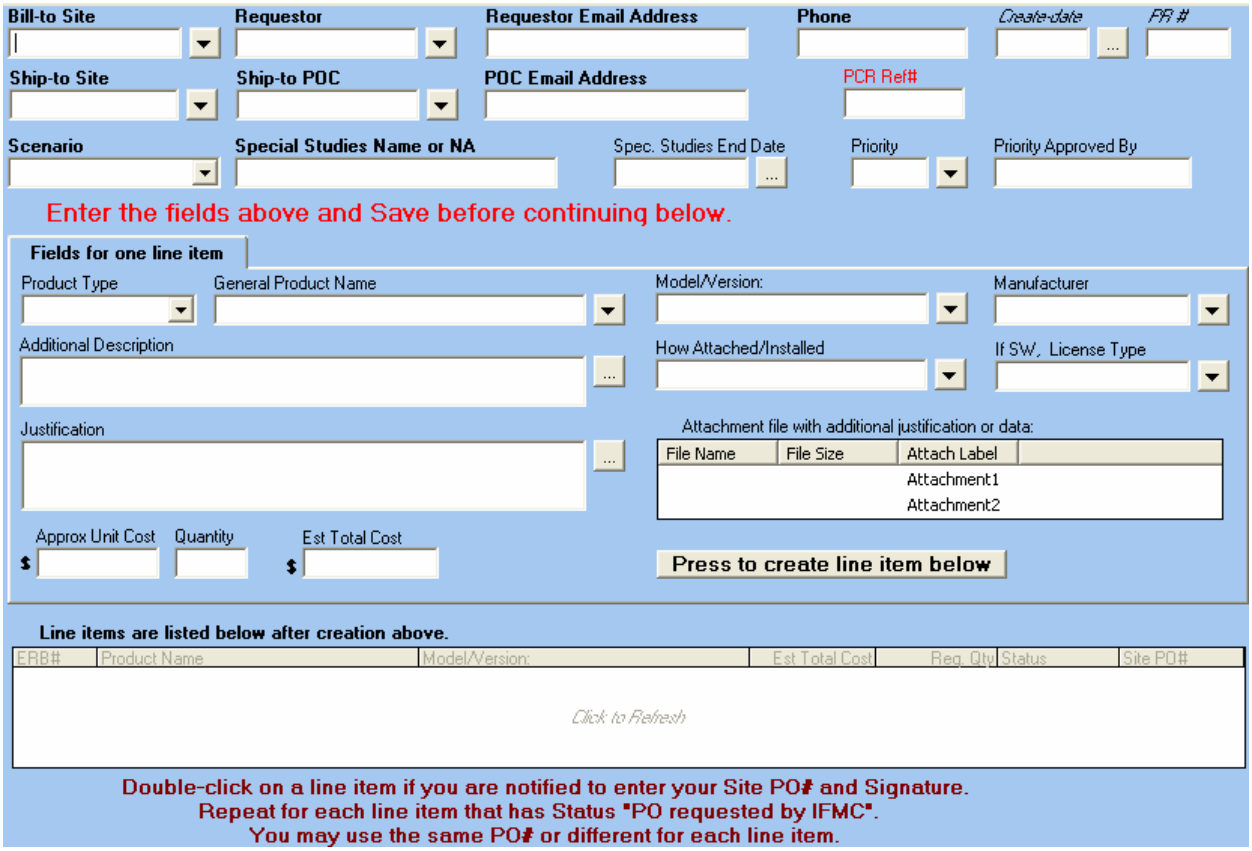
Last edited on November 3, 2005 and reviewed December 7, 2007

Introduction

Requests by all CMS contractor sites for new hardware and/or software are to be entered into the Remedy System via the Purchase Request form described in this document. As much as possible, menus will be used to populate the fields so that entries are standardized. Key field values are pushed (copied) by the system to the succeeding ERB form and database used by an Engineering Review Board (ERB) that evaluates compatibility and compliance issues with CMS hardware and software standards. Requests are ultimately approved or denied by CMS. The process from submittal through approval is automated by using the Remedy Action Request System.

If you are not familiar with the Remedy AR System, please see the AR System User's Guide for a general description before continuing with this document.

The Purchase Request Form



Fields are represented as rectangles in most cases or selection lists. Each field has a descriptive label indicating the type of information the field represents. Those that are bolded (e.g. **Bill-to Site**) are required fields that must be given a value in order to save the record. Labels in *italic* indicate a field that the system automatically fills in.

Fields that are based on menu selection are followed by buttons with down-pointing arrow heads. Even though it is usually possible to type in field values, menu based fields should be populated using the drop-down menus whenever possible for consistence of entry. This is especially important when doing searches based on these fields later.

Field Descriptions:

Bill-to Site This key field should be filled by using the drop-down menu. To prevent a user from making a wrong choice here, the system checks the entry to see if the user is registered in Remedy as representing the selected site. If not, the site choice is blanked out. Make sure you select correctly.

Requestor This value should be set by selecting from the drop-down menu. The menu is built by the system based on the Customers database maintained by the Procurement group at IFMC and your choice for the Bill-to Site field. If your name is not in the menu list you can type it in and later let the Help Desk know that your name needs to be added to the Customers database.

Requestor Email Address
Make sure this address is accurate. It is used by the system to communicate to the Requestor various Status changes and processing needs. If the Requestor has a Remedy User account the field will auto-fill, however, its accuracy should still be checked.

Phone This field will auto-fill when you select the Requestor if the information is available from the Customer database maintained by IFMC. If not, you can type in the phone number with extension but let the Help Desk know you had to do this so they can correct it for next time.

Create-date This field is auto-filled by the system at the time of creating the record. The user cannot change its value.

Note: The text, "Enter the fields above and Save before continuing below", is emphasized because it is required. Time spent filling the fields below will be wasted unless you save the record fields above first.

PR # This field is auto-filled by the system when the record is first saved.

Ship-to Site This is a required field. It allows documenting that a product is to be shipped initially or permanently to a site different than that indicated in the Bill-to Site field.

Ship-to POC If the Ship-to Site is BCSSI-MD, CSC, eDaptive, IFMC-IA, IFMC-MD, or IFMC-VA an appropriate menu showing the 1 or 2 points of contact for these sites will display and should be used. For other ship-to sites, this required field can be assigned the Requestor's name, the name of a shipping/receiving agent, or NA.

POC Email Address
If the Ship-to POC was selected from a menu or is the same as the Requestor, this field auto-populates. Otherwise, the submitter must enter the appropriate address by hand. If Ship-to POC is NA, this field should be NA.

Scenario This field should be populated from the menu. "Need specific to Site" means the request is for HW or SW within the SDPS set of standards and needed to meet a Site requirement. "New System Wide Standard" means the request is for CMS to consider adding the product as a new standard for the entire community. "Specific Studies/Contract" means the request is the result of a Special Study or Contract approved by CMS. "Prompted by CMS/IFMC" means the request is in response to a CMS memo. "Created by CMS" is to be used by CMS users that are creating the ERB request.

Special Studies Name or NA
If you indicated "Specific Studies/Contract" in the Scenario field, enter the name of the Special Study. Otherwise, enter NA in this required field.

Spec. Studies End Date
If you indicated "Specific Studies/Contract" in the Scenario field, enter the date the Special Study is suppose to end. Otherwise, leave the field blank or enter NA.

Priority This field is to give an indication of the time urgency for the request. "Low" implies there is no urgent deadline. "Medium" means there is a date requirement but normal processing should be able to meet it. "High" means the request is under a tight time line and needs to be expedited as much as possible. "High" should only be used if the Priority Approved By field is also populated.

Priority Approved By
This field is only needed if the Priority field is set to "High". In that case this field should have the name of a high ranking manager or CMS official that approved the "High" priority.

PCR Ref# This field is only visible to Development users. When a request has the potential for an impact on the entire WAN community, a Change Request (PCR) must be submitted to the CCB board. In that event the corresponding PCR# needs to be entered here for reference purposes.

Fields for one line item tab
This tab surrounds the fields that describe one line item in the Purchase Request. The Purchase Request can be used to order one or several line items. Entry for each line item is completed when the "Press to create line item below" button is pressed.

Product Type This is a required field with menu choices of Hardware, Software, SW Upgrade, HW Upgrade or Other. The choice here effects the menu list displayed for the "General Product Name" field.

General Product Name
Whenever possible this required field should be filled from the drop-down menu. The menu list displayed is dependent on your choice for the "Product Type" field.

Model/Version: Use the drop-down menu to enter the Model or Version number if possible. Not only will this create consistency but the Manufacturer and Approx Unit Cost fields will be auto-filled if a menu choice is selected. However, if the model or version are not listed in the menu, you can free hand enter the appropriate information.

Manufacturer This field is auto-filled if the General Product Name and Model/Version fields were selected from their drop-down menus. If necessary you can type in a Manufacturer value.

Additional Description
This 1500 character field is a catch-all for additional descriptive information for what the product is or who will use it. For some products the system may auto-fill this field. The user can add descriptive information also.

How Attached/Installed
For a hardware request, choose either "Direct to network", "To workstation only", or "Remote" from the menu. For a software request, choose either "On network volume" or "On a local workstation drive" from the menu.

If SW, License Type
This field is only applicable for a software request. Choose either "Concurrent" or "Standalone" from the menu.

Justification Enter the reason for making this request. This often is the main field that will be reviewed to determine whether the request will be approved. It is limited to 800 characters so must be concise and to the point. If this limited field size is inadequate, continue the justification in a Word document and add it as an attachment in the Attachment field described next.

Attachment field box

This field allows you to attach up to two application files containing relevant additional information. It is very similar to the attachment concept in GroupWise messaging. Right-click on the attachment field box and choose Add Attachment. This opens a browser dialog box for you to find and select your file. A copy of the file is actually stored on the Remedy server.

Approx Unit Cost

This field should auto-fill if the General Product Name and Model/Version fields were selected from the drop-down menus. If it does not auto-fill or is known to be incorrect you can enter a correct value. Do not enter a $ or comma as part of the entry.

Quantity Enter a whole number indicating how many you are requesting.

Est Total Cost The system will auto-fill this field when you lose focus (move the cursor) from the Quantity field if both the Approx Unit Cost and Quantity fields are populated. Otherwise, you can enter the appropriate amount but with no $ or comma punctuation.

Press to create line item below button

Once all the appropriate info for the line item has been entered into the fields contained in the **Fields for one line item** tab area, pressing this button will copy all the field information into an ERB form record used by the Engineering Review Board and CMS to consider for approval. Pressing this button will also add the line item to the display table below and clear all the tab fields for possible entry of another line item.

Note: Engineers that are requesting a Sun Bundle product will be prompted after creating the first and succeeding line items with the message: "You must also request the following as part of the bundle." As the user clicks to remove this message, the Purchase Request fields are auto-filled with the information for the next component in the bundle.

Line items table The line items table actually displays ERB records that have been created from the Purchase Request. Each line item is reviewed for approval by CMS separately. If approved, the Requestor will be notified by the system to enter a Site PO# and Signature. You can do that by bringing up the Purchase Request record in Remedy and executing the following instructions as displayed on the form:

Double-click on a line item if you are notified to enter your Site PO# and Signature.
Repeat for each line item that has Status "PO requested by IFMC".
You may use the same PO# or different for each line item.

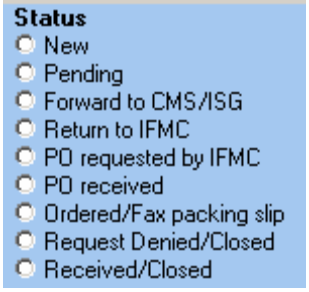
Tracking the progress of each line item:

Site users can follow the progress of their purchase requests by either viewing the Status column in the "Line item" table on the Purchase Request form or by opening and viewing the ERB form records. Site users can access the ERB records by either double-clicking the line item in the Purchase Request form or doing a File | Open in Remedy and selecting the ERB form directly. In either case, site users can view all fields and only modify the ones on the **Site PO# and Signature** tab.

Understanding the ERB Status values is the key to knowing the process. The following is a description of those values.

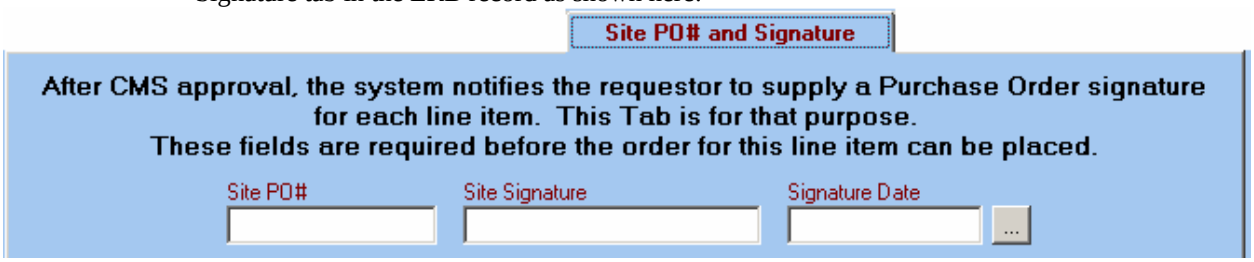
Status

This field has *New* as its default value at creation. The ERB team advances the request after review by setting the status to *Forward to CMS/ISG*. CMS/ISG advances the request after its resolution by setting status to *Return to IFMC*.



If the request is denied by CMS/ISG, IFMC will set the Status to *Request Denied/Closed*. This will trigger an automatic notification to the requestor that the request is denied and to check the ERB for details.

If the ERB is approved, IFMC Procurement sets the Status to *PO requested by IFMC*. This automatically triggers a notification to the requestor to enter their Site PO# and authorization Signature for IFMC to place the order. The Site PO# and Signature fields are on the Site PO# and Signature tab in the ERB record as shown here:



When the Site PO# and Signature has been entered by the site user, the system automatically sets the Status to *PO received*.

When IFMC sees the signature authorizing the purchase, they place the order and change the Status to *Ordered/Fax packing slip*. This triggers a notification by the system to the requestor saying the order has been placed and to FAX the packing slip to IFMC when the order is received.

When IFMC receives the packing slip, they set the Status to *Received/Closed*. ***No other purchase requests will be processed for a site if an ERB exists that is not closed.*** The system will automatically notify the requestor when the ERB ticket is closed. The notification also tells the requestor to update the Inventory record(s) that were created for them. See the Inventory User's Guide for more details.

General Procedures

The general procedures for creating new records and performing simple and complex searches are covered in the **AR System User's Guide**. The process of printing a report is also there. The Crystal reports that are available to submitters are **PR_Detail** which is for printing an Purchase Request record in detail.

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