

Partnering with CAPS

November 12, 2020

8:00 – 9:00

Presented by:
Cathy Neidner, Chris Tucker, Ashley Lund





Session Objective

To strengthen the partnership between CAPS supported agencies and CAPS by providing information on staff, policies and procedures to facilitate more efficient management of procurement activities and tasks.





Did you know?

- The CAPS section was created in 2006 to provide procurement support to non-delegated agencies when the procurement function was consolidated within the Bureau.
- The CAPS Section Chief is the special designated agent for your agency (hold the delegation) and acts as the Procurement Director for your agency.





Did you know?



CAPS Mission Statement

Manage the responsibility of procuring goods and services on behalf of its supported agencies by providing leadership, support and accountability.



Did you know?

Consolidated
Agency Purchasing
Services (CAPS)

DASHBOARD
FY20

24

Agencies/Boards
Supported

4949

Requisition
Approvals

33

RPA

21

Grant Exceptions

33

RFB/RFI

116

Renewals

51

CAPS Waiver

50

Simplified Bids

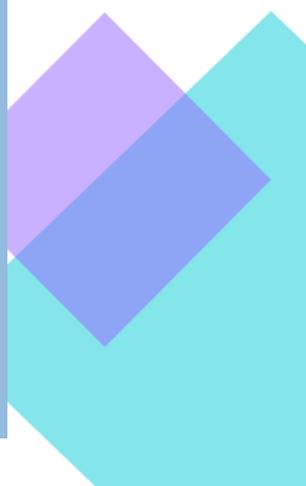
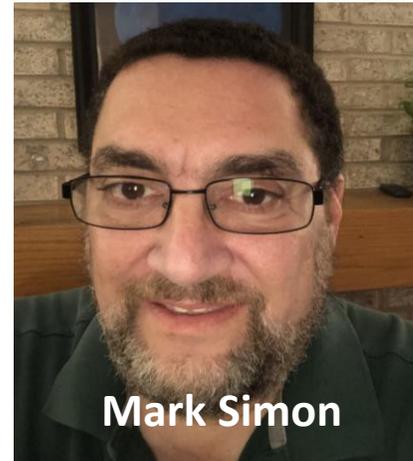
12

RFP





Meet the Team



Using
Discussion
Forum Chat
box . . .

*What is the one thing that
you wish you could learn
more about or feel that you
need more training on?*

“Survey says . . .”

WAIVERS

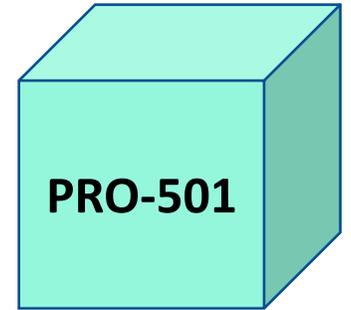
RFB/RFP/SIMP BID PROCESS

REQUISITION/PURCHASE ORDER PROCESS





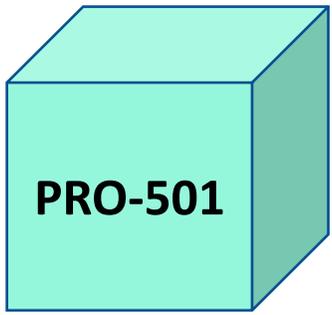
Waivers



- Competitive procurement process may be waived when bidding is not possible for ***uniqueness, emergency*** or substantial ***time pressure***.
- Exceptional and rare; will be scrutinized to ensure that bidding is not feasible, particularly for sole source requests.



Waivers

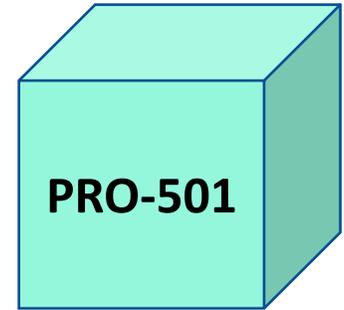


PRO-501

- Agencies must provide:
 - Justification of need and all relevant documentation to support the waiver request (e.g., market research to demonstrate that only one source exists, sole source letter from vendor, etc.)
 - How cost reflects market value:
 - Data-driven justification that the State is not being charged more than customers with similar products and services.



Waivers



- **General Waivers**

- Consolidation of like purchases from like vendors
- Maximum 1-year term
- Example: DOC requests approval to waive official sealed bid process to enter into agreements with local farmers to purchase produce and eggs as needed to support correctional farm enterprises

- **Sole Source Waivers**

- Commodity/service is available from only one source
- Can be longer than 1 year
- Example: Maintenance on OEM equipment must be performed by OEM



CAPS Waiver Procedures

- Under \$25K requires CAPS Section Chief approval
- Over \$25K requires Governor's Approval (through SBOP) RPA – DOA-3046

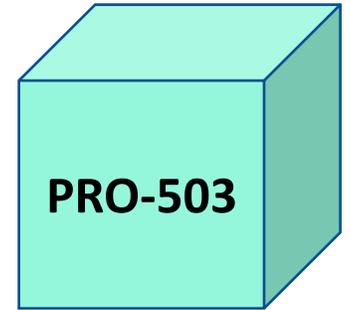
RESOURCES:

- CAPS How to Request a CAPS Waiver (Sole Source <\$25K)
- CAPS How to Submit a Request for Purchasing Authority (Governor's Waiver)





Waivers



- **Emergency Waivers**

- Beyond agency control, risk of human suffering or damage to state property requiring immediate action.
- May be a result of a declaration by the Governor





Business Case Exceptions from Mandatory Enterprise Contracts

- Enterprise contracts may have a waiver process for the following situations:
 - Required items are not available from the vendors on contract
 - Required items can be purchased from another source at a **significant** cost savings
- Consult with the Contract Manager to determine what process and documentation is needed to request the waiver.
- Some contracts have an automatic waiver under a certain dollar threshold
 - Intended for emergency purchases only; not a mechanism to avoid using the contract



“Survey says . . .”

WAIVERS



RFB/RFP/SIMP BID PROCESS

REQUISITION/PURCHASE ORDER PROCESS



Special Considerations

Mandatory Contract

Optional Contract

Purchasing Thresholds

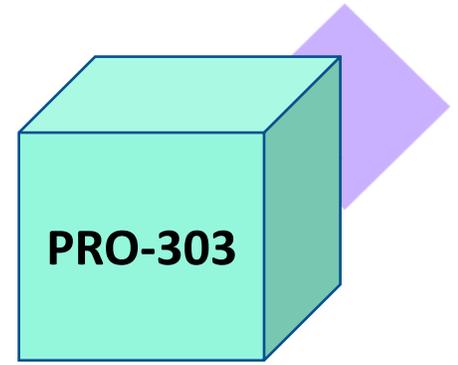
<\$5,000
Best Judgment

\$5,000-\$50,000
Simplified Bid

>\$50,000
Request for Bid or Proposal



Simplified Bid - \$5,000 to \$50,000



- Minimum of 3 quotes by telephone, verbal, catalog, web, etc. and confirm in writing
- Award to the lowest possible bidder (PRO-305)
- Be aware of serial contracting/purchasing (PRO-107)
- Use the Simplified Bidding Record Form (DOA-3088)
- Strongly recommended to post bid opportunities on the eSupplier Portal

RESOURCES:

- CAPS How to Guide – Simplified Bid



Simplified Bid - DOA-3088

Wisconsin Department of Administration
State Bureau of Procurement
DOA-3088 (R11/2016)

Simplified Bidding Record

Purchases over \$5,000 through \$50,000;
Printing, \$50 through \$50,000

Instructions:

- Agency shall contact at least three (3) suppliers and use PRO-C-8 as guidance.
- Agency shall make an effort to solicit small businesses, veteran-owned businesses, disabled veteran-owned business and minority businesses and work centers.
- The completed form shall be attached to the requisition or procurement/transactional contract.
- Generic specifications shall be used when possible.
- When necessary to use a brand name to identify a level of quality, suppliers must be informed that equivalent alternatives may be acceptable; agency will be the sole determinate of equivalency.
- The winning bidder should be indicated. Reasons for rejecting any bids shall be noted below.

Date	Agency/ Location
Person Completing	
Simplified Bid Number	
Req or Reference Number	
Codes: MBE: Minority Business Enterprise (Certified) WC: Work Center(Certified) DVB: Disabled Veteran-owned Business (Certified)	

Item Description	Qty	Supplier Name & Address			Supplier Name & Address			Supplier Name & Address		
		Supplier ID			Supplier ID			Supplier ID		
		MBE	WC	DVB	MBE	WC	DVB	MBE	WC	DVB
		Unit Price		Total	Unit Price		Total	Unit Price		Total
		Grand Total			Grand Total			Grand Total		
Contact Person										
Email Address										
Phone Number										
Contact Date										
Reply Date										
Method of Bid: Phone, email, fax, website, etc.										
Delivery										
Additional information (note the following as appropriate): bids rejected and why; preferences exercised; explain reason if less than 3 suppliers were contacted:										



Special Considerations

Mandatory Contract

Optional Contract

Purchasing Thresholds

<\$5,000
Best Judgment

\$5,000-\$50,000
Simplified Bid

>\$50,000
Request for Bid or Proposal



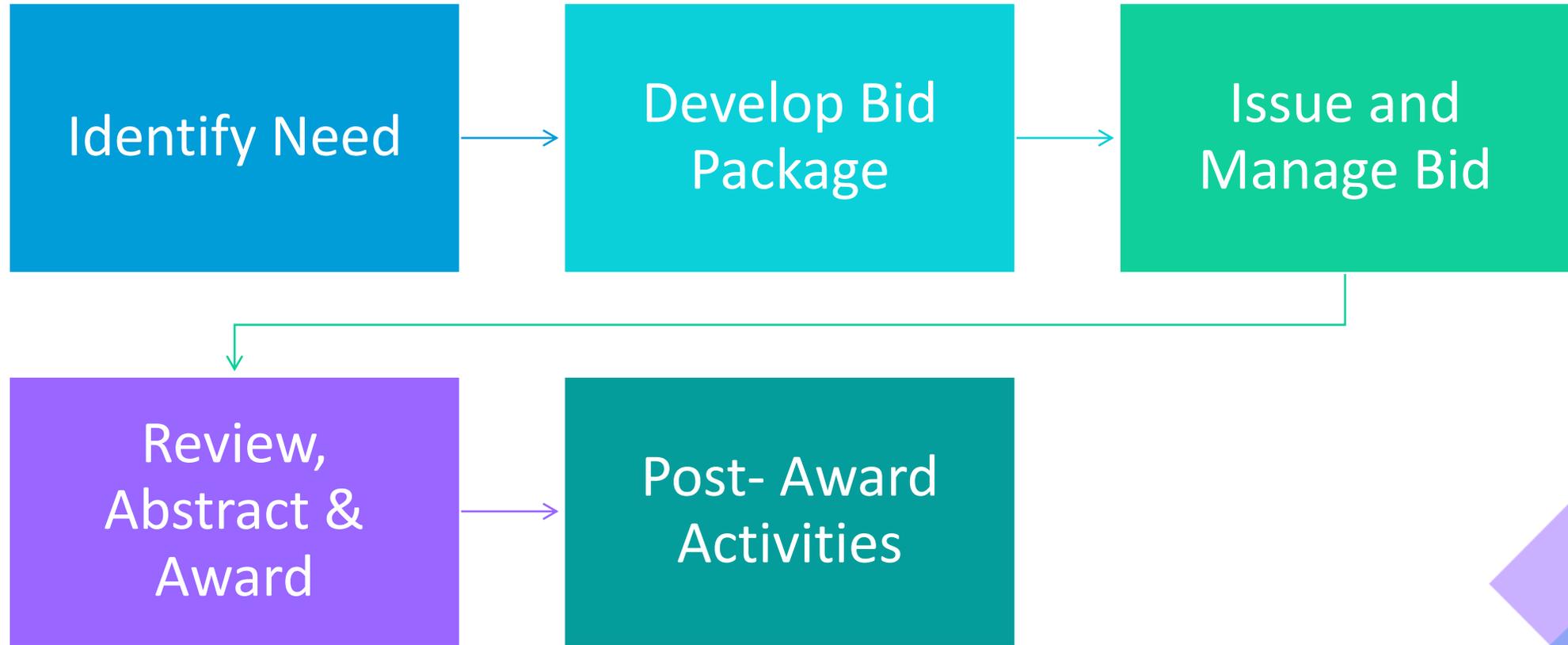
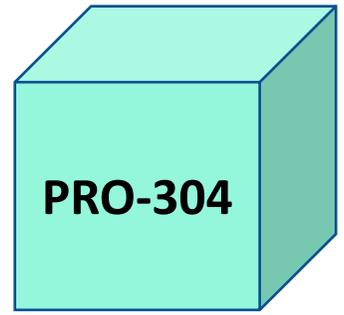
Request for Bid

When to Use

- You know precisely what you need
- You have detailed requirements and specifications
- Lots of competition exists
- The product or service is available from more than one source



Request for Bid (RFB) Process



RFB Process: Identify Need

Agency

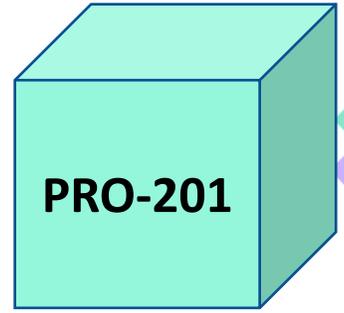
- New or existing procurement?
- Software purchase?
- Existing contract?
- Commodity or a Service?
- Create a timeline with CAPS

CAPS

- Aid in development of timeline
- Research existing contracts



RFB Process: Develop RFB (Planning & Preapproval)



Agency

- Complete Procurement Plan
- Complete CBA
- Send Proc Plan and CBA to CAPS

CAPS

- Review and submit completed Procurement Plan to SBOP
- Bid Number assigned
- Receives approved or denied Procurement Plan
- Review and send completed CBA to SBOP



RFB Process: Develop RFB (RFB Document & Cost Sheet Preparation)

Agency

- Purpose and Scope
- Bidder Qualifications
- Mandatory Specifications (Technical Requirements, Performance and Support Requirements, etc.)
- Any Special Terms and Conditions
- Cost Sheet
- Compile list of Potential Bidders

CAPS

- Bidder Outreach
- Assist Agency with Mandatory Specifications (Technical Requirements, Performance and Support Requirements, etc.)
- RFB and Cost Sheet entered into Strategic Sourcing
- Provide DRAFT RFB to agency for discussion and revisions
- RFB and Cost Sheet Finalized
- Peer Review
- Section Chief Review
- Agency approval to post to eSupplier
- RFB Posting to eSupplier



RFB Process: Issue and Manage RFB

Agency

- Answer Questions received from Bidders

CAPS

- Questions and concerns reviewed as needed
- Creation of Amendments
- Post Bidder Communication to eSupplier
- If multiple rounds of questions, repeat



RFB Process: Review, Abstract and Award

Agency

- Reference Checks
- Protest and Appeal Period

CAPS

- Review all Bidder responses
- Review all Bidder documents
- Verify Cost Sheet is completed
- Clarifications
- Eligible/ineligible status check
- Create Cost Abstract
- Admin Review (only occurs on Thursday)
- Notice of Intent to Award



RFB Process: Post Award Activities

Agency

- Negotiate and create Contract with winning Bidder(s)

CAPS

- Assign Contract Number
- Create Transactional Contract in STAR
- Award in Strategic Sourcing
- Ensure official procurement file is complete





RFB: Pros and Cons

Advantages

- Award process is simpler
- Award is made to the responsive qualified bidder providing the best value
- Explicitly outlines what the specifications and desired end-product will be

Disadvantages

- Defined specifications may be difficult to develop
- Does not always encourage innovative solutions
- Performance and track record are not sufficiently considered





Request for Proposal

When to Use

- Factors other than price are evaluated
- Negotiations are desired
- Proposer is expected to provide innovative ideas
- When a project is sufficiently complex



Request for Proposal (RFP) Process

PRO-306
PRO-307
PRO-308



RFP Process: Identify Need

Agency

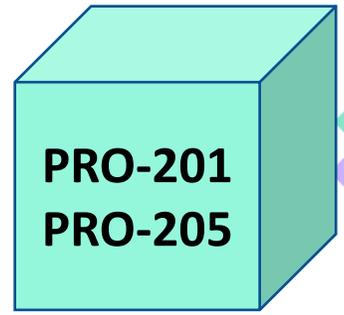
- New or existing procurement?
- Software purchase?
- Existing contract?
- Commodity or a Service?
- Create a timeline with CAPS

CAPS

- Aid in development of timeline
- Research existing contracts



RFP Process: Develop RFP (Planning & Preapproval)



Agency

- Complete Procurement Plan (PRO-201)
- Complete CBA (PRO-205)
- Send Proc Plan and CBA to CAPS

CAPS

- Review and submit completed Procurement Plan to SBOP
- Proposal Number assigned
- Receives approved or denied Procurement Plan
- Review and send completed CBA to SBOP



RFP Process: Develop RFP (RFP Document, Cost Sheet and Benchmark Preparation)

Agency

- Purpose and Scope
- General/Mandatory Requirements
- Technical, Performance and Support Requirements, etc.
- Any Special Terms and Conditions
- Cost Sheet
- Scoring Criteria/Benchmarks
- Compile list of Potential Bidders
- Compile list of Evaluators, PRO-307

CAPS

- Proposer Outreach
- Assist in development of RFP
- RFP, Cost Sheet and Scoring Criteria entered into Strategic Sourcing
- Review of questions or concerns
- RFP, Cost Sheet and Benchmarks Finalized
- Peer Review
- Section Chief Review
- Agency approval to post to eSupplier
- RFP Posting to eSupplier



RFP Process: Issue and Manage RFP

Agency

- Answer Questions received from proposers

CAPS

- Questions and concerns reviewed as needed
- Creation of Amendments
- Post Bidder Communication to eSupplier
- If multiple rounds of questions, repeat



RFP Process: Review, Evaluate and Award

Agency/Evaluation Committee

- Evaluation Committee acts on Agency's behalf during this process

CAPS

- Review all Proposer responses
- Review all Proposer documents
- Verify Cost Sheet is completed
- Review exceptions
- Ensure cost is not referenced in Proposals
- Clarifications
- Eligible/ineligible status



RFP Process: *Review, Evaluate and Award*

Agency/Evaluation Committee

- Attend all meetings
- Read and review all proposals
- Score proposals against benchmarks
- Raise questions
- Request clarifications

CAPS

- Kick off Meeting
- Evaluation Meeting(s)
- Demonstrations/interviews/site visits
- Reference Checks
- Evaluation Follow-up Meeting(s)
- Cost Evaluation
- BAFO
- Evaluation Committee Report (PRO-307)
- Admin Review (only occurs on Thursday)
- Notice of Intent to Award



RFP Process: Post Award Activities

Agency

- Negotiate and create Contract with winning Proposer(s)
- Protest and Appeals period

CAPS

- Assign Contract Number
- Create Transactional Contract in Strategic Sourcing
- Post Award Information to STAR
- Ensure official procurement file is complete





RFP: Pros and Cons

Advantages

- Flexibility
- Vendors give ideas and solutions you had not considered
- Not just based on price
- Allows for negotiations in order to obtain the best value

Disadvantages

- Lead times for procurement are much longer
- Evaluations are more complex
- Not always the lowest cost



RFB	vs.	RFP
Specifications	Request	Outcomes
Objective; yes/no, lowest cost	Response	Subjective; how well met, cost is a factor
Lowest responsible bidder	Award	Evaluation committee scores
Only with the lowest responsible bidder on price	Negotiation	Multiple proposers before award
3-6 months	Average Time	6-12 months



“Survey says . . .”

WAIVERS

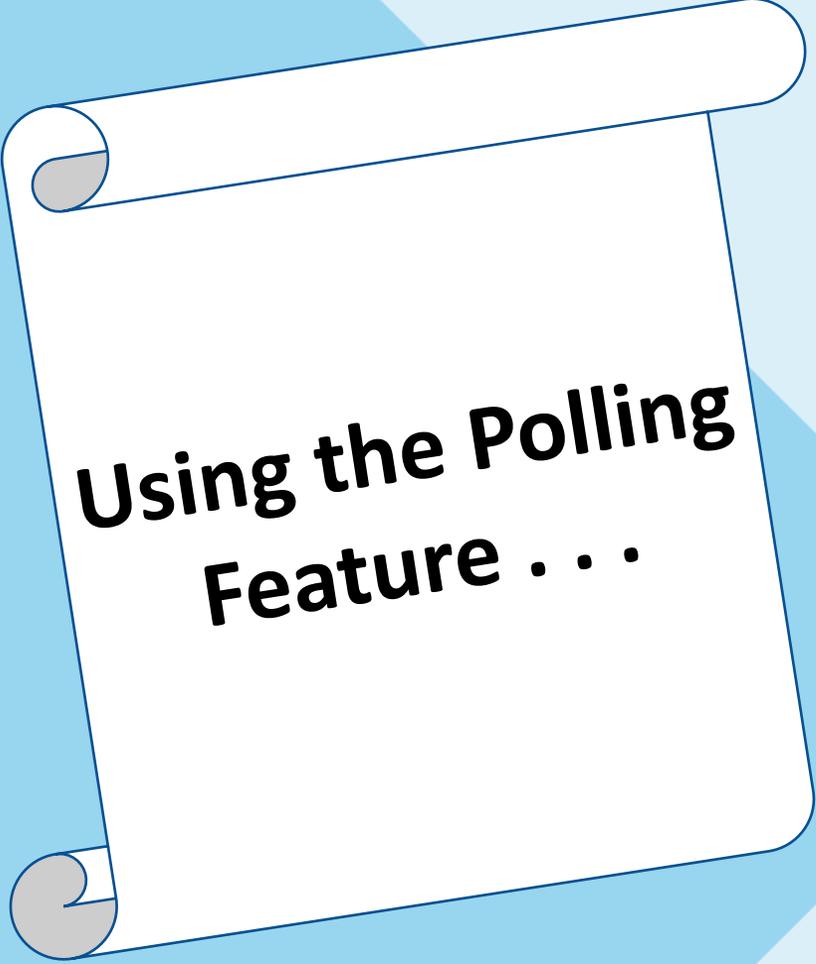


RFB/RFP/SIMP BID PROCESS



REQUISITION/PURCHASE ORDER PROCESS





**Using the Polling
Feature . . .**

*What part of the
requisition process do you
find most challenging?*

Overview

- Creating a Requisition
 - Common Pitfalls/Things to consider
 - Procurement Authority and Documentation
- Monitoring the Requisition
 - Who are the Approvers?
 - What is the status?
- Purchase Order
 - Change Order





Common Pitfalls of the Requisition Process

- Creating a Requisition
 - Purchasing Authority
 - Category/ Commodity/ NIGP Codes
 - PO Type
 - General vs. Grant
 - Amount Only Flag



Procurement Authority

Procurement Authority	Description	Required Attachments	Approval Justification
Best Judgement	\$5,000 or less over a fiscal year	Quote where available	Best Judgement
Simplified Bid	Over the \$5,000 up to the \$50,000 over full contract duration	DOA-3088 as attachment or on contract	Simplified Bid
Sole Source Under \$25K	Under \$25,000 over full contract duration	*Contract notated in Contract ID *Signed authorization letter from CAPS Section Chief	PRO-501
RPA	Over \$25,000 over full contract duration	Contract notated in Contract ID	RPA Number
Enterprise, CAPS, or Piggybacking Contract	*Mandatory Contracts *Optional Contracts *Piggybacking off UW System	Contract notated in Contract ID	Contract Number



Procurement Authority-Continued

Procurement Authority	Description	Required Attachments	Approval Justification
Grant	Awarding Grant Funds to Participants	Exemption Letter PO Type: Grant Recommended: Contract w/ \$\$	Grant
Interagency	Purchase of commodities or services from Wisconsin state agencies	Nothing Required	Interagency
Intergovernmental	Purchase of commodities or services from the Federal Government	Must be a federal government listed as the supplier	Intergovernmental
Collective/ Collaborative Purchase	Purchase from any vendor on agreements established by any other state government, federal government, or any municipality of the State of Wisconsin.	If over \$50K will require a Procurement Plan	Collective Purchase



Announcements

No Announcements

STAR Approvals



STAR Inquiry



Reporting Tools



Procurement Workcenter



Requisitions



Purchase Orders



Receiving



Transactional Contracts



Strategic Sourcing



Process Requisitions ^

Manage Requisitions

Requisition Entry

Manage Requisition Approvals

Requester's Workbench

Expedite Requisitions

Sourcing Workbench

View Supplier Info

Source Requisitions v

Review Requisitions v

Requisition Settings

Business Unit Department of Administration Requisition Name

*Requester Lund, Ashley Kay Priority

*Currency

Default Options ?

- Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To Add One Time Address

Due Date Attention

Distribution Defaults

SpeedChart

Accounting Defaults

Personalize | Find | First 1 of 1 Last

Chartfields1 | Details | Asset Information

Dist	Percent	Location	GL Unit	Bud Ref	Fund	Appropriation	Dept	Account	Program
1	<input type="text"/>	MADEWI0017	50500	<input type="text"/>	<input type="text"/>	<input type="text"/>	505R30000C	<input type="text"/>	<input type="text"/>

OK Cancel



Business Unit 50500

Department of Administration

*Requester LUNDAXHUG

Lund, Ashley Kay

*Currency USD

Requisition Name FY21 Laptop Computer SHI

Priority Medium

Default Options

- Default If you select this option, the defaults specified below will be applied to all fields.
- Override If you select this option, the defaults specified below will override the system defaults.

Line Defaults

Supplier 0000004111

Supplier Location LOC-6

Buyer

Shipping Defaults

Ship To

Due Date

Distribution Defaults

SpeedChart

Accounting Defaults

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Bud Ref	Fund
1		MADEWI0017	50500		

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By Description laptop Find

Catalog	Category	Description	Find in Tree
1 NON_CATALOG	05567	Mounting Hardware, Automotive: Laptops, GPS, Cameras, Electr	
2 NON_CATALOG	20454	Microcomputers, Handheld, Laptop, and Notebook	
3 NON_CATALOG	20554	Microcomputers, Handheld, Laptop, and Notebook, Environmenta	
4 NON_CATALOG	98424	Computers, Microcomputer, Handheld, Laptop and Notebook, Ren	

Browse Category Tree

Return



Vendornet.wi.gov

VendorNet Registration Bids **Contracts** **ICGP Codes** Forms General Procurement FAQ Contact Us Login

Search

*Hit Enter to Search

Code	Description
05500	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRAILERS, TRUCKS, ETC.
Code	Description
05567	Mounting Hardware, Automotive: Laptops, GPS, Cameras, Electronic Devices, etc.
20400	COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS
Code	Description
20454	Microcomputers, Handheld, Laptop, and Notebook
20500	COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS, ENVIRONMENTALLY CERTIFIED BY AN AGENCY ACCEPTED CERTIFICATION ENTITY
Code	Description
20554	Microcomputers, Handheld, Laptop, and Notebook, Environmentally Certified Products
98400	RENTAL OR LEASE SERVICES OF COMPUTERS, DATA PROCESSING, AND WORD PROCESSING EQUIPMENT
Code	Description
98424	Computers, Microcomputer, Handheld, Laptop and Notebook, Rental or Lease



Business Unit 50500

Department of Administration

Requisition Name FY21 Laptop Computer SHI

*Requester LUNDAXHUG

Lund, Ashley Kay

Priority Medium

*Currency USD

Default Options

Default

If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override

If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier 0000004111

Supplier Location LOC-6

Buyer

Category 20454

Unit of Measure UNT



Shipping Defaults

Ship To DOA001709

Add One Time Address

Due Date

Attention Ashley Lund

Distribution Defaults

SpeedChart

Accounting Defaults

Personalize | Find | First 1 of 1 Last

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Bud Ref	Fund	Appropriation	Dept	Account	Program
1		MADEWI0017	50500				505R30000C		

OK Cancel



Special Requests ?

Enter information about the non-catalog item you would like to order.

 1 Line

Checkout

Item Details

*Item Description

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

Supplier

Supplier ID

Supplier Name SHI International Corp [Suggest New Supplier](#)

Supplier Item ID

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

Extended notes on the product you are purchasing. Some examples: Product specifications, color, type, Anything you think is important to share about this line.

Send to Supplier

Show at Receipt

Show at Voucher

Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.



Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit Department of Administration Requisition Name
*Requester Lund,Ashley Kay Priority
*Currency PO Type

Cart Summary: Total Amount 100.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input type="checkbox"/> 1	Laptop Computer		SHI International Corp	<input type="text" value="1.0000"/>	Units	0000	100.00			
<input type="checkbox"/> Select All / Deselect All		Select lines to:								

Amount 100.00 USD

- Chap 160
- Chap 281
- Chap 283
- Chap 285
- Chap 289
- Chap 291
- Chap 350
- Chapter 13
- Chapter 23
- Chapter 26
- Chapter 27
- Chapter 28
- Chapter 29
- Chapter 30
- Chapter 31
- Chapter 33
- Chapter 40
- Chapter 84
- General
- Grants

Shipping Summary

[Edit for All Lines](#)

Ship To Location DOA001709
Address ADMINISTRATION, DEPARTMENT OF
DIVISION OF ADMINISTRATIVE SERVICES
101 EAST WILSON ST
MADISON, WI 53703
Attention To Lund,Ashley Kay
Comments

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

 [Check Budget](#)  [Pre-Check Budget](#)  [Save & submit](#)  [Save for Later](#)  [Add More Items](#)  [Preview Approvals](#)  [Add Request Document](#)



Amount Only Flag

Line Details

Line Details ?

No Image Line 1 #24421166 ROUND STIC 96PK BONU Line Status Approved

Item Details ?

Merchandise Amount	78023.33 USD	<input type="checkbox"/> RFQ Required
Item ID		<input type="checkbox"/> Device Tracking
Category	62080	<input type="checkbox"/> Zero Price Indicator
Original Substituted Item Description		<input type="checkbox"/> Stockless Item
Physical Nature	Goods	<input checked="" type="checkbox"/> Amount Only
Buyer		<input type="checkbox"/> Inspection Required

Buyer Information
Configuration Info



Line Details

Line Details

No Image Line 1 Laptop Computer

Item Details

Merchandise Amount: 100.00 USD
Item ID:
Category: 20454
Original Substituted Item Description:
Physical Nature: Goods
Buyer:
Buyer Information
Configuration Info

Contract Information

Use Contract if Available
Contract ID: 
Contract Details
Version:
Contract Line: 
Category Line: 

Look Up Contract ID

SetID: SHARE
Contract ID: 
Short Supplier Name: 
Description: 

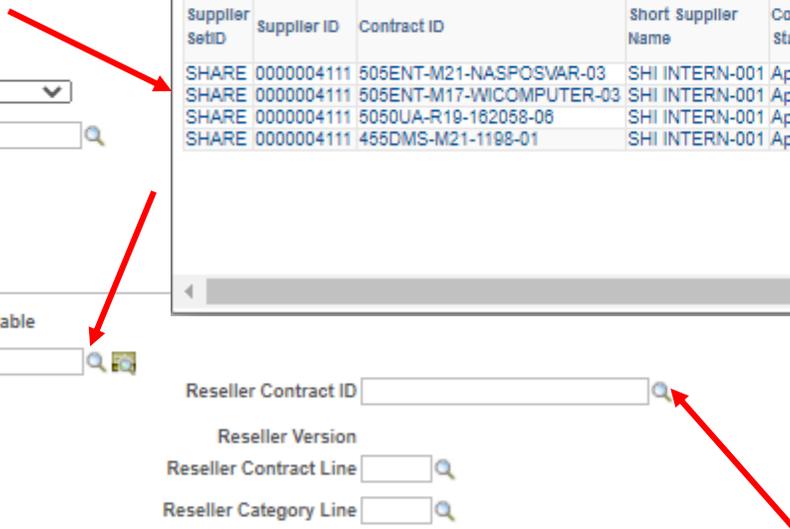
 Basic Lookup

Search Results

View 100 First 1-4 of 4 Last

Supplier SetID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date
SHARE	0000004111	505ENT-M21-NASPOSVAR-03	SHI INTERN-001	Approved	VAR SOFTWARE SUPPORT AND MAINT	09/02/2020
SHARE	0000004111	505ENT-M17-WICOMPUTER-03	SHI INTERN-001	Approved	Computer Hardware/Periph/Svcs	11/23/2016
SHARE	0000004111	5050UA-R19-182058-06	SHI INTERN-001	Approved	(blank)	10/24/2018
SHARE	0000004111	455DMS-M21-1198-01	SHI INTERN-001	Approved	HP&IBM Extended Server Support	08/07/2020

Reseller Contract ID: 
Reseller Version:
Reseller Contract Line: 
Reseller Category Line: 



Co

Shipping Summary

[Edit for All Lines](#)

Ship To Location DOA001709
Address ADMINISTRATION, DEPARTMENT OF
DIVISION OF ADMINISTRATIVE SERVICES
101 EAST WILSON ST
MADISON, WI 53703
Attention To Lund,Ashley Kay
Comments

Header Comments

Business Unit 50500 Requisition Date 10/22/2020
Status Open

Comments Find First 1 of 1 Last

Use Standard Comments Entered On:

1 Add notes for the full requisition

Send to Supplier Show at Receipt Show at Voucher

Add Attachments

OK Cancel

Requisition Comments and Attachments

Enter requisition comments

Add notes for the full requisition

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

505ENT-M17-WICOMPUTER-03

[Check Budget](#) [Pre-Check Budget](#)

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#) [Add Request Document](#)



Approval Process

- Where is the requisition in the process?
- Who are the Approvers?
- Expedite to PO



Announcements

No Announcements

STAR Approvals



STAR Inquiry



Reporting Tools



Procurement Workcenter



Requisitions



Purchase Orders



Receiving



Transactional Contracts



Strategic Sourcing



Process Requisitions

Manage Requisitions

Requisition Entry

Manage Requisition Approvals

Requester's Workbench

Expedite Requisitions

Sourcing Workbench

View Supplier Info

Source Requisitions

Review Requisitions

Manage Requisitions

Requisition Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit

Requisition Name

Requisition ID

Request State

Budget Status

Date From

Date To

Requester

Entered By

PO ID

[Show Advanced Search](#)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action menu.

Req ID	Requisition Name	BU	Date	Requester	Entered By	Request State	Budget Status	PO ID
000009847	Elections-COVID-19	50500	10/21/2020	Ness,Stella R	Ness,Stella R	PO(s) Dis		
Requester: Ness,Stella R		Entered By: Ness,Stella R		Pre-Encumbrance Balance		0.00 USD		

Request Lifespan: Requisition → **Approvals** → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Request Lifespan:

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	#24421166 ROUND STIC 96PK BO...	PO Dispatched	7.4900	USD	10,417.0000	EA	Staples Contract & Commercial

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)



▶ Line Information ?

▼ Review/Edit Approvers

Threshold Approval

▼ RHD 19-08 Horicon School Apts: **Awaiting Further Approvals**

Req Total > \$50,000

Approved

✓ **Forcier, Julie**
Agency Requisition Approver 3
10/22/20 - 11:12 AM

Fiscal Approval

▼ Line 1: **Approved**

RHD 19-08 HOME2020PI Assistance

ChartField Verification

Approved

✓ **Chhetri, Anju**
Agency ChartField Approver
10/22/20 - 11:30 AM

Central Purchasing Approval

▼ Line 1: **Pending**

RHD 19-08 HOME2020PI Assistance

CAPS Central Approval

Pending

🕒 **Multiple Approvers**
CAPS Central Approver

https://starfin.wi.gov/psc/starfin_9/EMPLOY... — □ ×

starfin.wi.gov/psc/starfin_9/EMPLOYEE/ERP/s/WEB... 🔍

Approver #1

Name: Tucker, Christopher A
Empl ID: 100115100
Department: 505R310000
Supervisor ID:
Telephone:
Reports To Position Number: 333705
Email ID: chris.tucker@wisconsin.gov

Approver #2

Name: Rademacher, Amber M
Empl ID: 100073062
Department: 505R310000
Supervisor ID:
Telephone:
Reports To Position Number: 333705
Email ID: Amber.Rademacher@wisconsin.gov

Approver #3

Name: Ness, Stella R
Empl ID: 100049231
Department: 505R310000
Supervisor ID:
Telephone:
Reports To Position Number: 333705
Email ID: stella.ness2@wisconsin.gov

Approver #4

Name: Neidner, Catherine
Empl ID: 100030858
Department: 505R310000
Supervisor ID:
Telephone:
Reports To Position Number: 324799
Email ID: Catherine.Neidner@wisconsin.gov



Change Order-Purchase Order Process

Trigger Approval Routing

- Increase or Decrease Amount or Item Price
- Increase or Decrease Quantity
- Add Amount Only Checkbox
- Adding an Item Line
- Updating Chartfields

Does not Trigger Approval Routing

- Change the PO Type
- Supplier Location
- Updating Item Description



“Survey says . . .”

WAIVERS ✓

RFB/RFP/SIMP BID PROCESS ✓

REQUISITION/PURCHASE ORDER PROCESS ✓



RESOURCES

- **CAPS Liaison**
- State Procurement Manual
- SBOP Trainings
- STAR Job Aids
- VendorNet
- WISBuy
- eSupplier

HOW TO Guides

(available on CAPS SharePoint site)

- Grant Exemption
- Request a CAPS waiver
- Search VendorNet
- Submit an RPA
- Do a Simplified Bid
- How to Enter a Reseller on a Requisition

Thank You for attending!

Questions?