

State of Wisconsin

Department of Administration

Procurement Request Portal:

Procurement Plan

User Guide

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Note: If you have a pop-up blocker installed in your browser, be sure that it is turned off while filling out the information for the creation of your Procurement Plan. If you click the back button in your browser with the pop-up blocker on, you may not be prompted to save your progress, which could result in losing information you had previously entered.

Note: You will be automatically logged out after your screen has been idle for 20-minutes. Be sure to save your information often to avoid losing anything.

Note: CAPS will submit all Procurement Plan requests on behalf of its supported agencies. CAPS agencies should follow up directly with CAPS staff to track progress of their requests.

ACCESSING THE PROCUREMENT REQUEST PORTAL

For State Agencies:

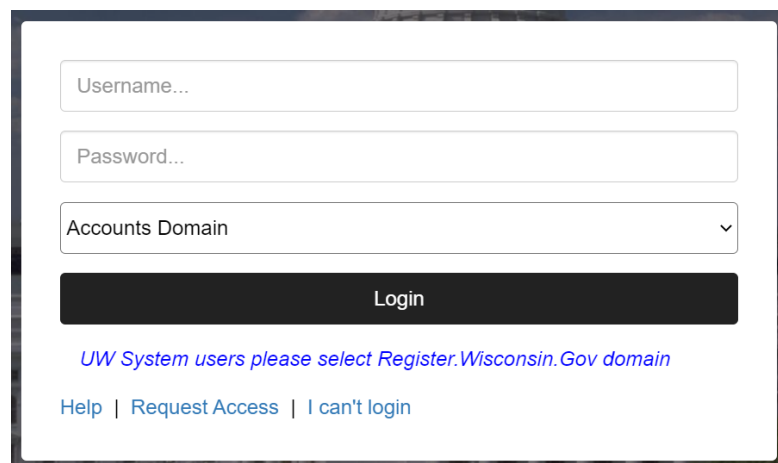
1. Sign up for an account.

Before you can begin to use the Procurement Request Portal to submit Procurement Plans, you'll need to sign up for an account. If you have the RPA User role you will automatically have access to enter Procurement Plans. If you do not currently have access to the Request for Procurement Authority system, send an email to DOAWisPro@wisconsin.gov with the following information:

- Your name
- Your IAM username
- The name of your agency
- Reference "Procurement Request Portal" in your email

2. Login to your account.

Navigate to the website <https://rpa.wi.gov/>. As an employee of a State Agency, you will use your accounts domain credentials, also known as an IAM account. These are the credentials you use for your "wisconsin.gov" email address. Make sure **Accounts Domain** is selected in the dropdown menu before clicking **Login**.



Username...

Password...

Accounts Domain ▾

Login

UW System users please select Register.Wisconsin.Gov domain

[Help](#) | [Request Access](#) | [I can't login](#)

For the University of Wisconsin System:

1. Obtain login credentials.

Navigate to the website <https://register.wisconsin.gov>. Follow the instructions on the website to **Sign Up for your DOA/Wisconsin Logon** using your Wisconsin credentials. Choose **SharePoint** for the **Systems You Will Access** when you create your account.

2. Sign up for an account.

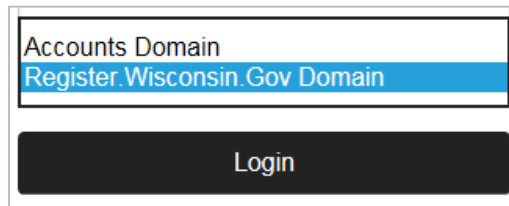
Before you can begin to use the Procurement Request Portal to submit Procurement Plans, you'll need to sign up for an account. If you have the RPA User role you will automatically have access to enter

Procurement Plans. If you do not currently have access to the Procurement Request Portal, send an email to DOAWisPro@wisconsin.gov with the following information:

- Your name
- Your IAM username
- The name of your agency
- Reference “Procurement Request Portal” in your email

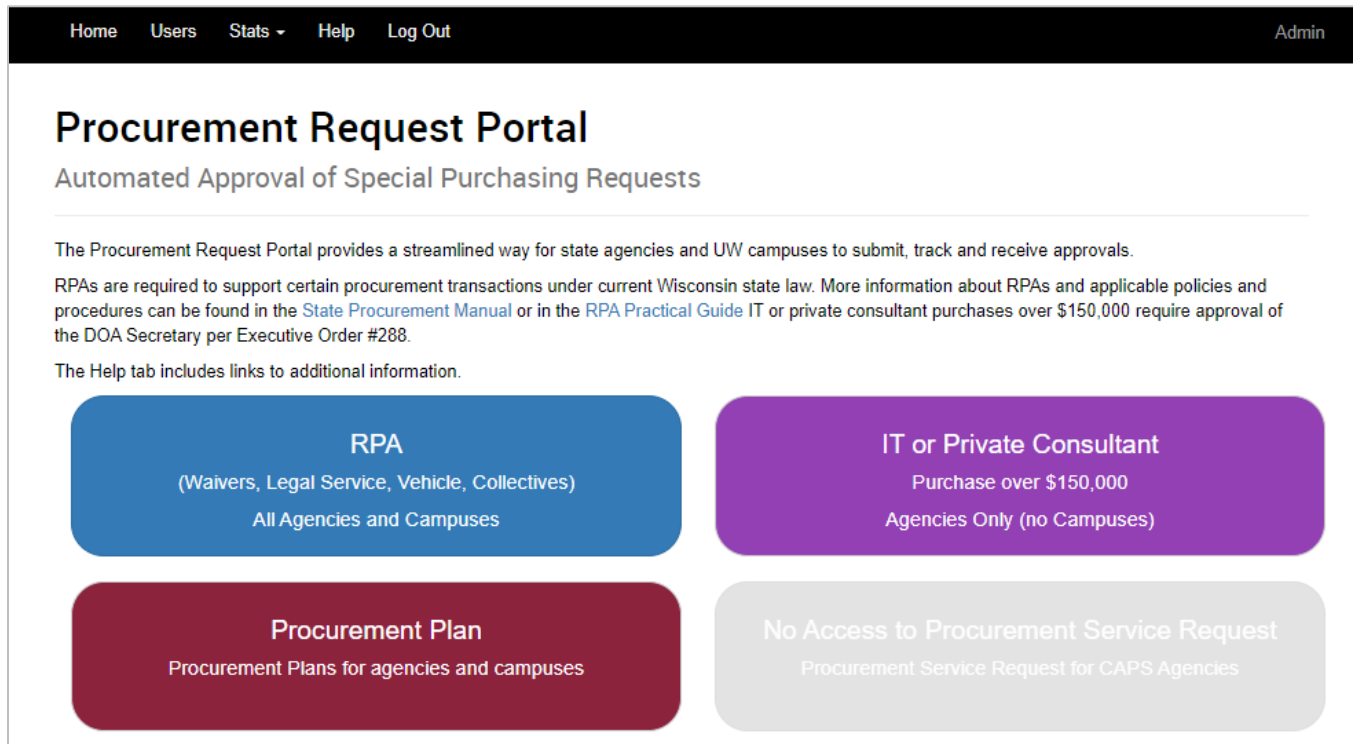
3. Login to your account.

Navigate to the website <https://rpa.wi.gov/>. As an employee of the UW System, you will use the credentials you obtained through Step 1 to log into the site. Make sure you select **Register.Wisconsin.Gov Domain** in the dropdown menu before clicking **Login**.



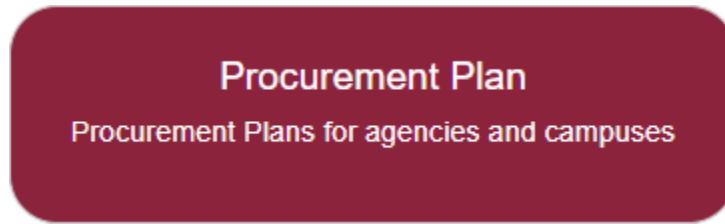
For All Users:

Once you have successfully logged in, you will see this homepage:

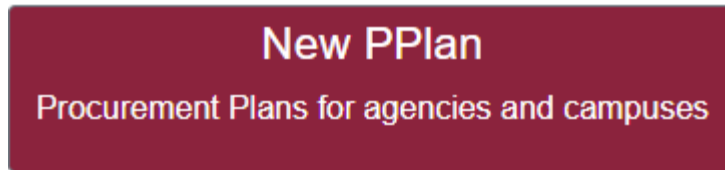


CREATING A NEW PROCUREMENT PLAN

1. Click on the Procurement Plan button.



2. On the Procurement Plan main page, select the **New PPlan** button.



3. Complete the *New PPlan Request*.

Add New PPlan Request

Request

Enter the request basics. Once you fill out this form you can save it as a draft so you can come back to it later. Hover over a field's label to view help.

Agency	Title of Procurement	Rush or Non Rush	
-- Select Agency --	<input type="text"/>	<input type="button" value="× Non Rush"/>	
Transaction Type	Eligible Users	Request Number	Agency Tracking Number
-- Select Transaction Type --	-- Select Eligible Users --	<input type="text"/>	<input type="text"/>
Program Contact	Contact Phone	Contact Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Request Description			
<input type="text"/>			

- **Agency:** Select your agency or campus from the dropdown menu.
- **Title of Procurement:** Identify your request with a unique name.
- **Rush Button:** Specify whether you need a time sensitive review of your Procurement Plan. The form will default to *Non-Rush*.

- **Transaction Type:** Select the appropriate transaction type from the dropdown menu. Options include *RFP*, *RFB for Services*, *Cooperative Purchase*, or *Collective Purchase*. If RFP is selected, you will need to complete the *Rationale for RFP* section that will appear.

Rationale for RFP

- **Eligible Users:** Select who will be able to use the resulting procurement from the dropdown menu. Options include *Procuring Agency Only*, *Procuring Agency with Other Specific Agency*, *Procuring Agency with Piggybacking*, or *Procuring Agency with Piggybacking and Cooperative Purchasing*.
- **Request Number:** This number will be generated automatically when the request is submitted.
- **Agency Tracking Number:** Enter the tracking number assigned by your agency.
- **Program Contact, Contact Phone, and Contact Email:** Enter the information for the person who should be contacted if there are any questions about the Procurement Plan.
- **Request Description:** Provide a clear and concise summary of what you are buying and who will use the resulting contract, written in language understandable to readers with no knowledge of the commodity or service. The description field has a maximum of 2000 characters.

Initial Term -- Select --

Number of Renewals -- Select --

Renewal Term -- Select --

Extended Term Non Extended Term

Services and/or Goods

Non Service
Non Goods

IT or Non IT Request

Non IT Request

NIGP Codes

Type here to search for NIGP codes by number or description

Save & Continue →

- **Initial Term:** Select the appropriate initial contract term from the dropdown menu. If you select *Other*, you must fill in the text box that appears.
- **Number of Renewals:** Select the appropriate number of renewals from the dropdown menu. If there are no renewals or if this will be a one-time purchase, select *0*.
- **Renewal Term:** Select the appropriate term of the renewals from the dropdown menu.

- **Extended Term:** Indicate whether the contract resulting from the Procurement Plan is an extended term. The form will default to *Non-Extended Term*.

If an *Extended Term* is selected, a field for the required *Justification Statement* will appear. The *Justification Statement* can be a maximum of 2000 characters.

For a contract to be designated with extended period contract status, it must meet all the following standards:

- Contracts for services only.
- Requires substantial investment in time, money, infrastructure, training and knowledge by the state and/or the supplier in order to start up and maintain the contract.
- Requires consistency in vendor personnel over time to provide evolving understanding of the state's structure and operations.
- Requires innovation and changes in scope, process and technology that are developed by and are mutually beneficial to both parties.
- A change of suppliers will disrupt critical state operations and/or cause the state to incur significant, documented costs.
- Competition is extremely limited or non-existent.

See [PRO-418](#) for additional guidelines regarding Extended Period Contracts.

The image shows two screenshots of a web form. The top screenshot shows a section labeled 'Extended Term' with two buttons: 'Non Extended Term' (selected, indicated by a radio button) and 'Extended Term'. The bottom screenshot shows the same section with 'Extended Term' selected (indicated by a checkmark in a green box). Below this, a text area labeled 'Justification Statement' is visible.

- **Services and/or Goods:** The *Services and/or Goods* section expands depending on what is selected. Indicate whether the Procurement Plan is for *Services* or *Goods* by selecting the appropriate buttons. The form will default to *Non-Service* and *Non-Goods*. You must select one or both.

The image shows two screenshots of a web form. The top screenshot shows a section labeled 'Services and/or Goods' with four buttons: 'Non Service' (selected, indicated by a radio button), 'Non Goods' (selected, indicated by a radio button), and two unselected buttons. The bottom screenshot shows the same section with 'Non Service' (selected, indicated by a radio button) and 'Goods' (selected, indicated by a checkmark in a green box).

If *Service* is selected, the **CBA will be completed** button appears. Clicking the *CBA will be completed* button will toggle the *CBA Exemption Claimed* button and a list of *CBA Exemptions* will appear. You must select the applicable exemption.

The screenshot shows a form section titled "Services and/or Goods". There are two buttons: a green button with a checkmark and the text "Service", and a grey button with a circle and slash and the text "Non Goods". The "Service" button is selected. Below this, under the heading "CBA Requirements", there is a grey button with the text "CBA will be completed".

The screenshot shows the same "Services and/or Goods" section. The "Service" button is still selected. Below it, under "CBA Requirements", there is now a green button with the text "CBA Exemption Claimed". Below this button is a box titled "CBA Exemptions" containing a list of five items, each with an unchecked checkbox:

- Federal or state law require these services to be performed by contract
- Services must be provided per a contract, license or warranty by the original equipment manufacturer or publisher
- Services cannot be performed by state employees because the state lacks the required infrastructure
- Web-based software application services that are delivered and managed remotely
- Services do not exceed \$50,000

- **IT or Non IT Request:** The *IT or Non IT Request* section will also expand depending on what is selected. Indicate whether the Procurement Plan is an *IT Request* by selecting the button. The form defaults to *Non IT Request*.
 - **IT Purchase Contact:** An *IT Request* will require an *IT Contact Person* including that individual's phone and email.

The screenshot shows a form section titled "IT or Non IT Request". There are two buttons: a grey button with the text "IT or Non IT Request" and a grey button with a circle and slash and the text "Non IT Request". The "Non IT Request" button is selected.

IT or Non IT Request

IT Purchase Contact

IT Purchase Contact Phone

IT Purchase Contact Email

- **High Risk IT:** Indicate whether the *Request is High Risk* (more than \$1,000,000) by clicking the *Not High Risk IT* button to change it to *High Risk IT*. The form defaults to *Not High Risk*.
 If *High Risk IT* is selected, a set of fields will appear for you to enter the contact information for the person that will be able to answer questions about the *High Risk IT Request*. Complete this section even if it is the same information entered in the previous *IT Purchase Contact* section.

High Risk IT

High Risk IT

High Risk IT Purchase Contact

High Risk IT Purchase Contact Phone

High Risk IT Purchase Contact Email

- **STAR Overlap:** The form defaults to No STAR Overlap. If the request overlaps with services already available in STAR, click the button to open a new field and enter a rationale in the available space. See [PIM 17-001 Purchasing of Software Related to STAR Functionality](#) for more information on the STAR Overlap policy.

STAR Overlap

STAR Overlap ★ STAR Overlap

Rationale for Star Overlap

Enter the rationale for STAR overlap

- **IT Subcategory(s):** Select the appropriate category for your request. If it is a *XaaS* (Something as a Service) request, a new set of fields will appear asking for a Cloud Contact person and their contact information. Complete this section even if it is the same as the *Contact Person* entered in the previous section(s).

IT Subcategory(s)

Hardware

Software

Professional Services

Telecom

XaaS

Non Cloud Based Request

XaaS

☁ Cloud Based IT Request

Cloud Contact

Cloud Contact Phone

Cloud Contact Email

- **NIGP Codes:** You can search the full list of codes available by typing a number or keyword into the field.
4. Click the **Save & Continue** button. Before you'll be allowed to save, you must complete all required fields. If you have not completed all the required fields, an error message will appear.
 5. Once you have clicked *Save & Continue*, you will see a green **PPlan Request Added** message appear at the top of your screen. At this point, you may stop and come back later to complete the request, or you may

continue by clicking the tabs at the top of the page. If you come back later, you can find your draft under **PPlan Drafts** (note that you can also view it under **PPlan Search** but may not be able to edit it from there).

COMPLETING & SUBMITTING YOUR PROCUREMENT PLAN

Once you've created the initial *Procurement Plan Request*, a new series of tabs will appear at the top of your screen. You've just completed the Request tab. You'll need to review or submit information in the required **Estimates** and the optional **Documents** tabs before you'll be able to submit your plan. Let's take a closer look at these other tabs.



Estimates Tab

The screenshot shows the 'Estimates' tab selected in the navigation bar. Below the tabs is a light blue notification box: 'Purchase Estimates - 1 Year's estimate is required. Estimates can be \$0.00'. Underneath is a form with a 'Year 1 Estimate' label, a '\$' symbol, a text input field containing '\$0.00', and a green '+ Add' button. Below the form is the heading 'Yearly Estimates' and a pink error message box: 'You must estimate the cost of this request for at least one year'. At the bottom are two buttons: a yellow '← Back' button and a green 'Save & Continue →' button.

Estimates is a required tab. Estimate the cost of the procurement for each year. In some cases, the estimate may be \$0. Enter the **Year 1 Estimate** and click **+ Add**. To add additional years, repeat this process. To delete an entry, click the **Delete** button to the right of the desired estimate.

After you enter all appropriate annual cost estimates, click **Save & Continue**. You will see a green notification at the top of your page when your information has been saved successfully.

Request Estimates **3** Documents **0** Finish History Notes **0**

Purchase Estimates - 1 Year's estimate is required. Estimates can be \$0.00

Year 4 Estimate \$ \$0.00 **+ Add**

Yearly Estimates

Year 1 Estimate \$ \$100,000.00 **Delete**

Year 2 Estimate \$ \$75,000.00 **Delete**

Year 3 Estimate \$ \$75,000.00 **Delete**

Documents Tab

Request Estimates **3** Documents **0** Finish History Notes **0**

You can find blank forms here: Procurement Forms. Fill them out on your computer. Attach the completed version.

Select File for Upload

Choose a file or drop it here... **Choose File**

No Uploaded Documents

Document Name	Action
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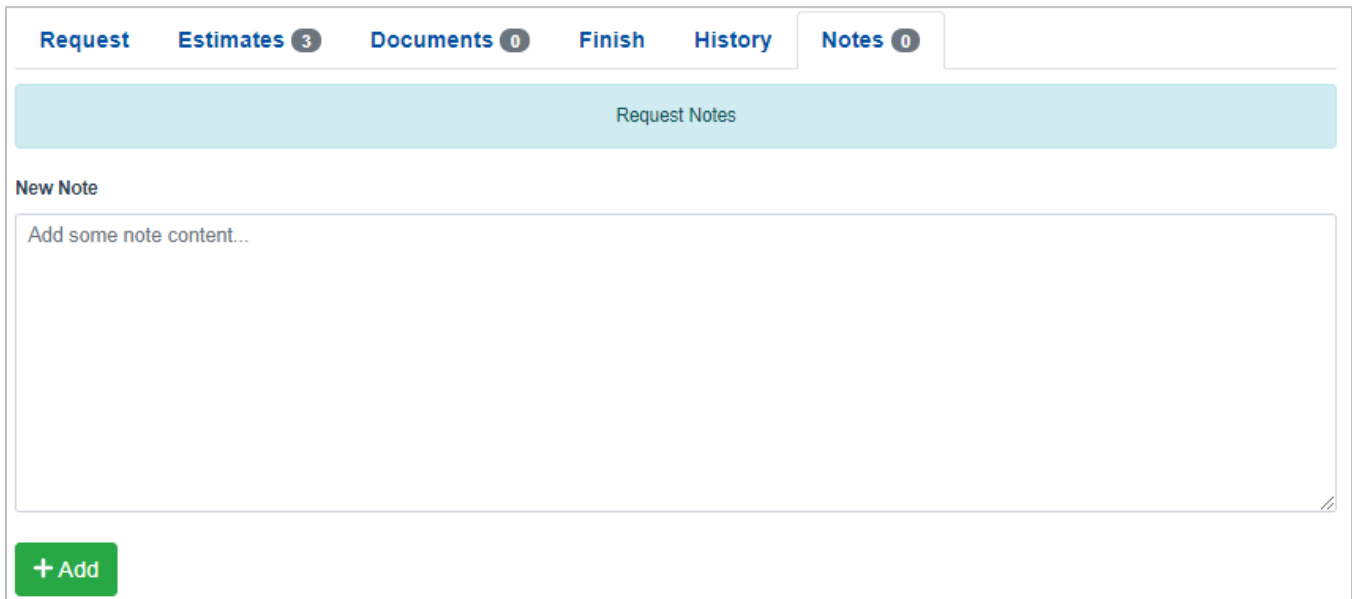
← Back

Some agencies may still require that you complete the DOA-3720 Proc Plan Form. In this case, you may choose to upload the form here, though the system does not require it.

The Documents tab is optional, though some Procurement Plans may require that you include additional support documents to facilitate approval. To upload documents that will be included with your Procurement Plan, click the **Choose File** button and locate the file you want to attach or drag and drop the document directly from your computer. To delete a file after uploading it, click the red **Delete** button to the right of the desired document.

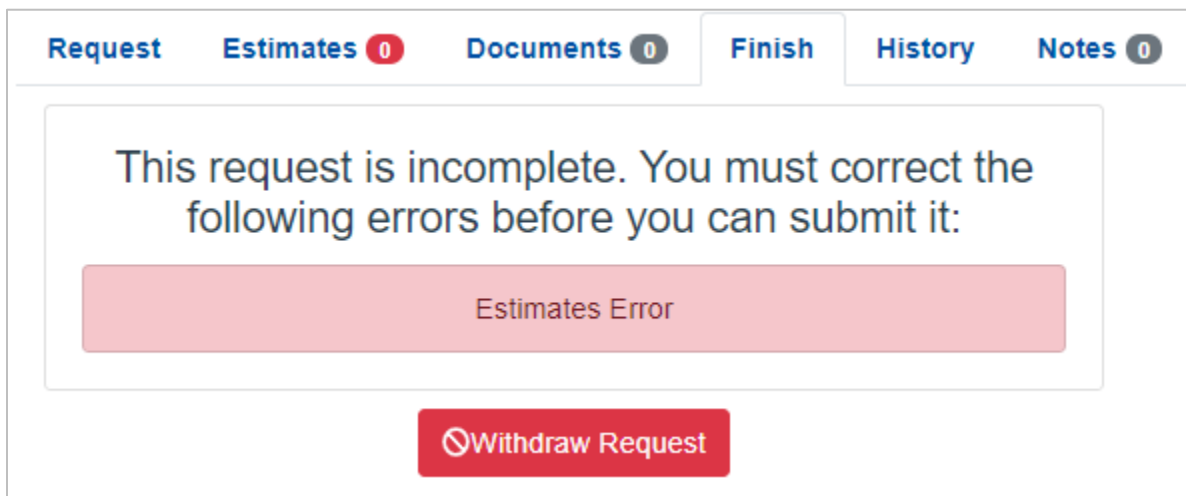
When you are done adding files, click **Save & Continue**.

Notes Tab

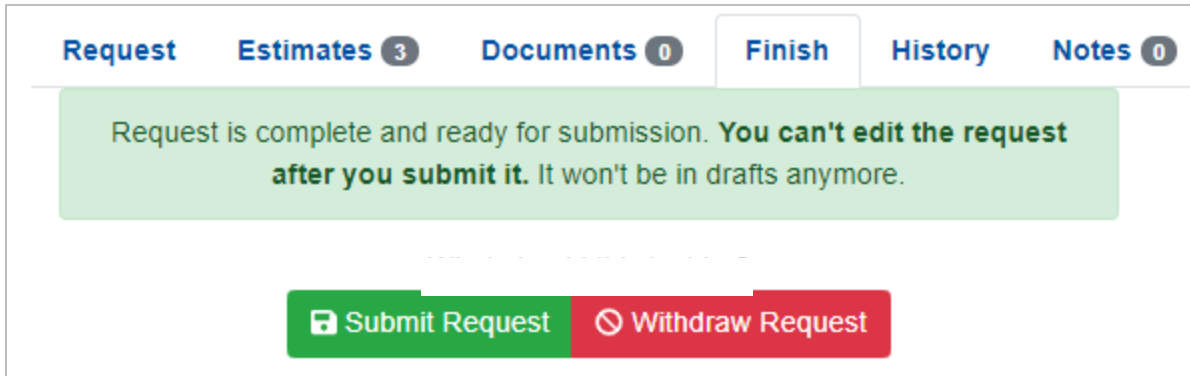


The Notes tab allows you to include additional information that would be important for the approvers to know that has not already been covered in the other sections of the request. Enter your text into the **New Note** box and click **+ Add** to save the note. Notes will appear below the **+ Add** button and will include date, time, and name of the author. **Notes cannot be added after the Procurement Plan has been submitted.**

Finish Tab



You will not be allowed to submit your Procurement Plan if any required information is missing. If the green Submit button is missing, you still have required information missing from your request. Review the information listed in the red notification box.

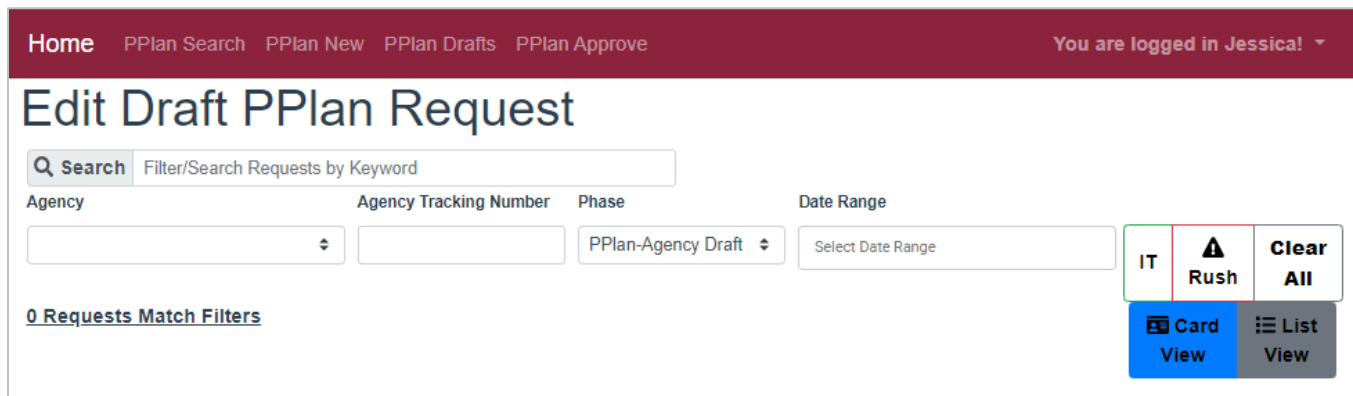
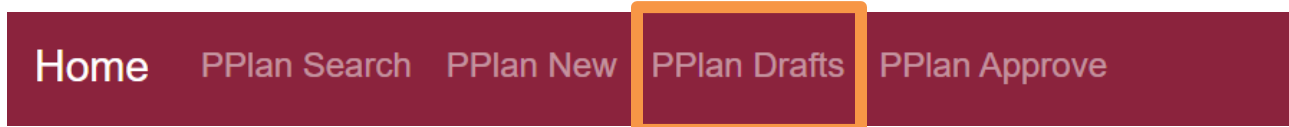


When you have finished entering all required and optional information needed for the request, go to the **Finish** tab to submit your request. Click the green **Submit Request** button to send your Procurement Plan to SBOP to be reviewed. When your request is submitted, you will see a confirmation message that will include a link to view your request.

If you need to cancel your request before submitting it, you can click **Withdraw Request** on the *Finish* tab. To withdraw a request after it has been submitted, contact SBOP (DOAWisPro@wisconsin.gov).

EDITING YOUR PROCUREMENT PLAN

If you created and saved a Procurement Plan but have not yet submitted it, you may access it by clicking the **PPlan Drafts** tab from the Top Menu.

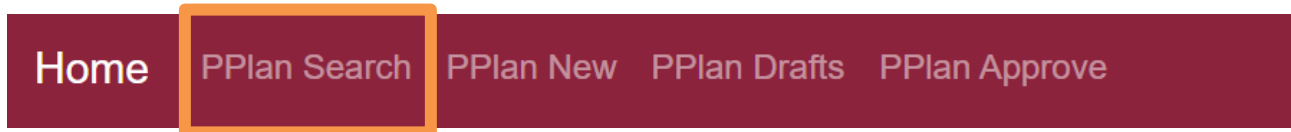


Locate your Procurement Plan using the various filters on the *PPlan Drafts* tab. You may search by keyword, agency, agency tracking number, phase, date range, or by flags (IT or Rush). You also have the ability to view the search results in Card View or in List View.

After entering any applicable filters and searching, access your Procurement Plan by clicking anywhere on the card. You will be taken to the Request tab of your Procurement Plan where you can proceed to edit anything within the request or submit or withdraw the request.

VIEWING OTHER PROCUREMENT PLANS

To view **but not be able to edit** other Procurement Plans that you may have access to, click the **PPlan Search** tab from the Top Menu.



The view within the **PPlan Search tab** will look different than the *PPlan Drafts tab*. This page allows you to get a brief overview of all the information included in the Procurement Plan. You will not be able to add or edit anything within the *PPlan Search tab*, even if you are viewing a Procurement Plan you created.

Services	✓
Goods	✗
CBA Requirements	✓
CBA Exemption(s)	<ul style="list-style-type: none">Services cannot be performed by state employees because the state lacks the required infrastructure
IT Purchase	✗
High Risk	✗
Cloud Based	✗
Star Overlap	✗
Rush Request	⚠

TRACKING THE PROCUREMENT PLAN'S PROGRESS

To track the progress of your Procurement Plan, search for the Procurement Plan through the *PPlan Search tab*. Click on the **Progress tab** within the Procurement Plan to see which phases the Procurement Plan has passed through.

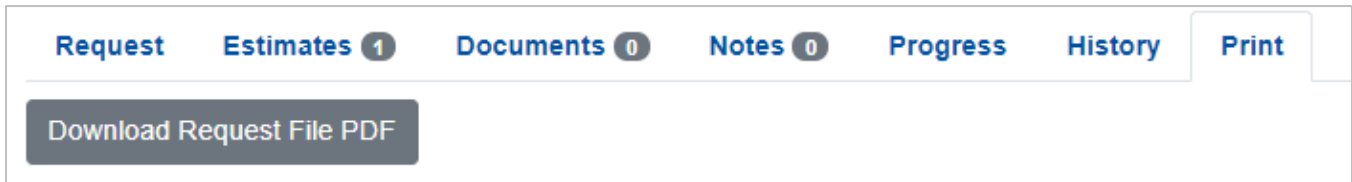
1 PPlan-Agency Draft Current Phase
2 PPlan-Section Chief
3 PPlan-DET Analysis
4 PPlan-SBOP Director
5 PPlan-Approved
6 PPlan-Withdrawn
7 PPlan-Denied

The **History tab** will allow you to see a detailed view of when the Procurement Plan entered and exited each phase, and the name of the person who interacted with it at each stage. (**Note:** In the example below, all actions were completed by Cheryl Edgington within a few minutes of each other during a test. With an actual Procurement Plan, the users would all likely be different and the times would be more spread out.)

Time	User	Phase	Event
10/26/2020 3:26 pm	Edgington, Cheryl	PPlan-Agency Draft	Submit
10/26/2020 3:26 pm	Edgington, Cheryl	PPlan-Section Chief	In Queue
10/26/2020 3:27 pm	Edgington, Cheryl	PPlan-Section Chief	Approve
10/26/2020 3:27 pm	Edgington, Cheryl	PPlan-SBOP Director	In Queue
10/26/2020 3:28 pm	Edgington, Cheryl	PPlan-SBOP Director	SendBack
10/26/2020 3:28 pm	Edgington, Cheryl	PPlan-Agency Revision	In Queue
10/26/2020 3:33 pm	Edgington, Cheryl	PPlan-Agency Revision	Submit
10/26/2020 3:33 pm	Edgington, Cheryl	PPlan-Section Chief	In Queue
10/26/2020 3:34 pm	Edgington, Cheryl	PPlan-Section Chief	Approve
10/26/2020 3:34 pm	Edgington, Cheryl	PPlan-DET Analysis	In Queue

PROCUREMENT PLAN APPROVAL

When your Procurement Plan has been approved, you will be able to print a PDF of the approval document. To do this, search for your Procurement Plan through the PPlan Search tab on the Top Menu (using the *Phase* filter to limit the search to **PPlan-Approved** may help find your request quickly). When you click on your Procurement Plan, you should see a new **Print** tab available to you. Through this tab, you will be able to click **Download Request File PDF** to save an electronic copy of the approval document.



NAVIGATING BACK TO THE PROCUREMENT REQUEST PORTAL

To return to the *Procurement Request Portal* from the *Procurement Plan System* at any time, click **your name** in the upper right corner of the *Top Menu* and select **RPA Home**.

