State of Wisconsin

Department of Administration

Request for Purchasing Authority Agency Guide

Job Aid: RPA Website User Guide for Agencies

Updated August 25, 2017

TABLE OF CONTENTS

Accessing the RPA Website 3
Creating a New Request 4
Editing Agency Drafts & Agency Revisions 8
Searching for Requests 14
Charts & Graphs 19

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 RPA. 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: The process for posting to the Public Notices site has not changed and will not be impacted by this website. You must still post notices through the same procedure you have been using up until this point.

Note: CAPS will submit all RPA requests on behalf of its supported agencies. CAPS agencies should still create user accounts in the RPA system to track the progress of their request.

ACCESSING THE RPA WEBSITE

For State Agencies:

- **STEP 1:** Sign up for an account.

  Before you can begin to use the RPA website, you'll need to sign up for an account. To do this you will need to send an email to doawispro@wisconsin.gov with the following information:

  - Your name
  - Your IAM username
  - The name of your agency
  - You should also reference "RPA Website" in your email

- **STEP 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 you select **Accounts Domain** in the dropdown menu before clicking **Login**.

For University of Wisconsin System:

- **STEP 1:** Obtain login credentials.

  Navigate to 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.

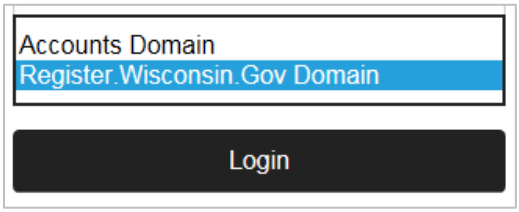
- **STEP 2:** Sign up for an account.

  Before you can begin to use the RPA website, you'll need to sign up for an account. To do this you will need to send an email to doawispro@wisconsin.gov with the following information:

  - Your name
  - The name of your campus
  - The login credentials you created in Step 1
  - You should also reference "RPA Website" in your email

- **STEP 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 login to the site. Make sure you select **Register.Wisconsin.Gov Domain** in the dropdown menu before clicking **Login**.

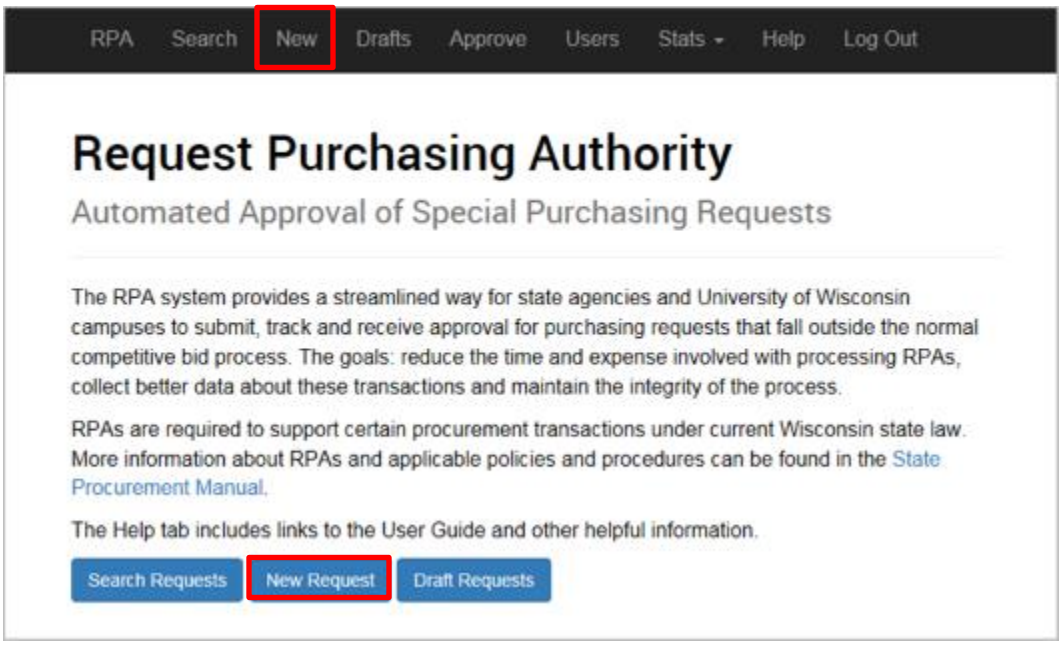


Once you have successfully logged in, you will see this homepage:

CREATING A NEW REQUEST

- **STEP 1:** Navigate to the RPA homepage.

  Click the **New Request** button at the bottom or select the **New** tab at the top.



- **STEP 2:** Fill in the required information. All required fields with missing information will be initially displayed in red. As you complete these fields, they will turn black.

RPA Search New Drafts Approve Users Stats Help Log Out

Add New 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.

Agency
--please select---
Required

RPA Number
Required

Program Contact
Required

Contact Phone
Required

Contact Email
Required

Method of Procurement
--please select---
Required

Delivery (F.O.B.)
--please select---
Required

Renewal Option
Required

Contract Term
--please select---
Required

Required fields are shown in red. As you complete them, they will change to black. All required fields must be filled out before you can save the request.

Funding
--please select---
Required

RPA Amendment
✖ Not an Amendment

The **RPA Amendment** field is a button that will add additional fields for an amendment.

Service/Commodity Description
Required

NIGP Codes
type here to search for NIGP codes by number or description

There are errors on the form. You must correct them before saving.

Save & Continue →

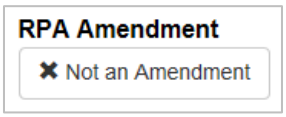
- **Agency:** Select the agency that your RPA applies to.
- **RPA Number:** The RPA Number must follow this format: AAA1230A1.
  - Alphabetical prefix: 2 letters (e.g., AA)
  - Fiscal year code: 1 letter (e.g., A)
  - Number: 4 digits (e.g., 1230)
  - Optional letter and amendment number (e.g., A1)

You will want to keep a record of your RPA Number as this will be the best way to search for your RPA once your request has been submitted.

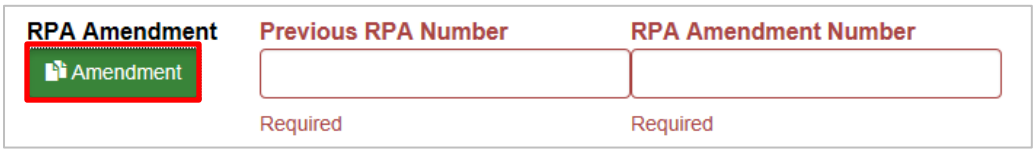
- **Program Contact**, **Contact Phone**, and **Contact Email:** Enter the contact information for the person who should be contacted if there are any questions about your RPA request.
- **Method of Procurement:** Select the appropriate method of procurement from the list:
  - A – Noncompetitive negotiation (sole source)
  - B – General waiver
  - C – Motor vehicle purchase
  - D – Legal services
  - E – Collective purchase
- **Delivery (F.O.B.):** Delivery Freight on Board options include:
  - Destination
  - Installed
  - Origin
- **Renewal Option:** The renewal option should be specific to your request. If there is no option for renewal for your RPA, enter **None**.
- **Contract Term:** The contract term can be entered as:
  - Number of years (e.g., 1 year)
  - Specific date range (e.g., 6/30/2015 to 7/1/2016)
  - One time purchase
- **Funding:** Specific revenue sources are listed in the dropdown menu:
  - GPR – General Purpose Revenue
  - PR-O – Program Revenue Other
  - PR-S – Program Revenue Service
  - PR-F – Program Revenue Federal
  - Seg-O – Segregated Revenue Other
  - Seg-L – Segregated Revenue Local
  - Seg-S – Segregated Revenue Service
  - Seg-F – Segregated Revenue Federal
  - Other: If **Other** is selected, you must fill the **Other Description**.

If your RPA will require more than one source of funding, be sure to specify the percentage of funding in the **Other Description** field (e.g., 50% SEG-L and 50% PR-O).

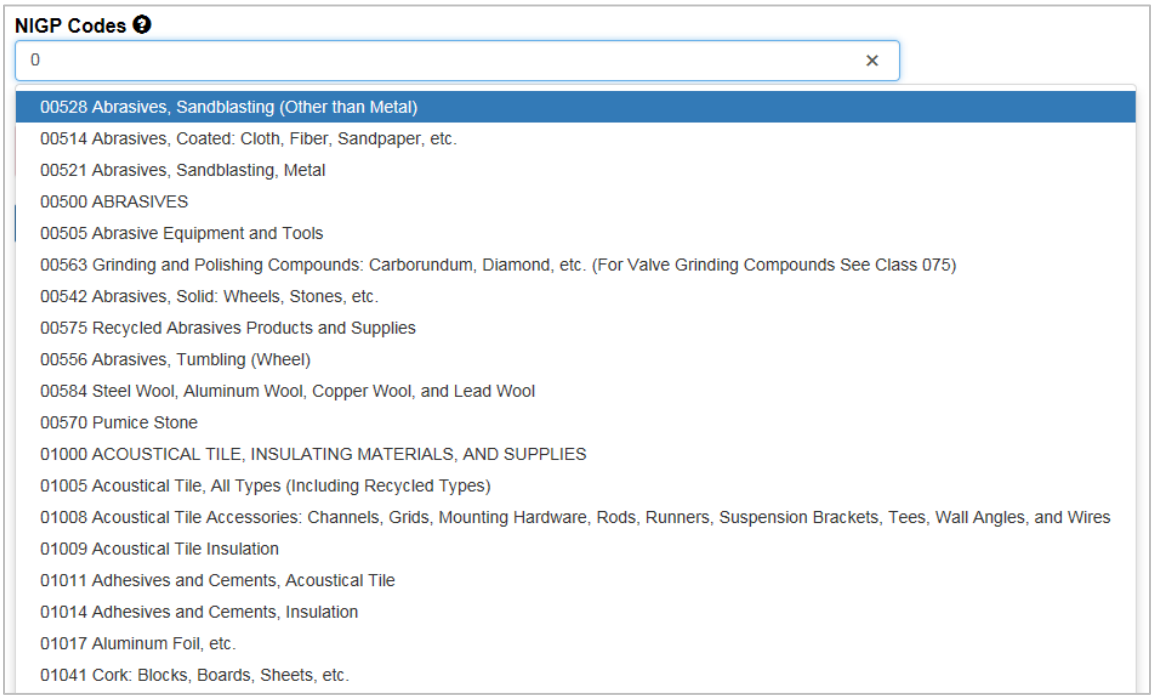
- **RPA Amendment:**
  - The white **RPA Amendment** field is a button that is set to **Not an Amendment** by default.



  - If your RPA *is* an amendment to an existing RPA, click the button and it will change color to green and will display two additional required fields:
    - Previous RPA Number
    - RPA Amendment Number



- **Service/Commodity Description:** Include a summary of the purpose of your RPA.
- **NIGP Codes:** If you are attaching NIGP codes, you can search the full list of codes available by typing a number or keyword into the field.



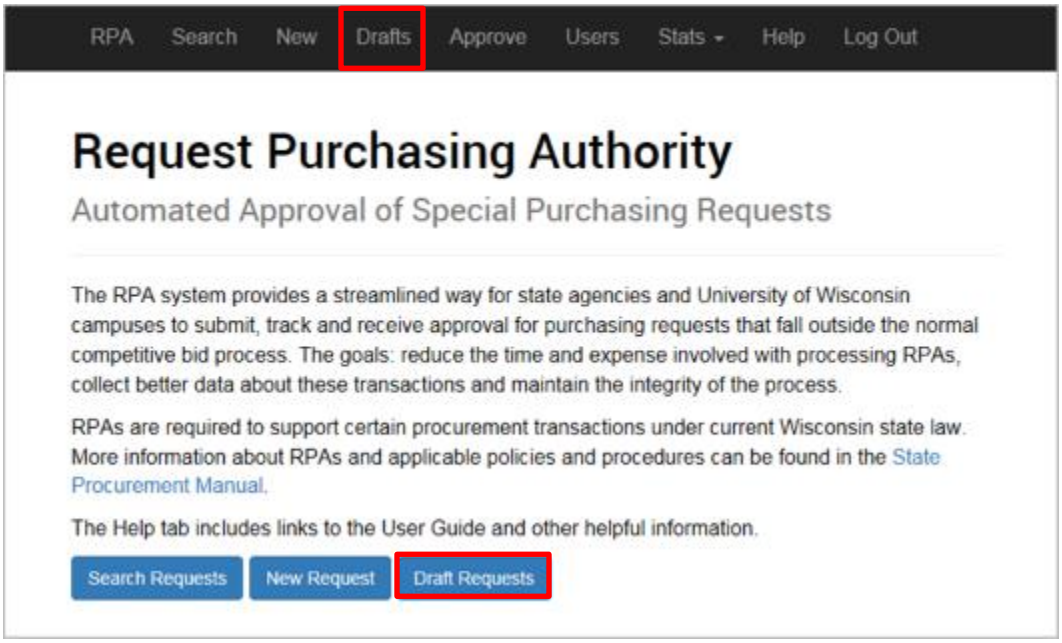
- **Save & Continue:** Click to save your work. Before you will be allowed to save, you must complete all required fields. Once you have clicked the button, several new tabs will appear at the top of your screen, which will allow you to complete your RPA. You don't have to complete each step at this time – you may return to work on your draft at a later date.

EDITING AGENCY DRAFTS & AGENCY REVISIONS

If your RPA has been created but hasn't yet been submitted for approval, it is in the **Agency Draft Phase** and may be accessed via the **Drafts** tab. You may edit your draft multiple times before submitting it. If you have already submitted your RPA for approval and it has been returned for revisions, it is in the **Agency Revision Phase**. Drafts in the **Agency Revision Phase** must be updated before they can be resubmitted.

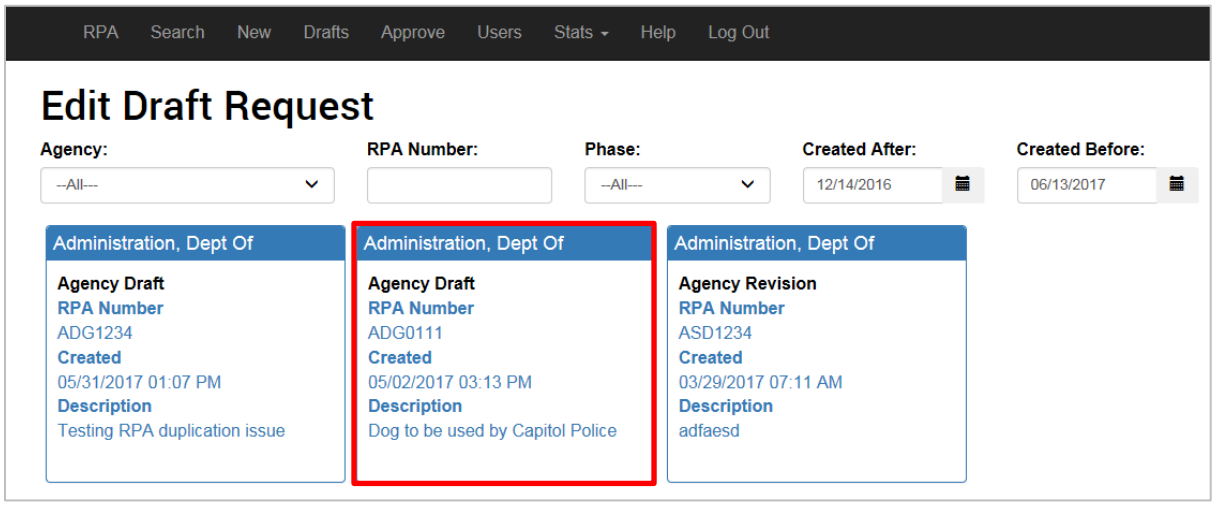
- **STEP 1:** Navigate to the RPA homepage.

  To find your saved draft, click the **Draft Requests** button at the bottom or select the **Drafts** tab at the top.



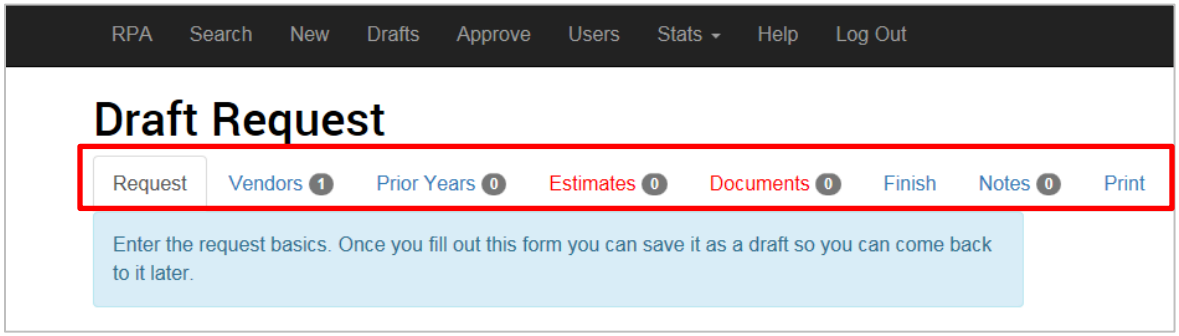
- **STEP 2:** Select your draft.

  Select the draft you'd like to work on by clicking anywhere within the description box.

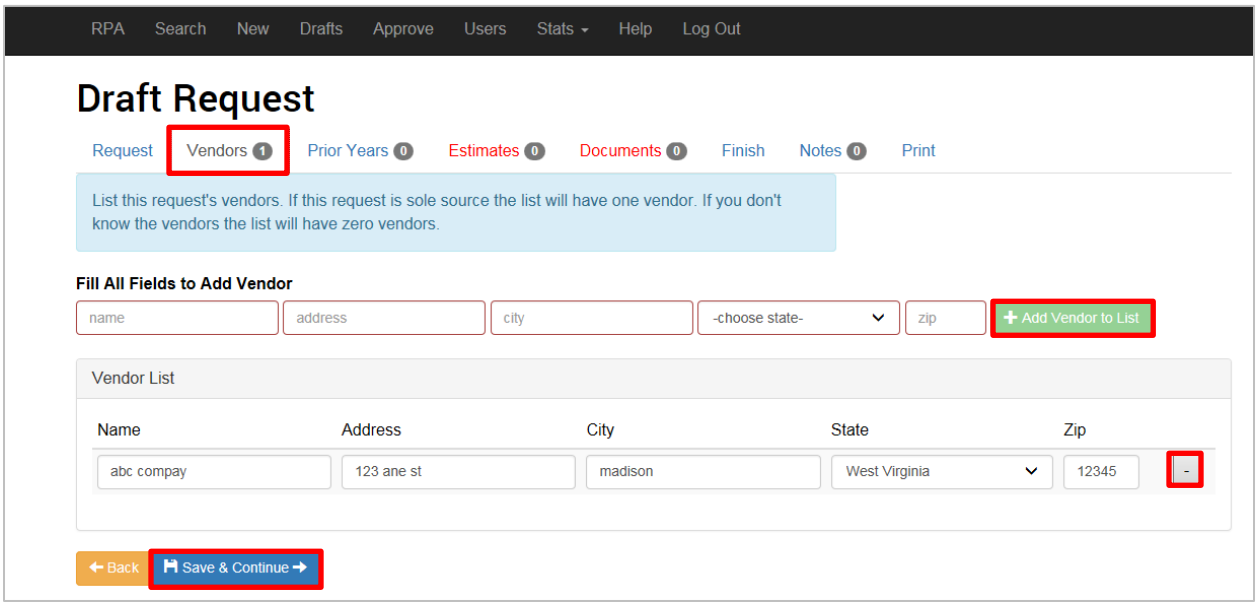


➢ **STEP 3:** Edit your draft.

Once you have created your initial request, you will have access to several new tabs to edit. All tabs in red must be completed before submitting your request for approval.

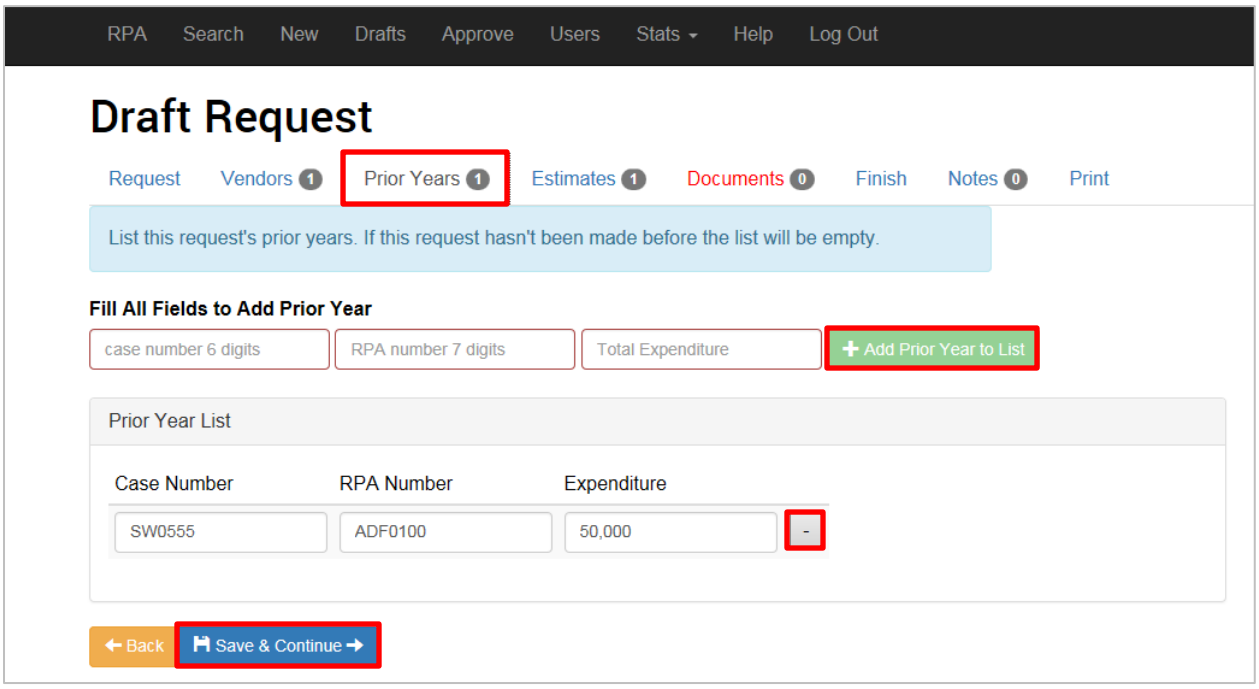


- **Request:** Shows the information you entered when you created your request.
- **Vendors:** Enter the information for the vendors associated with this request and click **+ Add Vendor to List**. You may enter multiple vendors, a single vendor if this request is sole source, or you may leave the field blank if you don't know the vendors. To remove a vendor from this list, click the - button to the right of the vendor's information. Click **Save & Continue** before leaving the page.

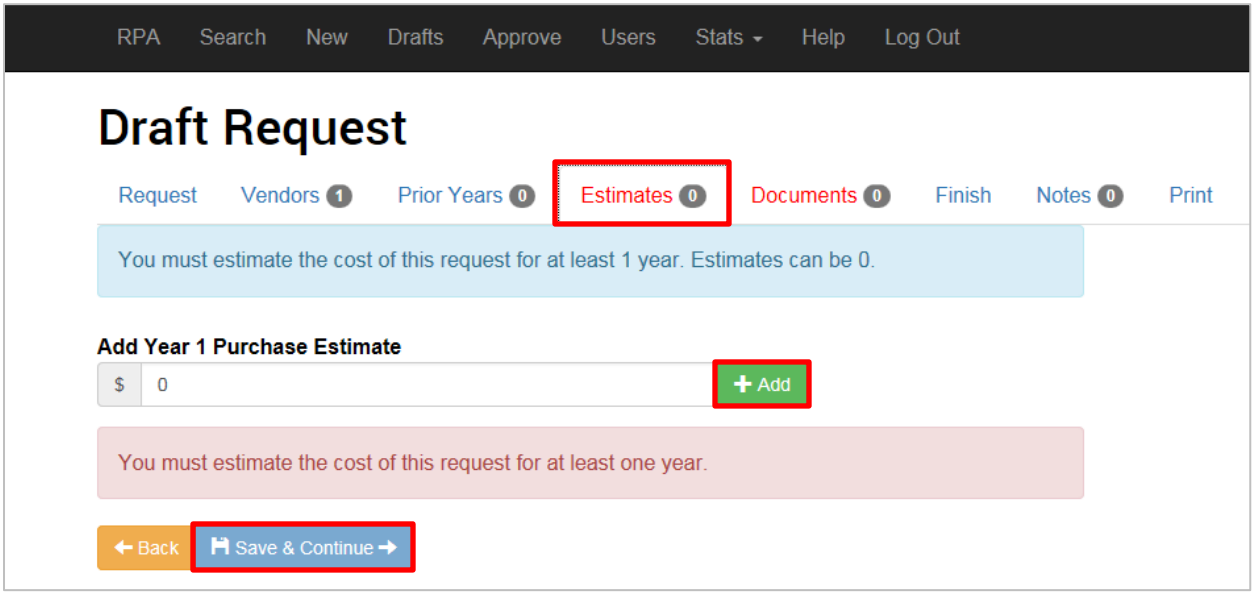


- **Prior Years:** Enter the requested information for prior years for this request and click **+ Add Prior Year to** List. If this request hasn't been made before, the list will be empty.
  - Case Number – 6 digits
  - RPA Number – 7 digits
  - Expenditure – total expenditure

  To remove a prior year from this list, click the - button to the right of the year's information. Click **Save & Continue** before leaving the page.



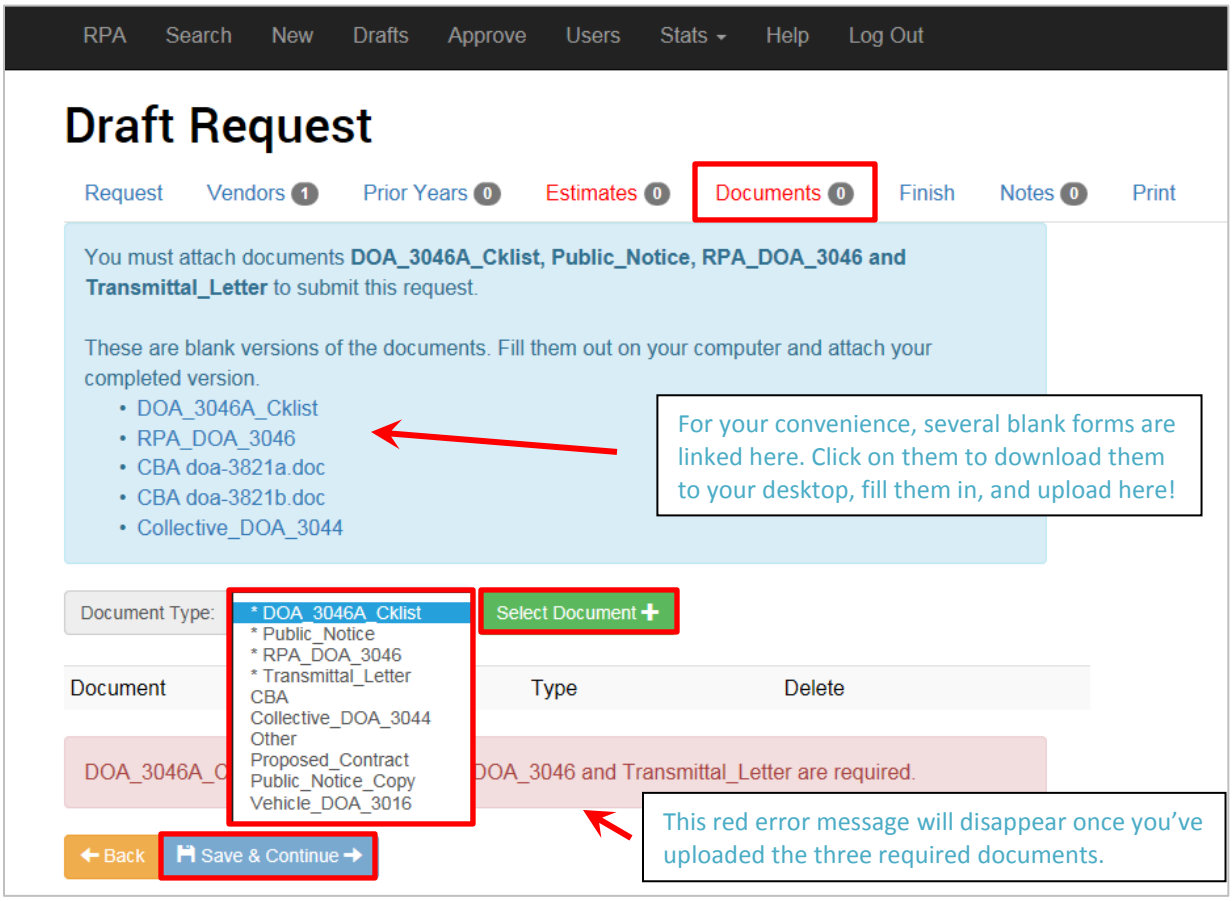
- **Estimates:** This is a required tab. Enter your best estimate for the cost of the request for a year. In some cases, the estimate may be $0. Once you **Add Year 1 Purchase Estimate** and click **+ Add**, you will have the option to enter information for additional years. If you need to delete an entry, click the − button to the right of the information. Click **Save & Continue** before leaving the page.

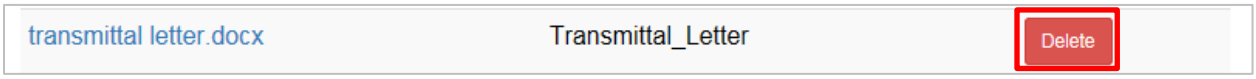


Once you **Add Year 1 Purchase Estimate** and click **+ Add**, you will have the option to enter information for additional years.

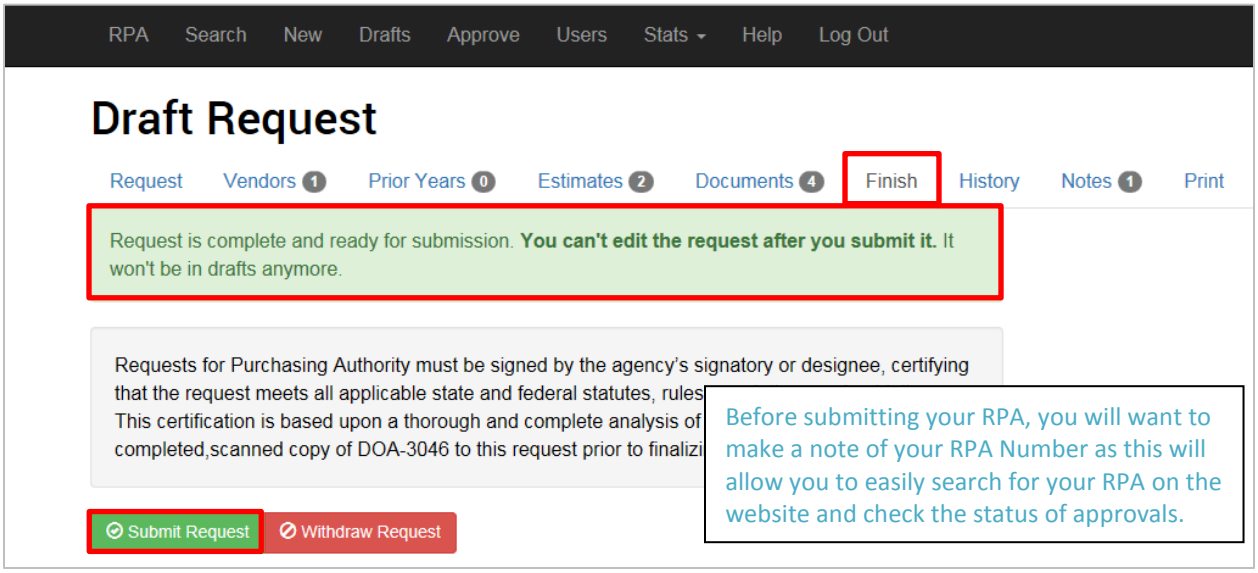
- **Documents:** This is a required tab. Click the dropdown arrow and select the document you will upload. You will have an option of attaching a number of documents through this screen.
    - *DOA_3046A_Cklist – Form DOA-3046A – Request for Purchasing Approval/Authority Checklist – *required*
    - *Public_Notice – a copy of the Public Notice or a document that includes a statement certifying the public notice will be placed in compliance with PRO-C-6 – *required when submitting noncompetitive negotiation (sole source) and general waiver requests.*
    - *RPA_DOA_3046 – Form DOA-3046 – Request for Purchasing Approval/Authority (RPA) – *required*
    - *Transmittal_Letter – Transmittal Letter – *required*
    - CBA – Form DOA-3821A or DOA-3821B – Cost Benefit Analysis
    - Collective_DOA_3044 – Form DOA-3044 – Collective Purchasing with Other States or the Federal Government Data Request
    - Other
    - Proposed_Contract
    - Vehicle_DOA_3016

To add a document, select the appropriate **Document Type** from the dropdown menu and click on **Select Document +** and locate the file you want to attach. If you'd like to delete a file after you'd added it, click on the red **Delete** button to the right of the document. Once you are done adding files, click **Save & Continue**.

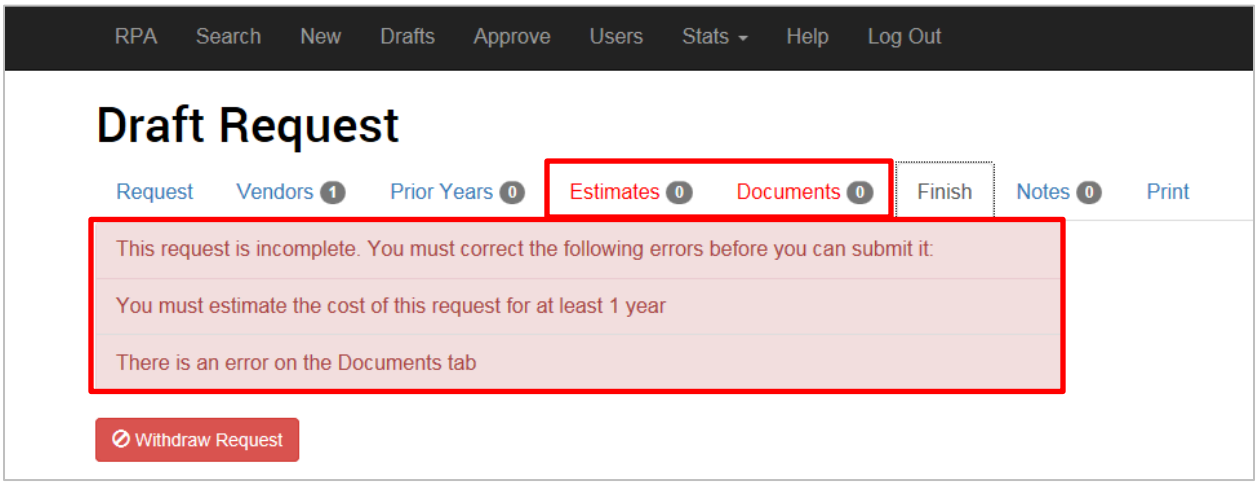




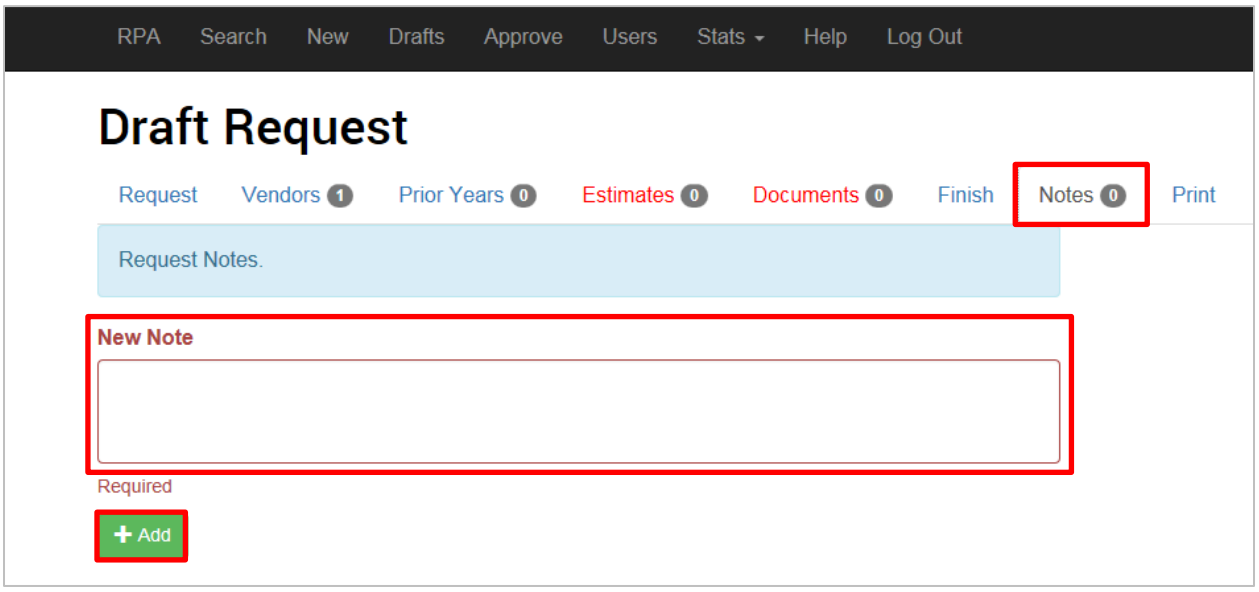
- **Finish:** Once you are done entering all of the information into the system, clicking on the **Finish** tab will allow you to submit your RPA for approval.
    - If all the required information has been entered, you will see a green confirmation message and will have the option of clicking **Submit Request**. When your request is submitted, you will see a confirmation message that will include a link to view your request.



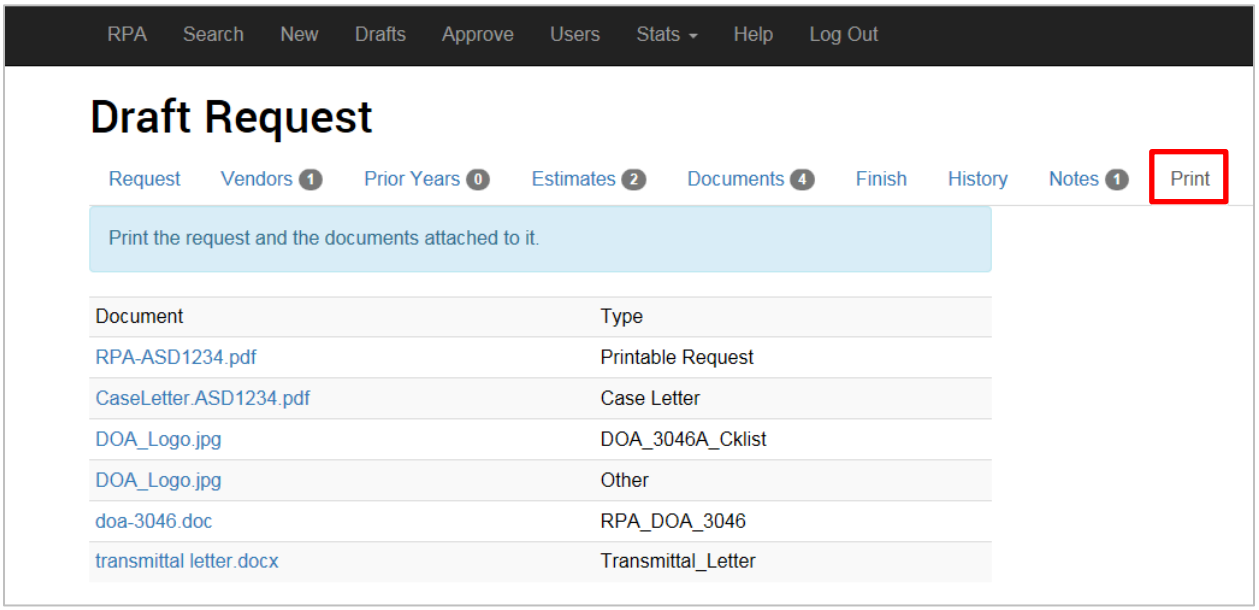
    - If you have not entered all of the required information, you will see a red error message letting you know which steps still need to be completed (and the tabs with missing information will also be shown in red).



- **Notes:** Allows you to include extra information not already covered within the other tabs. 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.



- **Print:** To print your RPA or any documents you've attached to the RPA, click on the **Print** tab. Click the **link** for the item you wish to print and when the pop up window appears, click **Open** to open the document. You may then print the document.

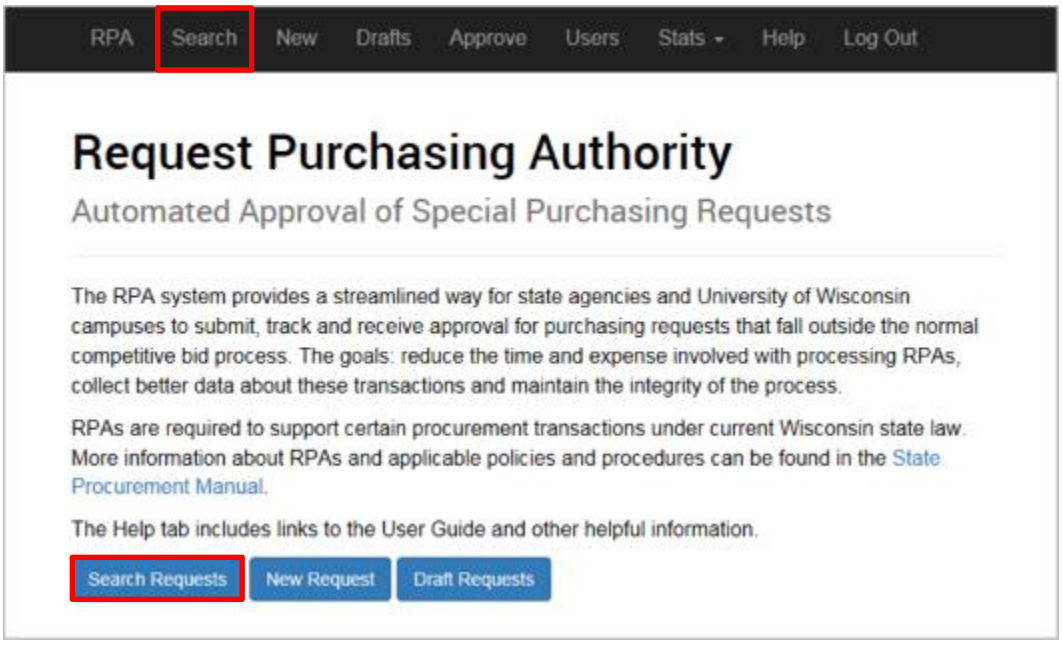


Note: The process for posting to the Public Notices site has not changed and will not be impacted by this website. You must still post notices through the same procedure you have been using up until this point.

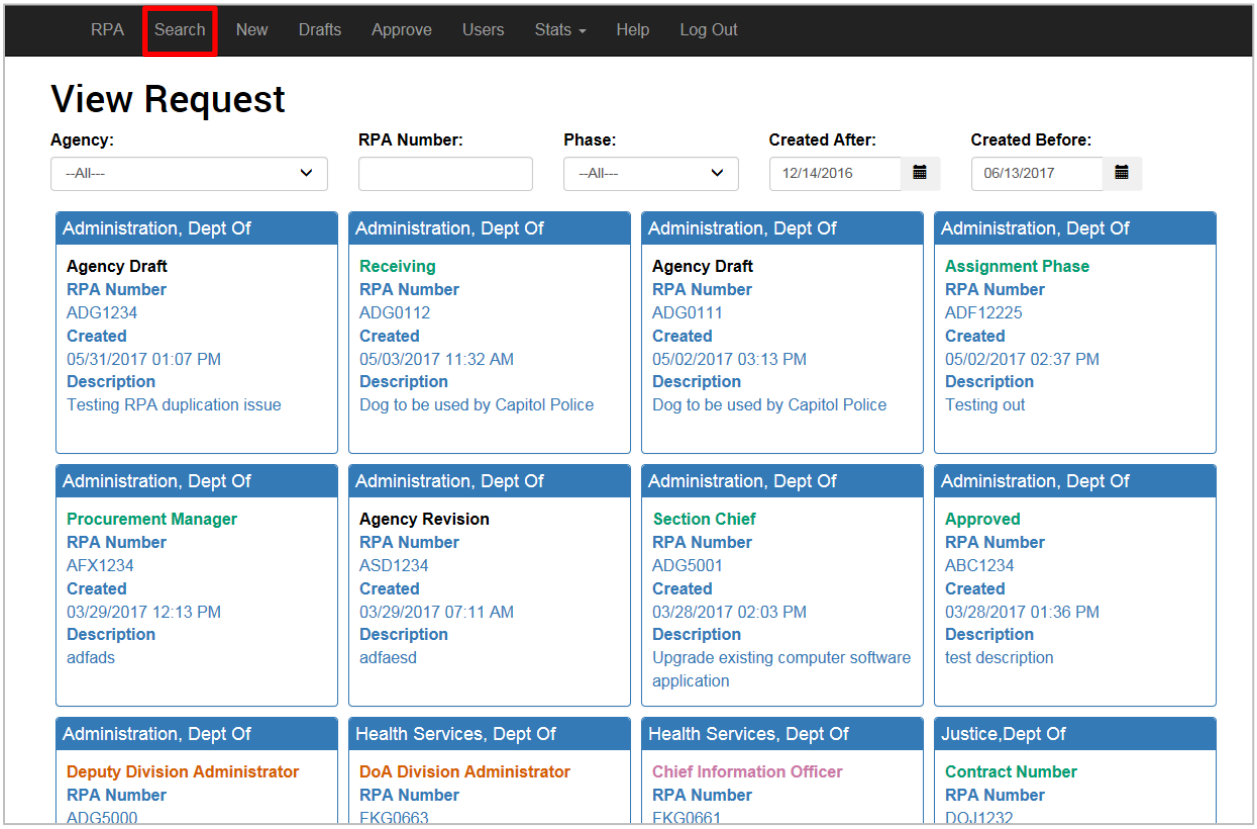
SEARCHING FOR REQUESTS

- **STEP 1:** Navigate to the RPA homepage.

  Click the **Search Requests** button at the bottom or select the **Search** tab at the top.



You may search for your RPA through the **Search** tab or button at any point during the RPA process. After clicking **Search Requests**, you will be taken to the **View Request** screen.



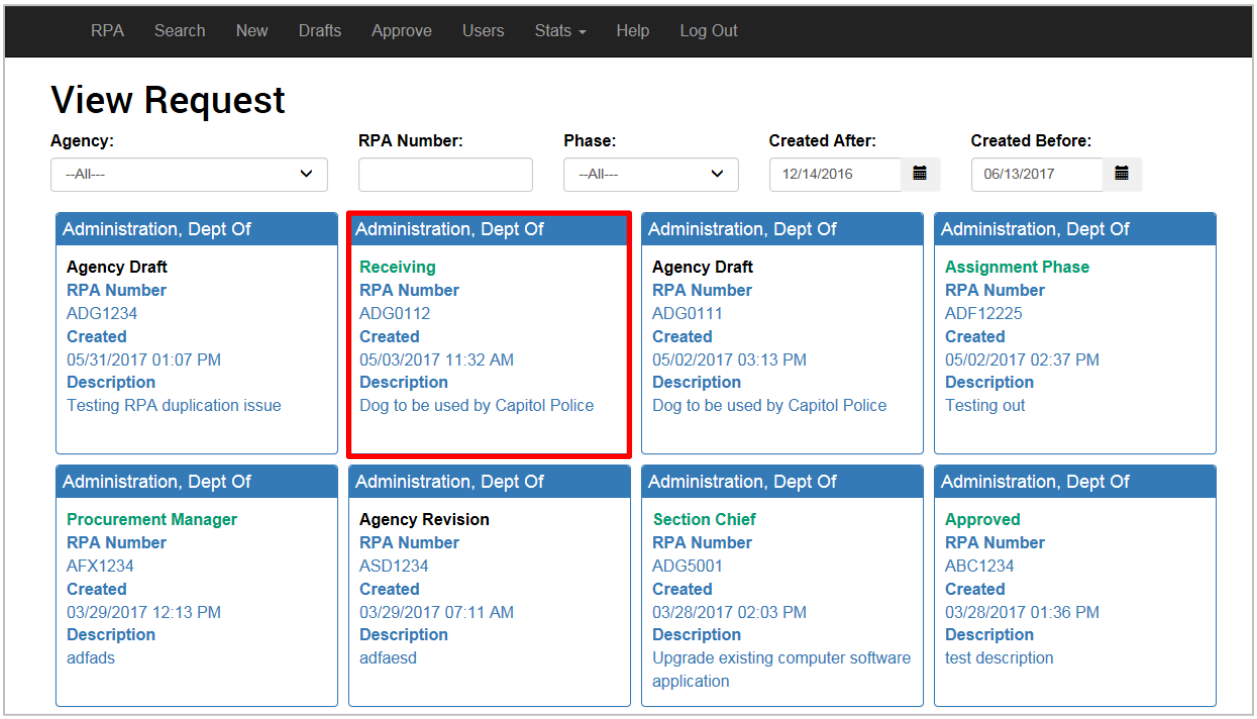
➢ **STEP 2:** Enter your search criteria.

Select the filters you wish to use to fine tune your search results. Search results will default to your agency and you will only be able to see the RPAs submitted by your agency or agencies you have access to.

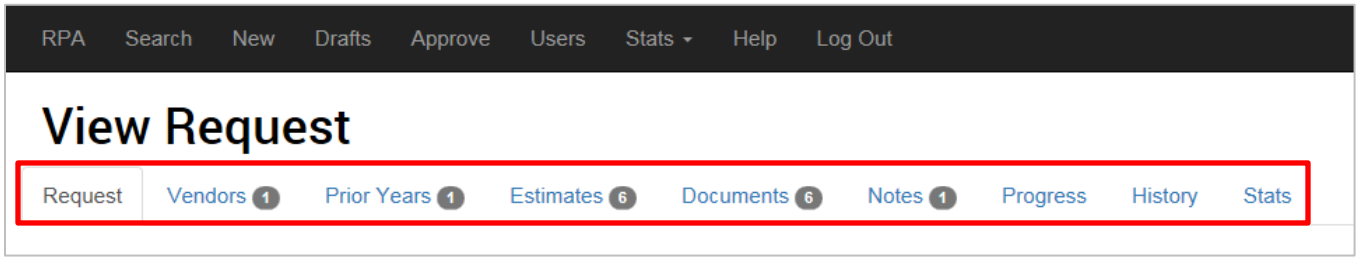
- **Agency:** Selecting an agency in the agency dropdown menu will filter your search results by the agency that submitted the RPA. Search results will default to your agency and you will only be able to see the RPAs submitted by your agency or agencies you have access to.
- **RPA Number:** If you wish to search for a specific RPA, type the **RPA Number** into the corresponding field (e.g., AAA1230). The search is not case sensitive.
- **Phase:** Select the current phase of the RPA. Phases include: Agency Draft, Agency Revision, Receiving, Assignment Phase, Procurement Manager, Section Chief, Deputy Division Administrator, DOA Division Administrator, Chief Information Officer, Governor, Contract Number, and Approved. If there is a phase that is not shown in the dropdown menu, then there are currently no RPAs in that phase.
- **Created After** and **Created Before:** You have the ability to search for an RPA submitted before or after a particular date. For example, you may search for RPA created sometime after January 1, 2017 or before December 15, 2017.

➢ **STEP 3:** Click on your RPA.

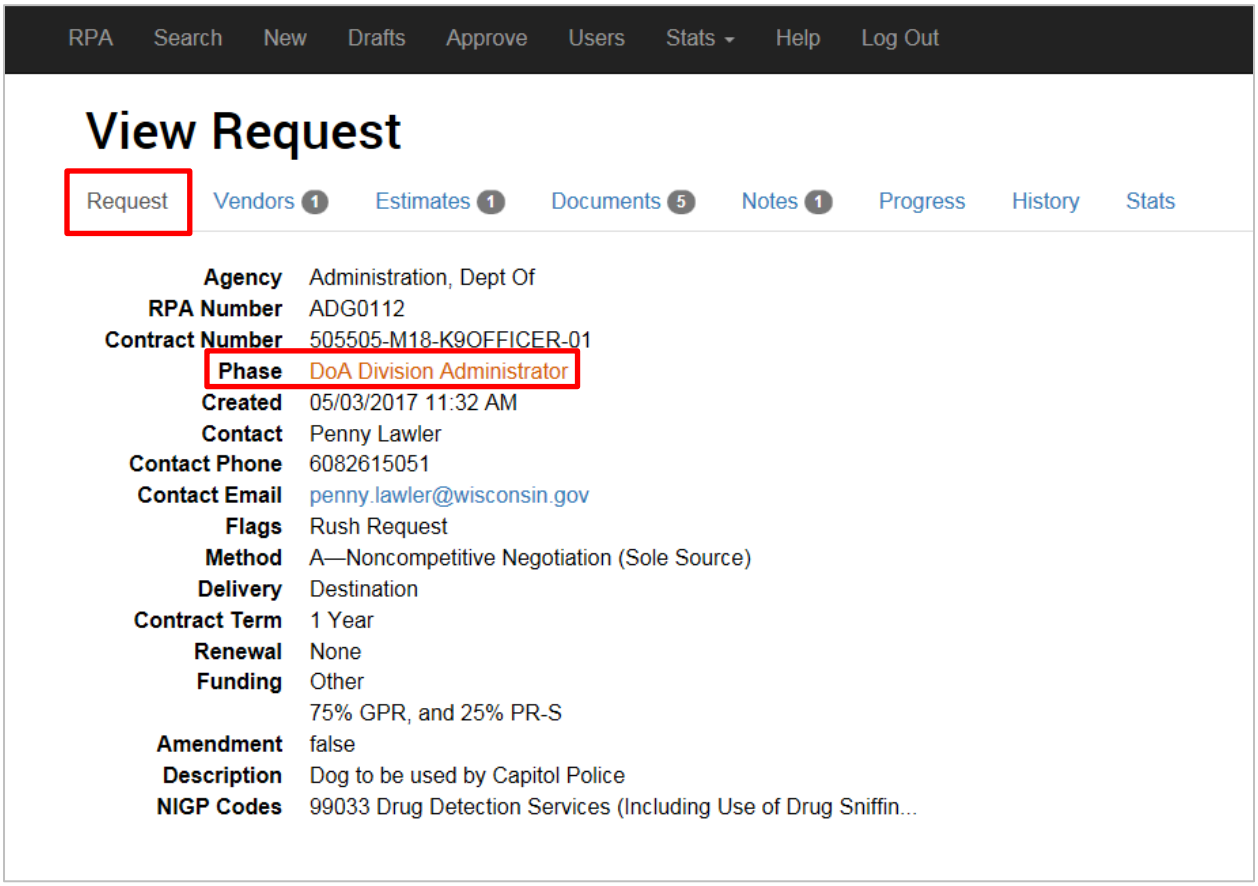
To open the desired RPA, click anywhere on the square.



Once your RPA has been submitted, you will have additional tabs you can access. The number of tabs displayed will depend on the information that was filled out in the initial request.

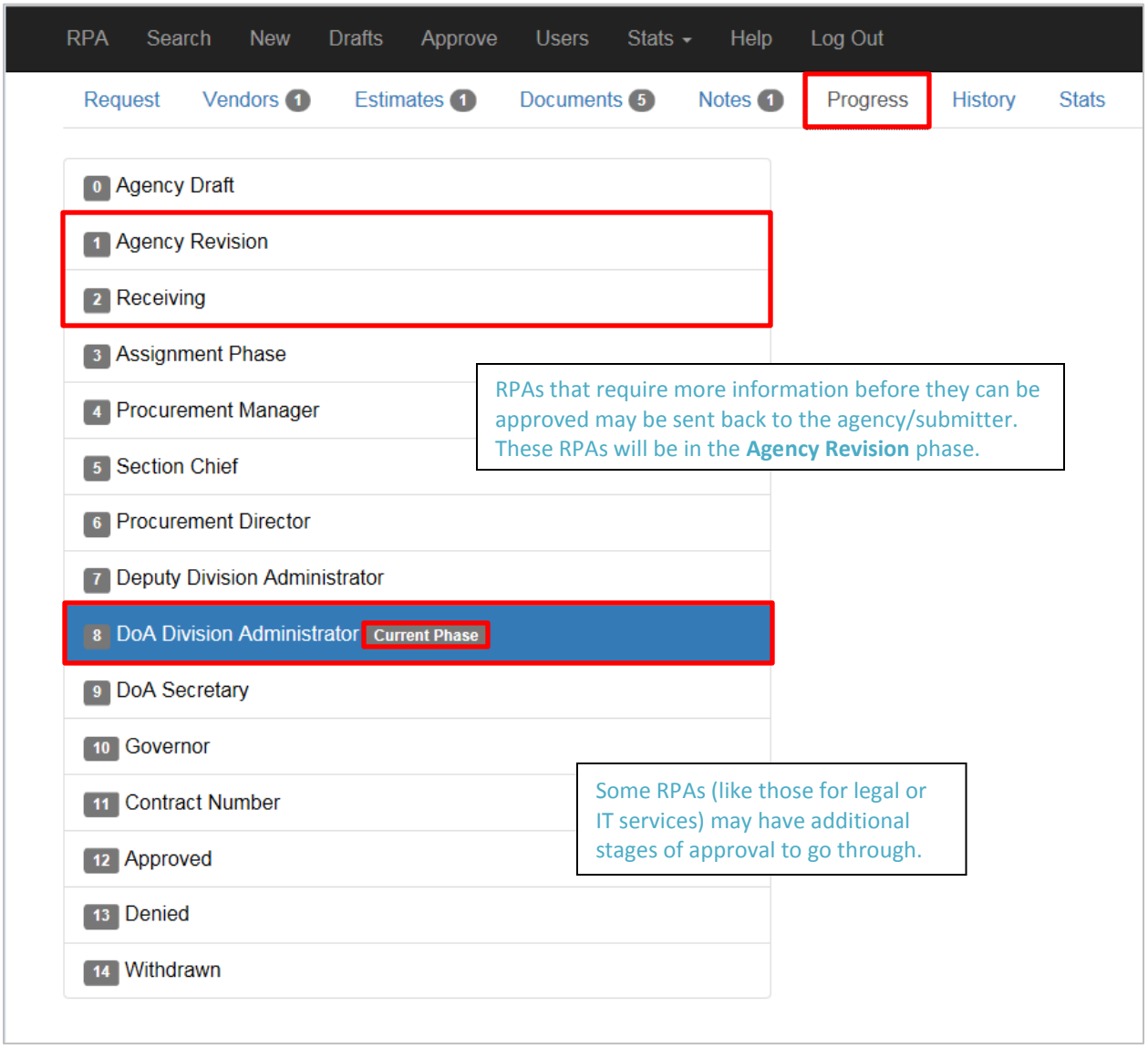


- **Request:** This tab contains a summary of all the information included with the initial RPA submission. The **Phase** indicates which phase the RPA is currently in and will display in a colored font.



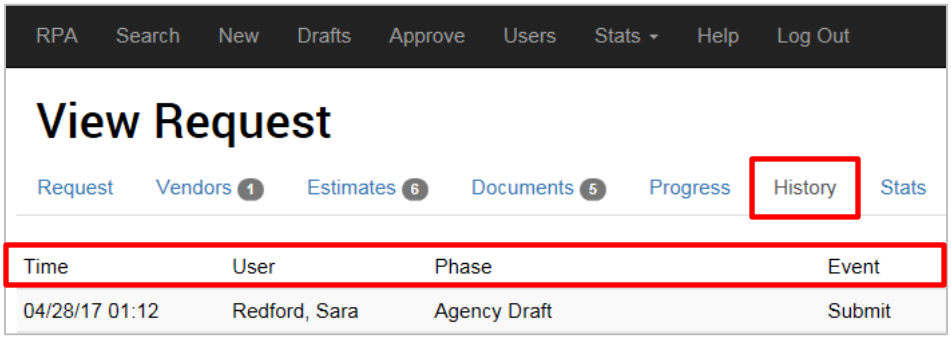
- **Vendors:** This tab displays the vendors that were entered into the initial RPA submission. If no vendors were added, this tab will not display.
- **Prior Years:** This tab displays RPAs that were submitted in a prior year. If no prior year case numbers or RPA numbers were added, this tab will not display.
- **Estimates:** This tab displays the estimates for all years the submitter entered for the RPA.
- **Documents:** This tab displays all of the documentation submitted with the RPA. Included with the uploaded documentation is a printable version of the RPA. All documents may be downloaded for viewing or printing.
- **Notes:** This tab displays any notes that have been added to the RPA. If no notes were added, this tab will not display.

- **Progress:** This tab lists all the stages of approval that an RPA must complete to be successful. The stage the RPA is currently in will be highlighted and will list **Current Phase** to the right of it. Some RPAs may have additional stages of approval to go through (e.g., RPAs for legal services or information technology services). Additionally, an RPA may be sent back for **Agency Revision** if more information is required before it can be approved. Once it passes through **Agency Revision**, it will move on to the **Receiving** phase.

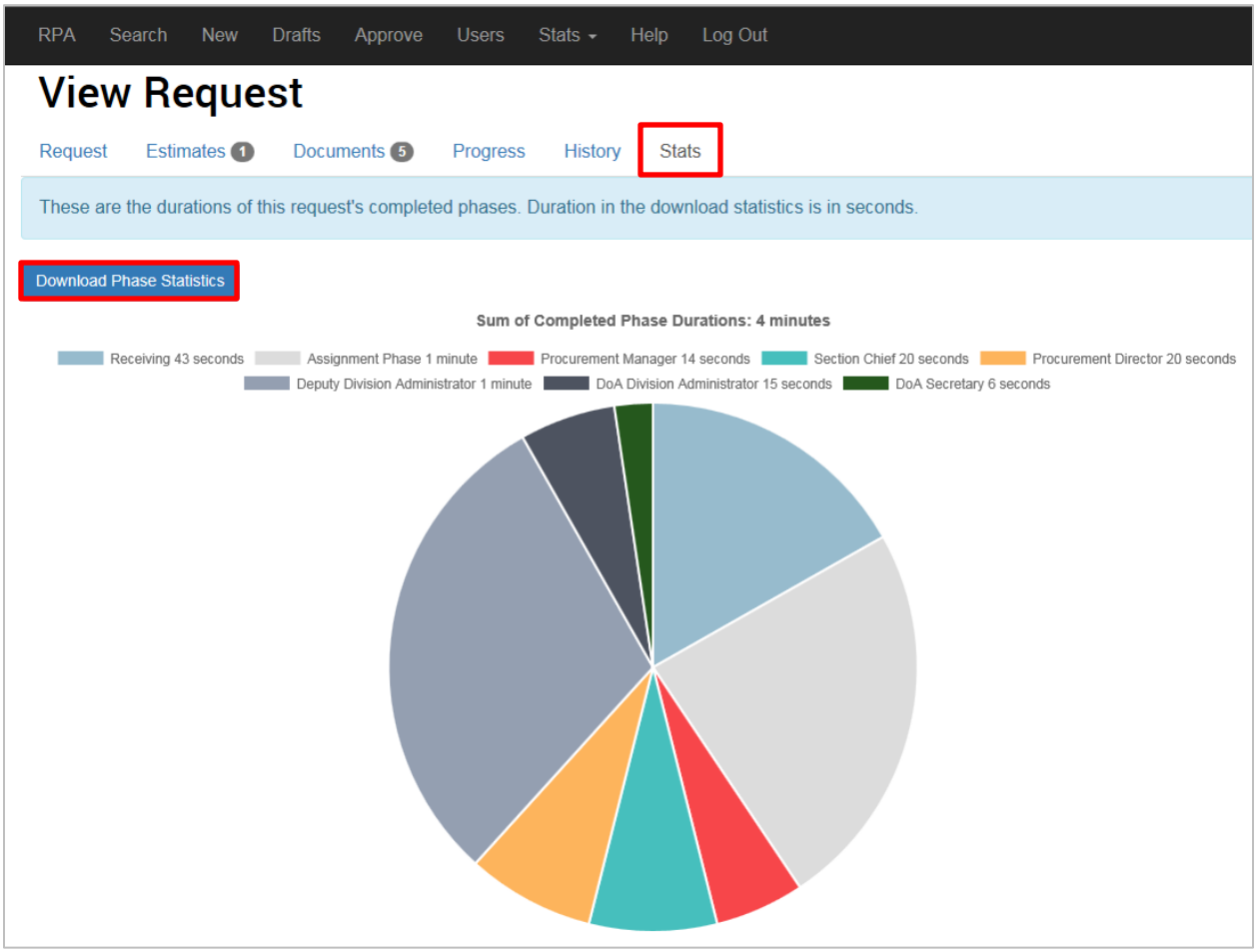


- **History:** This tab shows a list of everyone who has interacted with the RPA:
  - **Time:** Displays the date and time the RPA moved into that phase or when the associated action was completed.
  - **User:** Shows the name of the user the RPA was assigned to during this phase.
  - **Phase:** Lists the phase the RPA was in at that time. The initial submittal of the RPA will be shown as being in the **Agency Draf**t phase.
  - **Event:** Shows the action that was completed during this phase. As the RPA arrives into a new phase, the status is initially listed as **In Queue**. Once the RPA has been approved in that phase, the event status is

marked as **Approve** and the RPA is forwarded to the next approval phase. RPAs with the **SendBack** event have been returned to a previous phase and must have changes made before it can advance again.



- **Stats:** This tab displays statistics for the length of time the RPA spends in each approval phase. To download an Excel file of the data, click **Download Phase Statistics**.



CHARTS & GRAPHS

Statistics may be generated to see the average time that RPAs spend in each of the approval phases. This data may be generated for each individual RPA and may also be viewed as averages for all RPAs submitted to the site.

Stats for an Individual RPA

- **STEP 1:** Navigate to the RPA homepage.

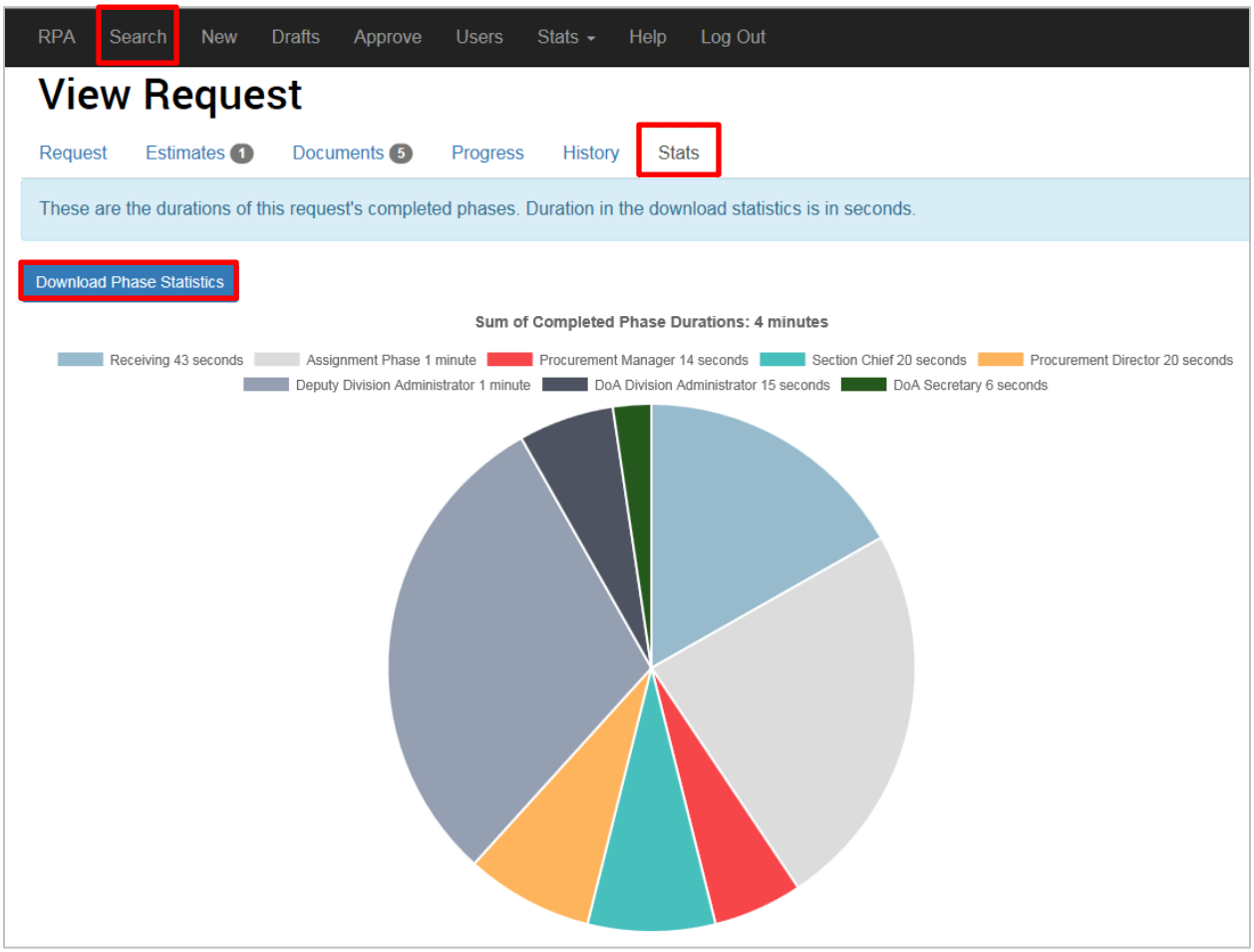
  Click the **Search Requests** button at the bottom or select the **Search** tab at the top.

- **STEP 2:** Search for and click on your RPA.

  For step-by-step instructions, see the section on **Searching for Requests**.

- **STEP 3:** Click on the **Stats** tab.

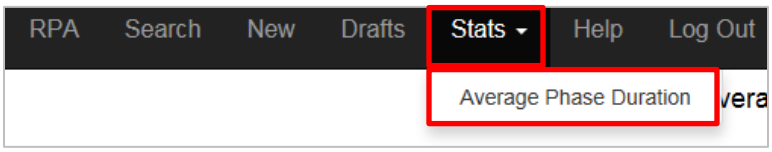
  You may download this information by clicking on the **Download Phase Statistics** button.



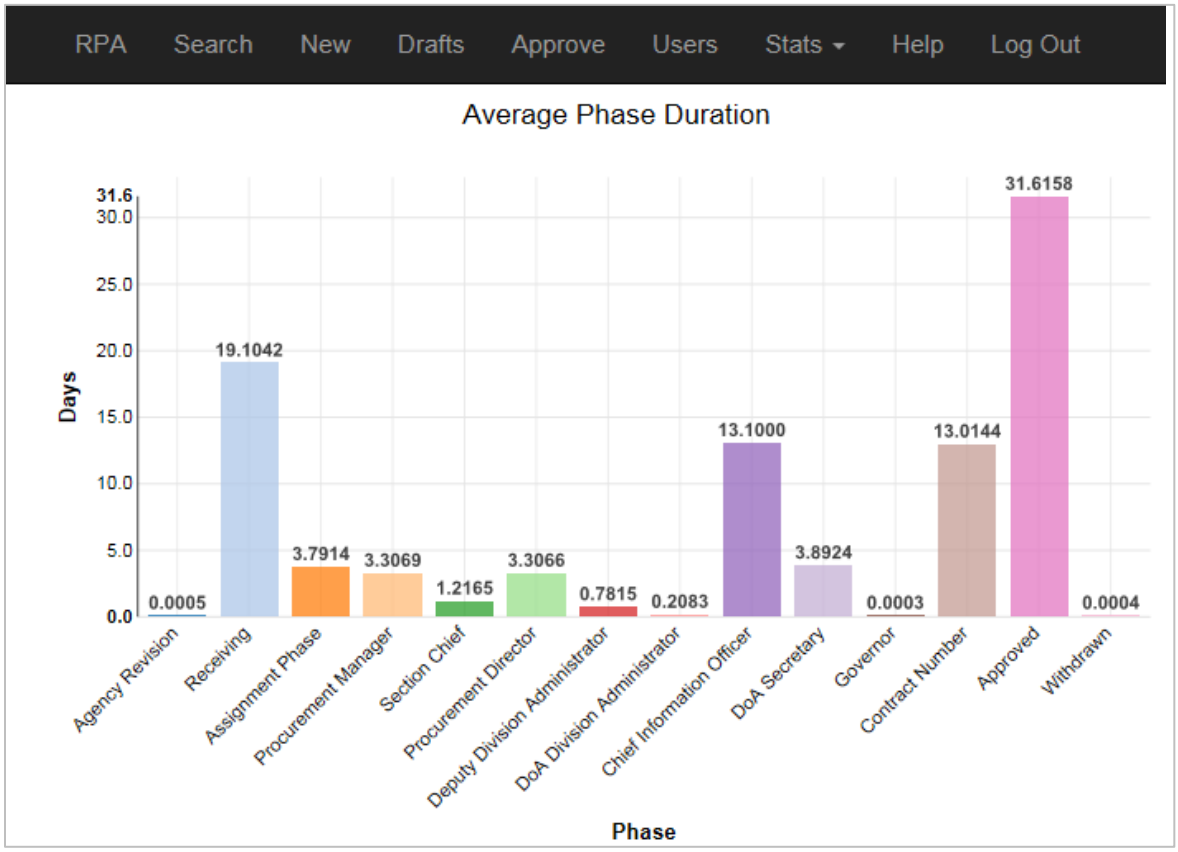
Stats for All RPAs

- **STEP 1:** Navigate to the RPA homepage.

  Click on the **Stats** tab and select **Average Phase Duration** from the dropdown menu.



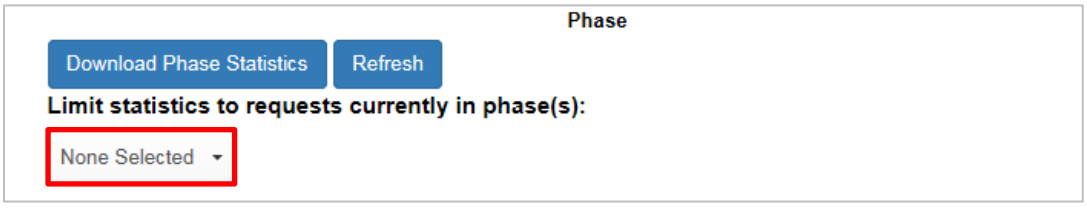
Once selected, you will be taken to a page displaying a bar graph of the average length of time all RPAs spend in each phase.



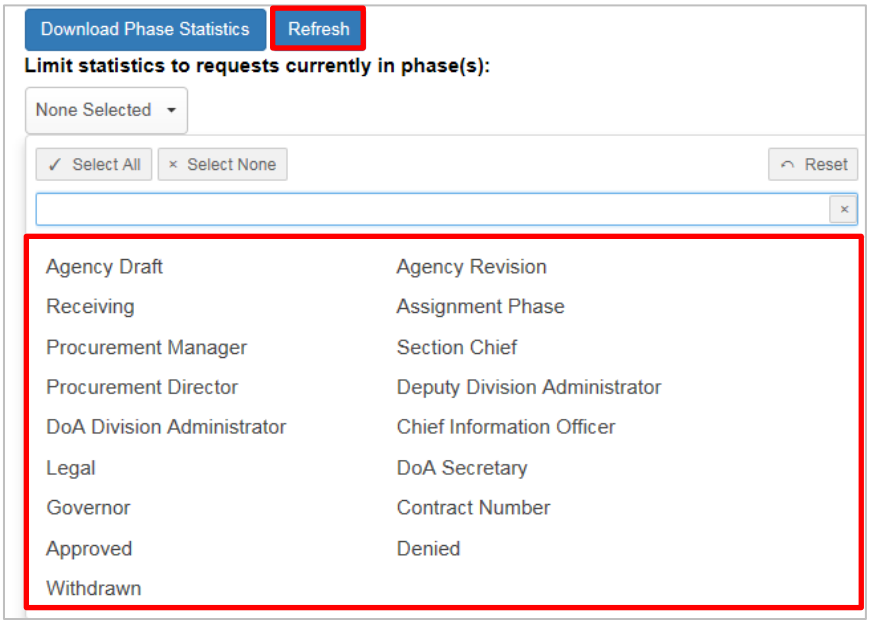
- **STEP 2:** Limit the data to a particular phase, if desired.

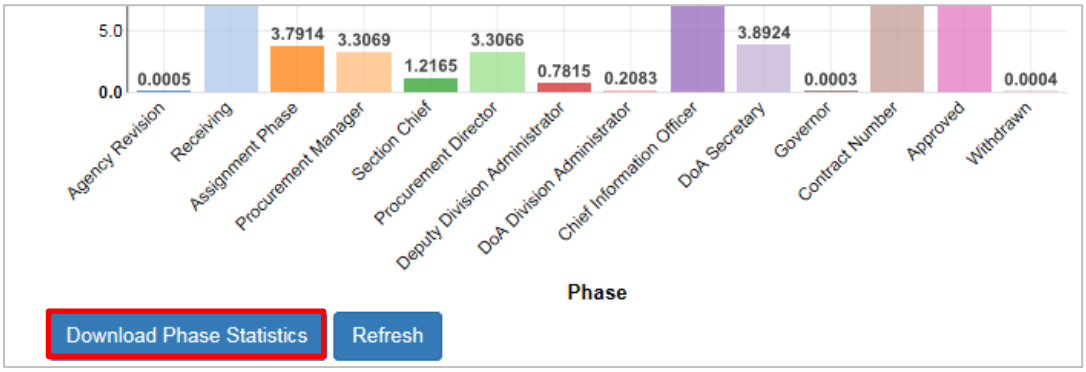
  You can limit the information shown to one or more phases, if desired.

  a. At the bottom of the page, you'll need to click on the **None Selected** dropdown menu under **Limit statistics to requests currently in phase(s)**.



  b. Select the desired phase(s) and click **Refresh** to update the graph. Clicking anywhere on the graph will also update the image.



- **STEP 3:** Download the data, if desired.

  If you wish to download the data, it can be saved as an Excel file. Click **Download Phase Statistics**.