

State of Wisconsin
Department of Administration

Request for Purchasing Authority
Approver Guide

Job Aid: RPA Website User Guide for Approvers

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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 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.

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 – Approver Privileges" 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.

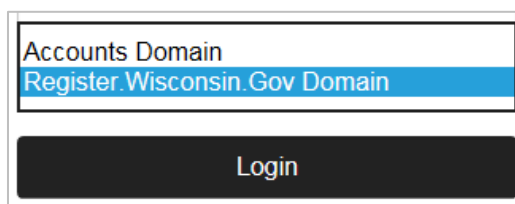
- **STEP 2:** Sign up for an account.

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:

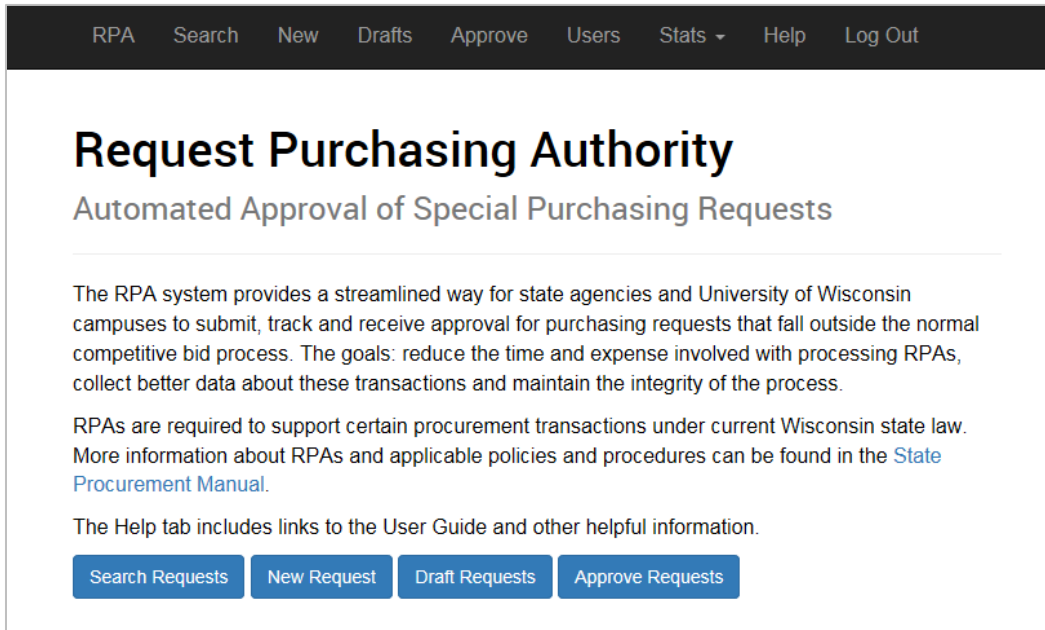
- Your name
- The name of your campus
- The login credentials you created in Step 1
- You should also reference "RPA Website – Approver Privileges" in your email

- **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**.



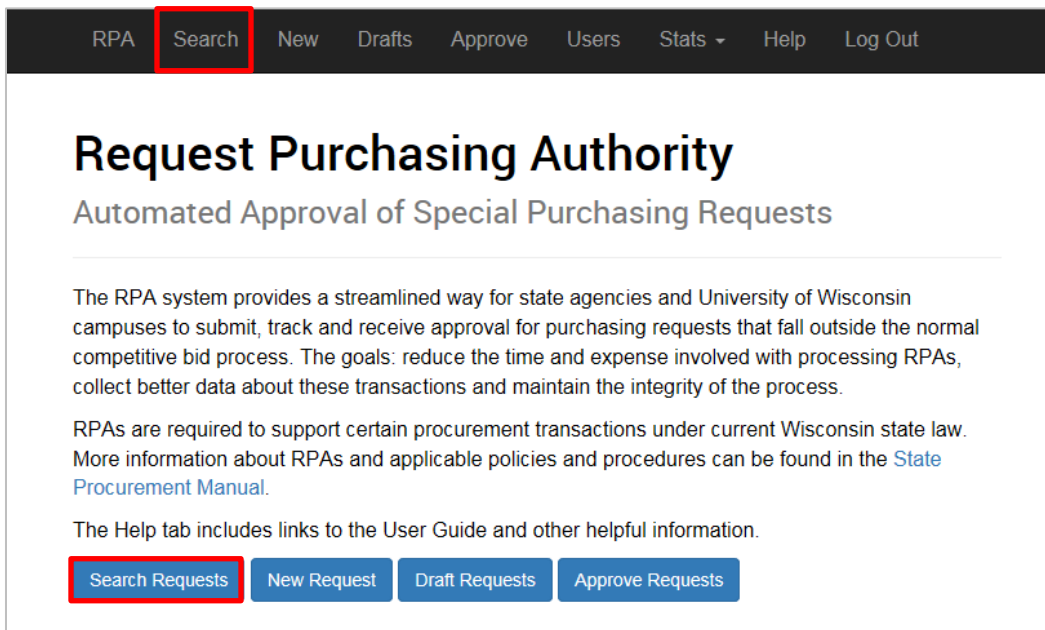
Once you have successfully logged in, you will see this homepage:



SEARCHING FOR REQUESTS

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

RPAs can be searched via the Search Requests page once it has been submitted for approval. Click the **Search Requests** button at the bottom or select the **Search** tab at the top.



After clicking **Search Requests**, you will be taken to the **View Request** screen.

The screenshot shows the 'View Request' interface. At the top, there is a navigation bar with 'RPA', 'Search' (highlighted with a red box), 'New', 'Drafts', 'Approve', 'Users', 'Stats', 'Help', and 'Log Out'. Below the navigation bar, the title 'View Request' is displayed. Underneath the title, there are five filter fields: 'Agency:' (dropdown menu with '--All--'), 'RPA Number:' (text input), 'Phase:' (dropdown menu with '--All--'), 'Created After:' (date input '12/14/2016' with a calendar icon), and 'Created Before:' (date input '06/13/2017' with a calendar icon). The main content area is a grid of 12 request cards, each with a header 'Administration, Dept Of' and a title in a different color (e.g., Agency Draft, Receiving, Procurement Manager, Agency Revision, Section Chief, Approved, Deputy Division Administrator, DoA Division Administrator, Chief Information Officer, Contract Number). Each card also lists 'RPA Number', 'Created' date, and 'Description'.

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

Select the filters you wish to use to fine tune your search results.

- **Agency:** Selecting an agency in the dropdown menu will filter your search results by the agency that submitted the RPA.
- **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.

This screenshot is similar to the one above, but with a red rectangular box highlighting the filter fields: 'Agency:', 'RPA Number:', 'Phase:', 'Created After:', and 'Created Before:'.

- **STEP 3:** Click on the desired RPA.

To open the RPA, click anywhere within the square.

The screenshot shows the 'View Request' interface with a navigation bar at the top containing 'RPA', 'Search', 'New', 'Drafts', 'Approve', 'Users', 'Stats', 'Help', and 'Log Out'. Below the navigation bar, there are filter fields for Agency, RPA Number, Phase, Created After, and Created Before. The main content area displays a grid of 12 RPA cards, each with a title, RPA Number, Created date, and Description. The second card in the first row, titled 'Receiving' with RPA Number ADG0112, is highlighted with a red border.

Agency	RPA Number	Phase	Created After	Created Before
--All--		--All--	12/14/2016	06/13/2017

Administration, Dept Of	Administration, Dept Of	Administration, Dept Of	Administration, Dept Of
Agency Draft RPA Number ADG1234 Created 05/31/2017 01:07 PM Description Testing RPA duplication issue	Receiving RPA Number ADG0112 Created 05/03/2017 11:32 AM Description Dog to be used by Capitol Police	Agency Draft RPA Number ADG0111 Created 05/02/2017 03:13 PM Description Dog to be used by Capitol Police	Assignment Phase RPA Number ADF12225 Created 05/02/2017 02:37 PM Description Testing out
Administration, Dept Of	Administration, Dept Of	Administration, Dept Of	Administration, Dept Of
Procurement Manager RPA Number AFX1234 Created 03/29/2017 12:13 PM Description adfaed	Agency Revision RPA Number ASD1234 Created 03/29/2017 07:11 AM Description adfaed	Section Chief RPA Number ADG5001 Created 03/28/2017 02:03 PM Description Upgrade existing computer software application	Approved RPA Number ABC1234 Created 03/28/2017 01:36 PM Description test description
Administration, Dept Of	Health Services, Dept Of	Health Services, Dept Of	Justice, Dept Of
Deputy Division Administrator RPA Number ADG5000 Created 03/28/2017 09:20 AM	DoA Division Administrator RPA Number FKG0663 Created 04/26/2017 01:39 PM	Chief Information Officer RPA Number FKG0661 Created 04/26/2017 08:18 AM	Contract Number RPA Number DOJ1232 Created 03/15/2017 10:53 AM

REVIEWING A SUBMITTED RPA

There are several tabs of information that you may view when reviewing an RPA. Each tab has a different set of information relevant to the status of the RPA. The number of tabs displayed will depend on the information that was filled out in the initial request.

The screenshot shows the 'View Request' interface with a navigation bar at the top containing 'RPA', 'Search', 'New', 'Drafts', 'Approve', 'Users', 'Stats', 'Help', and 'Log Out'. Below the navigation bar, there are filter fields for Agency, RPA Number, Phase, Created After, and Created Before. The main content area displays a grid of 12 RPA cards. Below the grid, there is a row of tabs: Request, Vendors (1), Prior Years (1), Estimates (6), Documents (6), Notes (1), Progress, History, and Stats. The tabs are highlighted with a red border.

Agency	RPA Number	Phase	Created After	Created Before
--All--		--All--	12/14/2016	06/13/2017

Administration, Dept Of	Administration, Dept Of	Administration, Dept Of	Administration, Dept Of
Agency Draft RPA Number ADG1234 Created 05/31/2017 01:07 PM Description Testing RPA duplication issue	Receiving RPA Number ADG0112 Created 05/03/2017 11:32 AM Description Dog to be used by Capitol Police	Agency Draft RPA Number ADG0111 Created 05/02/2017 03:13 PM Description Dog to be used by Capitol Police	Assignment Phase RPA Number ADF12225 Created 05/02/2017 02:37 PM Description Testing out
Administration, Dept Of	Administration, Dept Of	Administration, Dept Of	Administration, Dept Of
Procurement Manager RPA Number AFX1234 Created 03/29/2017 12:13 PM Description adfaed	Agency Revision RPA Number ASD1234 Created 03/29/2017 07:11 AM Description adfaed	Section Chief RPA Number ADG5001 Created 03/28/2017 02:03 PM Description Upgrade existing computer software application	Approved RPA Number ABC1234 Created 03/28/2017 01:36 PM Description test description
Administration, Dept Of	Health Services, Dept Of	Health Services, Dept Of	Justice, Dept Of
Deputy Division Administrator RPA Number ADG5000 Created 03/28/2017 09:20 AM	DoA Division Administrator RPA Number FKG0663 Created 04/26/2017 01:39 PM	Chief Information Officer RPA Number FKG0661 Created 04/26/2017 08:18 AM	Contract Number RPA Number DOJ1232 Created 03/15/2017 10:53 AM

Request | Vendors (1) | Prior Years (1) | Estimates (6) | Documents (6) | Notes (1) | Progress | History | Stats

- **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.

RPA Search New Drafts Approve Users Stats Help Log Out

View Request

Request Vendors 1 Estimates 1 Documents 5 Notes 1 Progress History Stats

Agency Administration, Dept Of
RPA Number ADG0112
Contract Number 505505-M18-K9OFFICER-01
Phase DoA Division Administrator
Created 05/03/2017 11:32 AM

- **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 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. There can be additional approval stages if the request was flagged for either Legal Services or Information Technology Services. RPAs in the **Agency Draft** phase have not yet been submitted and those in the **Agency Revision** phase have been returned to the submitter and require updates before they can be resubmitted. Upon exiting the **Agency Revision** stage, they automatically move to the **Receiving** phase.

RPA Search New Drafts Approve Users Stats Help Log Out

View Request

Request Vendors 1 Prior Years 1 Estimates 1 Documents 5 Progress History Stats

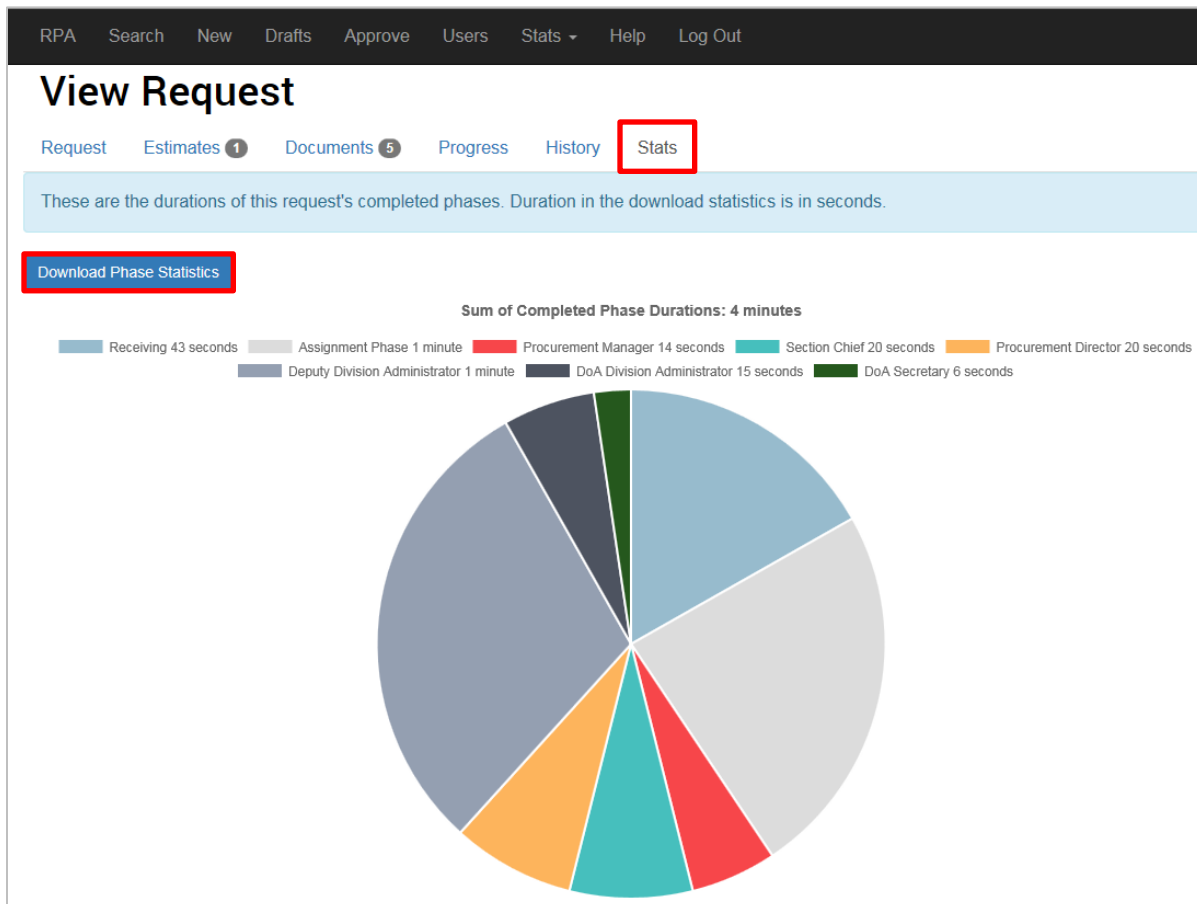
0 Agency Draft
1 Agency Revision
2 Receiving
3 Assignment Phase
4 Procurement Manager **Current Phase**
5 Section Chief

RPAs that are in draft version and have not yet been submitted are assigned the **Agency Draft** phase. In contrast, RPAs that have been previously submitted and were found to have errors are sent back to the **Agency Revision** phase and must be updated before they can be resubmitted.

- 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 Draft** 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.

Time	User	Phase	Event
04/28/17 01:12	Redford, Sara	Agency Draft	Submit

- 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**.

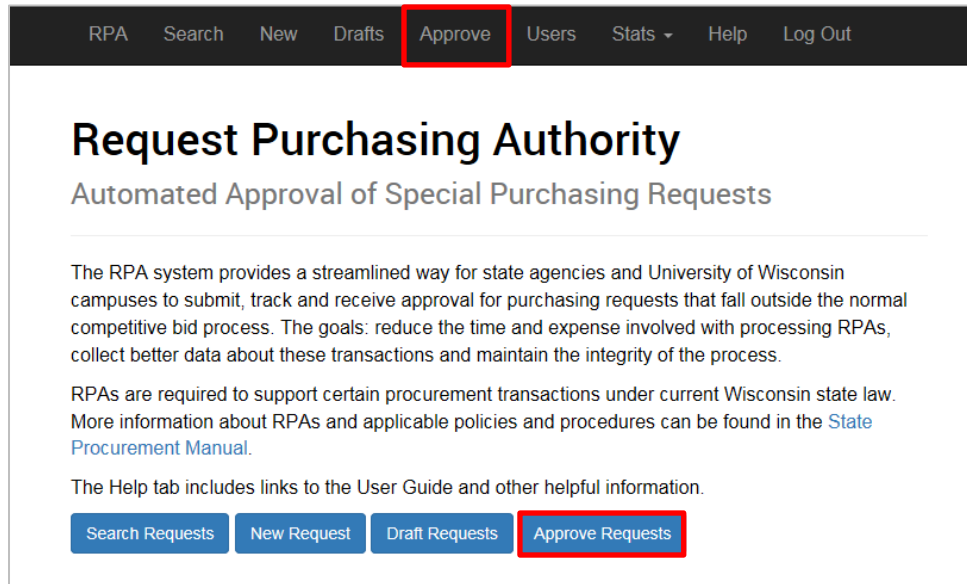


APPROVING REQUESTS

As a phase user in the RPA website, you have the ability to edit and approve requests that have been submitted to the website.

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

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

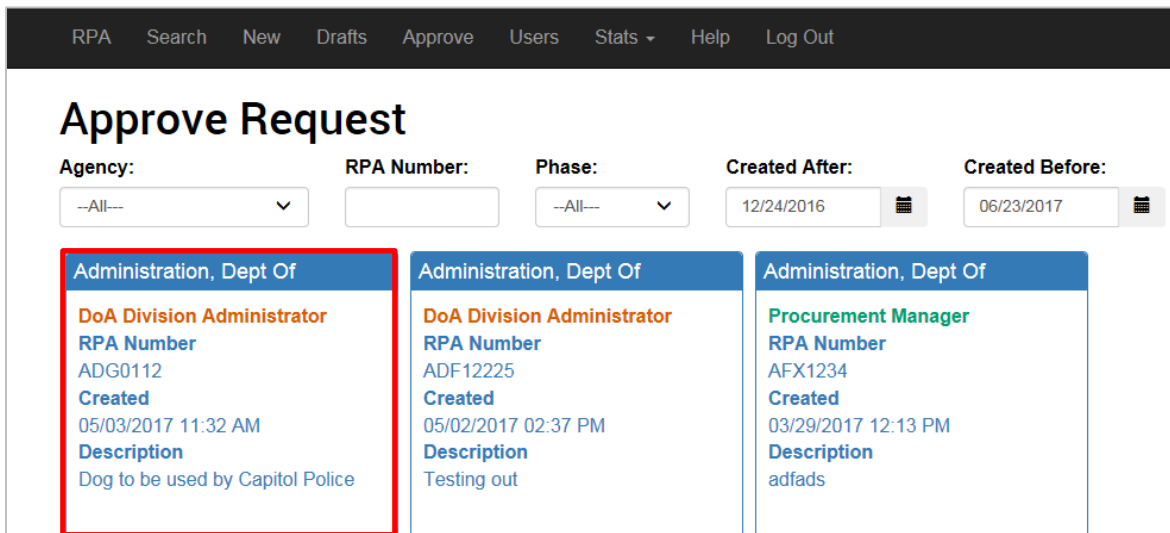


- **STEP 2:** Enter your search criteria.

Select the filters you wish to use to fine tune your search results. For step-by-step instructions on how to search with filters, see the section on [Searching for Requests](#).

- **STEP 3:** Click on the desired RPA.

To open the RPA, click anywhere within the square.



➤ **STEP 4:** Review the RPA.

After opening the RPA, several tabs will appear for review. Review each tab for the information displayed. On the **Request** tab, you may tag the RPA with additional flags, if necessary. Each flag is a button that will default to the off (white) position. To tag an RPA with additional flags, simply click the appropriate buttons to change their status and turn them green. If you make any changes to the document, be sure to click **Save & Continue** before leaving the tab.

- **Non-Legal Request** will change to **Request for Legal Services** and will add an additional approval phase.
- **Non-Information Technology Request** will change to **Request for Information Technology Services** and will add an additional approval phase.
- **Non-Rush** will change to **Rush** and will indicate the RPA is time-sensitive.

RPA Search New Drafts Approve Users Stats Help Log Out

Approve Request Deputy Division Administrator

Request Vendors 1 Prior Years 1 Estimates 6 Documents 4 Case Letter Approve History Notes 1 Print

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 Administration, Dept Of RPA Number ADG5001

Program Contact Bob Smith Contact Phone (608) 266-1234 Contact Email bob.jones@wisconsin.gov

Request Flags

Non Legal Request Request for Information Technology Services Non Rush

To tag the RPA with additional flags, click these buttons. The **Legal** and **IT** flags add additional approval phases and the **Rush** flag indicates the RPA is time-sensitive.

On the **Notes** tab, you may add any additional information you would like to include with the RPA. Enter the information in the **New Note** box and click the **+ Add** button to save it to the RPA.

RPA Search New Drafts Approve Users Stats Help Log Out

Approve Request DoA Division Administrator

Request Vendors 1 Prior Years 0 Estimates 1 Documents 4 Case Letter Approve History Notes 0 Print

Request Notes.

New Note

Required

➤ **STEP 5:** Make an approval decision.

Once you have reviewed the RPA, attached the appropriate flags, and added any notes that you wanted to include, you're ready to make an approval decision. Navigate to the **Approve** tab and click the **Deny**, **Send Back**, or **Approve** buttons as appropriate. The RPA will immediately be sent once one of the approval buttons are clicked; if a button is clicked unintentionally, you will need to contact an administrator for assistance.

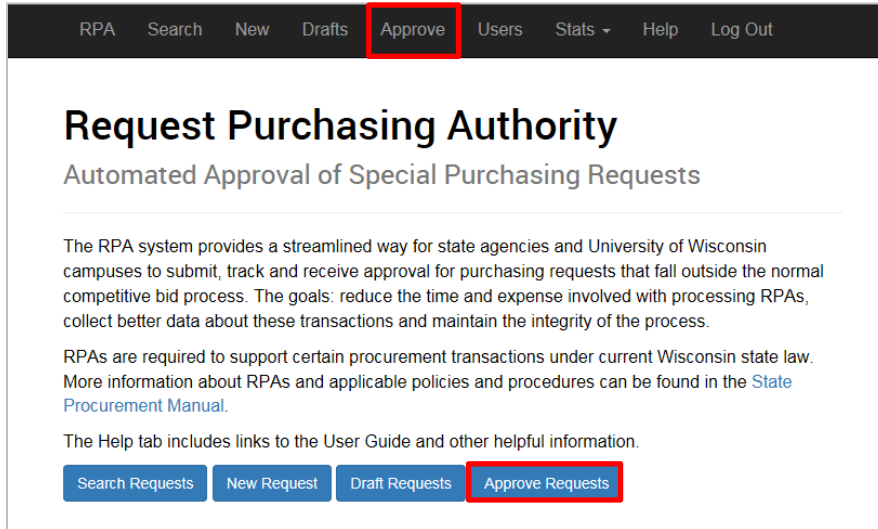
- **Deny:** This will deny the RPA.
- **Send Back:** This button will open a dropdown menu for you to select the specific phase the request needs to return to. If the RPA has errors and must be sent back to the agency submitting it, select **Agency Revision**.
- **Approve:** This will approve the RPA and it will be automatically moved on to the next phase for approval.

ADDING A CONTRACT NUMBER

After an RPA has gone through all applicable approval stages, it is ready to be assigned a contact number.

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

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

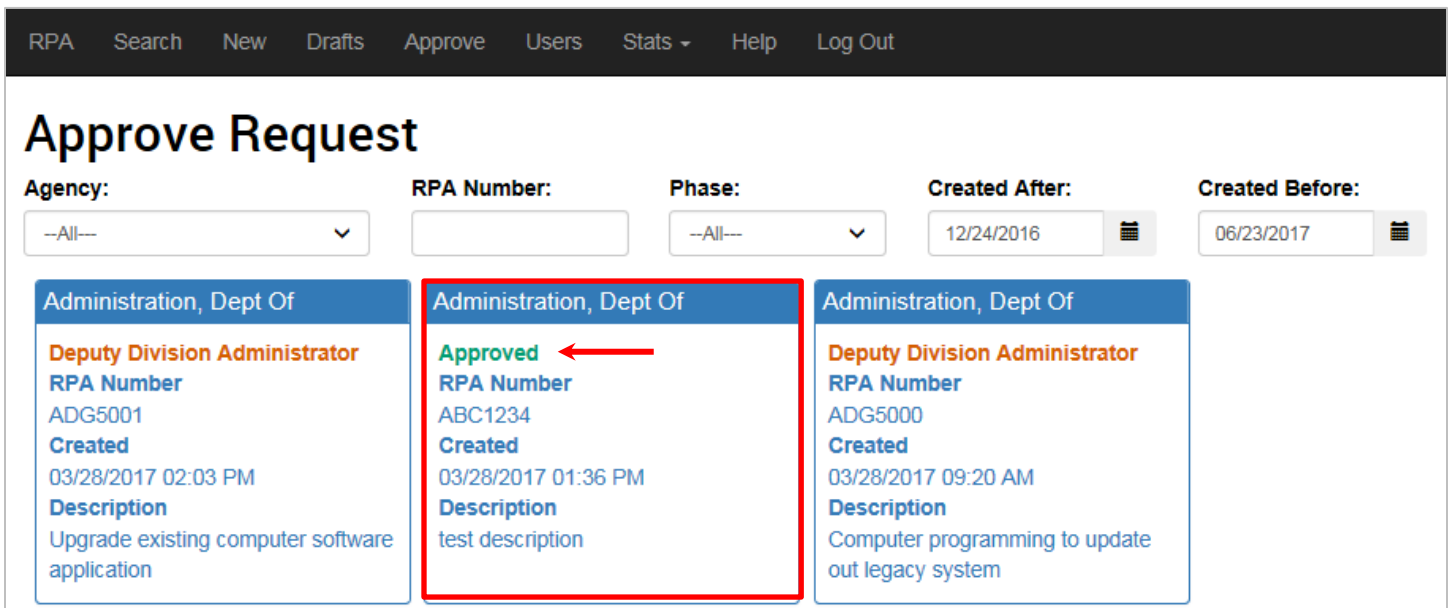


- **STEP 2:** Enter your search criteria.

Select the filters you wish to use to fine tune your search results. For step-by-step instructions on how to search with filters, see the section on [Searching for Requests](#).

- **STEP 3:** Click on the desired RPA.

To open the RPA, click anywhere within the square. An RPA ready to have a contract number assigned to it will be in the **Approved** phase.



➤ **STEP 4:** Click on the **Request** tab of the RPA.

There will now be a **Contract Number** field available for you to fill in (assuming you have the appropriate access in the system). The contract number should follow this format: 410505-W17-WZG6034-01

- First box: 3-digit Agency Number (e.g., 410) and the 3-digit DOA Agency Number (e.g., 505)
- Second box: 1 letter signifying the method of procurement (e.g. W) and the 2-digit fiscal year of award or contract start (e.g., 17). Method of procurement codes include:
 - W – General Waiver
 - S – Sole Source
 - V – Vehicle Purchase
 - C – Collective Purchase
 - L – Legal Service
 - R – Other
- Third box: the agency RPA number, which may use up to 11 characters (e.g., WZG6034)
- Fourth box: 2-digit sequential number identifier for multiple vendors on a single contract (e.g., 01)

RPA Search New Drafts Approve Users Stats Help Log Out

Approve Request Approved

Request Vendors 1 Prior Years 1 Estimates 3 Documents 4 Case Letter Approve History Notes 0 Print

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.

Contract Number

0UC505 S17 ABC1234 00

Agency Administration, Dept Of **RPA Number** ABC1234

➤ **STEP 5:** Print RPA documents, if desired.

To print an RPA or any of the documents attached to it, go to the **Print** tab. Click on any document to open it. Once opened, you may save or print.

RPA Search New Drafts Approve Users Stats Help Log Out

Approve Request Approved

Request Vendors 1 Prior Years 1 Estimates 3 Documents 4 Case Letter Approve History Notes 0 **Print**

Print the request and the documents attached to it.

Document	Type
RPA-ABC1234.pdf	Printable Request
CaseLetter.ABC1234.pdf	Case Letter
transmittal letter.docx	Transmittal_Letter
doa-3046.doc	CBA
doa-3046.doc	RPA_DOA_3046
doa-3046.doc	DOA_3046A_Cklist

CHARTS & GRAPHS

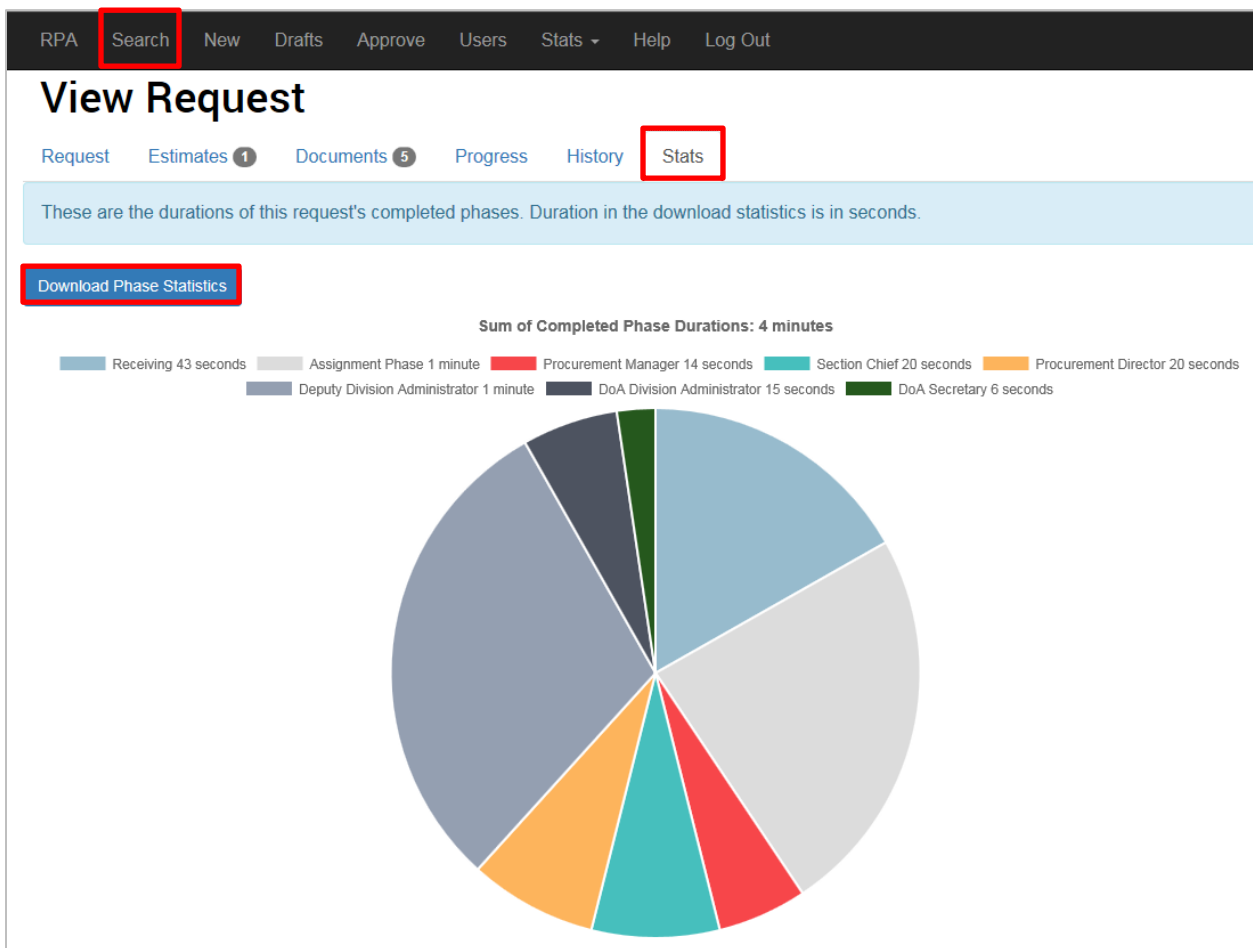
Statistics may be generated to see the average time that RPAs spend in each of the approval phases. This data may be generated for each individual RPA and may also be viewed as averages for all RPAs submitted to the site.

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.

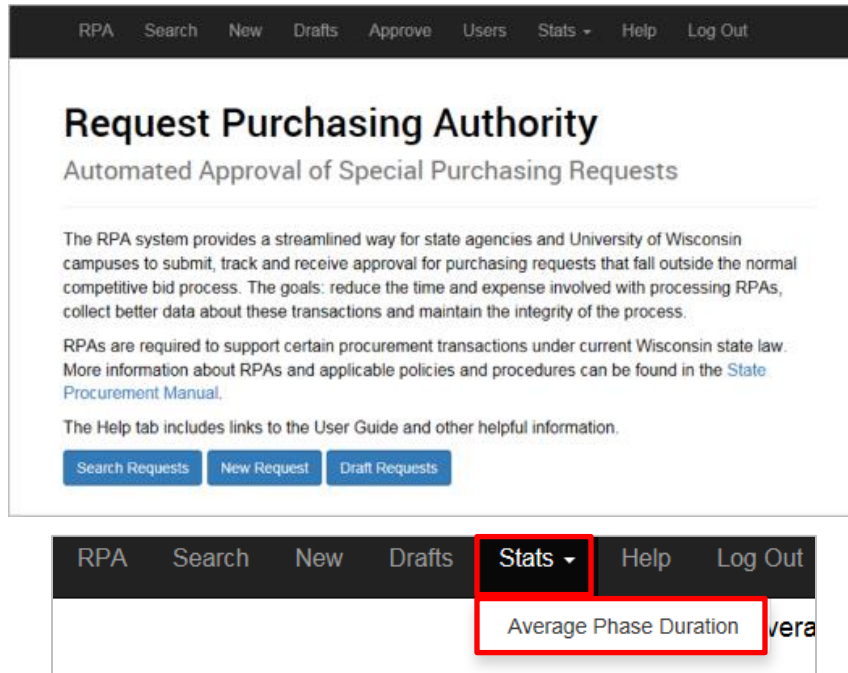
You may download this information by clicking on the **Download Phase Statistics** button.



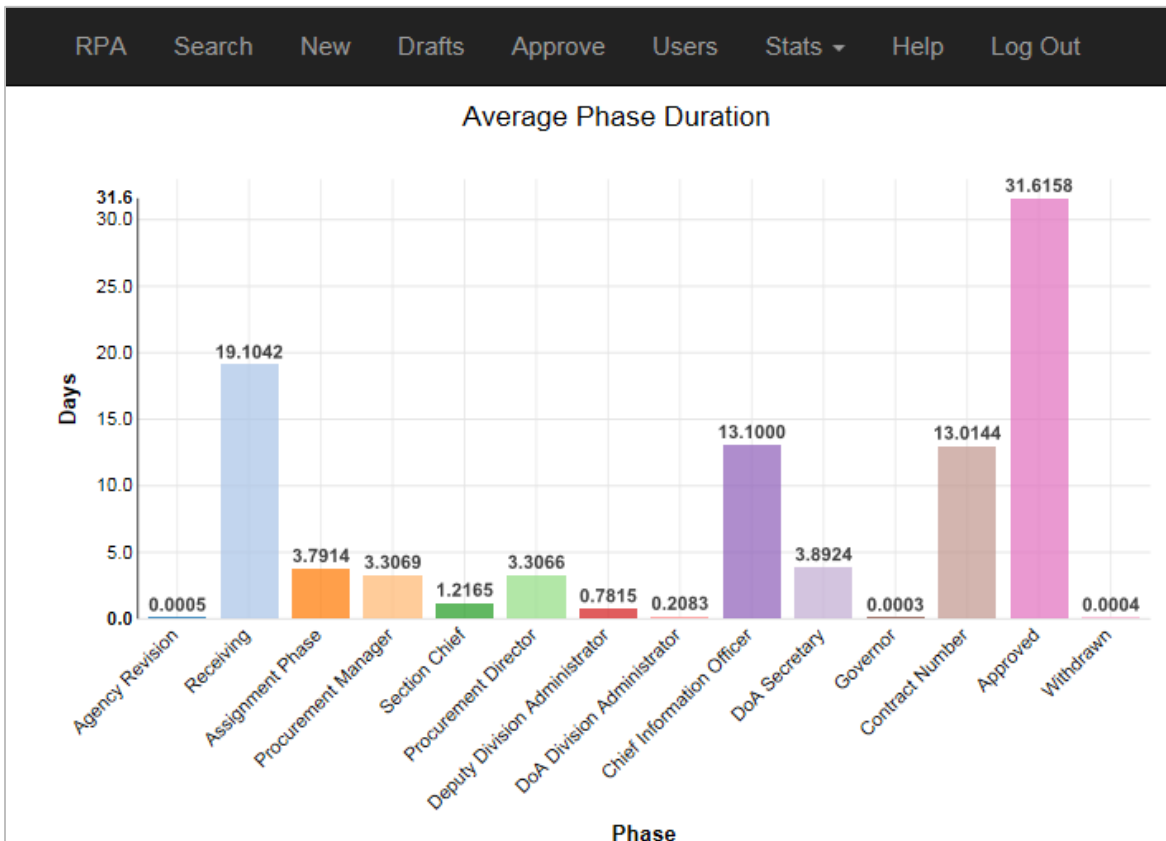
Stats for All RPAs

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

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



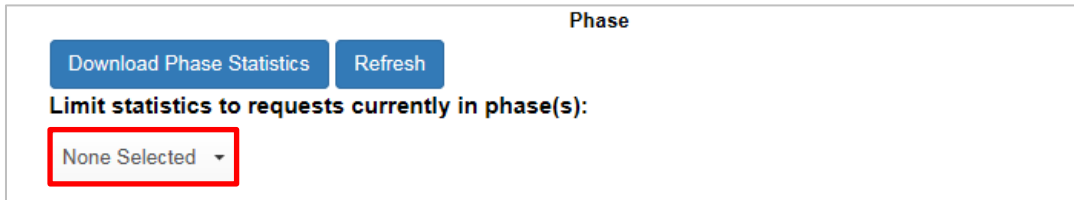
Once selected, you will be taken to a page displaying a bar graph of the average length of time all RPAs spend in each phase.



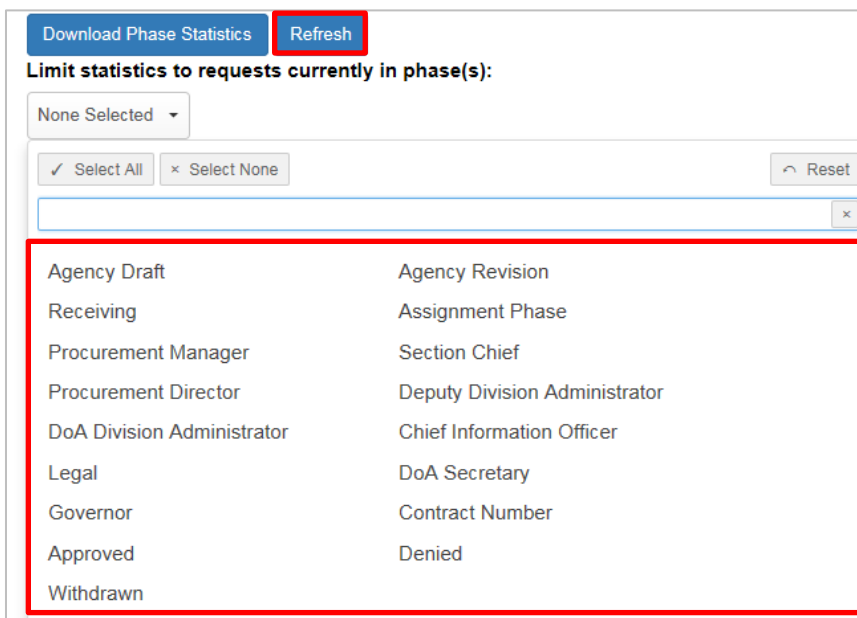
- **STEP 2:** Limit the data to a particular phase, if desired.

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

- 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)**.



- 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**.

