

# PARTNERING WITH CAPS: Let's Collaborate!

Presenters: Kathy Bergh, Mark Simon, Heather Strong





## Kathy Bergh

### *CAPS Section Chief*

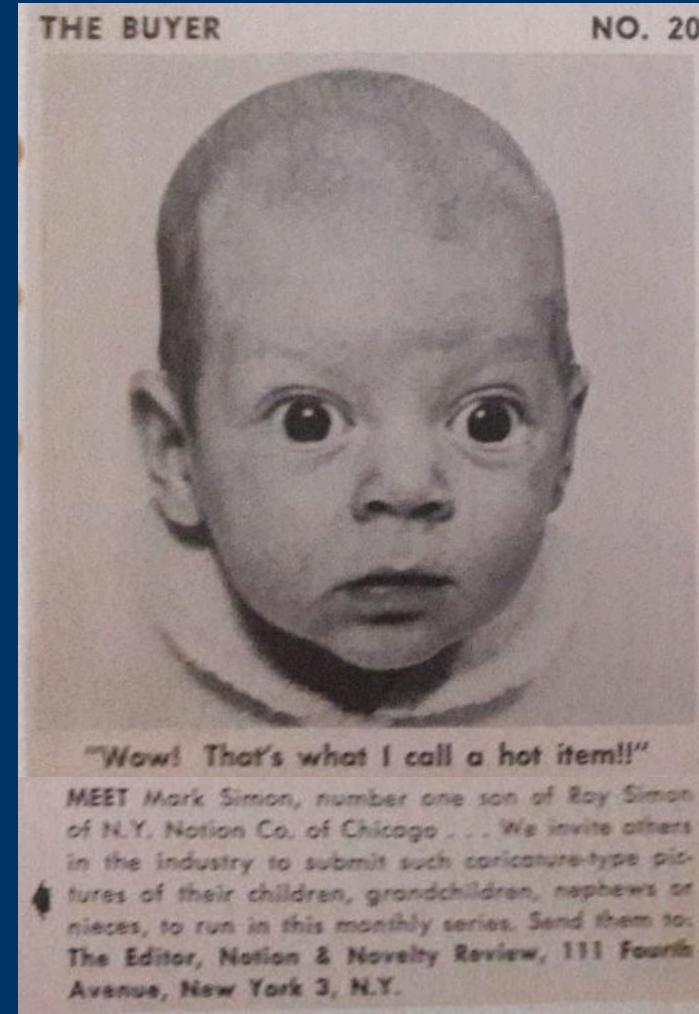
- 9 months with CAPS
- 12 years of experience with the State, mostly in procurement and HR positions
- Fun Fact: Still a Floridian at heart, my happy place is taking my kids to the beach at sunrise.



## Mark Simon

### *Procurement Specialist*

- 2 years with CAPS
- Over 20 years of procurement experience in the private sector. Spent five years supervising teams trading derivatives at the Chicago Board of Trade.
- Certified Purchasing Professional with the American Purchasing Society and holds an MBA in Finance from the University of Illinois – Chicago.
- Fun Fact: Has been in procurement a long time, as evidenced by the picture on the right. Enjoys reading science-fiction and fantasy, playing D&D, and helped develop a board game.



# Heather Strong

## *Procurement Specialist Senior*

- 4 months with CAPS
- Previous position as a Purchasing Agent Senior with the DNR for 5 years and worked in the accounting office of a local city government for 18 years.
- Fun Fact: I like to work on home remodeling projects in the winter and take trips on my Harley in the summer.



# Session Agenda



- CAPS Overview
- Procurement Authority
- Requisition Review and Approval
  - Simplified bids
  - Sole Source under 25k
  - RPAs
  - Collective/collaborative
- Requisition and PO Troubleshooting
- Looking ahead



Objective: Let's collaborate!



*Look for the cap image throughout the session for quick tips.*

# Who is CAPS?

Consolidated Agency  
Purchasing Services



Kathy Bergh  
*Section Chief*



Erin Schmitz  
*Procurement Specialist*



Mike Butterworth  
*Procurement Specialist*



Mark Simon  
*Procurement Specialist*



Stella Ness  
*Procurement Specialist Senior*



Dawn Stelse  
*Procurement Specialist*



Amber Rademacher  
*Procurement Specialist Advanced*



Heather Strong  
*Procurement Specialist Senior*

<https://doa.wi.gov/Pages/StateEmployees/SBOPKeyContact.aspx>





# Who are the CAPS supported agencies/boards?

- Board on Aging and Long Term Care
- Department of Administration
- Department of Agriculture, Trade and Consumer Protection
- Department of Financial Institutions
- Department of Military Affairs
- Department of Public Instruction
- Department of Revenue
- Department of Safety and Professional Services
- Department of Tourism
- Department of Veterans Affairs
- Educational Communications Board
- Ethics Commission

- Kickapoo Reserve Management Board
- Wisconsin Arts Board
- Labor and Industry Review Commission
- Office of the Commissioner of Insurance
- Offices of the Gov. and Lt. Gov.
- Office of the Secretary of State
- Office of the State Public Defender
- Office of the State Treasurer
- Public Service Commission
- Serve Wisconsin
- Wisconsin Board for People with Developmental Disabilities
- Wisconsin State Fair Park
- Wisconsin Women's Council



# CAPS FY22 Dashboard

26  
Agencies/Boards  
Supported

5430  
Requisition  
Approvals

47  
Simplified Bids

18  
RFB/RFI

11  
RFP

97  
RPAs

91  
CAPS Waiver

29  
Grant  
Exemptions

32  
Renewals





# What does CAPS do?




CAPS assists with procurements and with obtaining procurement authority.



What types of procurements do you find challenging?

Please insert your thoughts in the Chat Box and we'll have a short discussion.

[PRO-101.pdf \(wi.gov\)](#)

	<b>State Procurement Manual</b> Department of Administration, State Bureau of Procurement	<b>Number</b> PRO-101
<b>Section</b>	<b>Effective</b>	<b>Replaces</b>
INTRODUCTION AND PROCUREMENT FUNDAMENTALS	10/31/19	9/16/19
<b>Title</b>	<b>Page</b>	
PROCUREMENT DEFINITIONS AND THRESHOLDS	1 of 23	
<b>SCOPE:</b>	The purpose of this section is to establish definitions for terms and thresholds that are used throughout the State Procurement Manual.	



# What is Procurement Authority?



The legal authorization granting an Agency the right to purchase goods or services from a supplier.

# 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	<a href="#">DOA-3088</a> 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





# Procurement Manual Links

- Best Judgement ([PRO-302](#))
- Simplified Bid ([PRO-303](#))
- Sole Source Under \$25,000 ([PRO-501](#))
- Request for Purchasing Authority (RPA) ([PRO-210](#))
- Enterprise, CAPS, or Piggybacking Contract ([PRO-502](#))
- Grant ([PRO-504](#))
- Interagency ([PRO-504](#))
- Intergovernmental ([PRO-504](#))
- Collective/Collaborative Purchase ([PRO-502](#))



# Simplified Bid (PRO-303)



To increase your spend with diverse suppliers, remember to check the [database of certified diverse suppliers](#) when doing simplified bids.

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

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.

### Simplified Bidding Record

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

Date	1/9/23	Agency/Location	DOA
Person Completing	Mark Simon		
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			
		Stella's Snow Plowing 123 Fourth Street Blizzardville, WI. 53535			Heather's Helpful Snow Removal 1234 Main Street North Arctic, WI. 53535			Mark's Snow Removal 12 Flamethrower Lane Icewind, WI. 53535			
		Supplier ID	MBE	WC	DVB	Supplier ID	MBE	WC	DVB	Supplier ID	MBE
		Unit Price	Total		Unit Price	Total		Unit Price	Total		
Per Trip				\$50		No bid				\$75	
		Grand Total		\$50/trip	Grand Total		No Bid	Grand Total		\$75/trip	
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):

Stella's Snow Plowing was chosen, as Heather's Helpful Snow Removal chose not to bid, and Mark's Snow Removal was not the lowest bidder.



# Sole Source Under \$25k (PRO-501)



To avoid delays, be sure your supplier is set up in PeopleSoft.



STATE OF WISCONSIN  
DEPARTMENT OF ADMINISTRATION

## CORRESPONDENCE/Memorandum

**Date:** January 9, 2023

**To:** Reginald Q. Throckmorton, Director, Department of Remote Weather Stations

**From:** Kathy Bergh, Section Chief

**Department of Administration, Consolidated Agency Purchasing Services**

**Subject: Noncompetitive Negotiation Under \$25,000.00 Approval—\$7,500.00**

I have reviewed your request to waive the Simplified Bidding requirement (PRO-303) and to enter into a noncompetitive negotiation (PRO-501, Sole Source) with Stella's Snow Plowing for snow removal services in Blizzardsville, WI. In accordance with the supporting documentation, Stella's Snow Plowing is the only recognized provider of this service.

This memo serves as your approval of this sole source procurement, and you may move forward in your process. The cost for the service shall not exceed \$7500.00 and will be for nine months, from September 1, 2023 through May 31, 2024.

Keep a copy of this approval for your records. Attach a copy of this memo to your STAR Requisition and identify PRO-501 in the Requisition Approval Justification box as the authority for this sole source purchase. Also, use 123CAP-S23-RWASSU00365-01 in the contract ID field on the requisition.

Thank you.

Approved:

\_\_\_\_\_  
Kathy Bergh

\_\_\_\_\_  
Date



# RPA Approval queue



Include procurement history information in RPA.



Prior to submitting your RPA request, please do a final review to check for spelling/grammar/math errors.

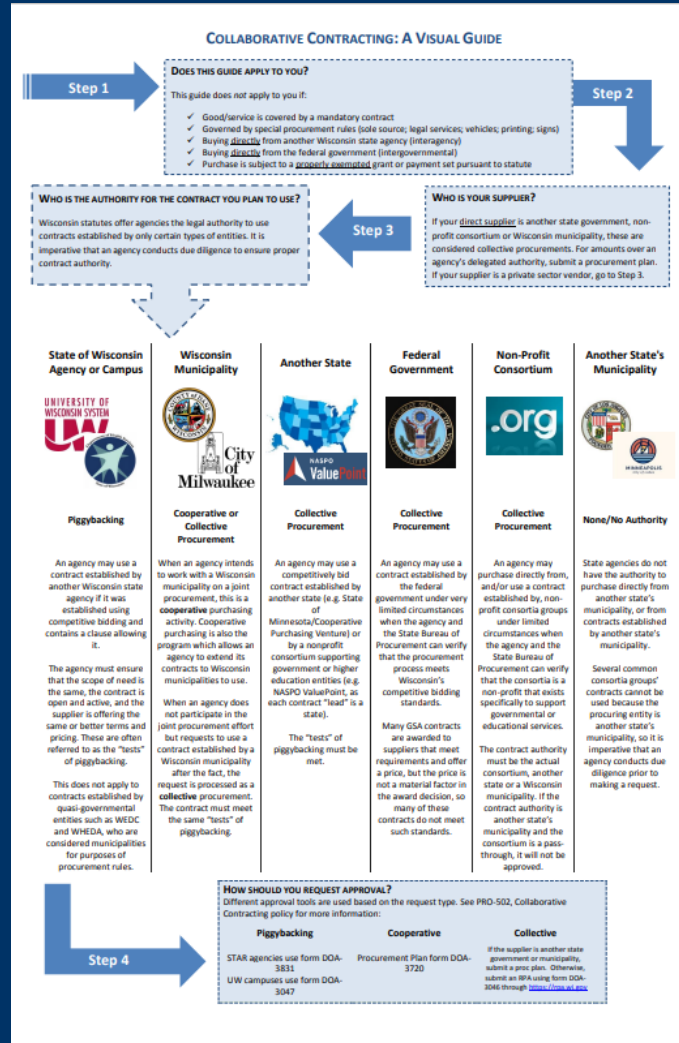
## View RPA Request

Request   Prior Years **2**   Estimates **1**   Documents **10**   Notes **2**   Progress   History   Stats

0	Agency Draft
1	Agency Revision
2	Receiving
3	Assignment Phase
4	Procurement Manager
5	Section Chief
6	Procurement Director
7	Deputy Division Administrator
8	DoA Division Administrator
9	DoA Secretary
10	Governor
11	Contract Number
12	Approved <b>Current Phase</b>
13	Denied
14	Withdrawn

# Collective/Collaborative Purchase (PRO-502)

## Collaborative Contracting: Visual Guide



There is a "Benefits of Collaborative Contracting" session tomorrow at 11:00 am.







# Questions?

*Learn from yesterday, live for today, hope for tomorrow.  
The important thing is not to stop questioning.*

*~ Albert Einstein*



# Managing Requisitions



POLL:



- Entering the Requisition
- Procurement Authority
- Amount Only Flag
- Supplier ID Number
- Unit of Measure
- NIGP Code Selections
- PO Type
- Documentation & Attachments
- Other

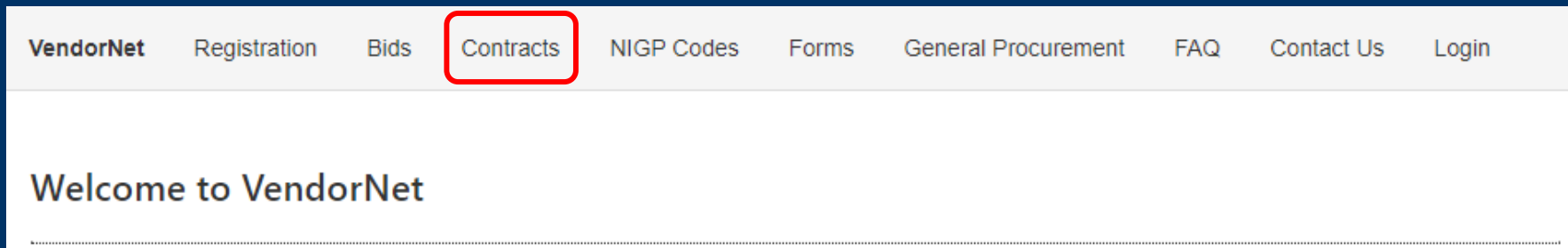




# Searching for Contracts on VendorNet



<https://VendorNet.wi.gov/>





Using fewer key words when searching for a contract will yield better results.

### Search Contracts

**Keyword or Number** Public Safety Communication

**Agency**

**NIGP**

**Supplier**

**Piggyback**  Yes  No  Both

**Cooperative Purchase**  Yes  No  Both

**Mandatory Purchase**  Yes  No  Both

**PCard**  Yes  No  Both

\*Hit Enter to Search

This site does not contain UW Madison Contracts. Please navigate to [UW Contracts](#)

Contract Number	Title	Agency	Start Date
505ENT-O22-SAFETYCOMM-00	NASPO Public Safety Communications Products, Services and Solutions	ADMINISTRATION, DEPT OF	1/1/2022
505ENT-O16-SAFETYCOMM-00	<b>EXPIRED:</b> NASPO Public Safety Communication Equipment	ADMINISTRATION, DEPT OF	12/23/2015
395002-O17-0405906-000-01	INTELLIGENT TRANSPORTATION SYSTEM	TRANSPORTATION, DEPT OF	10/31/2005



## View Contract

[Back to Contracts](#)

**Title:** NASPO Public Safety Communications Products, Services and Solutions

**Agency:** ADMINISTRATION, DEPT OF

**Contract Number:** 505ENT-O22-SAFETYCOMM-00

**Start Date:** 1/1/2022

**End Date:** 12/31/2026

**Cooperative Purchase?** Yes

**Mandatory Purchase?** No

**PCard?** Yes

**Piggyback?** Yes

**Manager:** [Laura Bergum](#)



# Awarded Suppliers

Contract #	Company Name	PeopleSoft Supplier ID #
505ENT-O22-SAFETYCOMM-10	Aviat U.S., Inc.	0000035472
505ENT-O22-SAFETYCOMM-04	BK Technologies, Inc.	0000007992
505ENT-O22-SAFETYCOMM-02	Codan Communications	0000111421
505ENT-O22-SAFETYCOMM-01	E.F. Johnson Company	0000029838
505ENT-O22-SAFETYCOMM-09	Icom America, Inc.	0000113010
505ENT-O22-SAFETYCOMM-03	JVCKENWOOD USA Corporation	0000106987
505ENT-O22-SAFETYCOMM-05	L3Harris Technologies, Inc.	0000007694
505ENT-O22-SAFETYCOMM-11	Motorola Solutions	0000008374
505ENT-O22-SAFETYCOMM-12	Nokia of America Corp.	0000004133
505ENT-O22-SAFETYCOMM-07	Pyramid Communications	0000122916
505ENT-O22-SAFETYCOMM-06	Zetron, Inc.	0000110285

Is your contractor on the Federal Debarment list or State Ineligibility List??

[Debarment PRO-401.pdf \(wi.gov\)](#)

[SAM.gov | Exclusions](#)

[VendorNet Information Center \(wi.gov\)](#)

# Contract Documentation

**Documents:**

- 01) Aviat Participating Addendum 12/23/2021
- 02) BK Technologies Participating Addendum 2/1/2022
- 03) Codan Participating Addendum 2/11/2022
- 04) E.F. Johnson Participating Addendum 1/14/2022
- 05) Icom America Participating Addendum 1/21/2022
- 06) JVCKENWOOD Participating Addendum 12/23/2021
- 07) L3Harris Participating Addendum 12/23/2021
- 08) Motorola Participating Addendum 1/24/2022
- 09) Nokia Participating Addendum 2/5/2022
- 10) Pyramid Participating Addendum 12/23/2021
- 12) Zetron Participating Addendum 2/11/2022
- 13) Categories Awarded to Each Supplier 1/4/2022
- 14) Contract Numbers and Supplier Numbers in PeopleSoft 2/6/2022
- 15) Supplier and Dealer Contact Information 2/21/2022

# NIGP Codes

Code	Description
12028	Communications Equipment, Marine
72606	Adhesive/Cement, Radio
72611	AM/FM Transmitters, Broadcast
72616	Antennas and Accessories (Radio Only): Brackets, Masts, Mount, Rotators, Standoffs, etc. (Including Aircraft, Vehicle
72624	Beacon Receivers, Radio
72637	Direction Finder, Radio
72640	Encoder/Decoder with Printer (Vehicle)
72641	Encoder/Decoder, Scramblers, etc. (Voice)
72644	Facsimile Transceivers (Not Office Type)
72647	Frequency Data Communication Equipment, Radio (Including Identification Equipment)
72651	Global Positioning Systems, Satellite (Global Info. System)
72654	Ground Stations, Satellite: Transmit/Receive and Receive Only (Including Antennas)
72656	Ham Band Transmitters and Receivers
72657	High Frequency Radio (SSB), Mobile and Base
72659	Highway Advisory Radio Systems
72670	Pagers, Radio (Including Parts and Accessories)
72677	Radio Frequency Scanner Receivers and Amplifiers (Including RF Connectors, Analyzers, Counters, Meters, Switches)
72678	Radios, Home and Auto (Incl. Short-Wave Type)
72680	Recycled Radio Communication Equipment (Including Batteries)
72684	Towers: Broadcasting, Microwave, Transmitting, etc.



## Requisition Settings

Business Unit

Department of Administration

Requisition Name

\*Requester

Strong, Heather L

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

Accounting Tag

Accounting Defaults									Personalize	Find	Print	Calendar	First	1 of 1	Last
Chartfields1	Details	Asset Information													
Dist	Percent	Location	GL Unit	Bud Ref	Fund	Appropriation	Dept	Account							
	1	MADEWI0017	50500		10000		505R300000								



# Searching for NIGP Code / Category Code on VendorNet

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

Search  \*Hit Enter to Search

Code	Description
> 28700	ELECTRONIC EQUIPMENT, COMPONENTS, PARTS, AND ACCESSORIES (SEE CLASS 730 FOR TESTING OR ANALYZING TYPE)
> 69000	POWER GENERATION EQUIPMENT, ACCESSORIES, AND SUPPLIES
✓ 72600	RADIO COMMUNICATION EQUIPMENT, ACCESSORIES AND SUPPLIES
Code	Description
72611	AM/FM Transmitters, Broadcast
72656	Ham Band Transmitters and Receivers
72689	Two-Way Radio Receivers, Transmitters, Transceivers: Mobile and Base Station (Audio Transfer)
> 82000	STEAM AND HOT WATER BOILERS AND STEAM HEATING EQUIPMENT
> 84000	TELEVISION EQUIPMENT AND ACCESSORIES
> 89000	WATER SUPPLY, GROUNDWATER, SEWAGE TREATMENT, AND RELATED EQUIPMENT (NOT FOR AIR CONDITIONING, STEAM BOILER, OR LABORATORY REAGENT WATER)

## NIGP Codes

Code	Description
12028	Communications Equipment, Marine
72606	Adhesive/Cement, Radio
72611	AM/FM Transmitters, Broadcast
72616	Antennas and Accessories (Radio Only): Brackets, Masts, Mount, Rotators, Standoffs, etc. (Including Aircraft, Vehicle
72624	Beacon Receivers, Radio
72637	Direction Finder, Radio
72640	Encoder/Decoder with Printer (Vehicle)
72641	Encoder/Decoder, Scramblers, etc. (Voice)
72644	Facsimile Transceivers (Not Office Type)
72647	Frequency Data Communication Equipment, Radio (Including Identification Equipment)
72651	Global Positioning Systems, Satellite (Global Info. System)
72654	Ground Stations, Satellite: Transmit/Receive and Receive Only (Including Antennas)
72656	Ham Band Transmitters and Receivers
72657	High Frequency Radio (SSB), Mobile and Base
72659	Highway Advisory Radio Systems
72670	Pagers, Radio (Including Parts and Accessories)
72677	Radio Frequency Scanner Receivers and Amplifiers (Including RF Connectors, Analyzers, Counters, Meters, Switches)
72678	Radios, Home and Auto (Incl. Short-Wave Type)
72680	Recycled Radio Communication Equipment (Including Batteries)
72684	Towers: Broadcasting, Microwave, Transmitting, etc.



<https://VendorNet.wi.gov/>





# Adding the Special Request

The screenshot shows the main navigation menu of the procurement system. The 'Special Requests' option, which includes the sub-link 'Create a non-catalog request', is highlighted with a red box. Other menu items include Catalog, Web, Express Item Entry, Forms, Favorites, Templates, ePro Services, and Recently Ordered.

The screenshot displays the 'Special Requests' form. A red box highlights the 'Item Details' section, which includes fields for Item Description (AM/FM Transmitters), Price (110.00), Quantity (17), Category (72611), Currency (USD), and Unit of Measure (EA). Another red box highlights the 'Additional Information' section, which contains a text area with the following text: "These are to replace the outdated transmitters from 2012. Specifications: AIR 118-137 MHz; AM 520-1710 kHz; FM 87.5-108MHz; LW 150-285KHz; SW 1.711 - 29.999 MHz; Color: Mineral Gray; Height 3-1/2 in; Width5-5/16 in; Depth1-3/16 in; and includes leather case." Below this text area are three checkboxes: 'Send to Supplier' (checked), 'Show at Receipt' (checked), and 'Show at Voucher' (unchecked). A third red box highlights the 'Add to Cart' button at the bottom of the form.





# Checkout – Review and Submit



## 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  Strong, Heather L Priority   
\*Currency  PO Type

Cart Summary: Total Amount 1,870.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ 1	AM/FM Transmitters		L3Harris Technologies Inc	<input type="text" value="17.0000"/>	Each	110.0000	1870.00			
								Total Amount 1,870.00 USD		

### Shipping Summary

[Edit for All Lines](#)

Ship To Location 00001708  
Address ADMINISTRATION, DEPARTMENT OF  
101 EAST WILSON ST  
MADISON, WI 53703  
Attention To Strong, Heather L  
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 & Contract Detail



The Contract ID# will include letters and numbers.

Cart Summary: Total Amount 1,870.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	AM/FM Transmitters		L3Harris Technologies Inc	17.0000	Each	110.0000	1870.00			

Select All / Deselect All      Select lines to:    [Add to Favorites](#)    [Add to Template\(s\)](#)    [Delete Selected](#)    [Mass Change](#)

Total Amount    1,870.00 USD

### Line Details

Merchandise Amount 1870.00 USD  
Item ID  
Category 72811  
Original Substituted Item Description  
Physical Nature Goods  
Buyer  
Buyer Information  
Configuration Info

RFQ Required  
 Device Tracking  
 Zero Price Indicator  
 Stockless Item  
 Amount Only  
 Inspection Required

Use Contract if Available

Contract ID 505ENT-022-SAFETYCOMM-05  
Contract Details  
Version 1  
Contract Line  
Category Line

Reseller Contract ID  
Reseller Version  
Reseller Contract Line  
Reseller Category Line

Supplier Information  
Supplier ID 0000007894 L3Harris Technologies Inc  
Supplier Location LOC-5 VA-Lynchburg-221 Jefferson-A  
Suggest New Supplier  
Supplier Item ID  
Supplier's Catalog

Manufacturer Information

Contractor ID

[OK](#) [Cancel](#)



# Checkout – Budget String Information

## Checkout - Review and Submit

Review the item information and submit the req for approval.

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

### Requisition Summary

Business Unit: 50500 Department of Administration Requisition Name: FY23 AM/FM Transmitters  
\*Requester: STRONHXBKO Strong, Heather L Priority: Medium  
\*Currency: USD PO Type:

Cart Summary: Total Amount 1,870.00 USD

Expand lines to review shipping and accounting details

[+ Add More Items](#)

### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	AM/FM Transmitters		L3Harris Technologies Inc	17.0000	Each	110.0000	1870.00			
Shipping Line 1			*Ship To: 00001706 Address: ADMINISTRATION, DEPARTMENT OF 101 EAST WILSON ST MADISON, WI 53703 Attention To: Mark Simon 608-264-958; Due Date:	Add Shipto Comments	Quantity: 17.0000	Price: 110.0000		Price Adjustment Pegging Inquiry Pegging Workbench		

### Accounting Lines

\*Distribute By: Qty Accounting Tag: Multi-Accounting Tags \*Liquidate By: Qty

### Accounting Lines

Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information

Budget Reference	Fund	Appropriation	Dept	Account	Program	Oper Unit	Product	PC Bus Unit	Project	Activity
	10000		505R300000	8115000						

Select All / Deselect All

Select lines to: [+ Add to Favorites](#) [+ Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 1,870.00 USD



# Checkout – Review and Submit



## 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  Strong, Heather L Priority   
\*Currency  PO Type

Cart Summary: Total Amount 1,870.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	AM/FM Transmitters		L3Harris Technologies Inc	17.0000	Each	110.0000	1870.00			

Select All / Deselect All      Select lines to:      [Add to Favorites](#)      [Add to Template\(s\)](#)      [Delete Selected](#)      [Mass Change](#)

Total Amount 1,870.00 USD

### Shipping Summary

[Edit for All Lines](#)

Ship To Location 00001706  
Address ADMINISTRATION, DEPARTMENT OF  
101 EAST WILSON ST  
MADISON, WI 53703  
Attention To Strong, Heather L  
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](#)

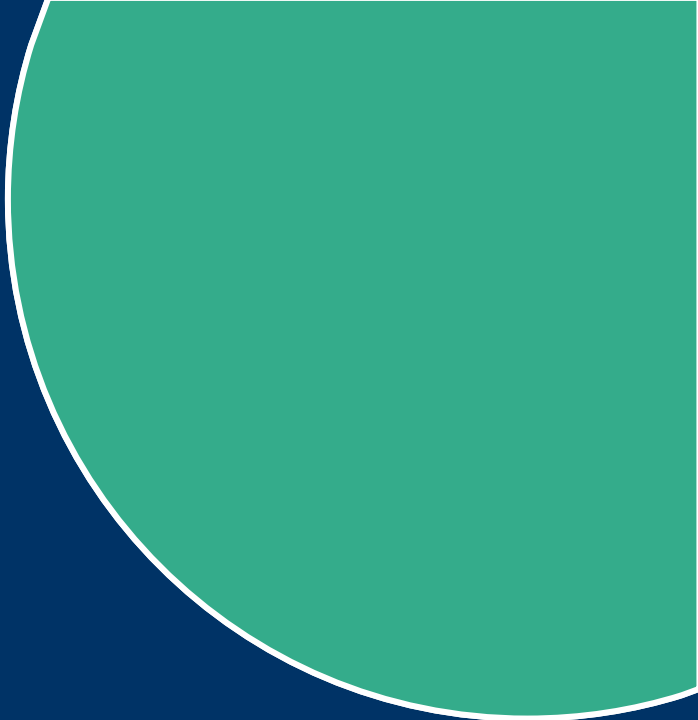
[Save & submit](#)

[Save for Later](#)

[Add More Items](#)

[Preview Approvals](#)

[Add Request Document](#)



# Managing a Requisition





ance      Finance & Procurement Ops      Home      Search      582

<p>Announcements</p> <p>No Announcements</p>	<p>STAR Approvals</p>  <p>0</p>	<p>Finance Center</p> 	
<p>Procurement Center</p> 	<p>STAR Support</p> 	<p>STAR Inquiry</p> 	<p>Reporting Tools</p> 





Procurement Ops Procurement Center

Home Search Notifications

Announcements

No Announcements

STAR Approvals 0

STAR Inquiry

Reporting Tools

Procurement Workcenter

**Requisitions**

Purchase Orders





Process Requisitions

Manage Requisitions

Requisition Entry

Add/Update Requisitions

Manage Requisition Approvals

Requester's Workbench

Expedite Requisitions

Sourcing Workbench

Source Requisitions

Review Requisitions

Manage Requisitions

Requisition Search Keyword 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

Search Clear

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 dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000013512	ARPA-EQRE-350	50500	01/11/2023	Approved	Prov Valid	17,712.50 USD	[Select Action]	Go
▶ 0000013511	ARPA-EQRE-200	50500	01/11/2023	Approved	Not Chk'd	649,490.00 USD	Check Budget	Go
▶ 0000013509	ARPA-EQRE-167	50500	01/10/2023	Partially Received	Valid	624,832.00 USD	[Select Action]	Go
▶ 0000013507	ARPA-TC-005	50500	01/10/2023	PO(s) Dispatched	Valid	2,500,000.00 USD	[Select Action]	Go
▶ 0000013506	ARPA-EQRE-364	50500	01/10/2023	PO(s) Dispatched	Valid	1,000,000.00 USD	[Select Action]	Go
▶ 0000013505	ARPA-EQRE-345	50500	01/10/2023	Partially Received	Valid	258,831.40 USD	[Select Action]	Go
▶ 0000013504	ARPA-EQRE-216	50500	01/10/2023	PO(s) Dispatched	Valid	1,000,000.00 USD	[Select Action]	Go
▶ 0000013503	ARPA-EQRE-237	50500	01/10/2023	PO(s) Dispatched	Valid	434,400.00 USD	[Select Action]	Go
▶ 0000013502	ARPA-EQRE-287	50500	01/10/2023	PO(s) Dispatched	Valid	1,000,000.00 USD	[Select Action]	Go
▶ 0000013501	ARPA-EQRE-195	50500	01/10/2023	PO(s) Dispatched	Valid	1,000,000.00 USD	[Select Action]	Go
▶ 0000013500	ARPA-EQRE-355	50500	01/10/2023	PO(s) Dispatched	Valid	998,000.00 USD	[Select Action]	Go
▶ 0000013499	ARPA-EQRE-304	50500	01/10/2023	PO(s) Dispatched	Valid	790,000.00 USD	[Select Action]	Go
▶ 0000013498	ARPA EQRE-363	50500	01/10/2023	Partially Received	Valid	1,000,000.00 USD	[Select Action]	Go
▶ 0000013489	ARPA-TC-110 Grant	50500	01/09/2023	PO(s) Dispatched	Valid	140,000.00 USD	[Select Action]	Go

Create New Requisition

Review Change Request

Review Change Tracking

Manage Receipts

Requisition Report



Line Information

Review/Edit Approvers

Threshold Approval

DET; MS Phone System Licenses: **Awaiting Further Approvals**

Req Total <= \$5,000

**Approved**

Brown, Charles M  
Agency Requisition Approver 1  
01/11/23 - 2:50 PM

Category Approval

DET; MS Phone System Licenses: **Awaiting Further Approvals**

IT Purchases

**Approved**

Hernandez, Brittney S  
Agency IT Purchases Approver  
01/11/23 - 2:59 PM

Fiscal Approval

Line 1: **Pending**

SHI; Microsoft Phone System GCC Sub Per User, MFG Part#: LK9-00003.

ChartField Verification

**Pending**

Multiple Approvers  
Agency ChartField Approver

Central Purchasing Approval

Line 1: **Awaiting Further Approvals**

SHI; Microsoft Phone System GCC Sub Per User, MFG Part#: LK9-00003.

CAPS Central Approval

**Not Routed**

Multiple Approvers  
CAPS Central Approver

https://starfin.wi.gov/psc/starfin\_9/EMPLO...

**Approver #1**

Name: Zellmer, Kip  
Empl ID: 100015878  
Department: 505R521000  
Supervisor ID:  
Telephone:  
Reports To Position Number: 014944  
Email ID: Kip.Zellmer@wisconsin.gov

**Approver #2**

Name: Wilson, Leonard A  
Empl ID: 100096240  
Department: 505R521100  
Supervisor ID:  
Telephone:  
Reports To Position Number: 525119  
Email ID: leonard.wilson@wisconsin.gov

Manage Requisitions

Requisition Search | Keyword Search

**Search Requisitions**

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

Business Unit: 50500 | Requisition Name: | Requisition ID: 0000013509 | Request State: All but Complete | Budget Status: | Date From: 01/05/2023 | Date To: 01/12/2023 | Requester: STRONHXBKO | Entered By: | PO ID: | Search | Clear | 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 dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000013509	ARPA-EQRE-167	50500	01/10/2023	Partially Received	Valid	624,832.00 USD	[Select Action] Go

Requester: Strong, Heather L | Entered By: Strong, Heather L | Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

Requisition | **Approvals** | Inventory | **Purchase Orders** | Change Request | Receiving | Returns | Invoice | Payment

**Request Lifespan:**

**Line Information**

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Equitable Recovery Grant Pro...	Partially Received	297205.0000	USD	1.0000	EA	Nia Imani Family Inc
2	Equitable Recovery Grant - P...	Partially Received	327627.0000	USD	1.0000	EA	Nia Imani Family Inc

Requisition information

Requisition ID: 0000013509 | Line Number: 1

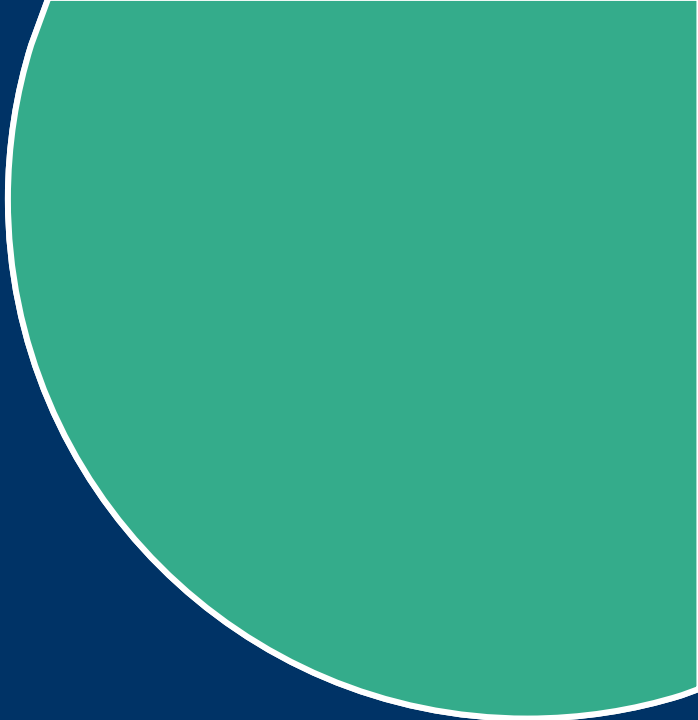
**PO information**

**PO Number: 0000014008** | Buyer: STRONHXBKO | Change Order: | PO Date: 01/10/2023 | Supplier ID: 0000144992 | Terms: 00 | PO Status: Dispatched

**Lines**

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		Equitable Recovery Grant Program - Project ID ARPA-ERG1-167	297,205.00	USD	1.0000	Approved	





# Change Orders



# Change Order – Purchase Order Process



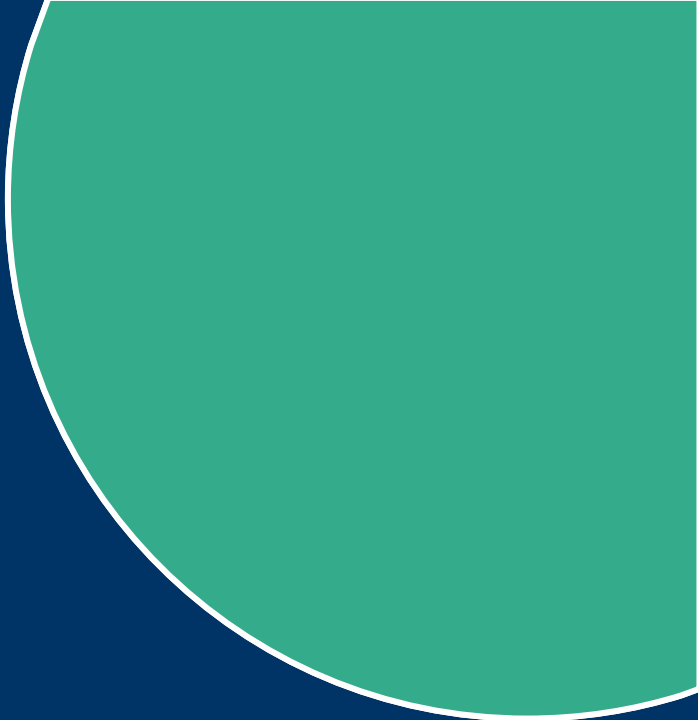
## Triggers Approval Routing

- Increase or Decrease Amount or Item Price
- Increase or Decrease Quantity
- Adding an Item Line
- Updating Chart Fields

## Does Not Trigger Approval Routing

- Changing the PO Type
- Changing the Supplier Location
- Updating Item Description
- Changing to Amount Only Checkbox (unless the quantity was greater than 1.0)





# Purchase Orders



# Purchase Order Lookup



Finance & Procurement Ops

Announcements

No Announcements

STAR Approvals

0

Finance Center

Procurement Center

STAR Support

STAR Inquiry

Reporting Tools

Procurement Ops Procurement Center

Announcements

No Announcements

STAR Approvals

0

STAR Inquiry

Reporting Tools

Procurement Workcenter

Requisitions

Purchase Orders

### Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Keyword Search

Search Criteria

\*Business Unit = 50500

PO ID begins with 0000013571

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Case Sensitive

Search Clear Basic Search Save Search Criteria





# Common Purchase Order Scenarios

- Changing Vendor
- Changing Contract
- Budget Error
- Budget Dates and FY Dates
- Amount Only Flag
- Adding a line
- Change in price on a line
- Item Description
- Changing Quantity



Maintain Purchase Order  
Purchase Order

Business Unit 50500  
PO ID 0000013571  
Change Order 3  
Current Change Reason

PO Status Approved  
Budget Status Error

Copy From [dropdown]  Hold From Further Processing

Header

\*PO Date 09/27/2022  
\*Supplier WI WETLAND-242  
\*Supplier ID 0000039246  
\*Buyer AGENCY\_BUYER

Doc Tol Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd

\*Dispatch Method Print  
Amount Summary

Merchandise 39,990.00  
Freight/Tax/Misc  
Total Amount  
Encumbrance Balance

Current document has failed budget check. (10222,23)

OK

Maintain Purchase Order  
Purchase Order

Business Unit 50500  
PO ID 0000013571  
Change Order 3  
Current Change Reason

PO Status Approved  
Budget Status Error

Copy From [dropdown]  Hold From Further Processing

Budgets with Exceptions

1-1 of 1 | View All

Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1	50500	CC_PRJACT	Exceeds Budget Tolerance	More Detail	<input type="checkbox"/>	Go To ...





# Looking Ahead

Things to Look Forward to in 2023 ...



Better Outreach to Agencies/Boards

Survey

New Intake Process

Ideas?

Procurement User Group (PUG)

E-Learnings







*Thank you!  
Looking forward to collaborating  
with you this year!  
~ The CAPS Team*

# Questions?

**Thank you for attending  
Partnering with CAPS:  
Let's Collaborate!**

[DOA SBOP Trainings & eLearnings \(wi.gov\)](https://www.wisconsin.gov/sbop)

