2.16.4 Buying Team/Procurement Improvements

Fill with Local Purchase

1. Create a non-NFES request.

2. Check the Buying Team Request box.

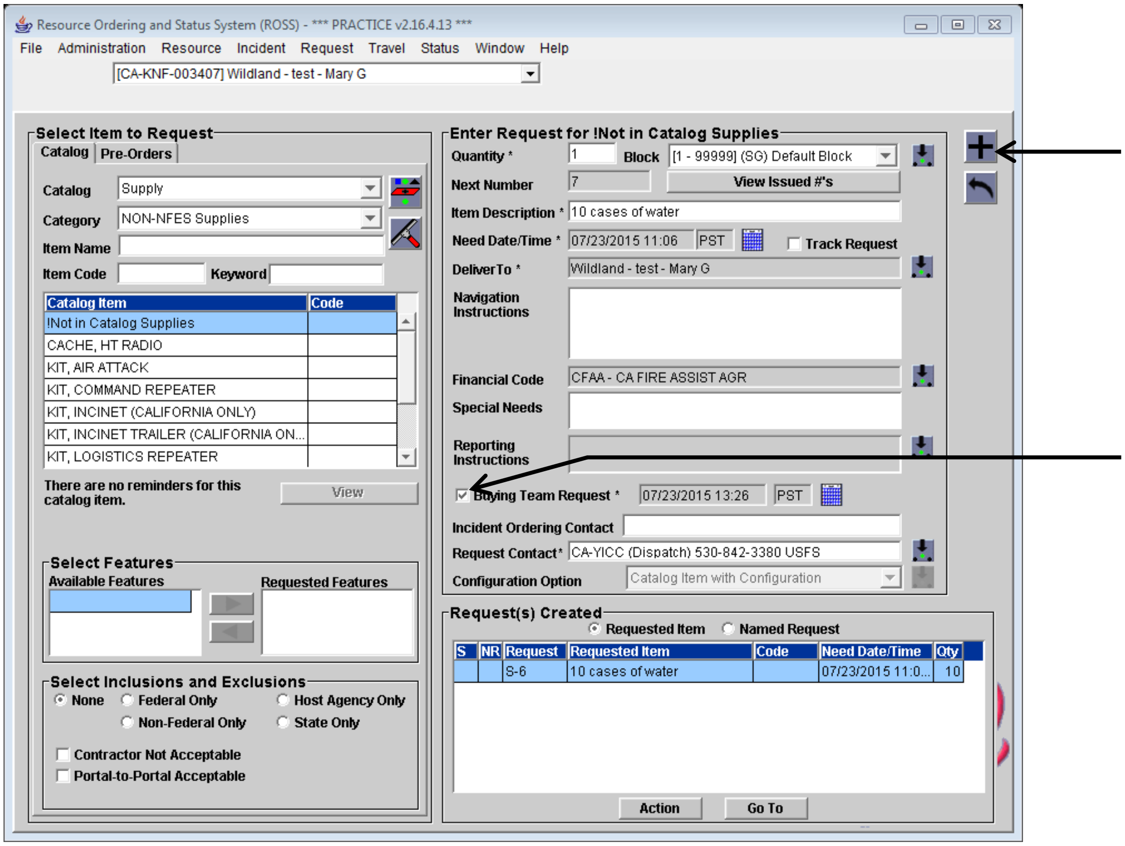

Figure 1. Creating a non-NFES request for a Buying Team

3. Adjust the date and time to reflect when you will be giving the Buying Team that request.

4. Click + to create the request.

5. Go to the Pending Request screen.

6. Highlight S-6.

7. Click the Action button, and then click Fill with Local Purchase.

8. Click the arrow button until you see the Buying Team column.

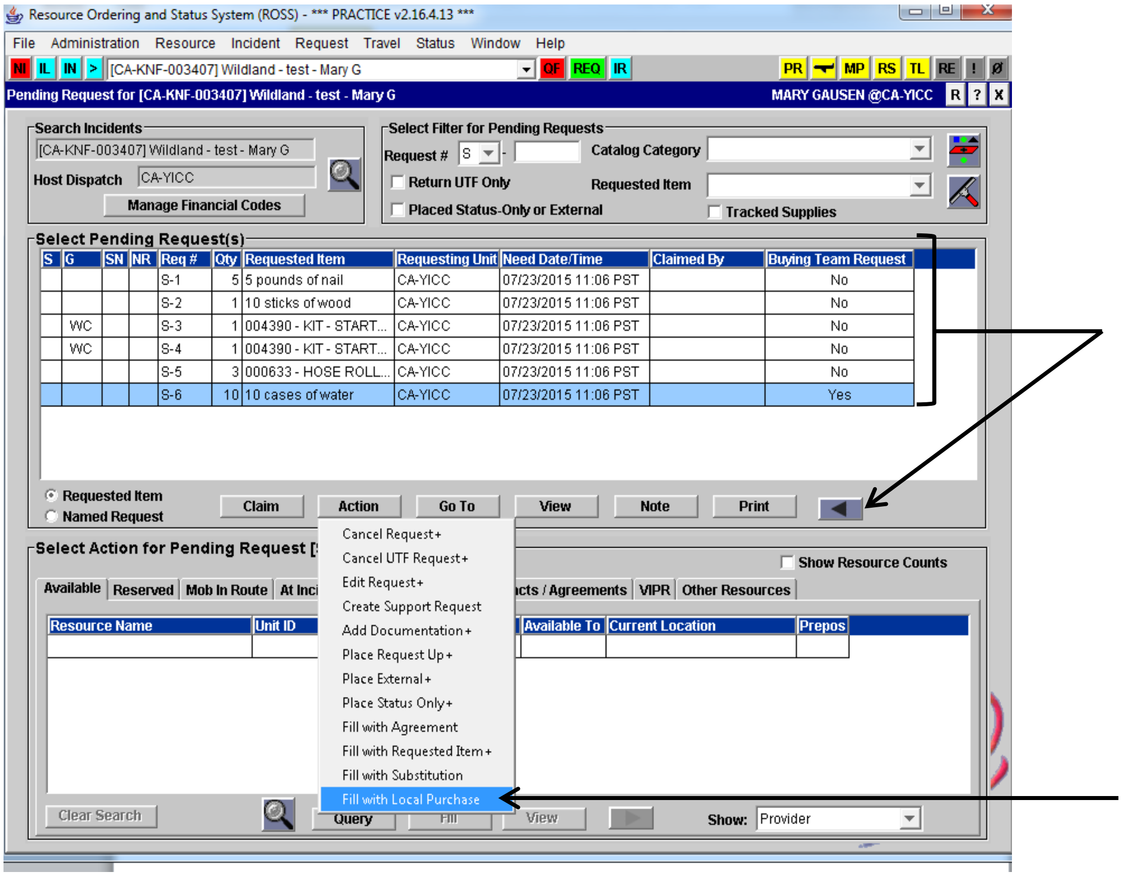

Figure 2. Edit Assignment option on the Request Status screen

9. Fill out all pertinent fields, and then click Save.

10. To add another vendor, click New.

11. When done, click Save, and then click OK.

Follow your agency business practices when completing Vendor information on the Fill with Local Purchase dialog box.

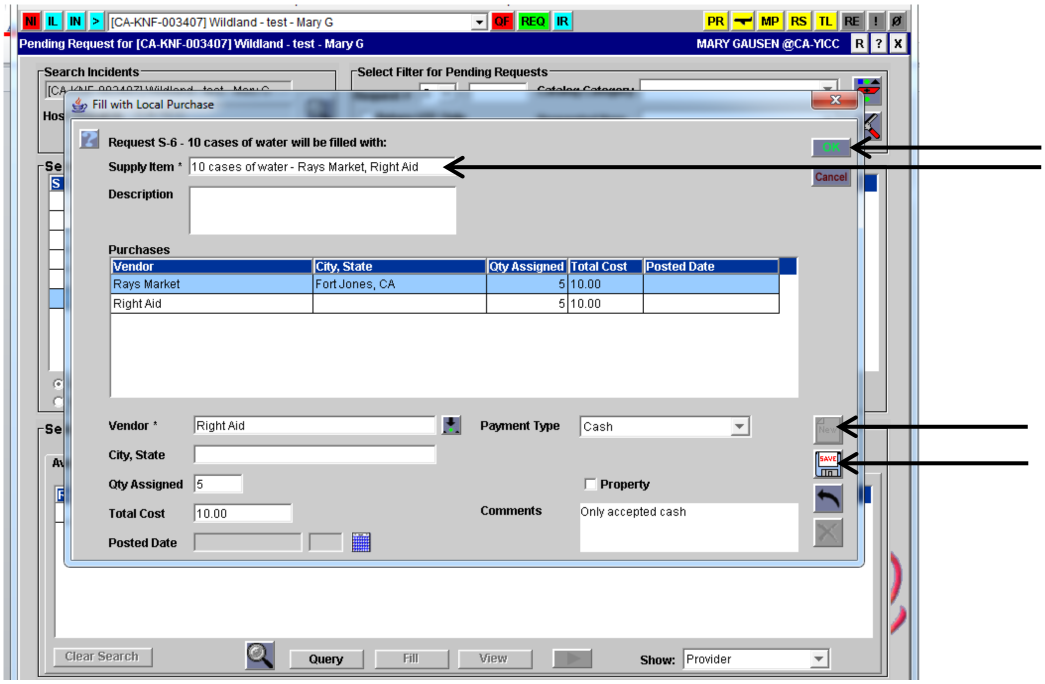

Figure 3. Completed Fill with Local Purchase dialog box

12. To set Travel, click the Track Request check box on the Fill Request dialog box.

13. On the Fill Request dialog box, complete the travel information as appropriate.

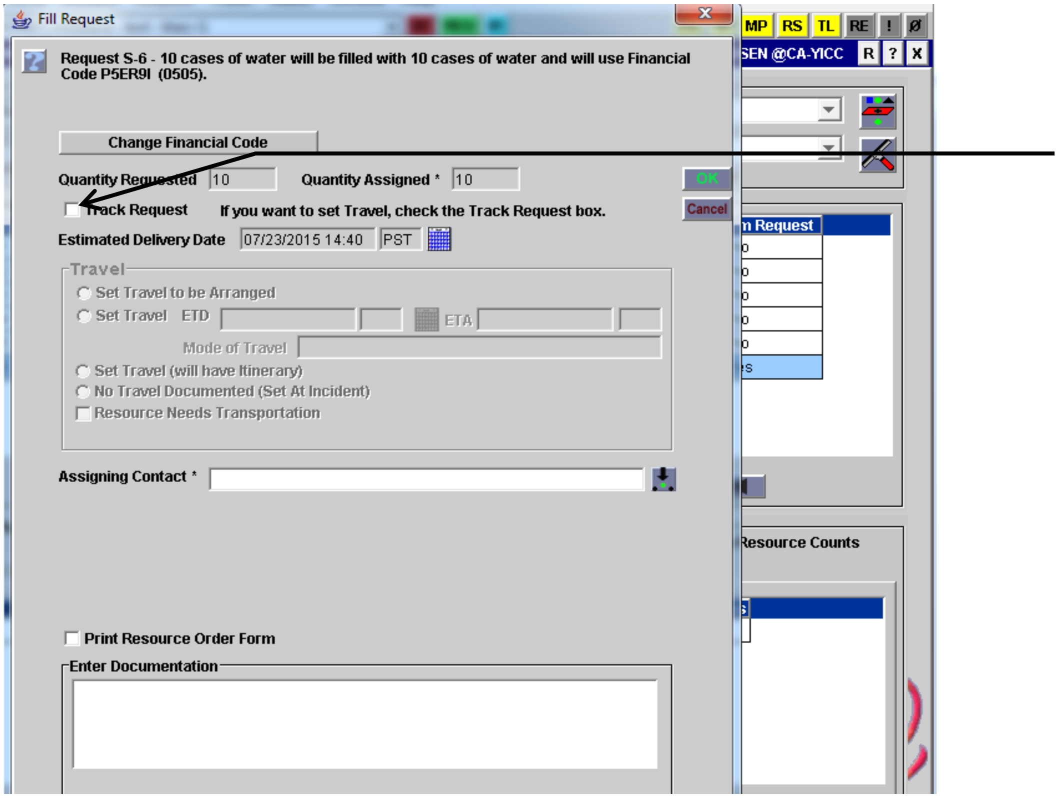

Figure 4. Selecting the Track Request check box

To download and print the Buying Team List Report

The Print button creates an Excel file of the Buying Team List Report, where you can manipulate the columns and rows to suit your reporting needs, save it to your computer, and print it at your convenience.

1. Return to Request Status screen.

2. Filter for catalog of your choice.

3. Highlight Incident Name, and then click the Print button.

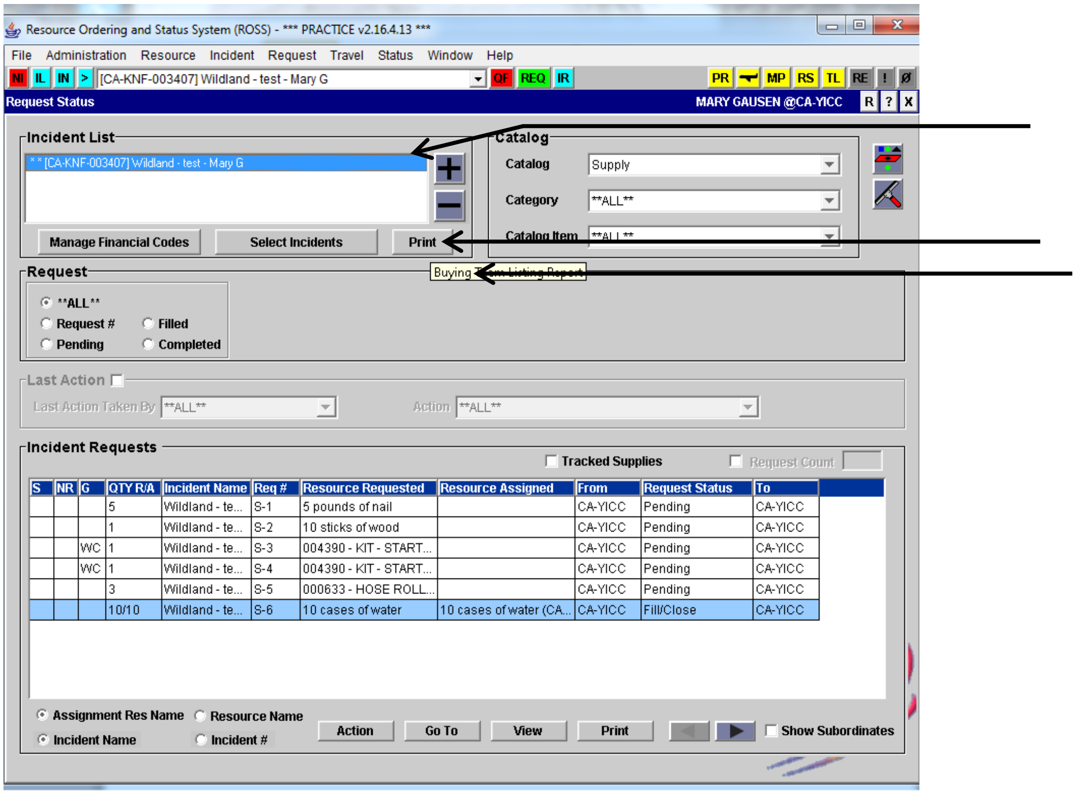

Figure 5. Printing the Buying Team List Report from the Request Status screen

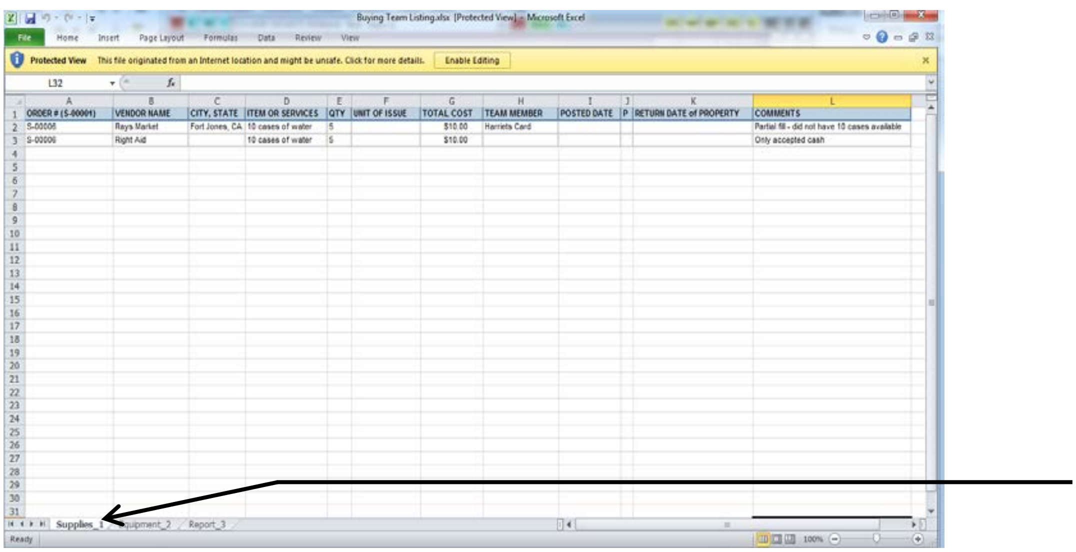

Figure 6. Buying Team List Report

Note the name on the tab. "Supplies" displays for Buying Team requests for Fill with Local Purchase resources, while "Equipment" displays for Buying Team requests for Fill with Agreement resources.

To change a request to a request for a Buying Team

If you did not check the Buying Team Request check box when the request was created, you can edit the request. This will allow you to view Fill with Local Purchase or Fill with Agreement information

1. On the Request Status screen, highlight the request.

2. Click the Action button, and then click Edit Request.

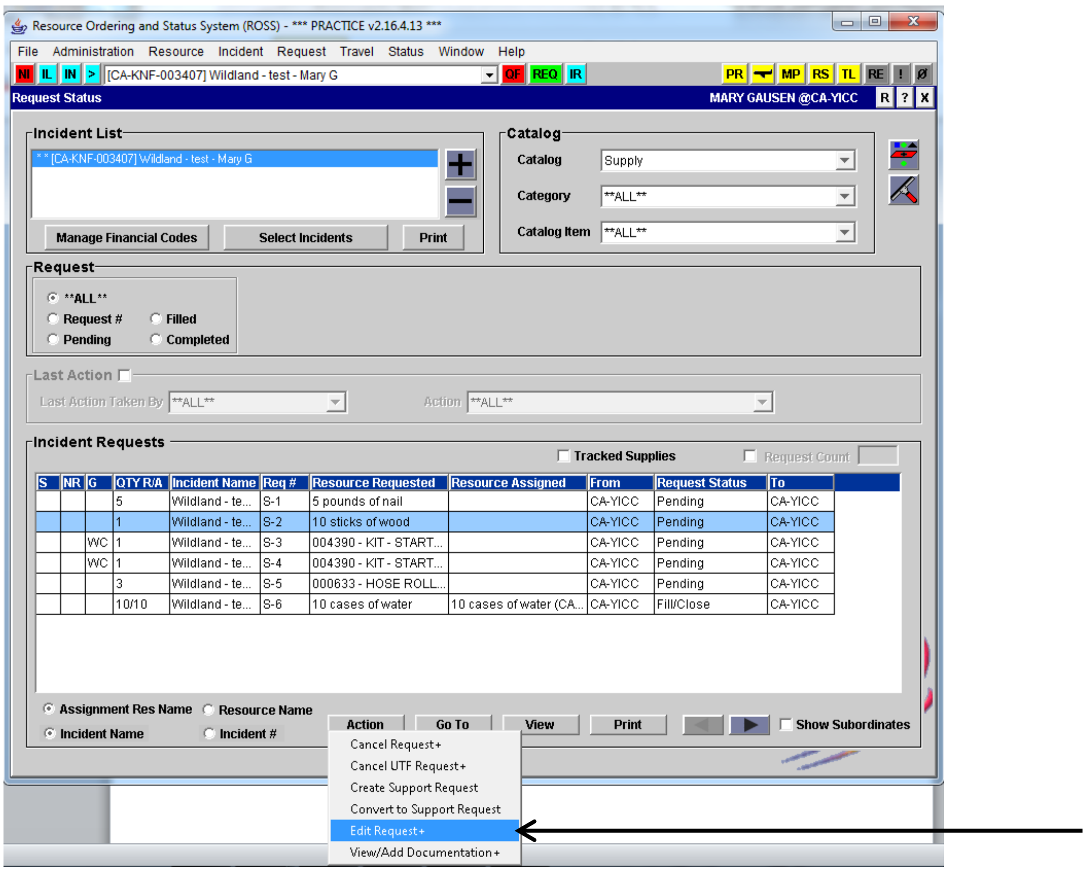

Figure 7. Changing an existing request to a request for a Buying Team

3. On the Edit Request dialog box, click to check the Buying Team Request check box, click Save, and then click Close.

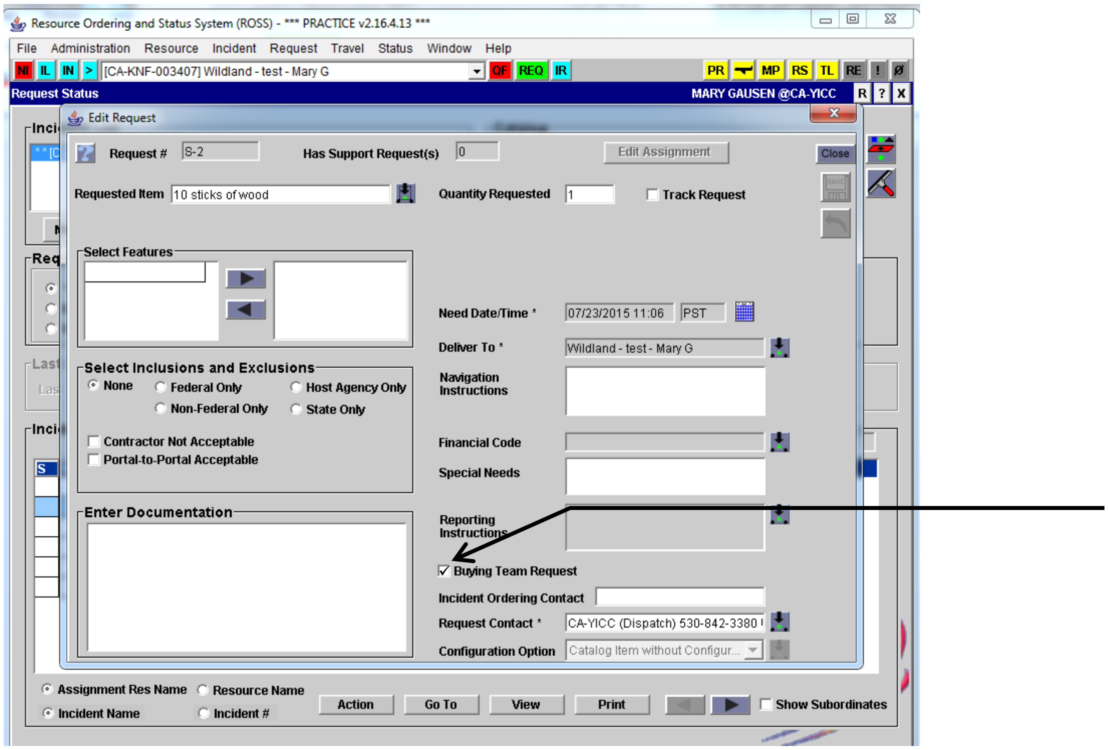

Figure 8. Selecting the Buying Team Request check box on the Edit Request dialog box

Fill with Agreement

1. Create an equipment request on the New Request screen.

   Be sure to check the Buying Team Request check box.

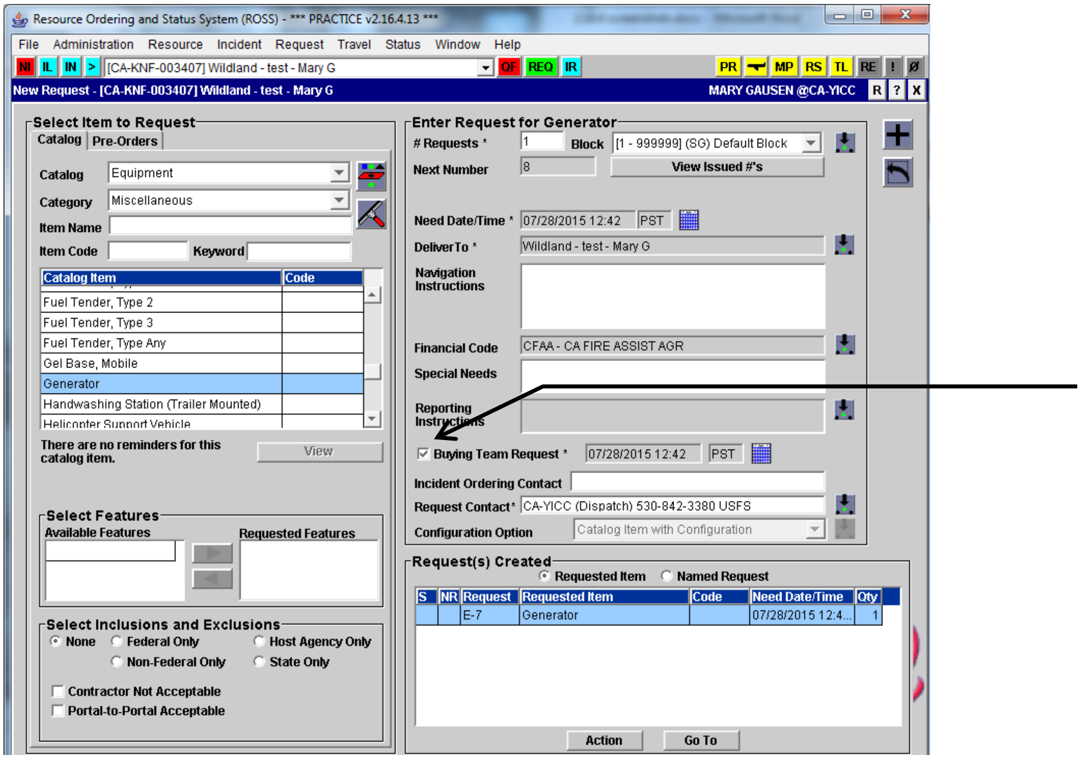

Figure 9. New Buying Team request

2. Go to the Pending Request screen and highlight the request.

3. Click the Action button, and then click Fill with Agreement.

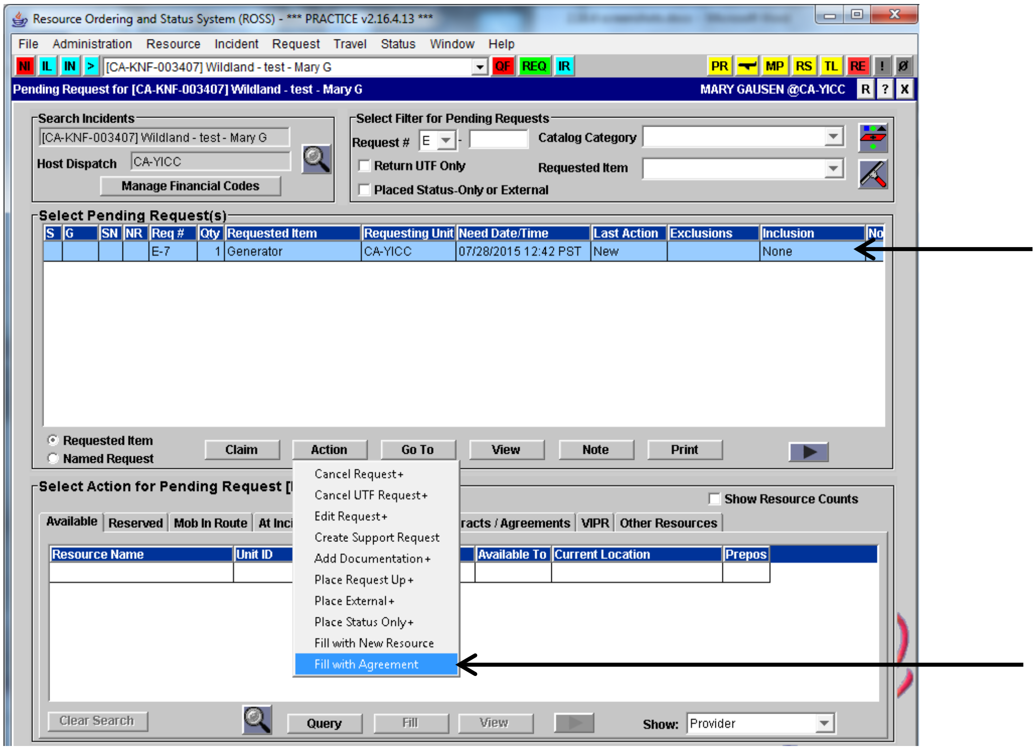

Figure 10. Fill with Agreement option on the Pending Request screen

4. On the Fill with Agreement dialog box, complete the Resource Name and Provider text boxes (required) and other fields, and then click OK.

   Follow your agency business practices when completing Vendor information on the Fill with Agreement dialog box.

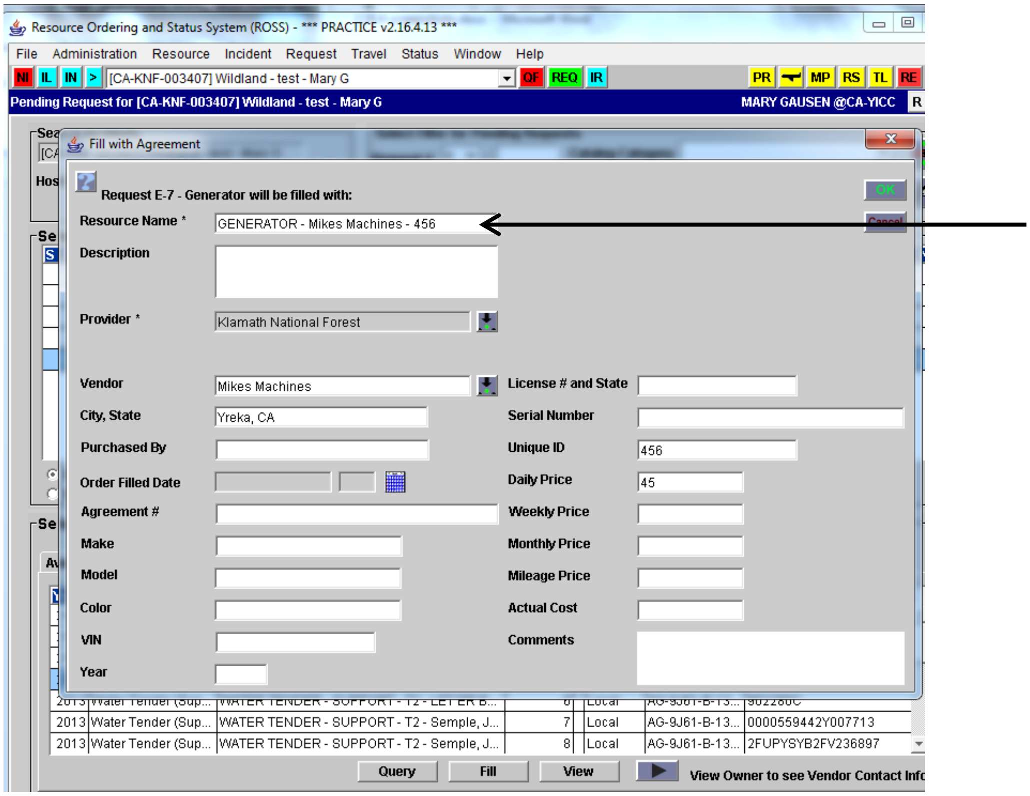

Figure 11. Fill with Agreement dialog box

5. On the Fill Request dialog box, complete the travel information as appropriate.

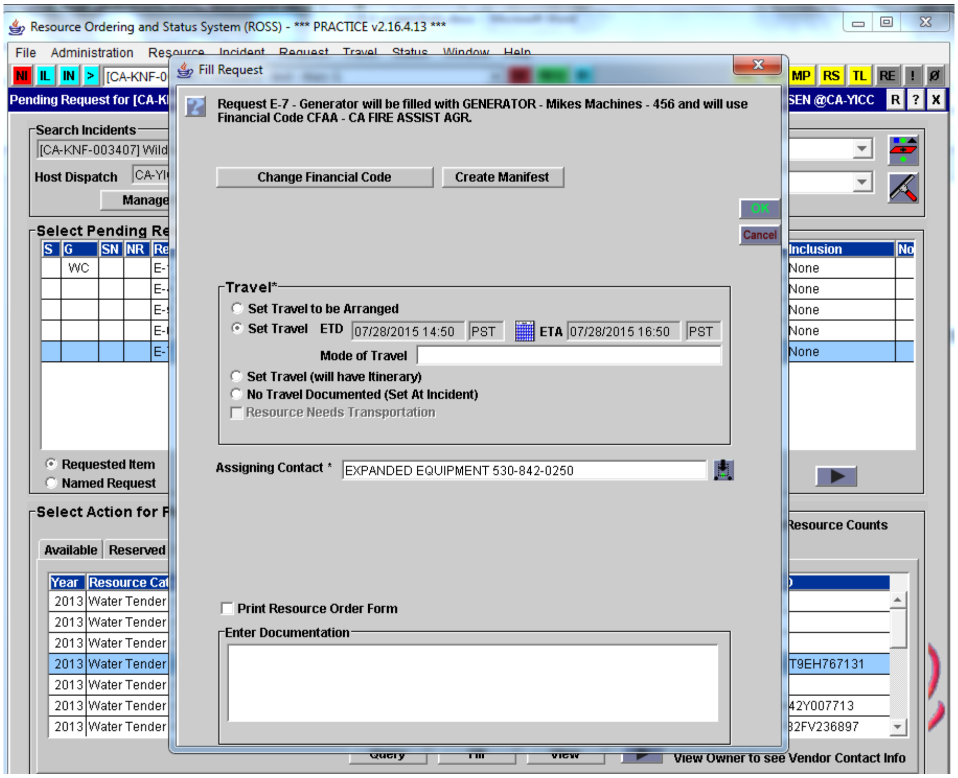

Figure 12. Completing the travel

6. [Download and print the Buying Team List Report]

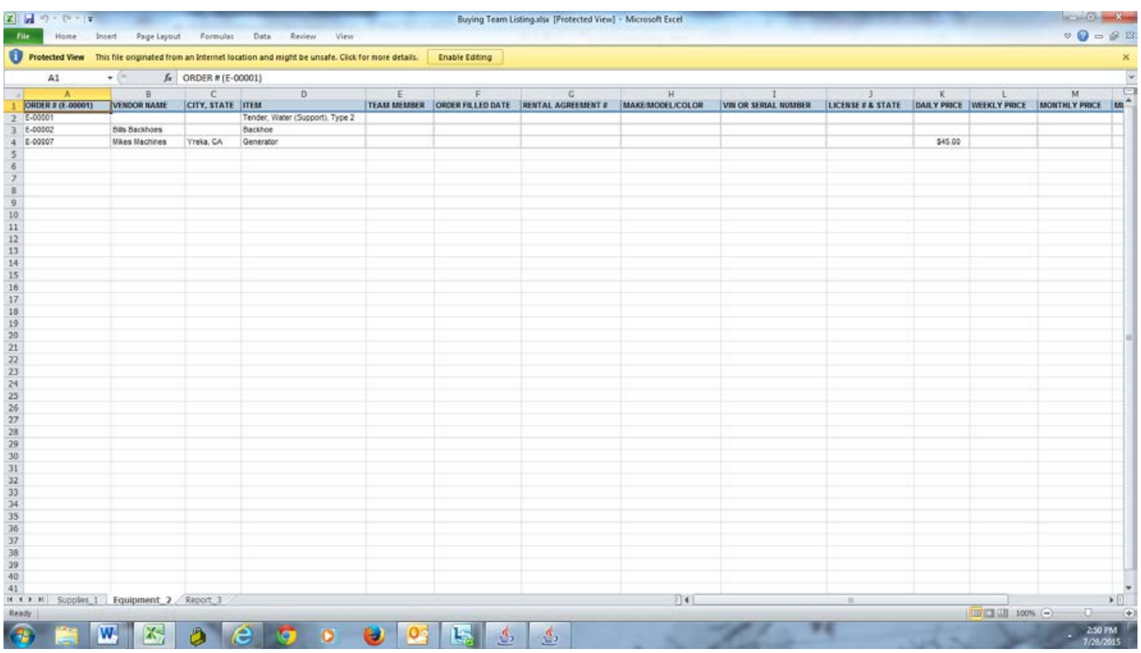

Figure 13. Sample Buying Team Listing for Equipment request

To view or edit the Assignment Resource

1. On the Request Status screen, highlight the request.

2. Click the Action button, and then click Edit Assignment.

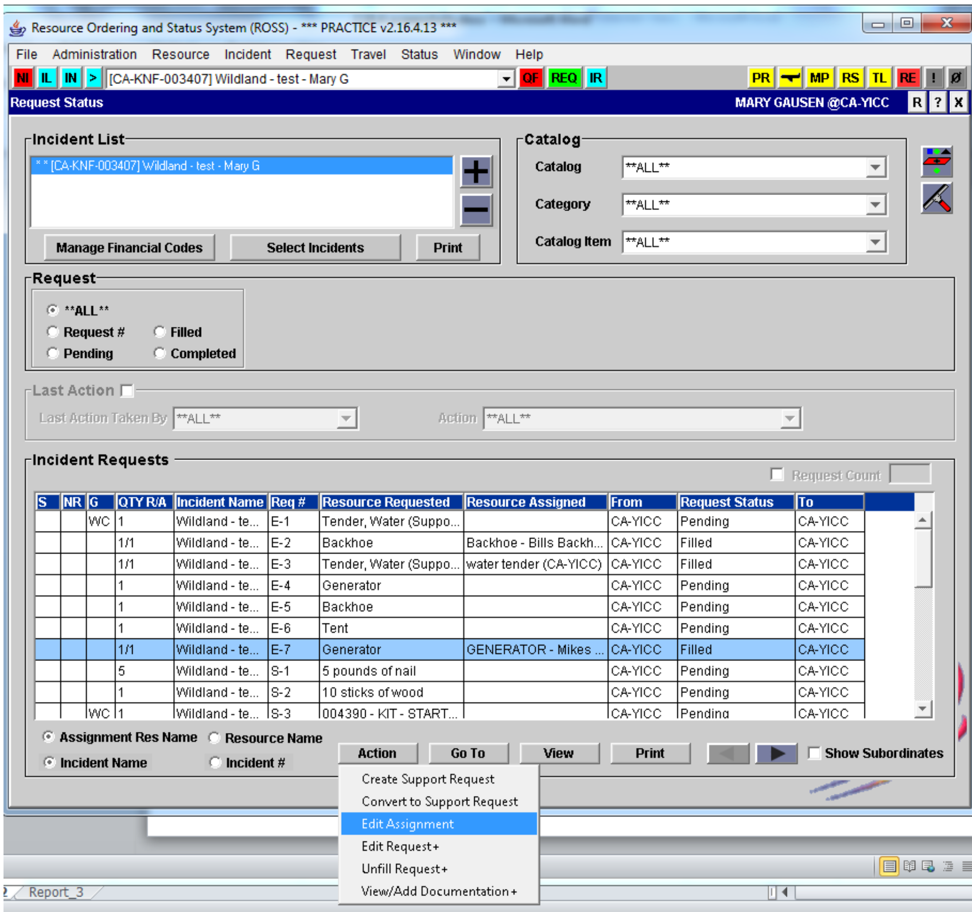

Figure 14. Edit Assignment option on the Request Status screen

3. On the Edit Assignment dialog box, click the Edit button.

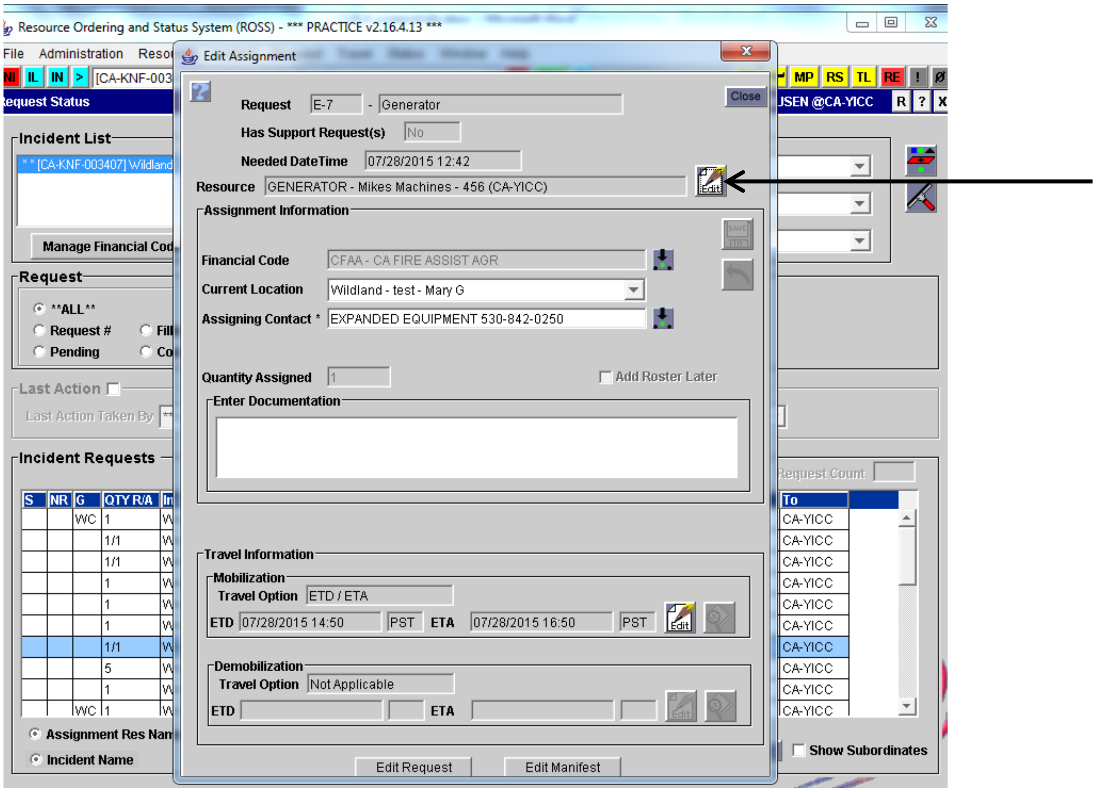

Figure 15. Editing the assignment resource

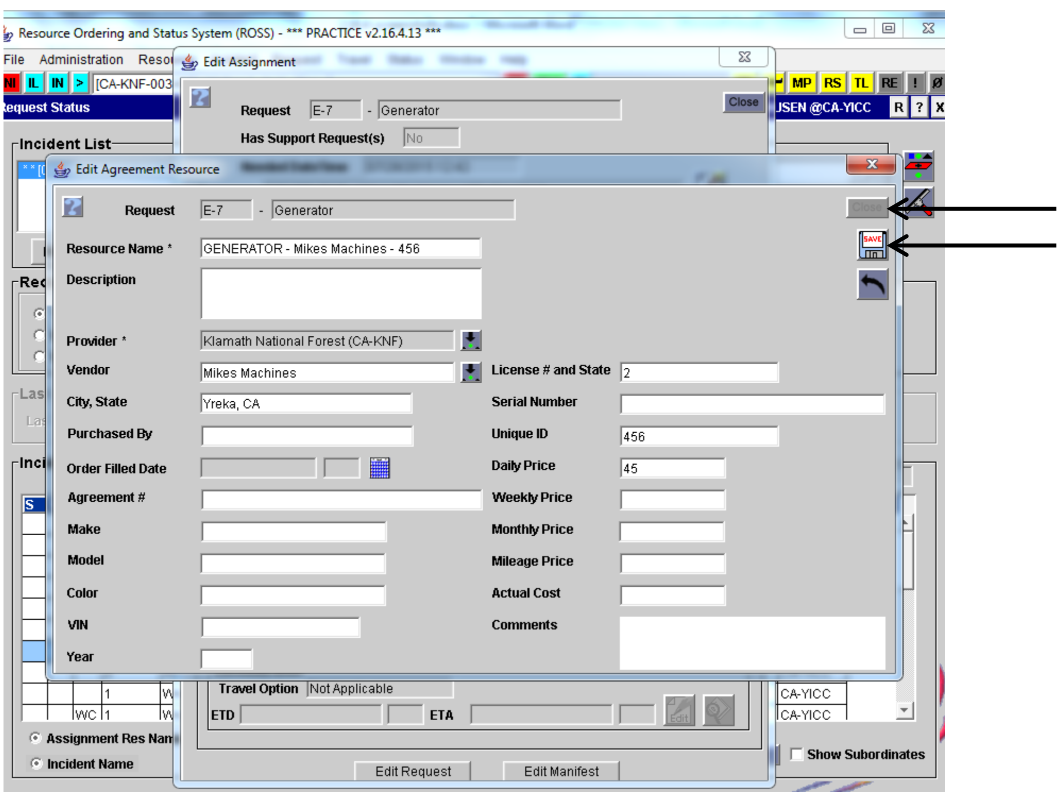

Figure 16. Viewing or changing the assignment resource

4. On the Edit Assignment Resource dialog box, view or edit the information as needed.

5. To save changes, click Save, and then click Close.

Key Points

- For the information to show up on the Resource Order Form, you must complete the vendor, unique ID, and any other relevant information to the Resource Name field for Fill with Agreement and in the Requested Item field for Fill with Local Purchase.
- Follow your agency business practices when completing vendor information. This functionality has not changed.
- When using the Fill with Agreement and you enter the VIN and Year of the piece of equipment that matches a VIPR resource, a warning will appear stating there is a match. It will not prevent you from filling that request.
- If you forgot the check the Buying Team Request check box or you want to remove it from the request, go to Edit Request and correct it there.
- The only way the request will show up on the Buying Team List Report is to be sure to check the Buying Team Request box.
- If you need to edit the information on a Fill with Agreement or Fill with Local Purchase request, go to Edit Assignment and click on the edit box.
- When viewing a request that was Fill with Local Purchase, there is a new tab called Local Purchase. The vendors and other fill information will show on this tab.

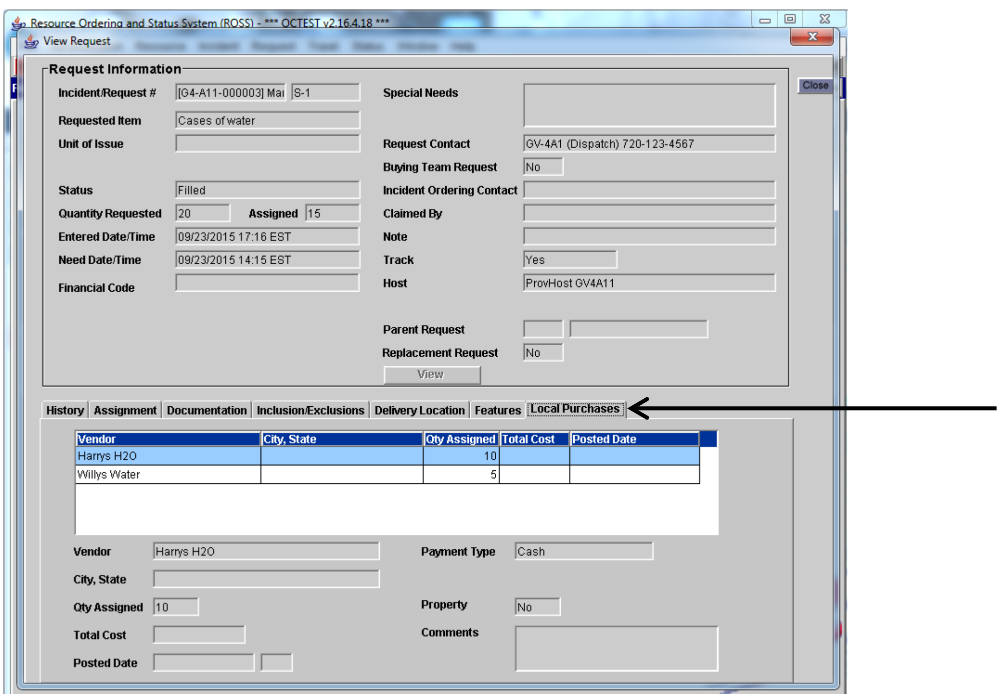

Figure 17. Local Purchase tab on the View Request dialog box