

## Job Aid:

### How to Record a Non-Contract or Incidental Purchase Previously Made (RPA)

#### This Job Aid shows how to:


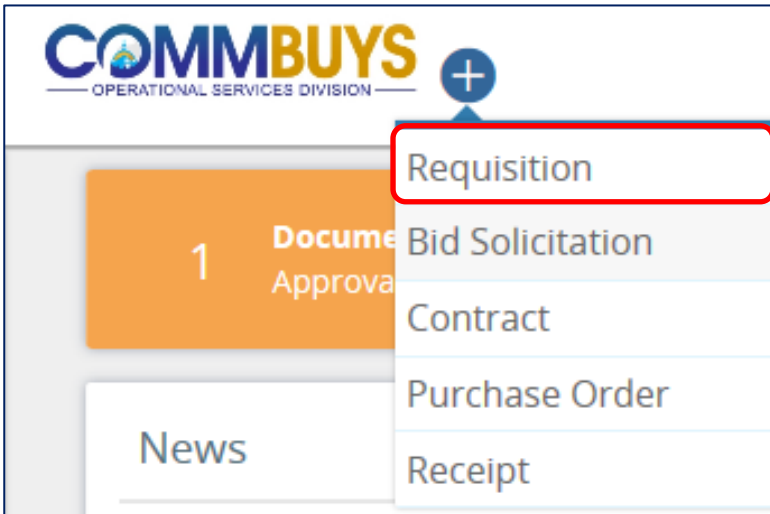
- Create an RPA Requisition in COMMBUYS

#### Of Special Note:

An RPA is a Request for Payment Authorization to be used after-the-fact for a purchase that has previously been made for goods or services not on an enabled statewide contract (SWC). These purchases are somewhat rare and must be approved by the appropriate authority at your agency prior to purchase. Purchasing through SWCs or a normal procurement is always the standard approach.

RPA Requisitions (as opposed to RPA Release Requisitions) in COMMBUYS record off-contract purchases when the normal procurement process is impractical due to impending need (emergency purchases) and for one-time incidental purchases up to \$10,000.

If your purchase can be found on a SWC, you will want to create an RPA Release in COMMBUYS and you will follow the Job Aid titled: *How to Record a Contract Purchase Previously Made*.

Screenshot	Directions
	<p><b>Step 1: Creating a New Document</b></p> <p>After logging in to COMMBUYS, click on the <b>Add Documents</b> (plus sign) icon at the top left of your home page.</p>
	<p><b>Step 2: Selecting Requisition</b></p> <p>Select <b>Requisition</b> from the dropdown menu.</p>

**New Requisition**

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number: \_\_\_\_\_

Status: 1RI - Requisition In Progress (When User request is created)

Department\*: OSD07 - OSD TRAINING

Location\*: OSD07 - OSD TRAINING

Required By Date: \_\_\_\_\_

Requisition Type: RPA

Requestor: Renee O'Rourke

Contact: Renee O'Rourke

Alternate ID: \_\_\_\_\_

Estimated Cost: \$0.00

Print Format: Requisition Print

Special Instructions: \_\_\_\_\_

Short Description\*: \_\_\_\_\_

Fiscal Year: 2017

Organization: Operational Services Division

Solicitation Enabled: ☐

Entered Date: 10/07/2016

Type Code: \_\_\_\_\_

Contact Phone: 617 777 7777

Tax Rate: \_\_\_\_\_

Save & Continue

### Step 3: Entering Data in the General Tab

The **General** tab page displays. Fields with asterisks are required fields. The required fields for **Department**, **Location**, and **Print Format** default to values that may be changed if needed.

1. In the required **Short Description** field enter a searchable description of the purchased goods or services.
2. Click on the dropdown arrow next to the Requisition Type field and select **RPA** (do NOT select RPA Release).
3. **Alternate ID**: Enter information as required. This may include (but not limited to) data such as MMARS encumbrance ID or ERP/Accounting system transaction numbers for non-MMARS users.
4. When you are finished, click on the **Save and Continue** button.

**COMMBUYS** Search... Catalog Advanced

Requisition RQ-17-1080-OSD01-OSDEP-77326 Status: 1RI - In Progress

General Items Address Accounting Routing Attachments Notes Reminders Summary

General Address Accounting Notes

There are no items. Please click 'Search Items' or 'Add Open Market Item' or 'Add RPA Item' below to add an item.

Search Items Add Open Market Item Add RPA Item

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### Step 4: Searching for Items

1. Click on the **Items** tab.
2. Click on the **Add RPA Item** button.

Requisition RQ-17-1080-OSD01-OSDEP-77326

General Items Address Accounting Routing Attachments Notes Reminders Summary

Item # \_\_\_\_\_ Item Type: Normal

Price Sequence# \_\_\_\_\_ Item Status: In Progress

Description: \_\_\_\_\_

Invoice # \_\_\_\_\_ Invoice Date: \_\_\_\_\_ Payment Due Date: \_\_\_\_\_

Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt	Tax
1.00	10.00	10.00	EA	0.0	0.0	10.00

UNSPSC Segment Family: \_\_\_\_\_

UNSPSC Class: \_\_\_\_\_

Commodity: ERP

Manufacturer: \_\_\_\_\_ Brand: \_\_\_\_\_ Model: \_\_\_\_\_

Make: \_\_\_\_\_ Packaging: \_\_\_\_\_

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

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Current Org: Operational Services Division US | Session 6, 2016-11-01 PM 007

### Step 5: Completing the Items Tab General Page

- When the page refreshes, enter:
  - Description of your goods or services
  - Invoice number based on the information on your vendor invoice (must be unique)
  - Invoice date
  - Payment due date (optional)
  - Number of items purchased
  - Unit cost of your item
  - Unit of measure (defaults to EA. for each)
  - UNSPSC Segment-Family Code and Class Code (use lookup to match the commodity or service purchased)

- Click on the **Save & Exit** button.

The screen refreshes to show the item saved successfully.

- Check all information for accuracy before moving on.

### Step 6: Clicking on the Vendors Tab

- Click on the **Vendors** tab.
- Click on the **Lookup & Add Vendor** button.

**NOTE:** The vendor must be registered in COMMBUYS. If not, then they should register immediately. If the vendor needs assistance with registration, please refer them to the OSD Helpdesk at 1-888-627-8283 or 617-720-3197.

RPA Requisition RQ-17-1080-OSD01-OSDEP-77326 (RPA-17-1080-OSD01-OSDEP-2393)

Status: In Progress

General **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor Validation Errors

RPA Vendor is required

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Address
No vendor found for this RPA				

Lookup & Add Vendor Print

Lookup & Add Vendor - RPA Requisition RQ-17-1080-OSD01-OSDEP-77326 (RPA-17-1080-OSD01-OSDEP-2393)

**Vendor Lookup:**

Search Using: ALL of the criteria

**Find It** **Clear**

Search Fields:

Vendor ID	Vendor Name
Vendor Tax ID	Show... Vendor Legal Name
Vendor Keyword	Alternate ID
ZIP Code	County
State	

### Step 7: Looking Up a Vendor

1. Enter the name of the vendor in the **Vendor Name** field.
2. Click on the **Find It** button.

Lookup & Add Vendor - RPA Requisition RQ-17-1080-OSD01-OSDEP-77326 (RPA-17-1080-OSD01-OSDEP-2393)

**Vendor Lookup:**

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="radio"/>	00009321	Acme Abatement Contractor, Inc.				52 Fuller Street P.O. Box 33	Seabrook	MA	Serg Han Karkacki	(123456-7890)	No
<input type="radio"/>	00009323	Acme Auto Leasing				440 Washington Ave	North Haven	CT	Rosa Hill	(123456-7890)	No
<input checked="" type="radio"/>	00009325	Acme Metals & Recycling, Inc.		Mar 25, 2014		P.O. Box 3214 Rte 64 Napier Street	Springfield	MA	George R Sachs	1234567890	No
<input type="radio"/>	00019974	Acme Services		Sep 26, 2014		35 Warren Ave	Hyle Park	MA	Jake Chambers	(617)655-1289	No
<input type="radio"/>	00001991	Acme Waterproofing Co., Inc.				21 Ningsong Avenue	Quincy	MA	Joseph Ambrose	(123456-7890)	No

**Add Vendor** **Vendor Add Request** **Close Window**

### Step 8: Adding the Vendor

1. In the **Select** column, click on the **radio button** next to the vendor name to select the vendor.
2. Scroll to the bottom of the page and click on the **Add Vendor** button.
3. When the screen re-displays, ensure that the vendor name is correct.

RPA Requisition RQ-17-1080-OSD07-OSD07-77333 (RPA-17-1080-OSD07-OSD07-2395)

General **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor ID: 00009325  
Alternate ID: Loughton Hardware  
Vendor Name: Loughton Hardware  
Preferred Delivery Method: Email  
Vendor Address: General Mailing Address - chris Loughton 1 Autumn Drive Enfield, CT 06032  
Chris Loughton  
1 Autumn Drive  
Enfield, CT 06032  
US  
Email: vend@autumnopenings.com  
Phone: (123456-7890)  
12-4528

Payment Terms:   
Freight Terms:   
Shipping Method:   
Shipping Terms:

**Save & Continue** **Save & Update Payment Due Date(s)** **Apply Vendor Terms to Requisition** **Lookup & Change Vendor** **Print**

### Step 9: Preparing the Attachment

Click on the **Attachments** tab and click on the **Add File** button.

General **Items** **Vendors** Address Accounting Routing **Attachments** Notes Reminders Summary

**Agency(0)** **Vendor(0)**

**Files**

**Click Add File to add file attachments.**

**No File Attachments**

**Add File**

**Add File**

**Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name:

Description:

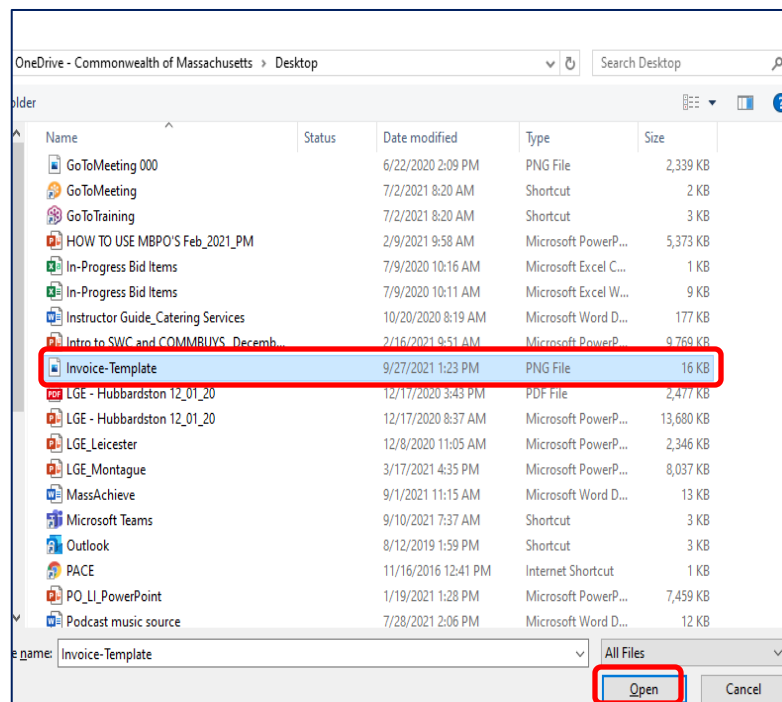
File:  file chosen

Location: 1990

**Step 10: Choosing the Attachment**

Click on the **Choose File** button.

**NOTE:** This button may be labelled **Browse** if using another browser.

**Step 11: Attaching the Invoice**

1. Select the scanned copy of the invoice in the location where it was saved on your computer (e.g. documents file, desktop, flash drive, shared file, etc.).
2. Click on the **Open** button.

**Step 12: Saving the Attachment**

When the screen re-displays, click on the **Save & Exit** button.

**Add File**

**Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name: Invoice-Template.png

Description:

File:  Invoice-Template.png

Location: 1990

COMMBUYS

Search... Catalog Advanced

**Contact:** Paul Martin  
**Estimated Cost:** \$1.00  
**Solicitation Enabled:** No  
**Invoice Method:** Three Way Match  
**Ship-to Address:** Accounts Payable  
 1 Amburton Place  
 Boston, MA 02108  
 US  
 Email: rpa@combuys.com  
 Phone: (724)56-7890

**Contact Phone:** (617)879-1525  
**Print Format:** Requisition Print  
**Alternate ID:** RPA-17-1080-OSD01-OSD07-2395

**Bill-to Address:** COMMBUYS  
 1 Amburton Place  
 Boston, MA 02108  
 US  
 Email: rpa@combuys.com  
 Phone: (724)56-7890  
 Attn: Reference: Paula Valente

**Vendor:** 218799 - Acme Metals & Recycling, Inc.  
**Remit-to Address:** George R Smith  
 P.O. Box 3218  
 Rear 14 Naper Street  
 Springfield, MA 01105-3218  
 Email: rpa@combuys.com  
 Phone: (724)56-7890  
 Attn: 1081

**Special Instructions:**

**Attachments**

**Agency Files:**  
**Agency Forms:**  
**Vendor Files:**  
**Vendor Forms:**

**Item Information**

**Submit for Approval** Cancel Requisition Clone Requisition Print

### Step 13: Submitting for Approval

1. Click on the **Summary** tab.
2. Check all the information for accuracy and make corrections if necessary, by returning to the appropriate tab to make and save any needed changes. Then return to the **Summary Tab**
3. Scroll to the bottom of the page and click on the **Submit For Approval** button.

### Step 14: Saving the Approval

The approval path displays or you're given the option to select the appropriate one. Click on the **Save & Continue** button to complete.

**NOTE:** The RPA Requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete.

RPA Requisition RQ-17-1080-OSD07-OSD07-77333 (RPA-17-1080-OSD07-2395)

Status: RPA - Gone to PO

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

RPA Purchase Order RPA-17-1080-OSD07-OSD07-2395

Status: RPA - Complete Receipt

General Items Vendor Address Accounting Routing Attachments Notes Charge Orders Reminders **Summary**

### Step 15: Viewing the Status

After approval, the Summary tab of the RPA Requisition will have the status of **Gone to PO**.

The Summary tab of the RPA Purchase Order will have the status of **Complete Receipt**.

**NOTE:** The vendor will not see this PO.