



# PURCHASE ORDER & REQUISITION TRAINING — FOR REQUESTOR & SIGNATURE AUTHORITY

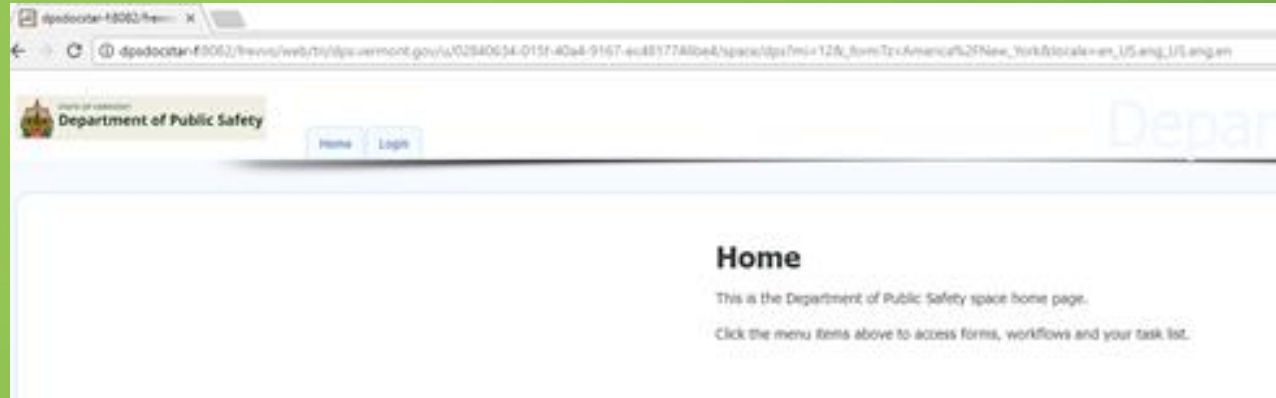
DPS PROCUREMENT OFFICE

# PO/REQUISITION WORKFLOW

- Log into Frevvo
- Complete/submit form
- Signature Authority Review/Approval
- My Tasks (open tasks)
- Other Finance workflows (for info only)
  - PO
  - Requisition

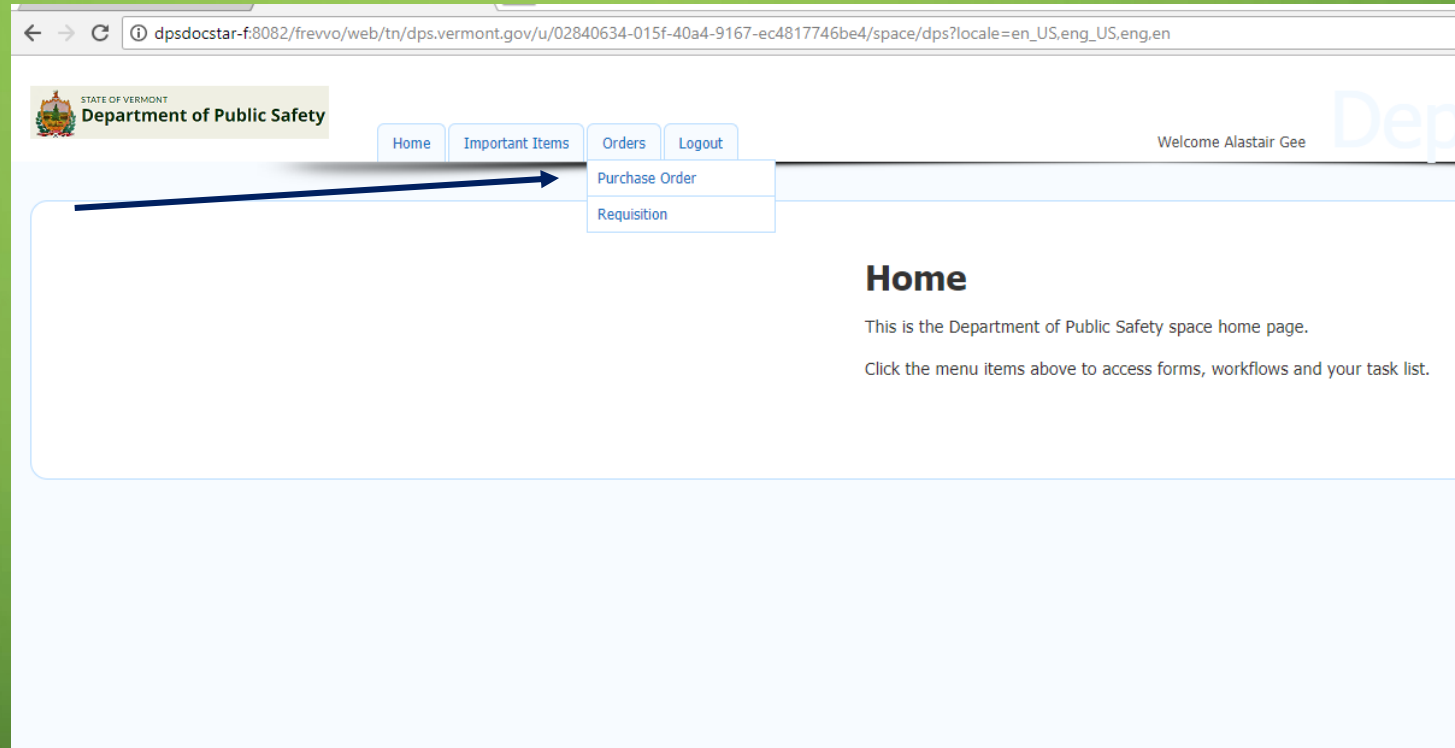
# LOG-IN

- Log into Frevvo:
  - <http://dpsdocstar-f:8082/frevvo/web/tn/dps.vermont.gov/u/02840634-015f-40a4-9167-ec4817746be4/space/dps>
- Log in name is
  - User name - same as logging into your computer daily. Normally first initial first name plus last name, **@dps.vermont.gov**
- Password is your daily computer log-in password

A screenshot of the login form. It has two input fields: 'Username' and 'Password'. The 'Username' field contains the text 'AGEE@dps.vermont.gov'. Below the fields are two buttons: 'Login' and 'Forgot Password ?'. A red bracket on the left side of the form groups the 'Username' and 'Password' fields together.

# FIND THE FORM

- To initiate a PO or requisition, click “Orders” here
- Select either:
  - PO
  - Requisition



# FILLING OUT THE FORM (1 OF 4 PAGES)

- Division (use drop down menu)
- State contract number (if applicable)
- Signature Authority
  - Who has spending authority (drop down menu)
  - See Signature Authority slide for more details
- Sam.gov check
  - For orders over \$25,000
- Fund Code (5 digit number)
  - General/Special/Federal funds
  - Not sure of funding numbers – contact the Finance Office
- Detail
  - If split funded, enter % for each line
  - If not split funded, type a dash in the box
- Dept ID (10 digit number)
  - Reflects what department funds are being utilized
- Project/Grant Number (if applicable)

**PO REQUISITION**

**VERMONT**  
**DEPARTMENT OF PUBLIC SAFETY**  
State Drive Waterbury, VT 05671-1300

PO Number:

Requisition Number:  PA Name:  PA Number:

**Requisition Information**

Requisition Date:  6/7/2018 Requestor:  Alastair Gee Division:

Class Code:  State Contract Number:  Program ID:

Signature Authority:  SAM.gov Check: ☐ No Active Exclusions

Fund Code	Detail	Department ID	Project/Grant Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Vendor / Ship To Information**

Select Vendor Search Type:  Ship To Name:

# FILLING OUT THE FORM (2 OF 4 PAGES)

- Vendor info
  - Select type of search
    - “Vendor Name” or “Vendor Address”
  - Vendor Search - Type in a few key letters for vendor name or address for search
  - Select Vendor
    - Choose vendor on drop down menu
- Ship To Name
  - Use drop down menu
- Upload Support Documentation (If needed as supplemental data, specs of equipment, 3 bids for simplified bid, etc.)
  - Click “Add Files”, then select file, upload

The screenshot shows a web form titled "Vendor / Ship To Information". It has two main columns. The left column contains "Select Vendor Search Type" with radio buttons for "Vendor Name" (selected) and "Vendor Address". Below this is a "Vendor Search" input field containing the letter "J". Underneath is a "Select Vendor" dropdown menu that is open, showing a list of vendors including "Eagle Point Gun/T J Morris (1707 Third St)", "EJM Enterprises (PO Box 211)", "J & B International (964 Hercules Dr)", "J & L Service Center Inc (216 S Main St)", "J & M Auto (134 Atkinson St.)", "Jamaica Town Treasurer (PO Box 173)", and "Janet M Carini DVM Inc (PO Box 67)". The right column contains "Ship To Name:" with a dropdown menu, "Ship To Address 1:" with an input field, "Ship To Address 2:" with an input field, and a table for "City:", "State:", and "Zip:" with corresponding input fields. At the bottom left is an "Upload" section with an "Add Files" button, and at the bottom right is a link "Click To View IT Codes". Blue arrows from the text on the left point to the "Vendor Name" radio button, the "Vendor Search" field, the "Select Vendor" dropdown, and the "Ship To Name" dropdown.



# FILLING OUT THE FORM (3 OF 4 PAGES)

- Description
  - Enter item to purchase (is detailed specs needed, add as a Word attachment)
- Account Code
  - Required for IT equipment, use “Click to view IT Codes” for correct account code
- Quantity
  - How many you want
- Unit Price
  - How much is the item
- Total – form automatically calculates
- Adding extra lines
  - Click on green + to add additional lines

City.  State.  Zip.

**Upload Supporting Documentation**






[Add Files](#) [Click To View IT Codes](#)

	Description	Account Code	Qty	Unit Price	Total
<a href="#">+</a> <a href="#">-</a>	Boots		2	45.00	90.00
<a href="#">+</a> <a href="#">-</a>	Socks		3	5.00	15.00
<a href="#">+</a> <a href="#">-</a>	Pants		2	67.00	134.00
<a href="#">+</a> <a href="#">-</a>	Hats		3	45.00	135.00
<a href="#">+</a> <a href="#">-</a>	Laptop	522216	1	890.00	890.00
<b>Total</b>					
				<input type="text" value="1264.00"/>	

**PO Request**


# FILLING OUT THE FORM (4 OF 4 PAGES)



- Requestor Signature
  - Sign using mouse
  - Then via electronic signature
    - Click “Sign this section”
- Form is now ready to submit
  - Can Save to submit later (click “Save”)
  - Submit, click “Send to Signature Authority
  - Note – If system won’t allow you to submit, a required block on form needs attention


		Hats		3	45.00	135.00
		Laptop	522216	1	890.00	890.00
			<b>Total</b>			
					1264.00	


**PO Request**  
Complete the PO request form, add any comments below (optional), then sign and click "Send to Supervisor" to submit the form for review.

Comments (Optional)

Requester Signature  


 Alastair Gee Jun 5 2018  Edit this section

 Send to Signature Authority

Save 

Powered by [frevvo](#)



# SIGNATURE AUTHORITY

- A DPS individual who has spending privileges approved by the Commissioner
  - An example of who has signature authority is found on the next page
- To Approve/Disapprove a PO and/or Requisition request
  - An email from [dpsfrevvo@vermont.gov](mailto:dpsfrevvo@vermont.gov) will notify you of a new request
  - Sign into Frevvo (see slide 3)
  - If you have multiple POs/Requisitions to approve, click on “Important Items” on task bar. Click on “Task List”, which will bring up all tasks needing attention
    - Click the arrow icon to work on form
  - First review the request, particularly ensure:
    - Fund code/Dept IDs are correct
    - To approve
      - Sign using mouse (optional)
      - Then via electronic signature, Click “Sign this section”
    - To disapprove
      - Click “Reject”, add comments why rejects, and send (this is then sent back to the requestor)

# EXAMPLE - DPS SIGNATURE AUTHORIZATION – DATED 14 MAY 18

- DPS Staff identified on the authorization have set spending limits
- Staff who aren't on this list wishing to purchase items, should forward the PO/Requisition to a person in their Division who has the spending limit for the purchase
- Link for latest authorization is found at:
  - <http://vibrs.dps.state.vt.us/>

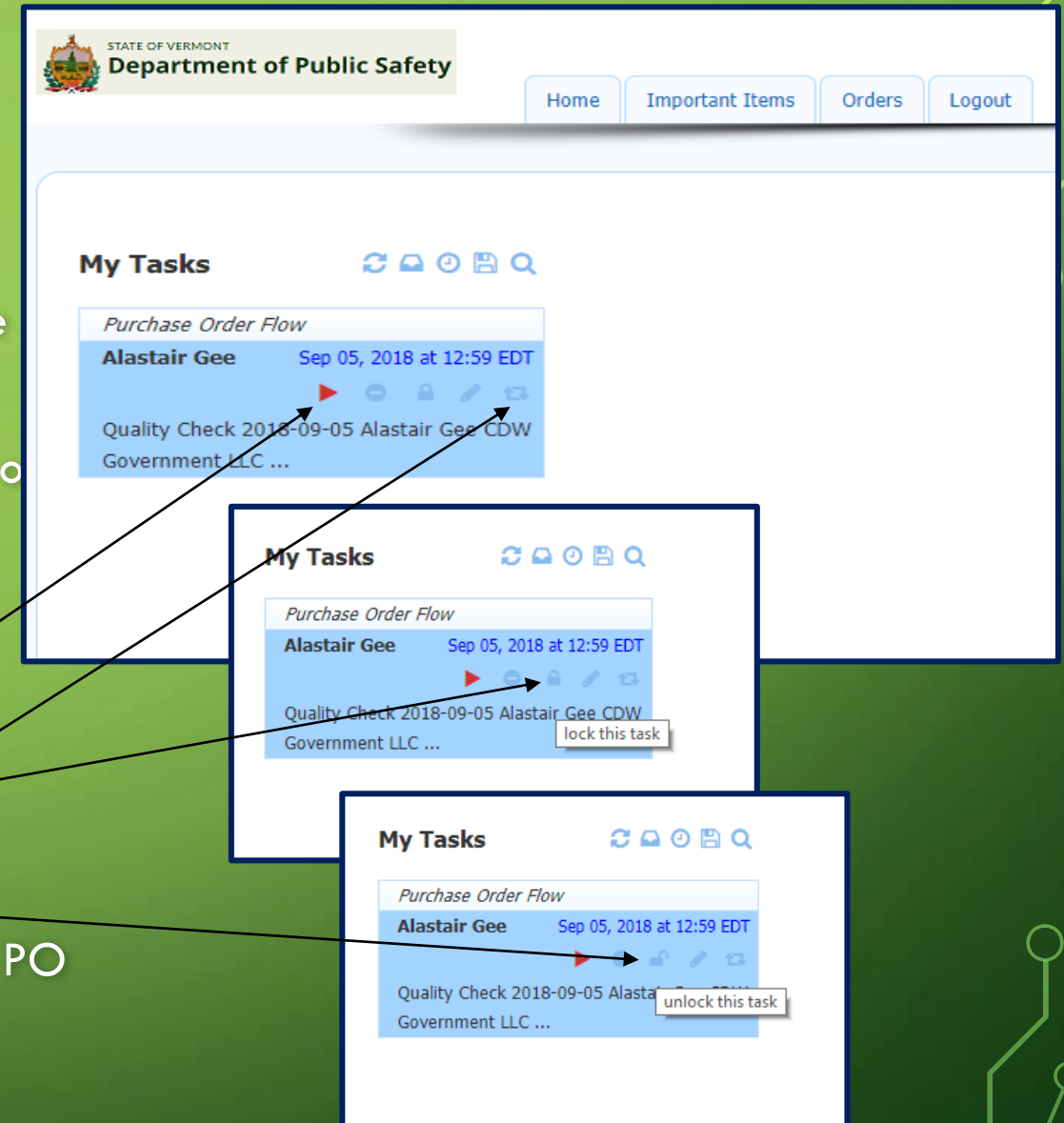
Department of Public Safety Signature Authorization			
Revision Date: May 14, 2018			
DPS Organization Level	Position Title and Name of Current Incumbent	Authorization Scope	Signature Authority Limit
All DPS	Commissioner (Thomas D. Anderson)	All DPS Expenses and documents requiring Appointing Authority signature	Unlimited
All DPS		All DPS Expenses, plus may sign other DPS documents requiring Appointing Authority signature as designee of the Commissioner. Chris Herrick as Deputy Commissioner will also be signatory for any CJS expenses higher than the limits approved for CJS Unit Directors as shown below (VCIC, Communications units). <b>Chris Herrick will be signatory for all expenses relating to the IT budget now that all State IT staff are reporting to ADS.</b>	Unlimited
All DPS	Deputy Commissioner (Chris Herrick)		Unlimited
All DPS	All Division Directors (State Police: Matthew Birmingham; Administration: Joanne Chadwick; Fire Safety: Michael Desrochers, VEM: Erica Bornemann, Forensics Lab: Trisha Conti)	All DPS Expenses	Unlimited
Division Specific	All Division Assistant Directors (Fire Safety: Joseph Benard; VEM: Charles (Chip) Deasy; Administration: Marie Hayward and Richard Hallenbeck; Forensic Lab: Tara Tighe)	Specific Division Expenses	Unlimited (for their assigned division expenses only)
State Police Division	All VSP Majors	State Police Division Expenses	Unlimited (for their assigned division expenses only)
State Police Division	All VSP Captains	State Police Division Expenses	\$10,000
State Police Division	All VSP Lieutenants	State Police Division Expenses	\$5,000
State Police Division	VSP Fleet Manager (Dave Tift)	VSP Fleet Services Expenses	\$5,000
State Police Division	VSP Marine Program Manager (Sgt. Trevor Carbo)	VSP Marine Program Expenses	\$5,000
State Police Division	Deputy Homeland Security Advisor (Jessica Stolz)	Homeland Security Program Expenses	\$5,000
Criminal Justice Service Division	Radio Technology Services Director (Terry LaValley)	Communications Expenses	\$10,000
Criminal Justice Service Division	VCIC Director (Jeff Wallin)	VCIC Expenses	\$10,000
Criminal Justice Service Division	VCIC Assistant Director (John Gonyea)	VCIC Expenses	\$5,000
Fire Safety Division	Fire Academy Director (Peter Lynch)	Fire Academy Expenses	\$10,000
Fire Safety Division	Hazardous Materials Program Manager (Todd Cosgrove)	Hazardous Materials Program Expenses	\$5,000
Fire Safety Division	Regional Managers (4)	Specific region expenditures only	\$5,000
VT Emergency Management Division	Planning Section Chief (vacant)	Planning Section Expenses	\$5,000
VT Emergency Management Division	Logistics Section Chief (Jason Gosselin)	Logistics Section Expenses	\$5,000
VT Emergency Management Division	Engagement Section Chief (Ed von Turkovich)	Engagement Section Expenses	\$5,000
VT Emergency Management Division	Recovery and Mitigation Chief (Ben Rose)	Recovery & Mitigation Unit Expenses	\$5,000
VT Emergency Management Division	Vermont Information Center (VIC) Chief (Captain Kevin Lane)	Vermont Information Center (formerly Fusion Center) Expenses	\$10,000
Administration/Legal Division	DPS General Counsel (Rosemary Grelkowski)	Legal Expenses	\$5,000

Thomas D. Anderson, Commissioner, DPS

5/23/18  
Date

# MY TASKS

- List what Purchase Orders and Requisitions require attention
- Click on “Important Tasks”, then choose “Task List” of the drop down menu
- All open tasks will show up on left of screen
- Click arrow icon to open PO/Requisition
- To delete PO/Req, click minus symbol
- To lock/unlock a PO
- Clicking on “View Task History” will show where a PO or requisition is in the flow



# PO WORKFLOW

- Quality Check
  - DPS Procurement Office checks the form for completeness/accuracy
- Financial Manager
  - DPS Finance Manager checks the form for accuracy
  - Forwards to Finance Specialist who manages the division/program finances
- Fund Check
  - Finance Specialist verifies fund codes, and if there is funding available
- PO Number
  - Procurement obtains a PO # from VISION database
- Budget Check
  - DPS Finance Manager budget checks the PO in VISION, forwards the approved PO to the PO requestor who then may initiate the purchase



# REQUISITION WORKFLOW

- Quality Check
  - DPS Procurement Office checks the form for completeness/accuracy
- Financial Manager
  - DPS Finance Manager checks the form for accuracy
  - Forwards to Finance Specialist who manages the division/program finances
- Fund Check
  - Finance Specialist verifies fund codes, and if there is funding available
- Requisition Number
  - Procurement obtains a Requisition # from VISION database
- Budget Check
  - DPS Finance Manager budget checks the Requisition in VISION
- BGS Contracting
  - DPS Procurement Office will forward requisition request to BGS Contracting for processing
- Budget Check
  - Once BGS Contracting has approved the requisition (might takes months), a PO is submitted vis VISION to DPS Procurement Office, who in turn sends the notification to the Finance Office for budget check
- Procurement Office
  - DPS Procurement Office will forward the approved PO with State attachments to requestor, approving the purchase

