
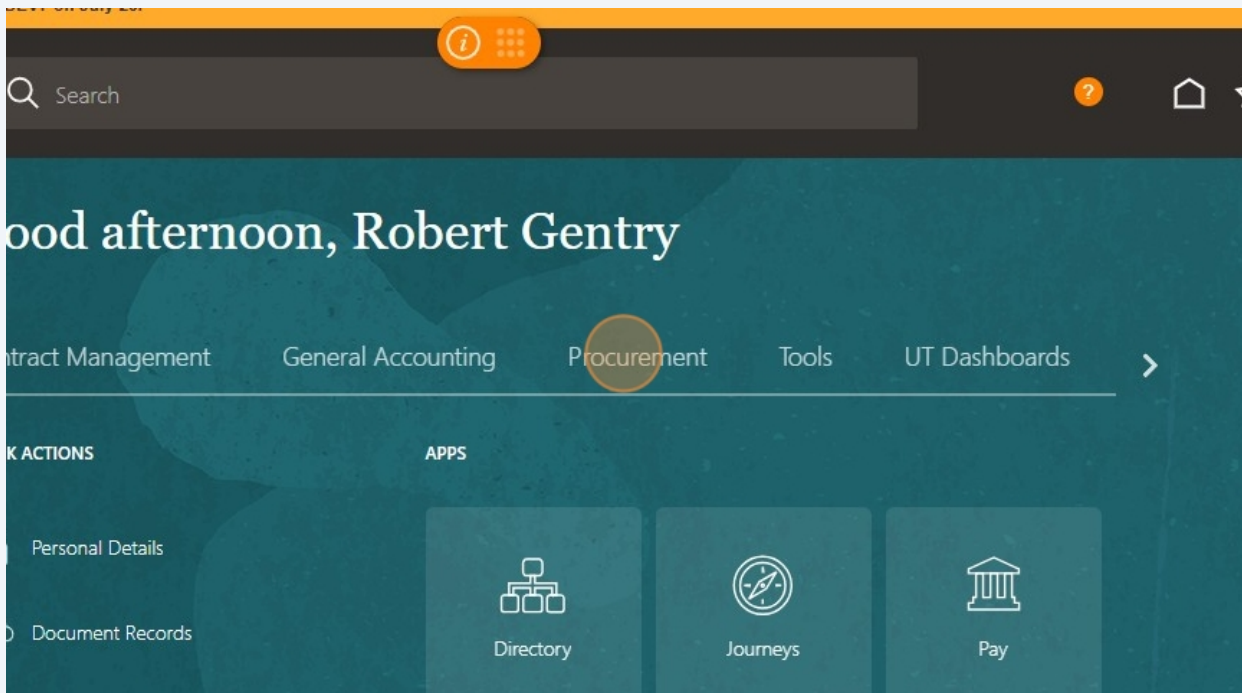


Create a PO against an existing Purchase Agreement (Framework Order)

 When do I use this transaction?

In DASH, you can not pay an invoice against a Purchase Agreement (previously known as a framework order). A separate requisition is required. In order to create this requisition, you must enter a transaction using the Purchase Agreement Order Form. This transaction will create a PO that is automatically approved. It is automatically approved because there is an existing purchase agreement in place. The PO that is created is used to pay invoices from the supplier. Each time an order is placed with the supplier, a Purchase Agreement Order Form must be created, otherwise, the department can't process a payment.

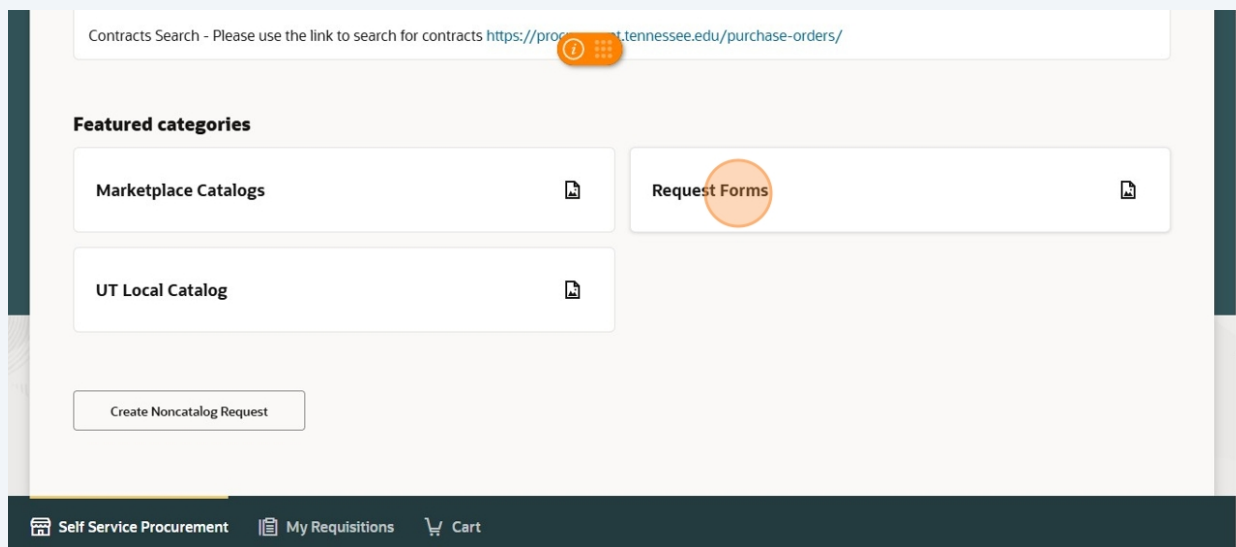
1 Click "Procurement", if you do not see Procurement, click the ">" for more options.



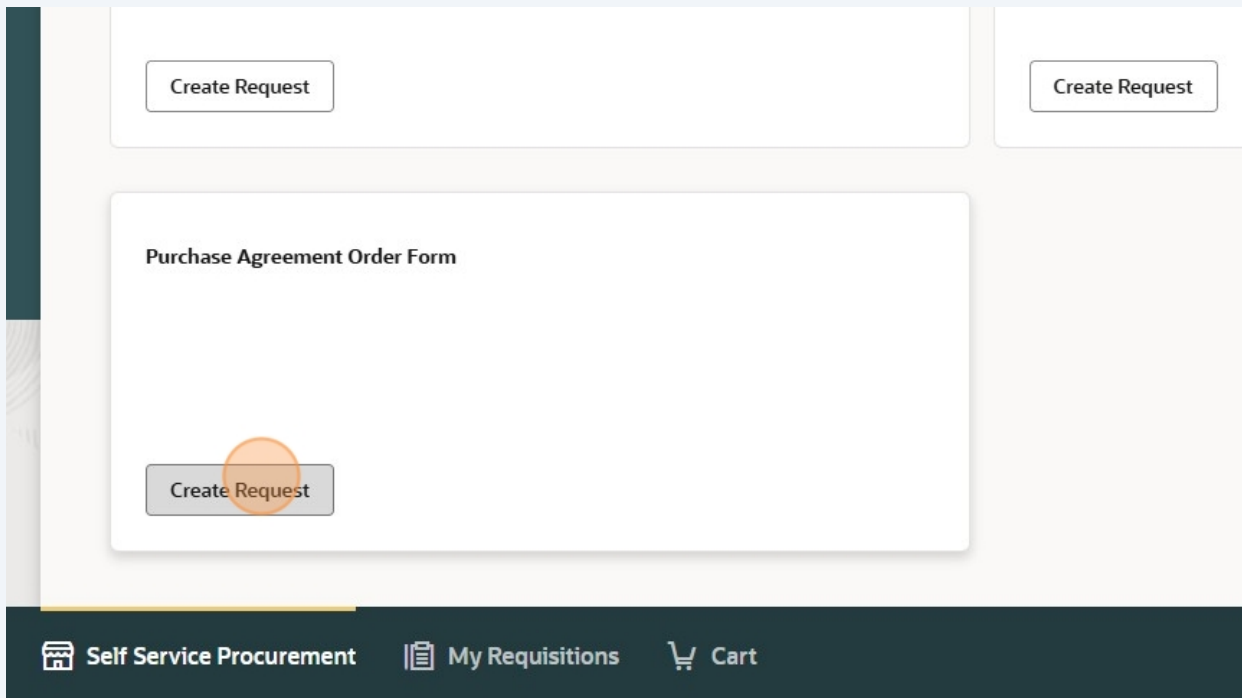
2 Click "Purchase Requisitions (New)"



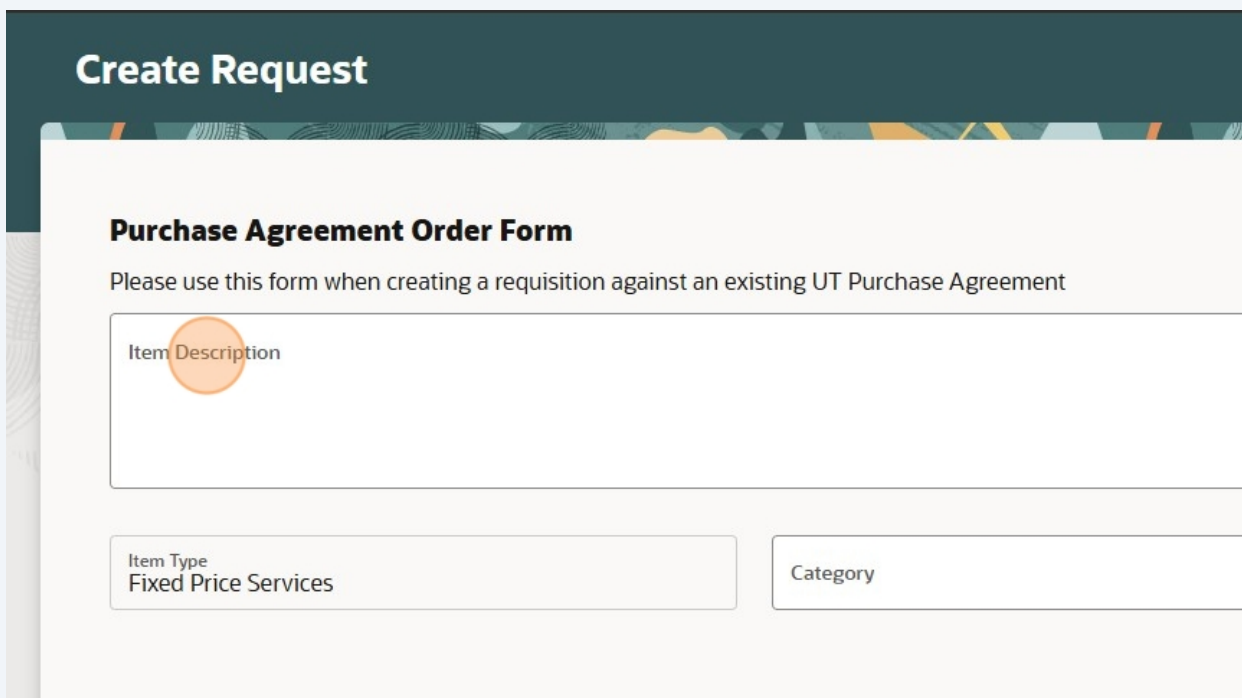
3 Scroll down to Featured Categories and click "Request Forms"



4 Select Purchase Agreement Order Form by clicking "Create Request"



5 Enter the Description for the purchase



6

Click the "Category" field. Type the category name, description, or select by scrolling through the list.

The screenshot shows a form with several fields. At the top, there is a large empty text box with an orange information icon (a circle with an 'i' and a grid) above it. Below this, there are two rows of fields. The first row has a small empty field on the left and a larger 'Category' field on the right. The 'Category' field has an orange circle highlighting its center and the word 'Required' below it. The second row has another small empty field on the left and a 'Currency' dropdown menu on the right showing 'USD' with a downward arrow. Below the 'Currency' field, there is a checkbox labeled 'Negotiated' which is checked. The letter 'd' is visible on the left side of the form.

7

Click and enter the "Amount"

The screenshot shows a form with a dark vertical bar on the left. At the top, there are two fields: 'Item Type' with the value 'Fixed Price Services' and 'Category' with the value 'Promotio'. The 'Category' field has an orange information icon above it. Below these is the 'Pricing' section, which contains an 'Amount' field with an orange circle highlighting its center and the word 'Required' below it. To the right of the 'Amount' field is a 'Currency' dropdown menu showing 'USD'. Below the 'Pricing' section, there are two checkboxes: 'Negotiation required' (unchecked) and 'Negotiated' (checked). Below this is the 'Source' section, which contains a 'New supplier' checkbox (unchecked). At the bottom, there are two fields: 'Agreement Type' with the value 'Contract Purchase Agreement' and 'Agreement'.

8

Click "Agreement"

on required Negotiated

olier

Type Purchase Agreement Agreement

Supplier Site

act Supplier Item

Additional information



Tip! Enter the supplier name or the existing purchase agreement number in the "Agreement Field"

9

For example, type or paste the purchase agreement number/supplier name into the "Agreement Field", then select from the drop down field.

Negotiated

Agreement	Supplier	Supplier Site
5500009249	Bacon and Company, Inc	KNOXVILLETN1



Alert! This is very important. Be sure to select an agreement number and confirm it is in the "Agreement" Field as shown below.

If you enter a supplier name in the Supplier field and do not enter an agreement number in the Agreement field, the transaction will not automatically approve. Instead it will go through workflow and be rejected with a note to add the agreement number.

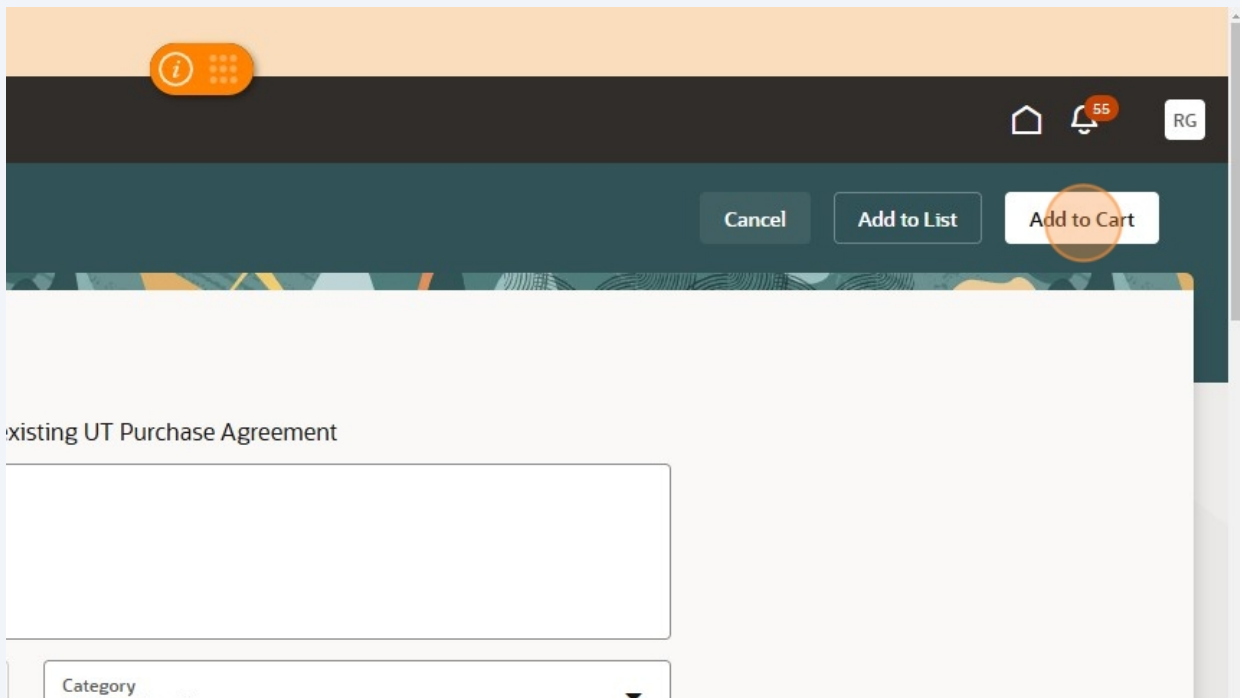
The auto-approval is based on the agreement number being present.

Amount \$5,000.00	Currency USD						
<input type="checkbox"/> Negotiation required	<input checked="" type="checkbox"/> Negotiated						
Source							
<input type="checkbox"/> New supplier							
Agreement Type Contract Purchase Agreement	Agreement 5500009249						
Supplier	<table border="1"><thead><tr><th>Agreement</th><th>Supplier</th><th>Supplier Site</th></tr></thead><tbody><tr><td>5500009249</td><td>Bacon and Company, Inc</td><td>KNOXVILLETN1</td></tr></tbody></table>	Agreement	Supplier	Supplier Site	5500009249	Bacon and Company, Inc	KNOXVILLETN1
Agreement	Supplier	Supplier Site					
5500009249	Bacon and Company, Inc	KNOXVILLETN1					
Supplier Contact							
Additional information							

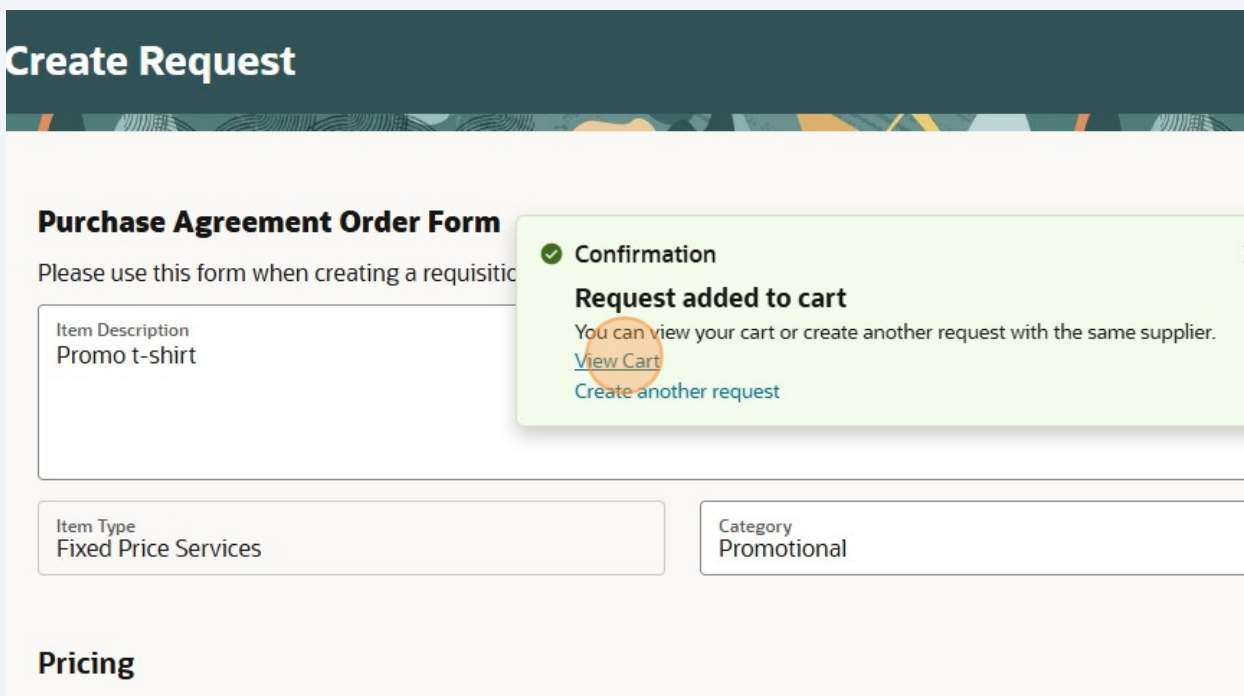


Tip! To look up a system-wide agreement, go to Procurement Services website here: <https://procurement.tennessee.edu/purchase-orders/> You will have to enter your NetID and password to access the purchase agreements.

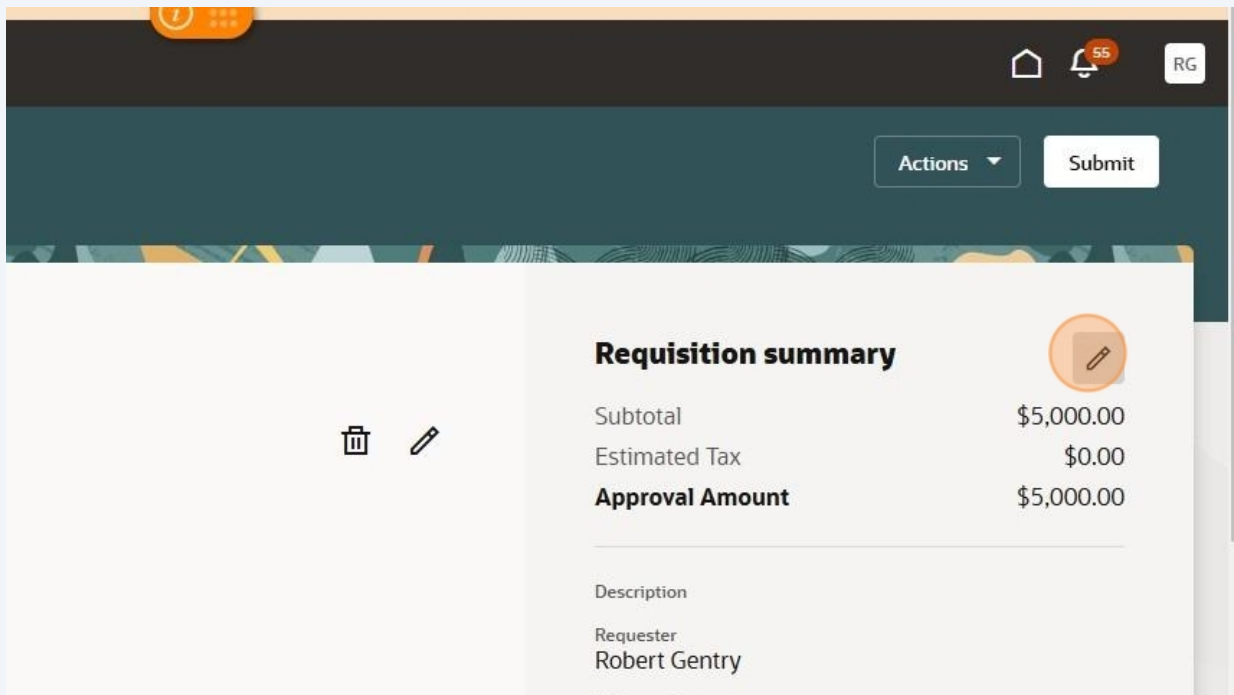
10 Scroll to the top of the page and click "Add to Cart"



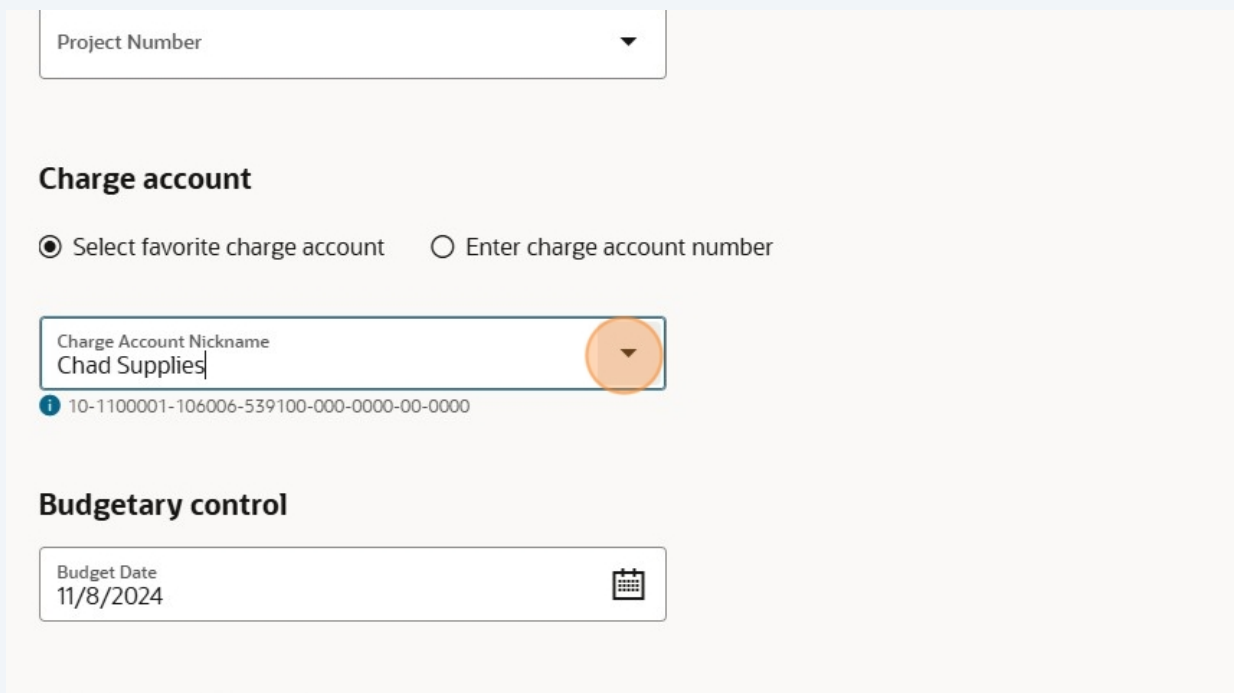
11 If you need to add another line item, click "Create Another Request". Otherwise, click "View Cart" to proceed and finalize the requisition.



12 From the "Cart" screen, click Requisition Summary "edit/pencil" icon.



13 Scroll down to Charge Account and confirm the correct account is selected. If the default Charge Account is correct, you can skip down to Step 36





Tip! If you have saved multiple charge accounts to your Preferences, you can find them by clicking the drop-down in the "Charge Account Nickname" field.

Charge account

Select favorite charge account Enter charge account number

Charge Account Nickname
Chad Supplies

Chad Supplies
10-1100001-106006-539100-000-0000-00-0000

Budget Date
11/8/2024

Additional information

Requisition Type
IIT Contract

Bill-to Location

14

To add a charge account, click the "O" to select "Enter Charge Account Number"

Project costing

Project Number

Charge account

Select favorite charge account Enter charge account number

Charge Account Nickname
Chad Supplies

Budgetary control

Budget Date
11/8/2024



Tip! There are multiple ways to enter a new charge account. See the options below and select the option that works best for you.

15

Click the "Charge To" field and delete the charge account

Project Number

Charge account

Select favorite charge account Enter charge account number

Charge To
-----0000|

Budgetary control

Budget Date
11/8/2024

Combination details

Segment	Value	Descr
Entity	-	-
Fund	-	-
Department	-	-

Additional information



Tip! You can copy and paste your charge account into the "Charge To" field or manually enter it.

16 Enter the Entity number or name and select from the drop-down

Charge account

Select favorite charge account Enter charge account number

Charge To
10

Entity	Description
10	UT Knoxville Campus

Budget Date
11/8/2024

Additional information

Requisition Type
UT Contract

Bill-to Location

17 Enter the Fund number or name and select from the drop-down

Charge account

Select favorite charge account Enter charge account number

Charge To
10-

Fund	Description
1100001	Educational & General Funds Current Unrestricted
1100002	Educational & General Funds Current Unrestricted Access & Diver
1100005	Educational & General Funds Current Unrestricted Faculty Startu
1100006	Educational & General Funds Current Unrestricted F&A
1100007	Educational & General Funds Current Unrestricted Mandatory Fee

18 Enter the Department number or name and select from the drop-down

The screenshot shows a 'Charge To' field with the value '10-1100001-chem' and an edit icon. A dropdown menu is open, displaying a table of departments. The 'Chemistry' department (106006) is highlighted with an orange circle. To the right of the dropdown is a 'Bill-to Location' field. Below the dropdown is a 'Notes' section with a text input area.

Department	Description
100417	Chemical and Biomolecular Engineering
106004	Biochem Cellular and Molecular Biology
106006	Chemistry
106007	RC Chemistry X Ray Facility
106010	RC Chemistry Polymer Characterizatn Lab

Bill-to Location

Notes

19 Enter the Account number or name and select from the drop-down

The screenshot shows a 'Charge account' section with two radio buttons: 'Select favorite charge account' (unselected) and 'Enter charge account number' (selected). Below this is a 'Charge To' field with the value '10-1100001-106006-suppl' and an edit icon. A dropdown menu is open, displaying a table of accounts. The 'Supplies' account (539001) is highlighted with an orange circle. To the right of the dropdown is a calendar icon and a 'Bill-to Location' field. Below the dropdown is a dropdown arrow and a 'Bill-to Location' field.

Charge account

Select favorite charge account Enter charge account number

Charge To: 10-1100001-106006-suppl


Account	Description
539001	Supplies
539100	Operating Supplies
539101	Operating Supplies User CD 01
539102	Operating Supplies User CD 02
539103	Operating Supplies User CD 03

Bill-to Location

20 Click "Default Program"

Charge account


Select favorite charge account Enter charge account number

Charge To
10-1100001-106006-539001- 

Program	Description
000	Default Program
210	Instruction
220	Research
230	Public Service
240	Academic Support


Bill-to Location

21 Click "Default Activity"

Project Number 


Charge account

Select favorite charge account Enter charge account number

Charge To
10-1100001-106006-539001-000-0000- 


InterCo	Description
00	Default intercompany
02	General University
05	UT Institute For Public Service
04	UT Municipal Technical Advisory Service

Budgetary control

Budget Date
11/8/2024 


Additional information

22 Click "Default Intercompany"


Project Number 

Charge account

Select favorite charge account Enter charge account number


Charge To
10-1100001-106006-539001-000-0000-00-| 

Budgetary control

Budget Date
11/8/2024 


Additional information

23 Click "Default Future"


Project Number 

Charge account

Select favorite charge account Enter charge account number

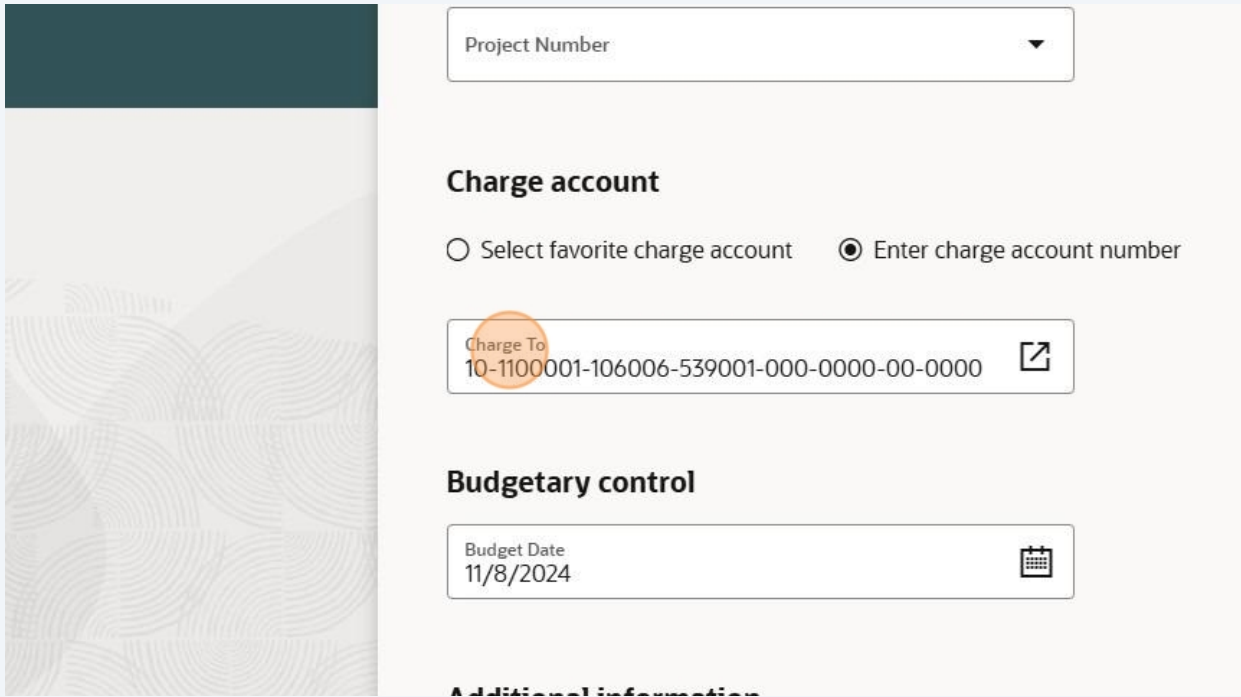
Charge To
10-1100001-106006-539001-000-0000-00-0000| 

Budgetary control

Budget Date
11/8/2024 


Additional information

24 The new Charge Account is set for this transaction



The screenshot shows a transaction entry form with the following fields and options:

- Project Number**: A dropdown menu.
- Charge account**: A section with two radio button options:
 - Select favorite charge account
 - Enter charge account number
- Charge To**: A text input field containing the account number "10-1100001-106006-539001-000-0000-00-0000". The first few characters "10-1100" are circled in orange. An external link icon is visible to the right of the field.
- Budgetary control**: A section with a **Budget Date** field containing "11/8/2024" and a calendar icon.
- Additional information**: A section header partially visible at the bottom.

 Tip! Below is another option for entering the transaction.

25 Click the "square-arrow" icon

Project Number ▼

Account	539100	Operating Supplies
Program	000	Default Program
Activity	0000	Default Activity
InterCo	00	Default Intercompany
Future	0000	Default Future

Charge account

Select favorite charge account Enter charge account

Charge To
10-1100001-106006-539100-000-0000-00-0000 

Budgetary control

Budget Date
11/8/2024 

Additional information

26 Click "Entity" and search by entity number or name

Requisition

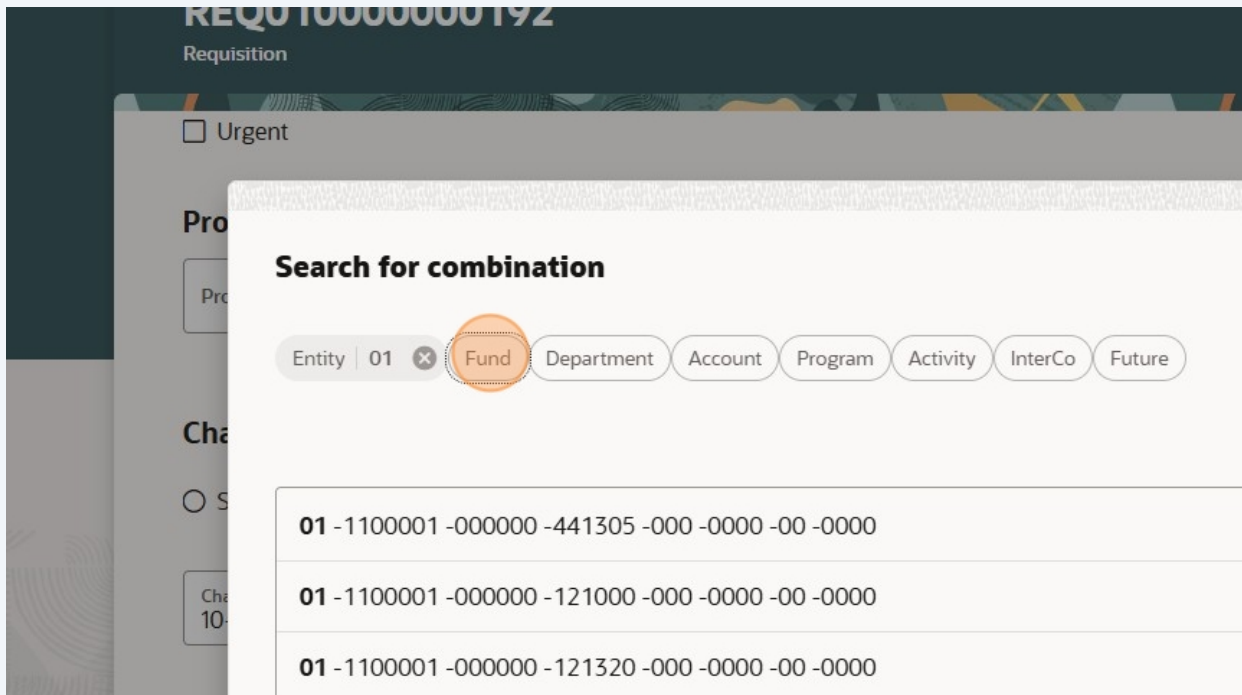
Urgent

Search for combination

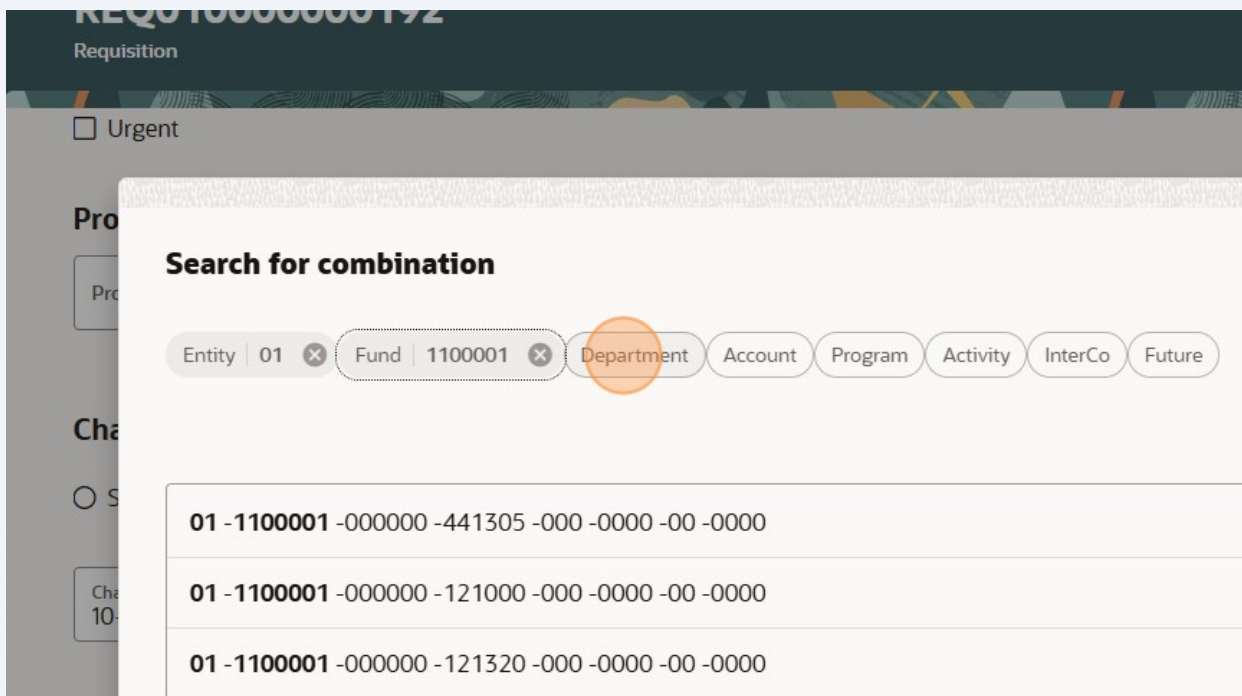
Entity Fund Department Account Program Activity InterCo Future

05 -1100001 -000000 -430012 -000 -0000 -00 -0000
01 -1100001 -000000 -441305 -000 -0000 -00 -0000
50 -1100001 -000000 -441305 -000 -0000 -00 -0000

27 Click "Fund" and search by fund number or name



28 Click "Department" and search by department number or name



29 Click "Account" and search by account number or name

00001 192

for combination

01 Fund 1100001 Department 011415 **Account** Program Activity InterCo Future

00001 -011415 -100000 -260 -0000 -00 -0000

00001 -011415 -100000 -000 -0000 -00 -0000

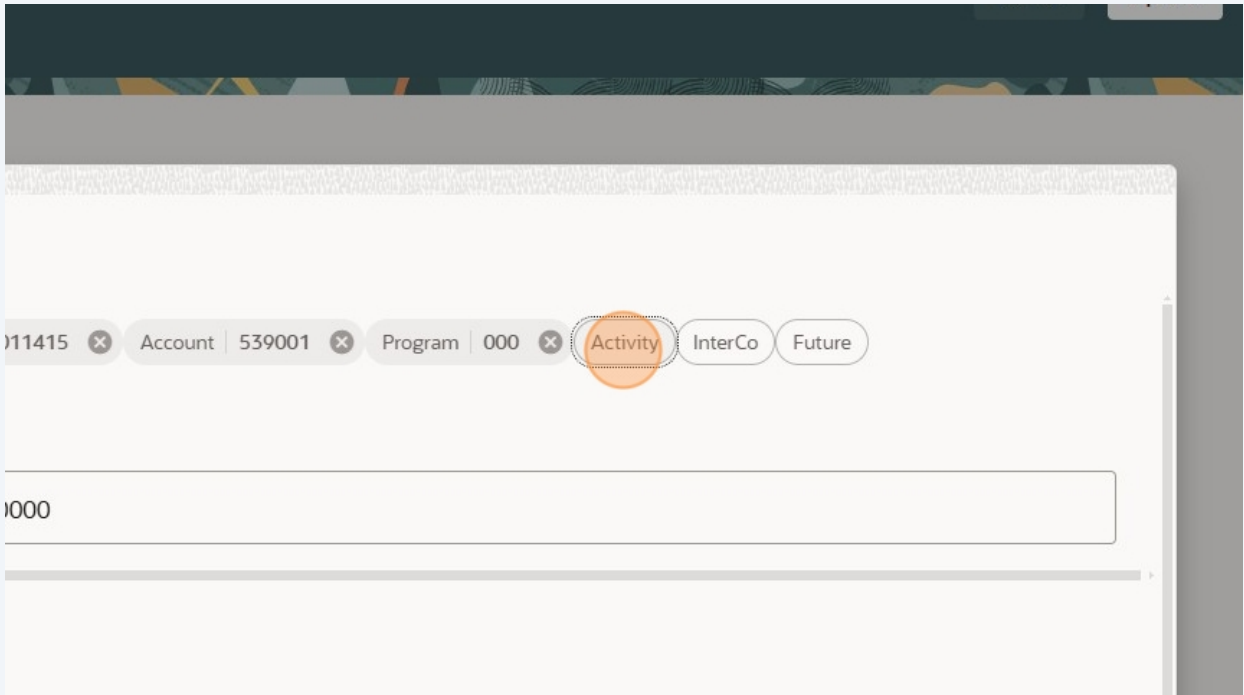
00001 -011415 -120400 -260 -0000 -00 -0000

30 Click "Program" and search by program number or name

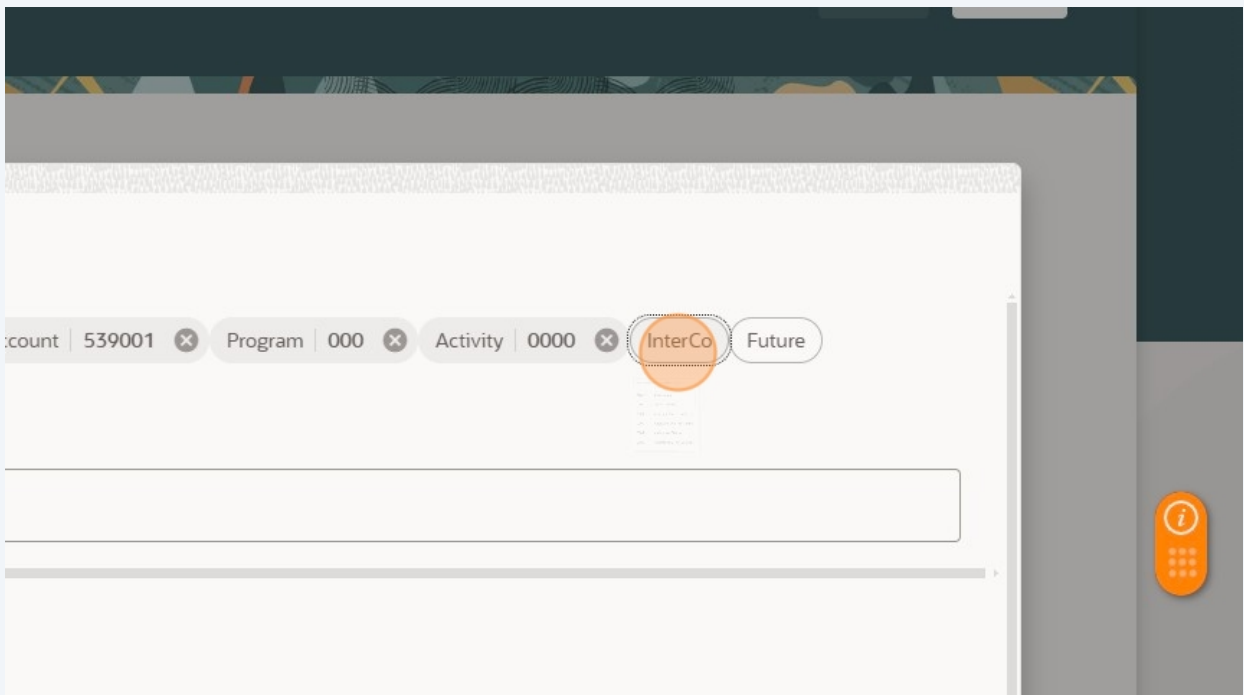
01 Department 011415 Account 539001 **Program** Activity InterCo Future

I -000 -0000 -00 -0000

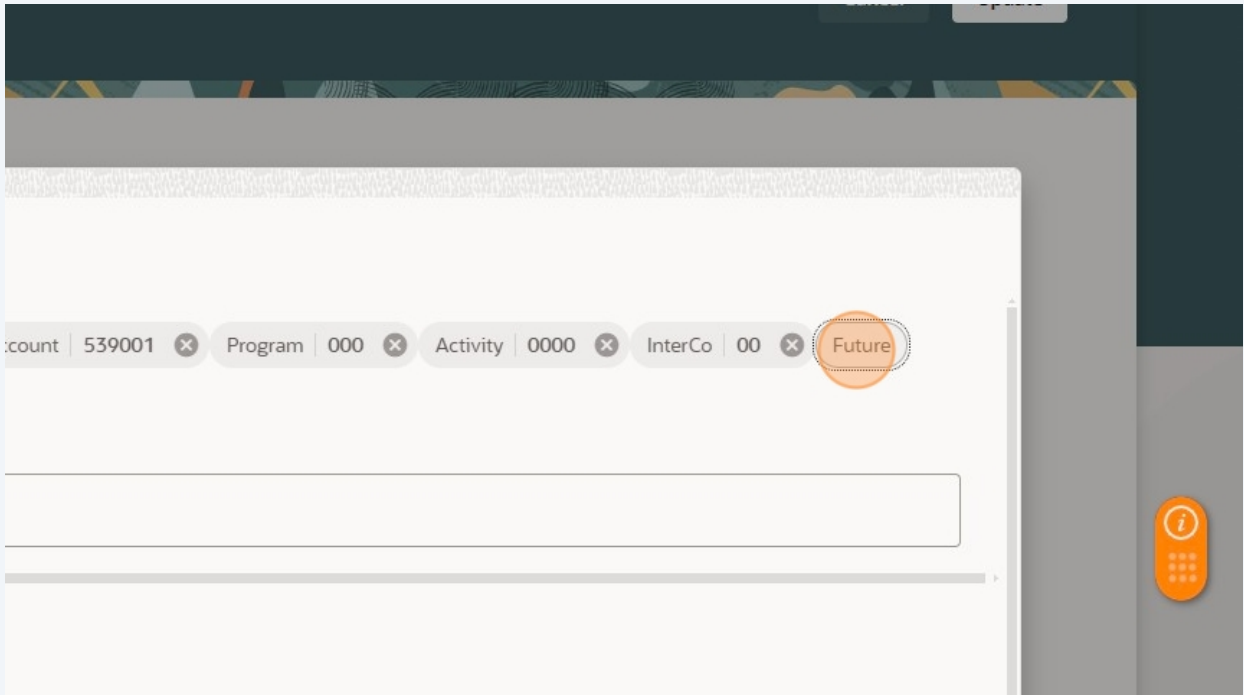
31 Click "Activity" and search by activity number or name



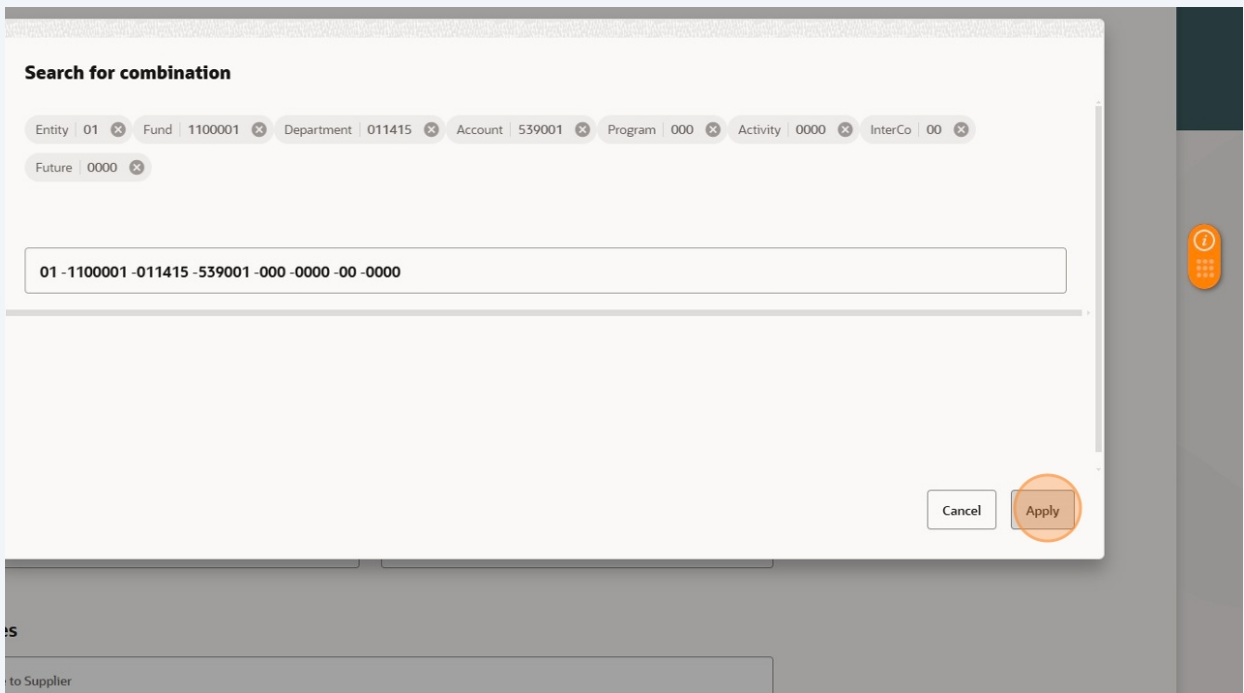
32 Click "InterCo" and search by interco number or name



33 Click "Future" and search by future number or name



34 Click "Apply"



35

The new charge account is set for this transaction

Project costing

Project Number ▼

Charge account

Select favorite charge account Enter charge account number

Charge To
10-1100001-106006-539100-000-0000-00-0000 

Budgetary control

Budget Date
11/8/2024 

Additional information

Requisition Type
UT Contract ▼

Bill-to Location ▼

36

Scroll down and click "Requisition Type"

Budgetary control

Budget Date
11/5/2024 

Additional information

Requisition Type 
Required

Bill-to Location

Notes

Note to Supplier

37 Click "Purchases made against a negotiated UT contract"

The screenshot shows a dropdown menu with the following options:

- Informal Bid Bid conducted by department in accordance with FI0405
- Marketplace Catalog Punchout catalog transaction
- Sole Source- NCJ Required Attach NCJ form to transaction
- Sole Source- No NCJ Required Per FI0405, NCJ form is not required
- Standard Purchase- No NCJ required Standard Purchase - No NCJ required
- State of TN Contract Provide the state contract number
- Sub Award Use for payable sub award contracts
- UT Contract Purchases made against a negotiated UT contract**

Below the dropdown menu is a text input field with the placeholder text "URL".

i Tip! Always select "Purchases made against a negotiated UT contract" for Purchase Agreement Order Form transactions.

i Tip! "Requisition Type" is the only required field on this page.

38

To change the "Requested Delivery Date" click the "Calendar" icon. The requested delivery date defaults to 7 days from the creation date of the transaction, unless revised.

The screenshot shows a mobile application interface with a light beige background. At the top, there are two empty white rectangular input fields. Below them, a larger white input field is highlighted with a dark border. Inside this field, the text "Requested Delivery Date" is displayed above the date "11/12/2024". To the right of the date is a circular orange icon containing a white calendar symbol. Below the date, there is a small, faint grey text prompt: "Enter a date on or after 11/5/2024".

39

Click "Update" to save

The screenshot shows a mobile application interface with a dark teal header bar. At the top left of the header is an orange circular icon with a white information symbol and a grid of dots. On the right side of the header, there are three icons: a white home icon, a white bell icon with a red notification bubble containing the number "55", and a white square icon with the letters "RG". Below the header, there are two white rectangular input fields. At the bottom of the screen, there are two buttons: a grey "Cancel" button and a white "Update" button with an orange border. The "Update" button is circled in orange.



Tip! To revise the line item, click the "edit/pencil" icon. This is not a required step to complete the transaction. If no change is required (such as splitting the line item into multiple GL codes), skip this step and move to the next.

DEV2 is the UAT environment, refreshed from DEV7 on July 26.

ORACLE

Cart
Requisition REQ01000000180

Promo t-shirt
Sold By Bacon and Company, Inc

Amount
\$5,000.00

Requisition summary

Subtotal	\$5,000.00
Estimated Tax	\$0.00
Approval Amount	\$5,000.00

Description
Requester
Robert Gentry
Deliver to Location

Self Service Procurement My Requisitions Cart 1

40

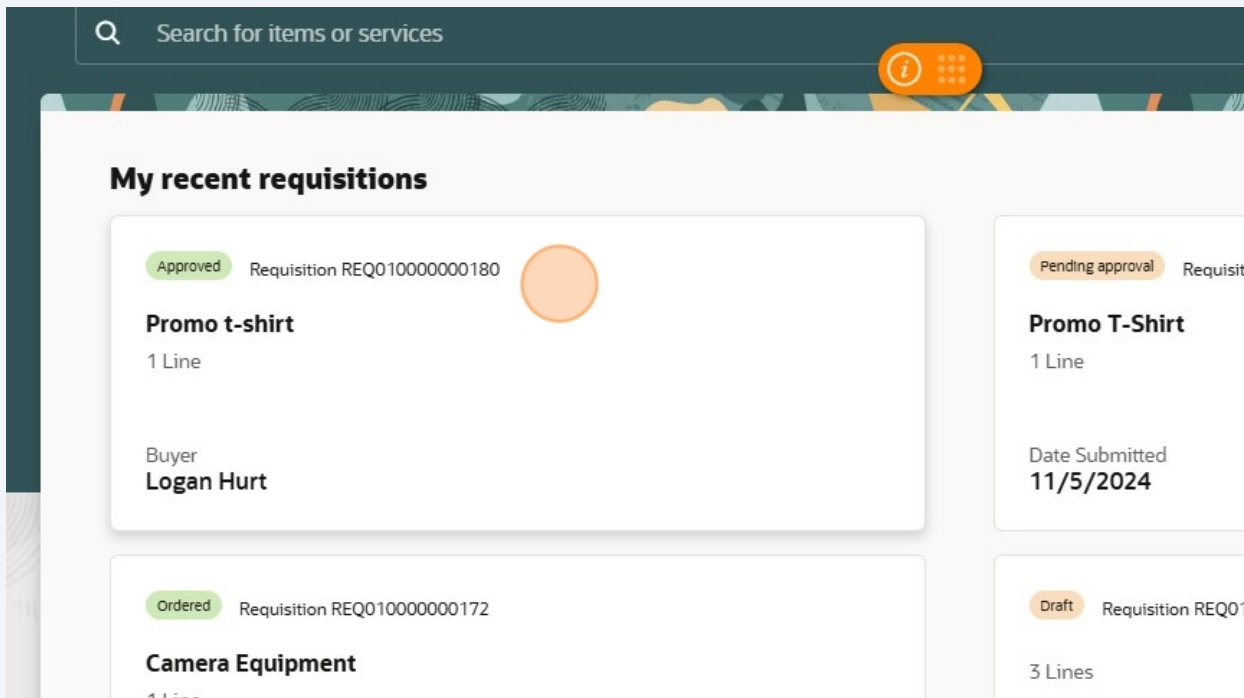
Click "Submit"

Requisition summary


Subtotal	\$5,000.00
Estimated Tax	\$0.00
Approval Amount	\$5,000.00


Description
Requester

41 The transaction is available for review under "My Recent Requisitions"



42 Congratulations! You have successfully submitted a Purchase Agreement Order Form!

 Alert! This transaction is not sent to the supplier. To place an order, you must contact the supplier. You can email a copy of this PO to the supplier if they need one for their records, but it is not required.

 Tip! The department will use this PO to pay the invoice from the supplier.