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

(i) **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.
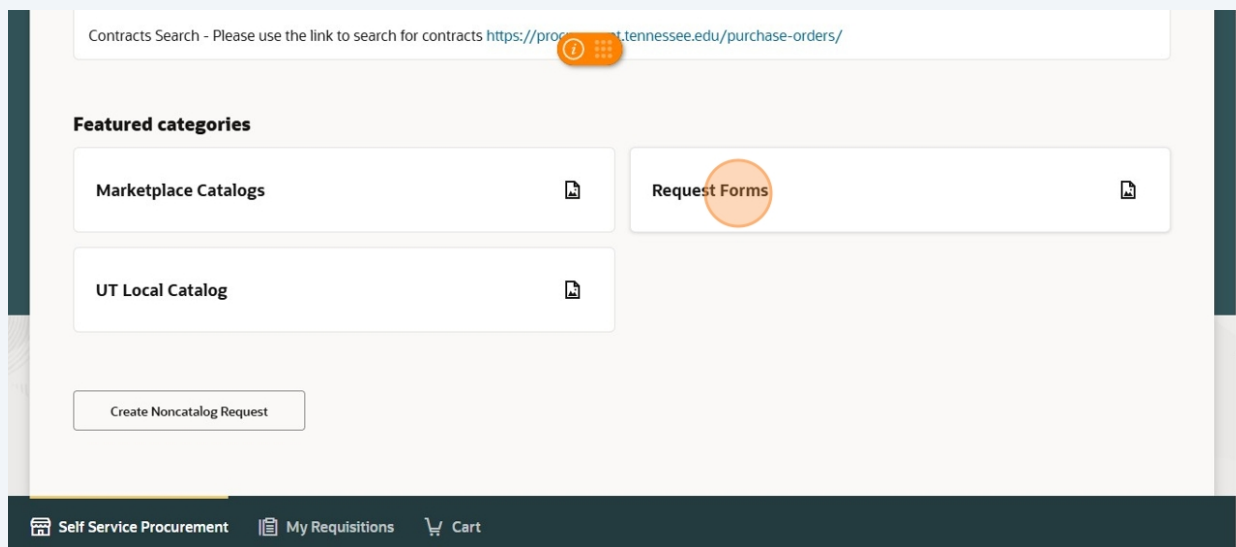
1 Click "Procurement", if you do not see Procurement, click the ">" for more options.
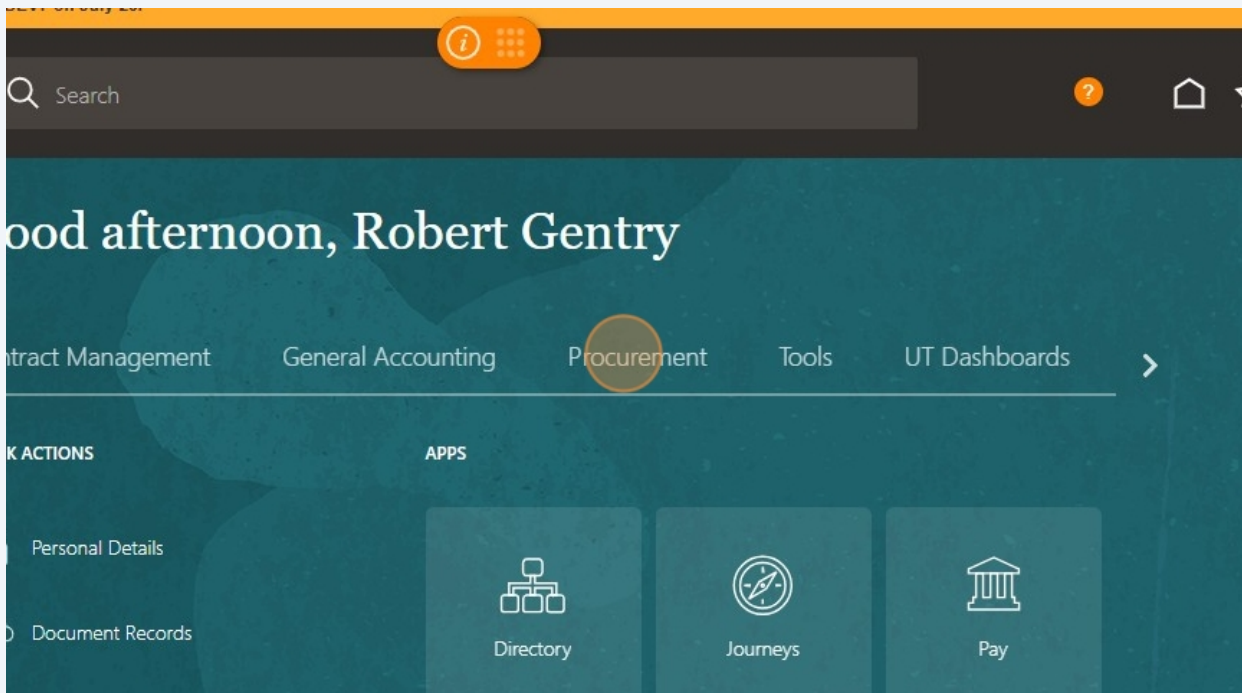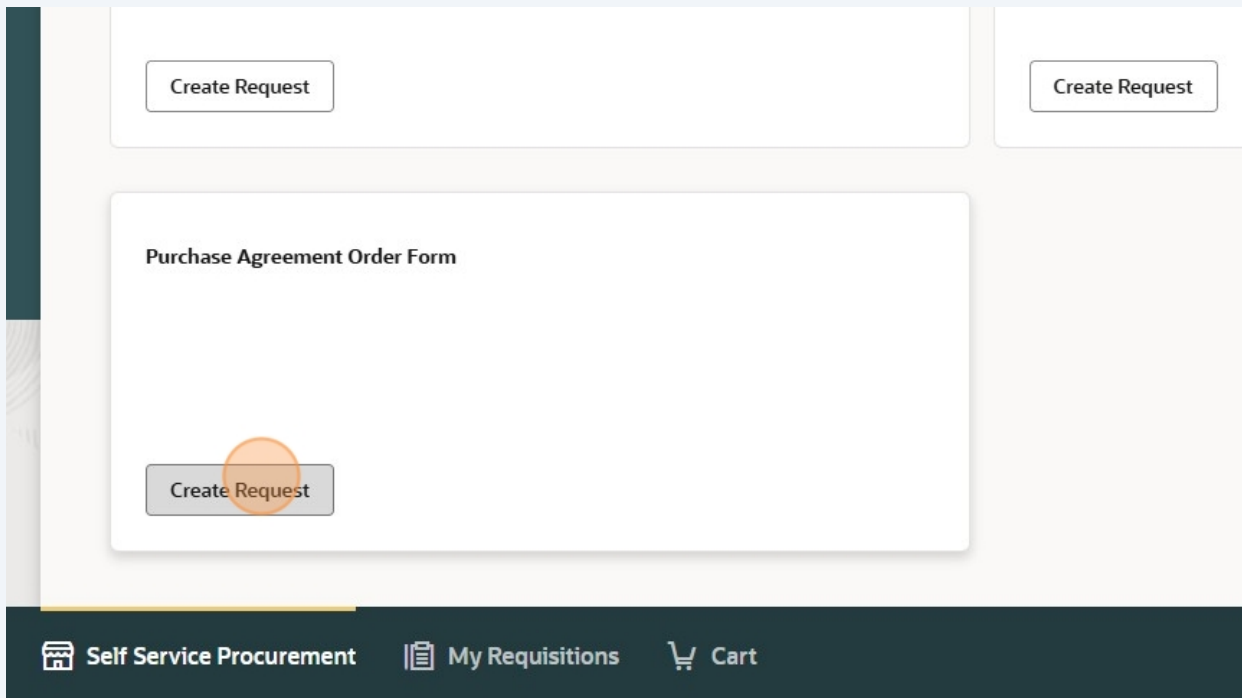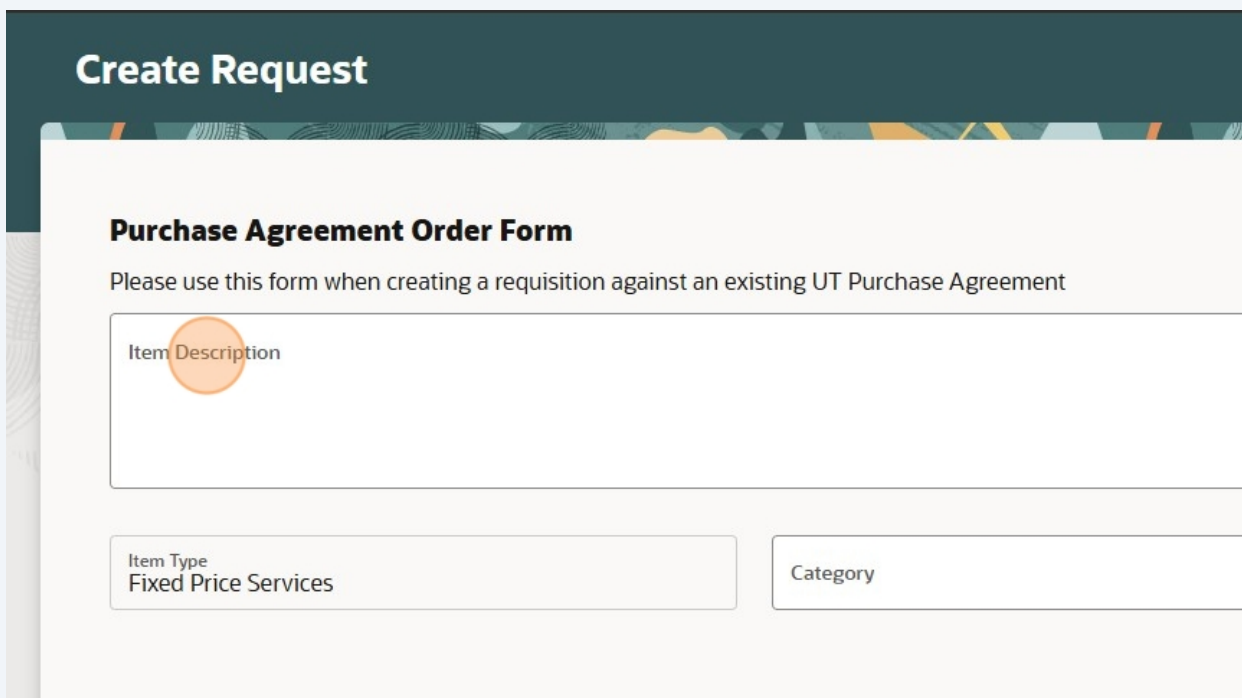
2 Click "Purchase Requisitions (New)"

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

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

Create Request   Create Request

Purchase Agreement Order Form

Create Request

▥ Self Service Procurement   ▤ My Requisitions   🛒 Cart

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5 Enter the Description for the purchase

Create Request

Purchase Agreement Order Form
Please use this form when creating a requisition against an existing UT Purchase Agreement

Item Description

Item Type
Fixed Price Services

Category

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

Category

Required

Currency
USD

✓ Negotiated

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7 Click and enter the "Amount"

Item Type
Fixed Price Services

Category
Promotio

Pricing

Amount

Required

Currency
USD

☐ Negotiation required

✓ Negotiated

Source

☐ New supplier

Agreement Type
Contract Purchase Agreement

Agreement

8 Click "Agreement"

USD

☑ Negotiated

plier

ype
urchase Agreement

Agreement ▼

Supplier Site

Supplier Item

act

al 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
5500009249 ▼

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		Currency	
$5,000.00		USD	▼

☐ Negotiation required   ☑ Negotiated

Source

☐ New supplier

Agreement Type		Agreement	
Contract Purchase Agreement		5500009249	▼

Supplier	▼

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.
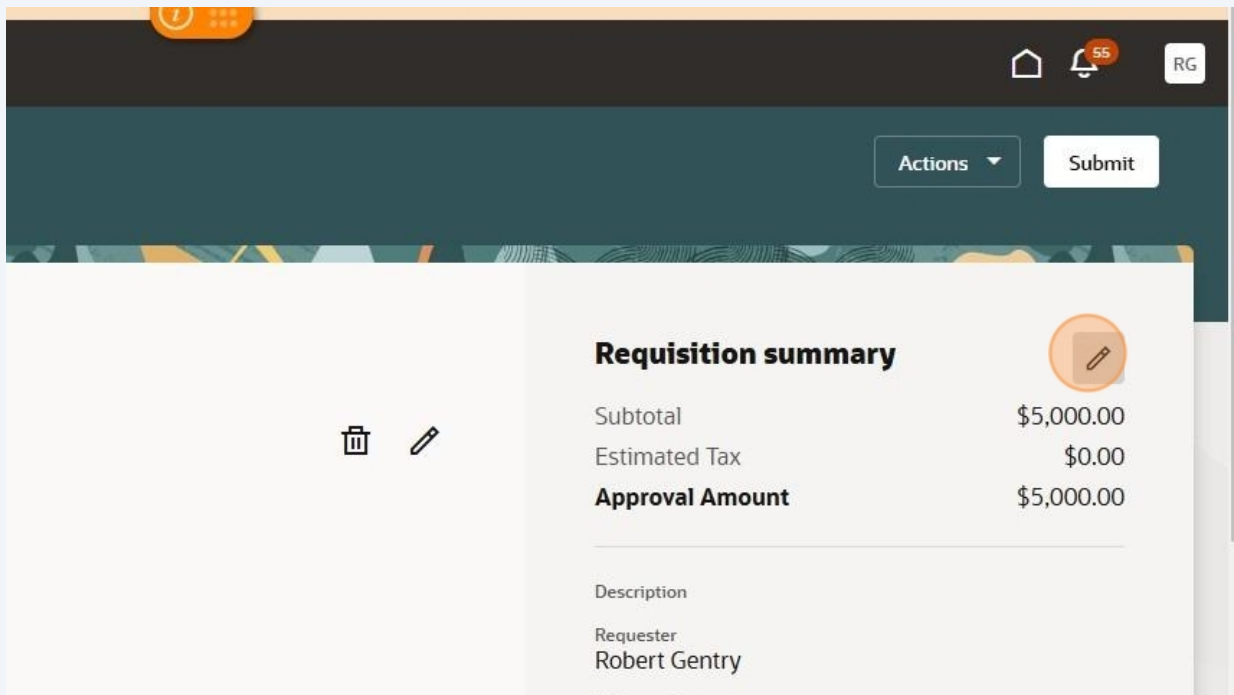
**10** Scroll to the top of the page and click "Add to Cart"
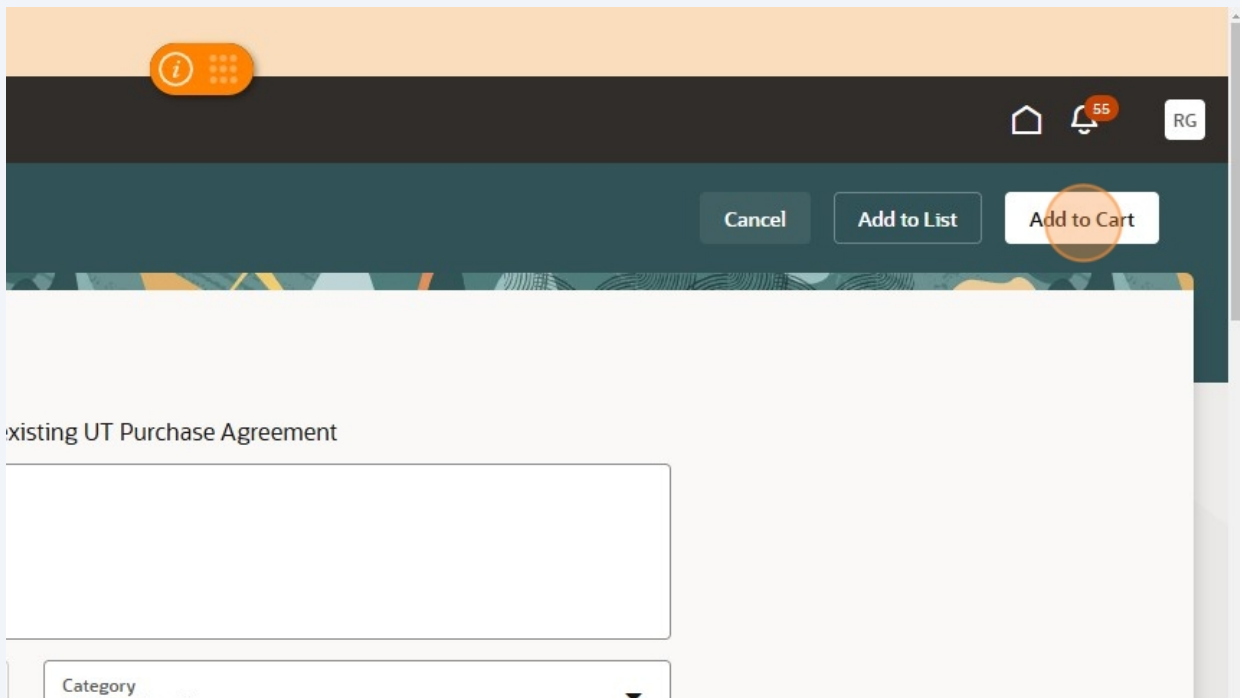
11 If you need to add another line item, click "Create Another Request". Otherwise, click "View Cart" to proceed and finalize the requisition.
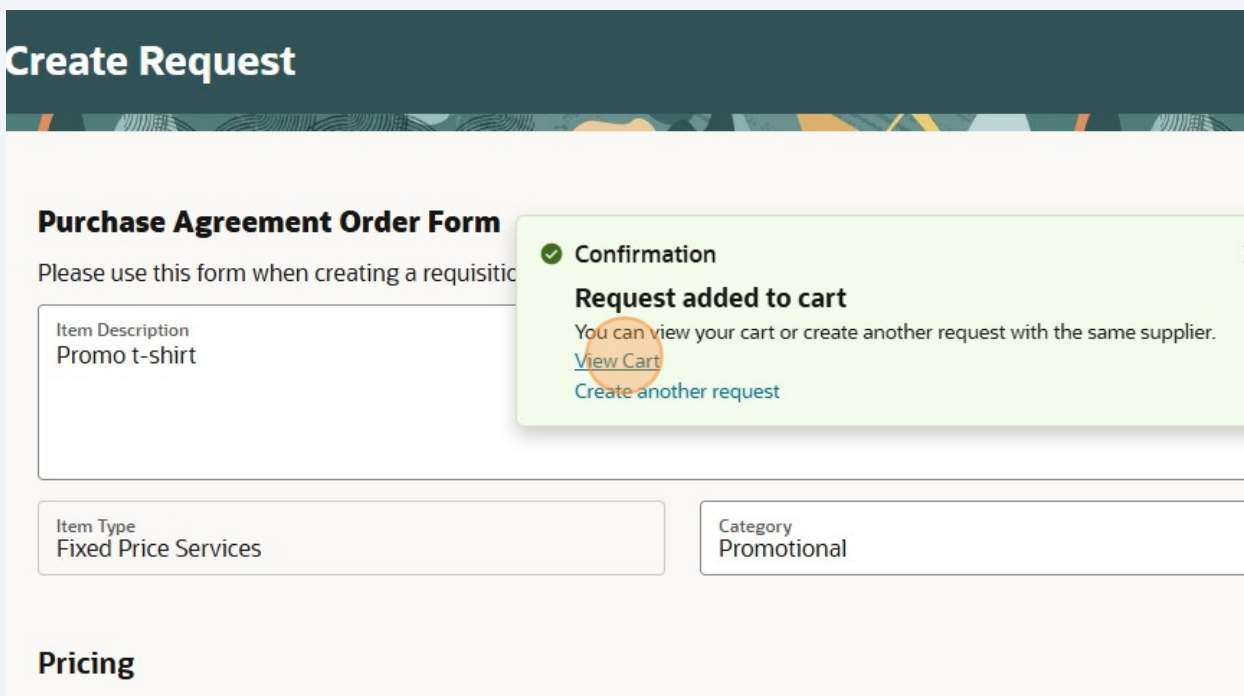
12 From the "Cart" screen, click Requisition Summary "edit/pencil" icon.

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
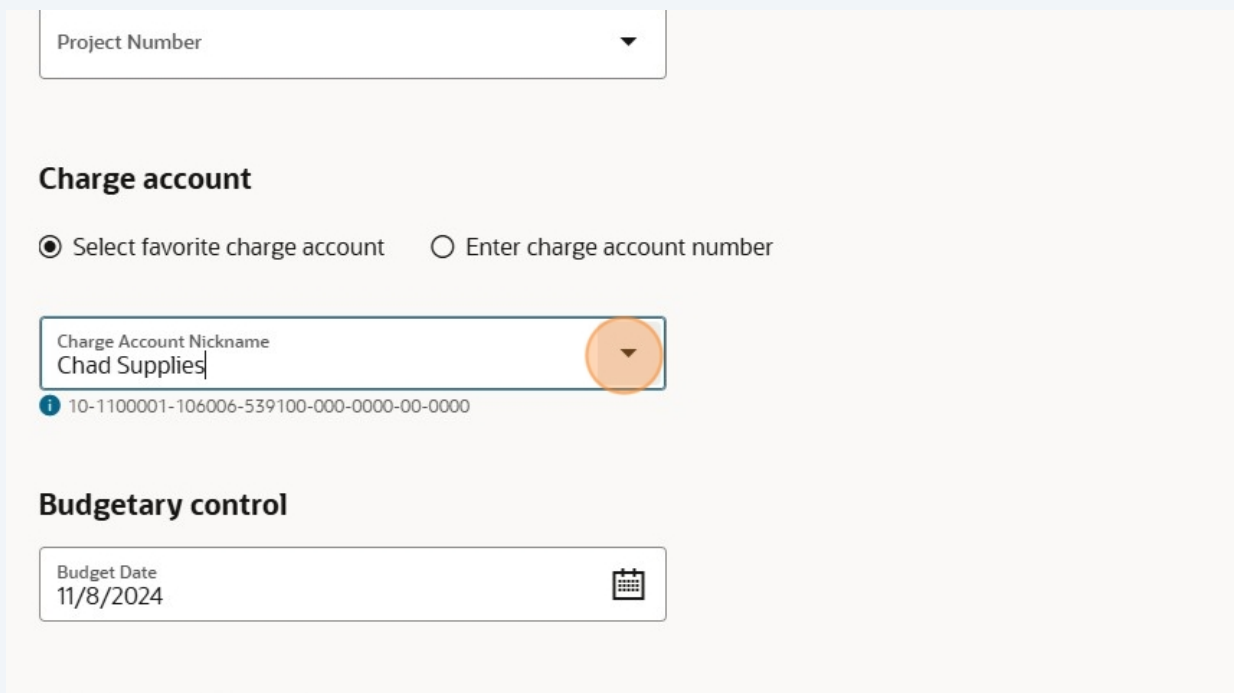
Charge account

◉ 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
UT Contract

Bill-to Location

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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

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

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

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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 Startup
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

Charge To
10-1100001-chem

Department	Description
100417	**Chem**ical and Biomolecular Engineering
106004	Bio**chem** Cellular and Molecular Biology
106006	**Chem**istry
106007	RC **Chem**istry X Ray Facility
106010	RC **Chem**istry Polymer Characterizatn Lab

Bill-to Location

Notes

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

Charge account

○ Select favorite charge account   ● Enter charge account number

Charge To
10-1100001-106006-suppl

Account	Description
539001	**Suppl**ies
539100	Operating **Suppl**ies
539101	Operating **Suppl**ies User CD 01
539102	Operating **Suppl**ies User CD 02
539103	Operating **Suppl**ies 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

ill-to Location

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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
	System
02	General University
03	UT Institute For Public Service
04	UT Municipal Technical Advisory Service

Budgetary control

Budget Date
11/8/2024   📅

Additional information

14

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

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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

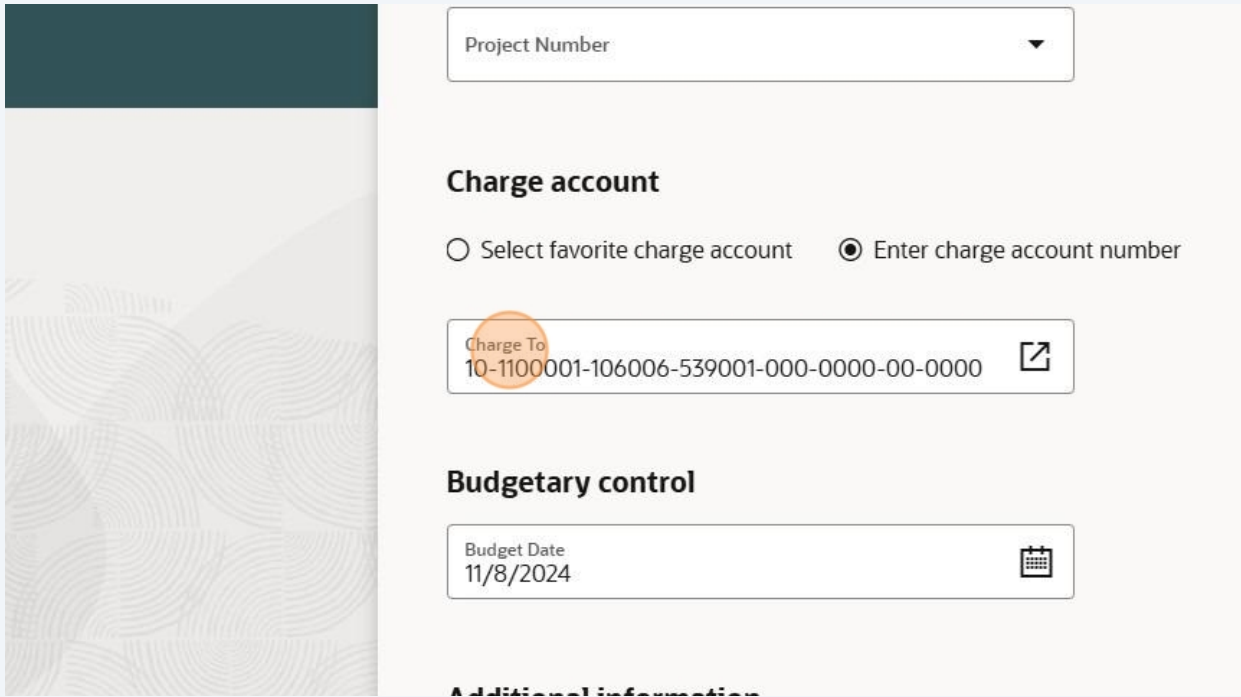**24**   The new Charge Account is set for this transaction

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

ⓘ   Tip! Below is another option for entering the transaction.

25 Click the "square-arrow" icon

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

Project Number ▼

Charge account

○ Select favorite charge account   ● Enter charge acc

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

Budgetary control

Budget Date
11/8/2024

Additional information

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

REQ010000000192
Requisition

☐ Urgent

Pro

Pro

Search for combination

(Entity) (Fund) (Department) (Account) (Program) (Activity) (InterCo) (Future)

Cha

○ S

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
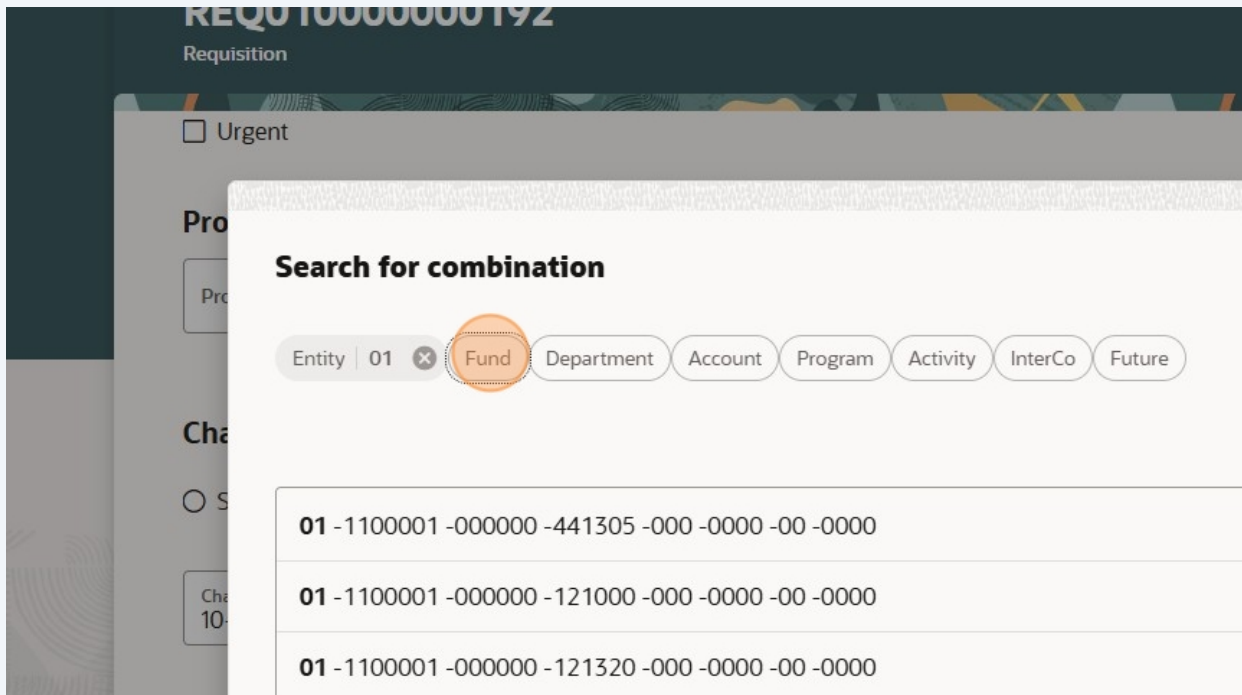
28 Click "Department" and search by department number or name
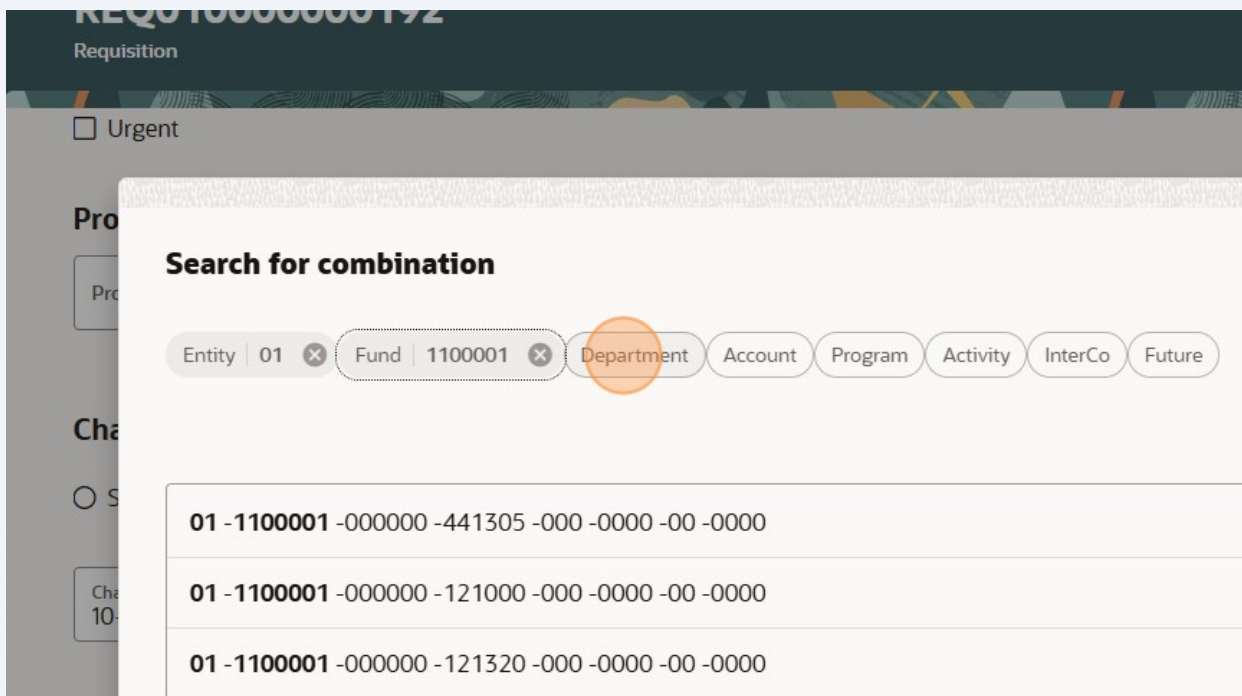
29 Click "Account" and search by account number or name

for combination

01 ⊗ Fund | 1100001 ⊗ Department | 011415 ⊗ Account Program Activity InterCo Future

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

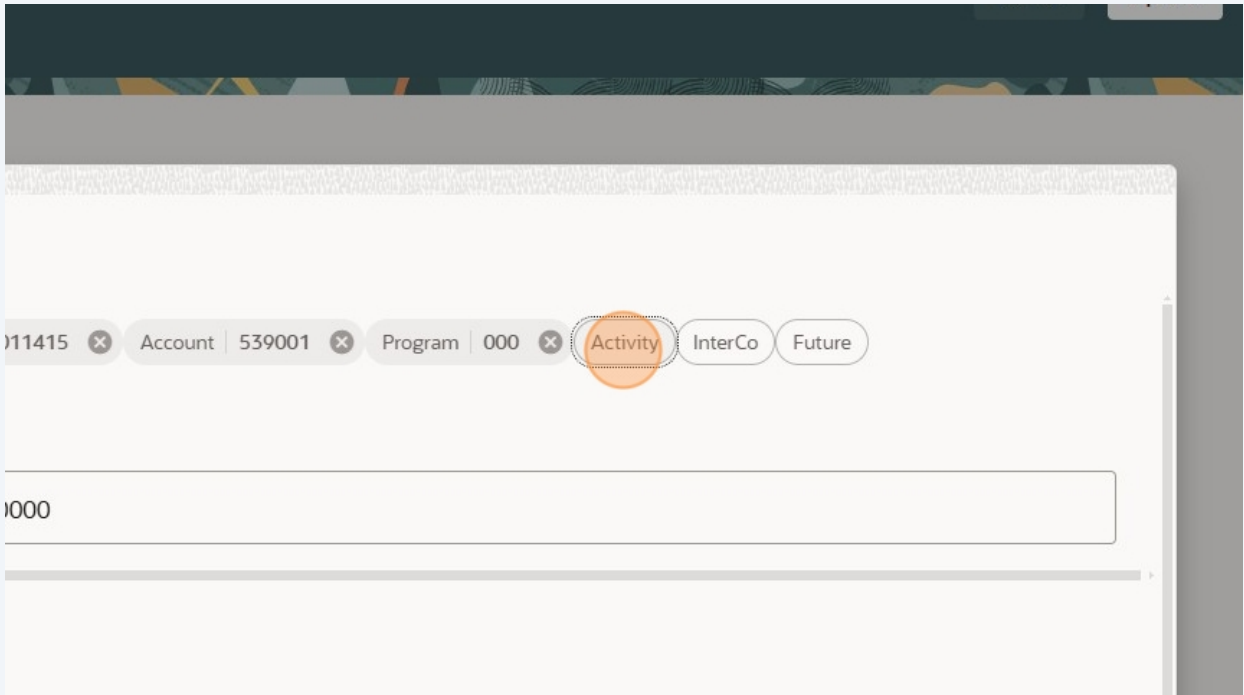00001 -**011415** -100000 -000 -0000 -00 -0000

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

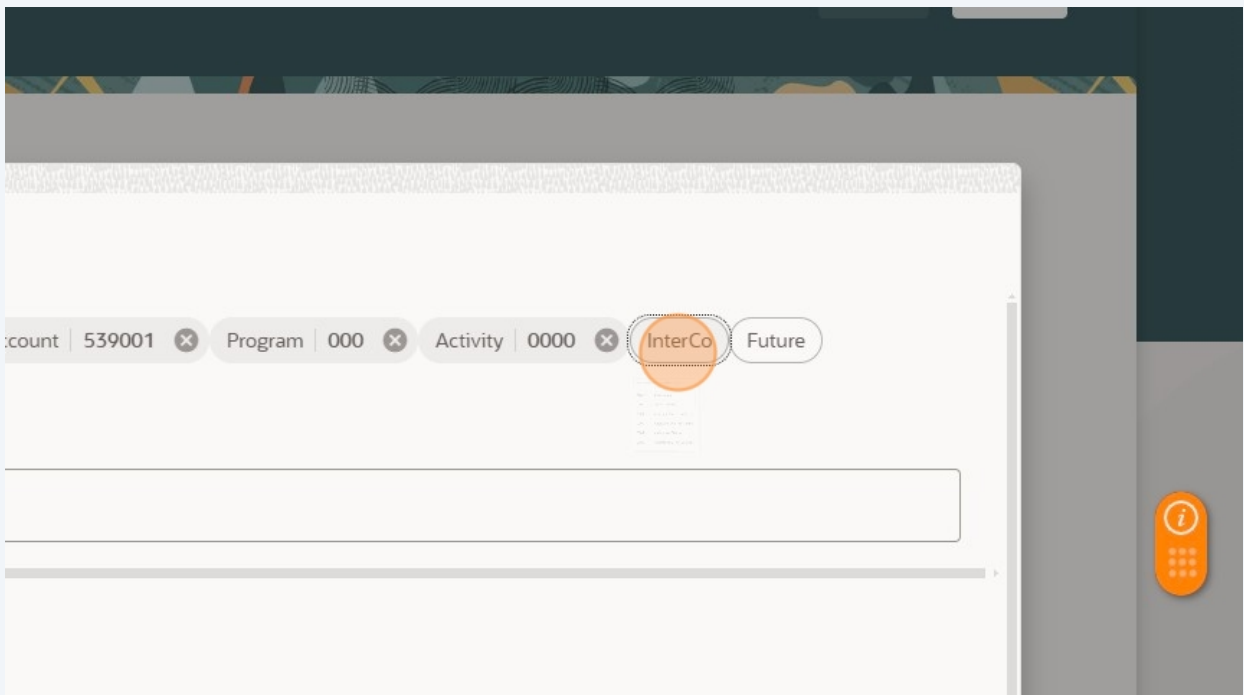**30** Click "Program" and search by program number or name

⊗ Department | 011415 ⊗ Account | 539001 ⊗ Program Activity InterCo Future
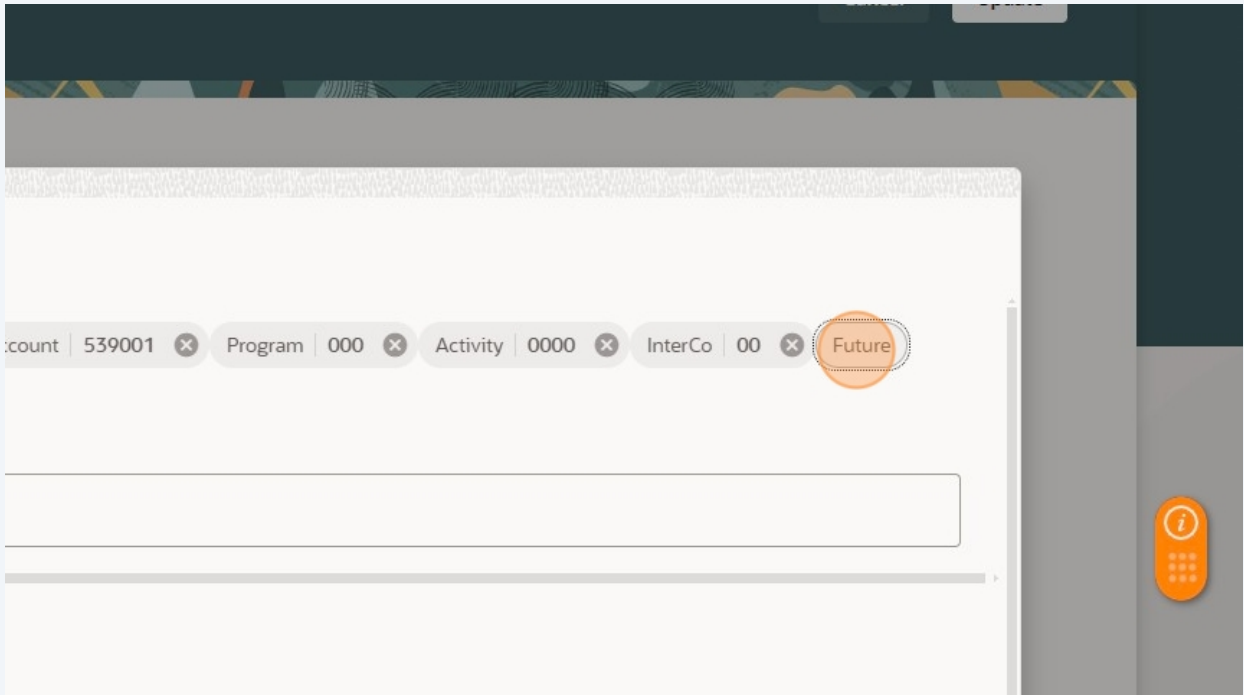
1 -000 -0000 -00 -0000

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

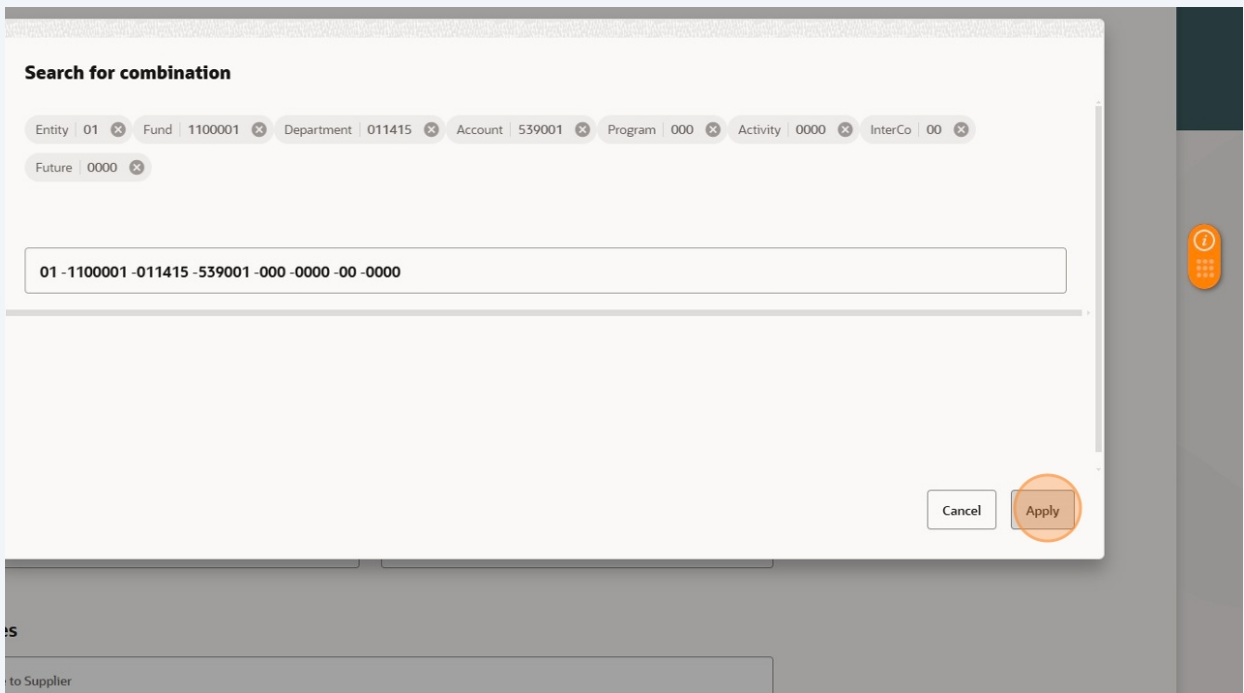**32** Click "InterCo" and search by interco number or name

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

34 Click "Apply"

Search for combination

Entity | 01 ⊗ Fund | 1100001 ⊗ Department | 011415 ⊗ Account | 539001 ⊗ Program | 000 ⊗ Activity | 0000 ⊗ InterCo | 00 ⊗
Future | 0000 ⊗

01 -1100001 -011415 -539001 -000 -0000 -00 -0000

Cancel   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 ▼

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36 Scroll down and click "Requisition Type"

Budgetary control

Budget Date
11/5/2024 📅

Additional information

Requisition Type
                                    Bill-to Location
                    Required

Notes

Note to Supplier

37 Click "Purchases made against a negotiated UT contract"

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

Drag and Drop
Select or drop files here.

URL

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

ⓘ 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.

Requested Delivery Date
11/12/2024

Enter a date on or after 11/5/2024.

39 Click "Update" to save

Cancel   Update

(i) 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 REQ010000000180

Actions ▾   Submit

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

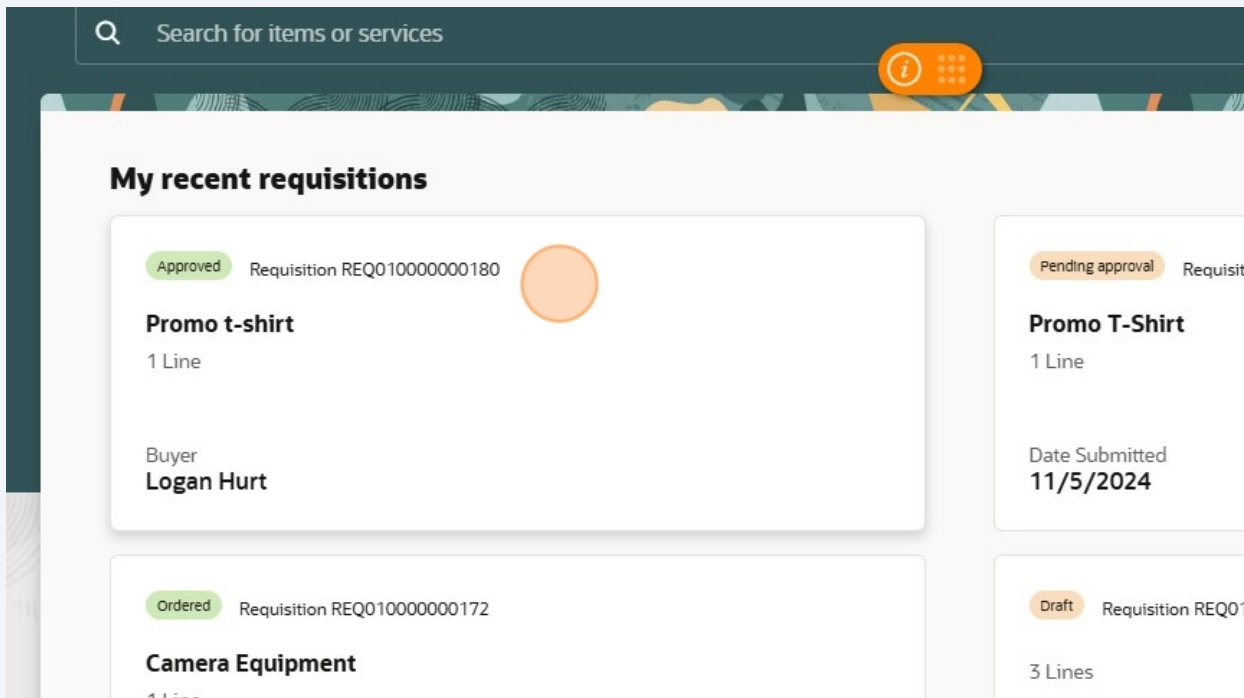🖥 Self Service Procurement   📋 My Requisitions   🛒 Cart ①

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40   Click "Submit"

Actions ▾   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.