## FSSA Administrative Services Contact: Mike Huth jonathan.huth@fssa.in.gov

#### Step 1. Receive recommendation from Ricoh.

The first step in the Ricoh recommendation process is to receive a recommendation on what products are suitable for your location from Ricoh. In order to do this you must contact or speak with one or both of the following:

Chris Johnson, Government Accounts Manager, Indiana

317-329-6088 Chris.johnson@ricoh-usa.com

Phil Napariu, Senior Technology Specialist

317-329-6121 Phil.napariu@ricoh-usa.com

Chris Johnson and Phil Napariu will work with you to determine what machines, features, and monthly volume of copies will suit the specific needs at your location. They will send you an email or a document with the specific part and item numbers that will be used to create the requisition. The recommendation will generally look something like this:

Recommended Unit						
Band 4 Color - Ricoh MPC4504ex (45 PPM) Copy/Print/Scan/Fax w/Staple Finisher, Enhanced Locked Print, Additional Paper Tray (2 x 1,000) and Network Install						
Item ID: MPC4504EX-C*19156269						
Product Components						
<ul> <li>ESP XG-PCS-15D</li> <li>BRIDGE UNIT BU3070</li> <li>MP C4504EX</li> <li>FAX OPTION TYPE M20</li> <li>LCIT PB3260</li> <li>FINISHER SR3210</li> <li>CONFIGURE ASSEMBLY FOR RICOH MPC4504EX</li> <li>MPC4504EX STARTUP SUPPLIES</li> </ul>						
48 Month Lease\$ 127.23 / monthB&W Service\$ .0055 / B&W impressionsColor Service\$ .04 / color impression						
Phil Napariu Senior Technology Specialist						
RICOH USA, INC. 6325 Digital Way, Suite 400 Indianapolis, IN 46278 Office: 317-329-6121						

Going forward in this guide the above recommendation will be the example used, but the details of your specific recommendation should be used when creating your own purchase requisition.

You will also need to have an estimate of how many B&W and/or Color copies your machine will use each month. Work with Mike Huth to determine your estimated monthly usage. For this example we will use 2000 copies for both B&W and Color each month.

## Step 2. Create normal requisition in PeopleSoft.

The next step is to begin creating a requisition in PeopleSoft Financials as you would for any other requisition. In PeopleSoft under eProcurement select Create Requisition.

ORACLE		
Favorites Main Menu >	eProcurement > Create Requisition	
Create Requisition	Buyer Center           Create Requisition	÷
Specify Busines	Manage Requisition Approvals	
*Business Unit:	My Profile	
*Requester:	Procurement Training & Resourc	
ОК		

Enter your Business Unit and Requester ID, and click OK.

ORACLE								
Favorites Main Menu > eProcurement > Create Requisition								
Create Requisition	Create Requisition							
Specify Business Unit and Requester								
*Business Unit:	00405 🔍	Family & Social Svcs Admin						
*Requester:	J339874 🔍	Huth, Jonathan-00405						
ОК								

Creating internal requisitions for Ricoh machines must be done in a specific way in order to properly order, receive, invoice, and pay Ricoh in future fiscal years. Each Ricoh lease is for 48 months (4 years) spanning 4 or 5 fiscal years depending on the start date, and the requisition will contain a line for each component of the machine for each fiscal year. For example, a complete Ricoh requisition for one machine (B&W and Color copies or impressions) that begins on 2/1/2018 will have the following lines:

Line 1 Ricoh Machine 4 MON FY 18

Line 2 Add-ons (such as stapler or hole punch, if any) 4 MON FY 18

Line 3 B&W Impressions FY 18

Line 4 Color Impressions FY18

Line 5 Ricoh Machine 12 MON FY 19

Line 6 Add-ons (if any) 12 MON FY 19

Line 7 B&W Impressions FY 19

Line 8 Color Impressions FY 19

Line 9 Ricoh Machine 12 MON FY 20

Line 10 Add-ons (if any) 12 MON FY 20

Line 11 B&W Impressions FY 20

Line 12 Color Impressions FY 20

Line 13 Ricoh Machine 12 MON FY 21

Line 14 Add-ons (if any) 12 MON FY 21

Line 15 B&W Impressions FY 21

Line 16 Color Impressions FY 21

Line 17 Ricoh Machine 8 MON FY 22

Line 18 Add-ons (if any) 12 MON FY 22

Line 19 B&W Impressions FY 22

Line 20 Color Impressions FY 22

**Note**: As of 1/1/2018 Mike Huth creates the Ricoh purchase orders from the purchase requisition you create, so he can assist you in setting up the requisition at any step of the process.

One the first page of Create Requisition you should add a Requisition Name that references Ricoh and conforms to your department policies on naming requisitions, add Vendor "0000005509," Location "000004," and the appropriate Ship To and Location for your office.

ORACLE							
Favorites Main Menu > eProcurement > Create Requisition							
Create Requisition							
I. Define Requisition         2. Add Items and Services         3. Review and Submit							
Specify requisition name, request	er, and other information that applies to the entire requisition.						
Business Unit:	00405 Q Family & Social Svcs Admin						
*Requester:	J339874 Q Huth, Jonathan-00405						
Requisition Name:	W353 Ricoh Lease 2/15/18 Priority: Medium V						
🔻 Line Defaults 👔							
Note: The defaults specified be	elow will be applied to requisition lines when there are no predefined values for these fields.						
Vendor: 0000005509	Q Vendor Location: 000004 Q						
Buyer:	Category: Q Unit of Measure: Q						
Shipping Defaults							
Ship To: 405FSSA17	Q Modify Onetime Address						
Due Date:	B Attention:						
Accounting Defaults	Personalize   Find   🖾   🛗 First 🚺 1 of 1 🖸 Last						
Chartfields1 <u>D</u> etails <u>A</u> s	sset Information						
Location GL Unit	Fund Account Program Dept Bud Ref PC Bus Unit Project						
405FSSA17 Q 00405							
<	>						
Continue							

Once those are entered click on "2. Add Items and Services."

ORACLE								
Favorites Main Menu >	eProcurement >	Create Requisition						
	•							
Create Requisit	ion							
🔒 1. Define Requ	isition	2. Add Item	s and Services	=	3. Review an	d Submit		
Specify requisition name, i	equester, and other i	information that applies to	the entire requisition					
Business Unit:	00405	Family & Social Svcs A	dmin					
*Requester:	J339874		🔍 Huth, Jonatha	n-00405				
Requisition Name:	Ricoh New L	ease 405 2-15-18			Priority:	Medium	$\sim$	
🔻 Line Defaults 🕜	▼ Line Defaults 👔							
Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.								
Vendor: 000000	05509	Vendor Location:	000004	Q				
Buver:	0	Category:		Q	Unit of Measure:		Q	

# Step 3. Enter Ricoh Punchout.

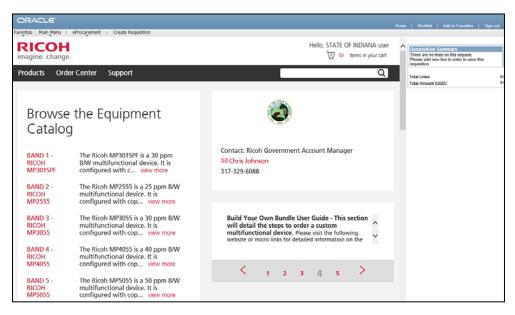
Under "2. Add Items and Services" click on the "Web" tab.

ORACLE		
Favorites Main Menu > ePro	curement > Create Requisition	
<b>Create Requisition</b>		
1. Define Requisitio	n 🔤 🖕 2. Add Items and Services	📑 <u>3. r</u>
Add lines to the requisition, speci Search:	ifying the information necessary to procure each item or servi	ce.
Catalog <u>F</u> avorites <u>T</u> err	nplates Forms Web Special Request	
Browse Catalog 👔		
*Select a catalog:	All Items UNSPSC V	<ul> <li>Choose from av dropdown list</li> <li>Navigate catego</li> <li>View items in a category name</li> <li>Use the checkbo to search below</li> </ul>

Then click on "Ricoh, USA."

ORACLE						
Favorites N	Main Menu > eProcurement >	Create Requisition				
Create	Requisition					
<mark>_</mark> * 1.1	Define Requisition	E 2. Add Items and Services	ew and Submit			
Add lines to Search:	the requisition, specifying the infor	mation necessary to procure each item or service.	Search			
<u>C</u> atalog		rms Web Special Request				
Direct Mer	chants 🕐	Personalize   Find   🗖   🛗 First 🚺 1-8 of 8 🕨 Last				
Logo	Merchant	Description				
MIAPSAN	Staples	Office Supplies, Inkjet Cartridges, and Toner				
MAPA	NAPA					
	Hewlett Packard	IT Hardware				
RICOH	Ricoh, USA	Multifunctions, Scanners & Faxes				
Fastenal	Fastenal					
Circepton R.	<u>Graybar</u>					
STRACTOR MARKET	Staples Facility	MRO – Paper/Janitorial Products and Dispensers				
KimbalfOffice	Kimball Office					
Review and	Submit					

You should now be in the Ricoh Punchout, and your screen should look like the image below. If it does not, your web browser will not allow you to properly use the punchout. You will either need IT to change the settings on your web browser, or you will need to use an alternate web browser such as Firefox or Chrome.



## Step 4. Search for Machine/Product.

In the upper right side of the Ricoh Punchout is a search bar where you will search for every line to add to the req. For this example we will be creating a requisition for the following product:

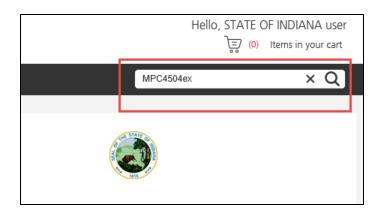
Ricoh MPC4504ex \$127.29 / month

No add-ons

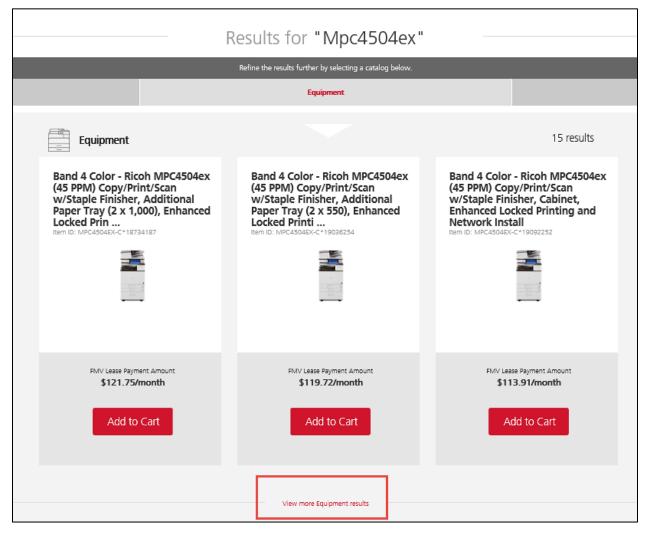
B&W Service \$.0055

Color Service \$.04

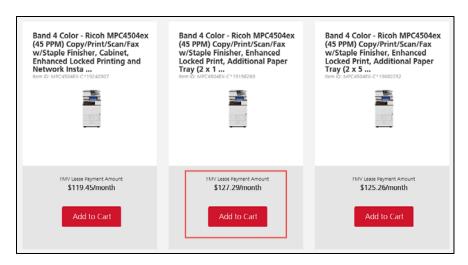
In the search bar type in the name of the Ricoh product and click search. In this example we will search for "MPC4504ex."



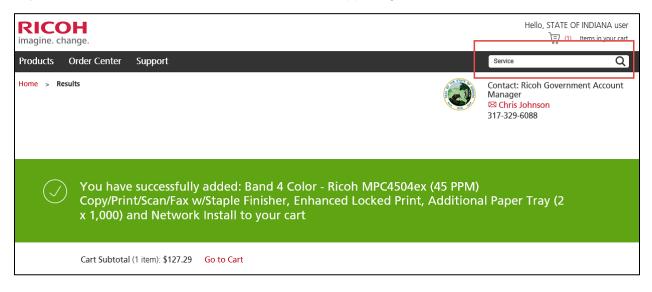
The punchout will then return three results. If you see the correct machine at the correct price (\$127.29 in this example) click on "Add to Cart." If you do not see the correct price listed, at the very bottom click on "View more Equipment results."



Once you have found the correct product at the correct price, click "Add to Cart."

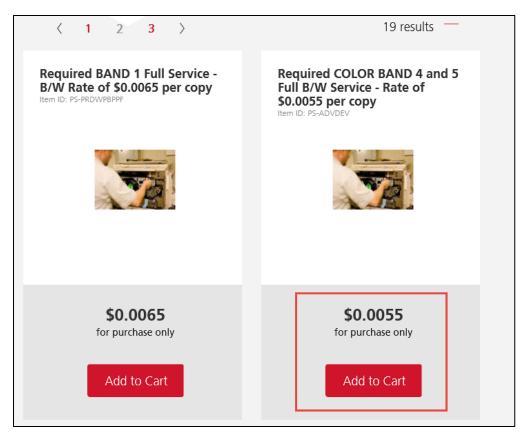


Clicking "Add to Cart" will bring you to a screen that says you've successfully added the product to your cart. Next use the same search bar in the upper right to search for "Service."

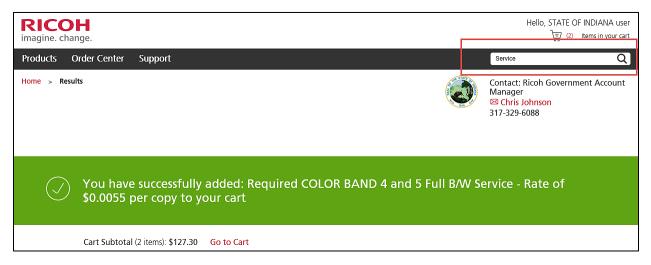


#### Step 5. Search for B&W/Color Service.

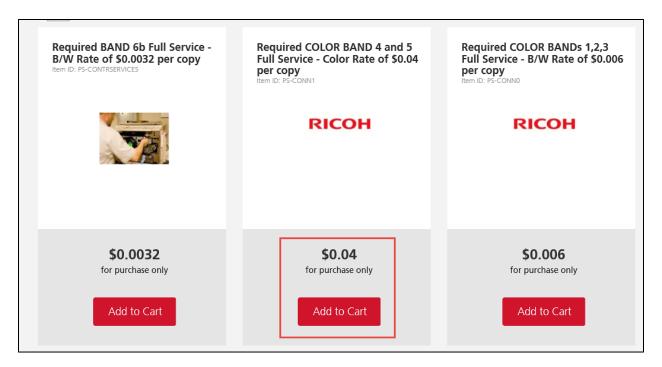
Searching for "Service" will bring up both B&W and Color copy service at different rates. Look for the B&W Service at the quoted rate, and remember to click "View more Equipment results" if necessary. In this example we will find B&W copies at \$0.0055.



After you add that to the cart, it will return you to the screen after you searched for "Service."



Look for your Color service at the recommended rate. In this example we will look for \$0.04. If your requested machine is only B&W, then skip adding Color service.



Add this to your cart and you have now completed the first fiscal year of your requisition. You should have three items in your cart at this point (four items if your machine had an additional add-on such as a stapler or hole punch).

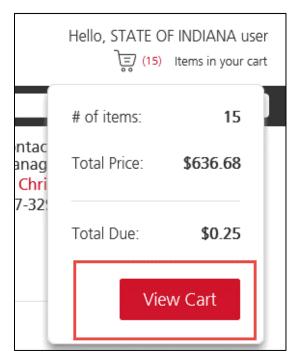
of \$0.04 per copy to your cart						
Cart Subtotal (3 items): \$127.34	Go to Cart					

#### Step 6. Repeat steps for four more fiscal years.

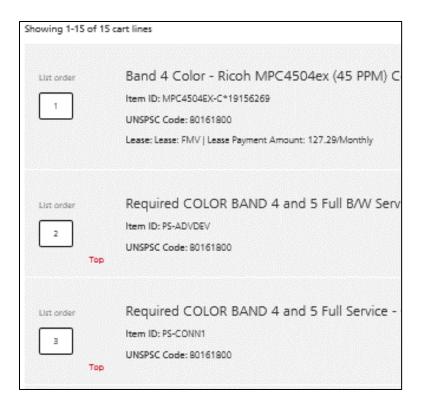
You have added a machine plus the B&W and/or Color service for the first fiscal year of your requisition (in this example FY 18), and you must now complete Steps 4 and 5 for each remaining fiscal year. In this example we will add the machine, B&W service, and color service a total of four additional times (FYs 19 - 22). When complete you should have either 15 items in your cart (if your recommended machine does not have an add-on such as stapler or hole punch) or 20 items in your cart (if an add-on is included) at the upper right corner of the screen.



Hover your mouse over the cart icon, then click on View Cart.



You will now be able to see all of the lines of your cart, and his is your chance to make sure you have the correct product and rates in each line. You also can change the order of the lines here if necessary.



If everything is correct, click "Submit" at the bottom to bring these lines to the requisition you created.



You will know your lines transferred to the requisition properly if on the right side of the screen you see a summary of all lines.

ORAC	cle:					Heme Workint Add to Favo	ontes   Sign out
avorites 1	Main Menu > eProcurement	> Create Regulation					party and a second second second
1000					? Hele		
Craata	Requisition					Requisition Summary	100 100 10
			4000			Description	Qty UOM
1.	Define Requisition	2. Add Items and Services	3. Review and 1	Submit		RICOH: Band 4 Color - Rico	1 MON
	Records March 1996 Barris	nformation necessary to procure each item or service.				RICOH: Required COLOR BAND	1 EA
Search:	the requisition, specifying the i	nformation necessary to procure each item or service.	0	Search		RICOH Required COLOR BAND	1 EA
Jouren.	a contract of the second second second		· · · ·	Swarch		RICOH: Band 4 Color - Rico RICOH: Reguired COLOR BAND	1 MON 1 EA
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and an and a second second		The Western	TELEVISION NOTICE AND ADDRESS			RICOH Required COLOR BAND	1 EA
Logo	Merchant	Description				RICOH Required COLOR BAND	1 EA
Taxan I	Staples	Office Supplies, Inkjet Cartridges, and Toner				RICOH: Band 4 Color - Rico	1 MON
		A CONTRACTOR OF A CONTRACTOR O				RICOH: Required COLOR BAND	1 EA
-Hapa	NAPA					RICOH: Required COLOR BAND	1 EA
(D)	Hewlett Packard	IT Hardware				RICOH Band 4 Color - Rico	1 MON
	and a second					RICOH: Required COLOR BAND RICOH: Required COLOR BAND	1 EA 1 EA
RICOH	Ricoh, USA	Multifunctions, Scanners & Faxes				RICON, Required COLOR BAND	1 0
FASTENAL	Eastenal					Total Lines	15
Graphafi	Gravbar					Total Amount (USD).	636.70
1111 1111	Staples Facility	MRO – Paper/Janitorial Products and Dispensers					
Rebailing	Kimball Office				L		
Review and	Quinnit						

# Step 7. Adjust requisition line amounts.

Next you will need to adjust the quantities and chart fields. Start by clicking on "3. Review and Submit."

ORACLE							
Favorites Main Menu > eProcurement > Create Requisition							
	Requisition	2. Add Items and Services	3. Review and Submit				
		mation necessary to procure each item or service.	S. REVIEW and Submit				
Search:	ule requisition, specifying the into	mation necessary to procure each tern of service.	Search				
<u>C</u> atalog	Eavorites Templates Fo	rms Web Special Request					
Direct Mer	chants 🕐	Personalize   Find   🗖   🛗 First 🚺 1-8 of					
Logo	Merchant	Description					
Service and	Staples	Office Supplies, Inkjet Cartridges, and Toner					
	NAPA						
	Hewlett Packard	IT Hardware					
RICOH	Ricoh, USA	Multifunctions, Scanners & Faxes					
FASTENAL	Fastenal						
Grayball.	<u>Graybar</u>						
STREET, South	Staples Facility	MRO – Paper/Janitorial Products and Dispensers					
KimbalfOffice	Kimball Office						
Review and	Submit						

After clicking "3. Review and Submit" you will see all of your lines with a Quantity of 1.

ORACLE								
Favorites Main Menu > eProcurement > Create Requisition								
Create Requisition								
1. Define Requisition 2. Add Items and Services 3. Review and Submit								
Review the de	tails of your requisition, r	nake any necessary changes, and su	bmit it for approval.					
Business Uni	t: 00405	Family & Social Svcs Admin			Priority:	Medium 🗸		
*Requester:	J33987		Huth, Jonathan-004	05	Phoney.	Medium 🗸		
Requisition N	ame: Ricoh N	lew Lease 405 2-15-18						
Requisition L	ines 🕐							
Line	Description	Vendor Name	<u>Quantity</u>	<u>UOM</u>	Price	Total		
▶ 🗌 1	RICOH: Band 4 Color	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Month	127.29000	127.290		
▶ □ 2	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Each	0.00550	0.010		
▷ 🗌 3	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Each	0.04000	0.040		
▶ □ 4	RICOH: Band 4 Color	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Month	127.29000	127.290		
▷ □ 5	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Each	0.00550	0.010		
▶ □ 6	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Each	0.04000	0.040		
▷ □ 7	RICOH: Band 4 Color	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Month	127.29000	127.290		
₿ 🗌 8	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	1.0000	Each	0.00550	0.010		

On this screen you will need to change the Months for the machine and the total number of copies on the corresponding lines. Remember that the first 3 lines (4 if you have an add-on) are a set for the first fiscal year, the next 3 lines are for the second fiscal year, etc. In the example used for this guide the PO starts on 2/1/2018. The first fiscal year set of lines will run from 2/1/18 to 5/31/18 (4 months), and the B&W and Color impressions lines will be 2000 copies per month (8000 copies per line).

Line	Description	Vendor Name	<u>Quantity</u>	<u>UOM</u>	<u>Price</u>	<u>Total</u>
▷ 🗌 1	RICOH: Band 4 Color -	RICOH USA IN IKON OFFICE SOLUTIONS	C FKA 4.0000	Month	127.29000	509.160
▷ □ 2	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKO OFFICE SOLUTIONS	N 8,000.0000	Each	0.00550	44.000
▷ □ 3	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKO OFFICE SOLUTIONS	N 8,000.0000	Each	0.04000	320.000

Now the first fiscal year is set with the correct quantities. Repeat the same steps for the remaining fiscal year sets of lines. Remember that the second, third, and fourth sets of fiscal years will be for 12 months. In this example each of those machine lines (Lines 4, 7, and 10) will have 12 months. The impressions lines (Lines 5, 6, 8, 9, 11 and 12) will have 2000 copies times 12 months totaling 24000 each. Lastly, the final fiscal year set of lines (Lines 13, 14, and 15) will have 8 months and 16000 copies.

Line	<b>Description</b>		Vendor Name	<u>Quantity</u>	<u>UOM</u>	<u>Price</u>	Total
▶ 🗆 1	RICOH: Band 4 Color -	Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	4.0000	Month	127.29000	509.160 🖶 🔿
▷ □ 2	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	8,000.0000	Each	0.00550	44.000
▷ □ 3	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	8,000.0000	Each	0.04000	320.000
▷ □ 4	RICOH: Band 4 Color -	Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	12.0000	Month	127.29000	1,527.480
▷ □ 5	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	24,000.0000	Each	0.00550	132.000
▶ □ 6	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	24,000.0000	Each	0.04000	960.000
▷ □ 7	RICOH: Band 4 Color -	Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	12.0000	Month	127.29000	1,527.480
▶ □ 8	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	24,000.0000	Each	0.00550	132.000
▶ □ 9	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	24,000.0000	Each	0.04000	960.000
▷ □ 10	RICOH: Band 4 Color -	Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	12.0000	Month	127.29000	1,527.480
▷ 🗌 11	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	24,000.0000	Each	0.00550	132.000
▶ 🗌 12	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	24,000.0000	Each	0.04000	960.000
▷ 🗌 13	RICOH: Band 4 Color -	Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8.0000	Month	127.29000	1,018.320
▷ □ 14	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	16,000.0000	Each	0.00550	88.000
▷ 🗌 15	RICOH: Required COLOR BAND 4 a		SA INC FKA IKON SOLUTIONS	16,000.0000	Each	0.04000	640.000

Note: This example is for one machine on this requisition. If your requisition will have two or more of the same machine on the requisition, keep the same number of lines but increase the number of months and copies corresponding to how many machines you will have. For example on Line 1 we entered 4 Months because we have one machine needed for the last 4 months of FY 18. If we are requesting two of the same machines for this period of time we would still enter the single line but give it 8 Months. Later on when we receive the invoices from Ricoh we will pay 4 Months from that line against the first machine, and 4 Months from that line against the second machine. If you were to have three of the same machine, you would enter 12 Months, and so on. The same applies to the impressions lines. For two machines, Line 2 would have 16,000 Each instead of 8,000 Each. If you are requesting two or more different machines, then those machines will have to be on separate lines. This example has 15 lines for one machine. If we requested two different models, our requisition would have 30 lines (15 lines for the first machine, and 15 lines for the second).

# Step 8. Adjust requisition line chart fields.

Next you will need to adjust the chart fields for each requisition line. To begin this open each three line set by fiscal year by clicking on the three small arrows to the immediate left of each line.

Requisition Lines 👔						
Line	Description	Vendor Name	Quantity	<u>UOM</u>	<u>Price</u>	Total
▶ 🗆 1	RICOH: Band 4 Color - I	RICOH USA INC FKA IKON OFFICE SOLUTIONS	4.0000	Month	127.29000	509.160
▷ □ 2	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8,000.0000	Each	0.00550	44.000
₽ □ 3	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8,000.0000	Each	0.04000	320.000
▶ □ 4	RICOH: Band 4 Color - I	RICOH USA INC FKA IKON OFFICE SOLUTIONS	12.0000	Month	127.29000	1,527.480
▷ □ 5	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	24,000.0000	Each	0.00550	132.000
▶ □ 6	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	24,000.0000	Each	0.04000	960.000

Once you have clicked the arrow for the first fiscal year set you will see all of the line information.

Requisition Lines 🙀				
Line Description	Vendor Name	Quantity UON	l Etice	Total
<sup> </sup>	IKON OFFICE SOLUTIONS	4.0000 Month	127.29000	509.160 🔤 📿
Consolidate with o	other Reqs Override	Suggested Vendor		
Status: Active *Sh	ee Date: 19 105FSSA17 0 105FSS	Quantity: Modify Onetime Address	4.0000 Price:	127.29000
*Distribute By: Qty	✓ SpeedChart:	Q		
Accounting Lines Chartfields1 Chartfields2 Det	ails Details 2 Asset Information		onalize   Eind   View All   🗖   🕌 idget Information 🛛 💷	Fitst 🚺 1 of 1 🗋 Last
Line Status Dist Type *1	Location Quantity	Percent	Merchandise Amt GL Unit	
1 Open 4	405FSSA28 Q	4.0000 100.0000	509.160 00405	Q + -
COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS other Reqs Override	8,000.0000 Each	0.00550	44.000 <b>B</b> C
Status: Active *Sh	ip To: 405FSSA17 Q athan-00405 SpeedChart:	Quantity: 8, Modify Onetime Address	000.0000 Price:	0.00550
Accounting Lines		Pers	onalize   Find   View All   🏝   🕌	First C 1 of 1 Last
Chartfields1 Chartfields2 Det	ails Details 2 Asset Information		dget Information	
Line Status Dist Type *	Location Quantity	Percent	Merchandise Amt GL Unit	
1 Open 4	405FSSA28 Q 8	000.0000 100.0000	44.000 00405	Q = =
Image: State	RICOH USA INC FKA IKON OFFICE SOLUTIONS other Reqs Override	8,000.0000 Each Suggested Vendor	0.04000	320.000 🔡 📿
Shipping Line: 1 Du	ie Date:	Quantity: 8,	000.0000 Price:	0.04000
Status. Poore	than-00405	Modify Onetime Address		
*Distribute By: Qty	SpeedChart:	٩		
Accounting Lines		Pers	onalize   Eind   View All   🎴   🏙	First 1 of 1 Last
Chartfields1 Chartfields2 Det	ails Details 2 Asset Information	Asset Information 2	dget Information	
Line Status Dist Type *	Location Quantity	Percent	Merchandise Amt GL Unit	
1 Open 4	405FSSA28 Q 8,	000.0000 100.0000	320.000 00405	Q 🕂 🖃

For each of the three lines click on "Chartfields2."

Requisition Lines 👔				
Line Description	Vendor Name	Quantity UOM	Price.	Total
T 1 RICOH: Band 4 Color -	RICOH USA INC FKA IKON OFFICE SOLUTIONS	4.0000 Month	127.29000	509.160 🔤 🖓
Consolidate with o	ther Reqs Override	Suggested Vendor		
Shipping Line: 1 Du	e Date:	Quantity:	4.0000 Price:	127.29000
Status. Astre	ip To: 405FSSA17 Q	Modify Onetime Address		
Attention To: Huth, Jona	than-00405			
*Distribute By: Qty	✓ SpeedChart:	٩		
Accounting Lines			analize   Eind   View All   🗖   🕌	First 1 of 1 D Last
	ils Details 2 Asset Information			
	ocation Quantity	Percent	Merchandise Amt GL Unit	
1 Open 4	05FSSA28	4.0000 100.0000	509.160 00405	Q + =
Z RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8,000.0000 Each	0.00550	44.000 🔡 🖓
Consolidate with o	ther Reqs Override	Suggested Vendor		
Shipping Line: 1 Du	e Date:	Quantity: 8,0	000.0000 Price:	0.00550
Status: Active *Sh	ip To: 405FSSA17 Q	Modify Onetime Address		
Attention To: Huth, Jona	than-00405			
*Distribute By: Qty	✓ SpeedChart:	٩		
Accounting Lines			onalize   Find   View All   🏝   🕌	First 🚺 1 of 1 🖸 Last
	ils Details 2 Asset Information		-	
Line Status Dist Type *L	ocation Quantity	Percent	Merchandise Amt GL Unit	
1 Open 4	05FSSA28 Q 8	,000.0000 100.0000	44.000 00405	Q + -
COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8,000.0000 Each	0.04000	320.000
Consolidate with o	ther Reqs Override	Suggested Vendor		
Shipping Line: 1 Du	e Date:	Quantity: 8,0	000.0000 Price:	0.04000
Status: Active *Sh	ip To: 405FSSA17 Q	Modify Onetime Address		
Attention To: Huth, Jona	than-00405			
*Distribute By: Qty	SpeedChart:	٩		
Accounting Lines		Penz	analize   Eind   View All   🗖   🕌	First 🚺 1 of 1 🖸 Last
Chartfields1 Chartfields2 Deta	ils Details 2 Asset Information	Asset Information 2 But	dget Information	
Line Status Dist Type *1	ocation Quantity	Percent	Merchandise Amt GL Unit	
1 Open 4	05FSSA28 Q 8	.000.0000 100.0000	320.000 00405	Q + -

From here you must make sure that the Account for the machine line is **591010**, and the Account for the impressions lines are **533040**. Under Fund, Program, Dept, PC Bus Unit, Project, and Activity enter the information specific to your location/department. Under Bud Ref enter the fiscal year these three lines are for. In this example, the Bud Ref is 2018. Once complete these three lines will look like this:

	Line	<u>Description</u>		<u>Vendor Name</u>	Quantity	UOM	Price	Total
Þ	⊽ <u>□</u> 1	RICOH: Band 4	4 Color - Ricoh MP	RICOH USA INC IKON OFFICE SOLUTIONS	FKA 4.000	00 Month	127.29000	509.160 📳 🖓
		Consolidat	te with other Reqs		verride Suggested Ven	dor		
	Shipping Li	ine: 1	Due Date:		Quantity:	4.00	00 Price:	127.29000
	Status:	Active	*Ship To:	405FSSA17	C Modify Onetin			
	Attention To	o: Hu	uth, Jonathan-0040	)5				
	*Distribute B		y 🗸	SpeedChart:		]0		
	Accounting	-					ze   Eind   View All   🔤   🕌	First I of 1 D Last
	Chartfields1				Rud Ref			
	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	
	54110	Q 591010 Q	C F6610	219000 Q	2018	00405	405FSSAADMINSTA	9
L	<							1
¢	<sup>7</sup> □ 2	RICOH: Require COLOR BAND		USA INC FKA IKON E SOLUTIONS	8,000.000	00 Each	0.00550	44.000 📳 🖓
			te with other Reqs	_	verride Suggested Ven	dor		
ſ	Shipping Li		Due Date:		Quantity:		00 Price:	0.00550
	Status:	Active	*Ship To:	405FSSA17	Modify Onetin		10	0.00000
	Attention To		uth, Jonathan-0040					
	*Distribute E	By: Qty	· · ·	SpeedChart:	[	0		
				000000000000000000000000000000000000000			2.	
	Accounting Chartfields1		Details Det	tails 2 Asset Inform	mation Asset Informatio		ze   Eind   View All   🖉   🎬 armation	First K 1 of 1 D Last
	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	
	54110	Q 533040 Q	F6610 Q	219000	2018	0, 00405	405FSSAADMINSTA	Q
	<				2010	~ <u></u>		>
Ļ		DIOOL: Damin			0.000.00/		2.04000	
Y	<sup>7</sup> □ 3	RICOH: Require		USA INC FKA IKON E SOLUTIONS	8,000.000	00 Each	0.04000	320.000 🔤 🖓
		Consolidat	te with other Reqs	5 Ov	verride Suggested Ven	dor		
	Shipping Li	ine: 1	Due Date:		Quantity:	8,000.000	00 Price:	0.04000
	Status:	Active	*Ship To:	405FSSA17	Q Modify Onetin	ne Address		
	Attention To	o: Hu	uth, Jonathan-0040	)5				
	*Distribute E	By: Qty	y ~	SpeedChart:		٩		
	Accounting	-					ze   Eind   View All   🗖   🕌	First 🚺 1 of 1 🕨 Last
	Chartfields1			tails 2 Asset Inform				
	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	
	54110	Q 533040 Q	F6610 Q	219000 🔍	2018	00405	405FSSAADMINSTA	Q

Close these three lines by clicking on the small arrow on the left side again. Now your first fiscal year lines (Lines 1, 2 and 3 in this example) are complete. The remaining sets of lines will now need the same information entered, so open up the next fiscal year lines (in this example Lines 4, 5, and 6) by clicking on the small arrows on the left.

Requisition I	Lines 👔			
Line	Description	<u>Vendor Name</u>	Quantity	UOM
▶ 🗆 1	RICOH: Band 4 Color - Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	4.0000	Month
▷□2		ISA INC FKA IKON SOLUTIONS	8,000.0000	Each
₽ 3		ISA INC FKA IKON SOLUTIONS	8,000.0000	Each
▷□4	RICOH: Band 4 Color - Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	12.0000	Month
▷ □ 5		ISA INC FKA IKON SOLUTIONS	24,000.0000	Each
▶ 🗆 6		ISA INC FKA IKON	24,000.0000	Each

Once these lines are open complete the same process as the first set of lines. Remember that the machine lines need to have Account 591010 while the impressions lines need to have Account 533040 entered. Also remember that this set of lines will be for the next fiscal year, so set Bud Ref to that correct year. In this example Lines 4, 5, and 6 will have a Bud Ref of 2019, etc.

#### Step 9. Complete the requisition.

You now have only a few small steps to complete the requisition. Below the lines of the requisition set "\*Requisition Type" to QPA.

		0020110110	
▷ 🗌 14	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	
▷ 🗌 15	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	C
Select	All / Deselect All		
L 📴	Add to Favorites	Add to Template(s)	
*Re	quisition Type: QPA	×	
Comr <mark>liants</mark>	•		
Send to V	endor	Show at Receipt Showr	۱a
Q (	Check Budget	R Pre-Check Budget	
S S	ave & submit	Save & preview approvals	

Next you will need to add a justification comment that includes the 7 Ricoh Justification Questions with your answers, plus additional requisition and location information. Start by expanding the Comments area by clicking the small arrow on the right side of the comments box.

*Requisition Type: QPA	V
Comments 😰	
Send to Vendor	□ Show at Receipt □ Shown at Voucher ☑ Approval Justification
💭 Check Budget	Re-Check Budget
Save & submit	Save & preview approvals Cancel requisition Find more items

You will now have a much larger area to type in. Copy and paste the following text into this box:

**Delivery Address:** 

BU: Previous PO: Location: Number of machines: Point of Contact:

Justification Questions/Answers for Ricoh MFD's

1. Was Chris Johnson, Ricoh Account Manager, or Phil Napariu, Senior Technology Specialist involved in recommending this requested device? (Yes/No)

2. Identify make and model of all requested devices. (If printer-include whether it will be used as a networked device or as a personal desktop. If personal desktop printer-include reason.)

3. Identify all functions that the equipment will perform (i.e. Print, Copy, Fax, Scan, Color)

4. Identify all physical addresses where the equipment will be delivered for usage (align device to address).

5. Identify the average total monthly volume this requested device will fulfill.

6. Identify all make and models that will be eliminated as a result of the new devices,

while identifying whether the eliminated devices are lease returns or owned.

7. Include additional comments that would be important for the IDOA reviewer.

**Periods of Performance:** 

Note that the Point of Contact should be the person at the specified location with whom Ricoh can coordinate delivery. Once you have added the above text into the comment box, provide the information and answer the justification questions. In the example used throughout this guide, the comments look like:

# Delivery Address: Rm W353 (Contract Management) 402 W. Washington St Indianapolis, IN 46207

BU: 00405

Previous PO: 13555331 Location: FSSA Contract Management W353 Number of machines: 1 Point of Contact: (Contact Name) (Contact Phone Number)

Justification Questions/Answers for Ricoh MFD's

1. Was Chris Johnson, Ricoh Account Manager, or Phil Napariu, Senior Technology Specialist involved in recommending this requested device? (Yes/No) Yes 2. Identify make and model of all requested devices. (If printer-include whether it will be used as a networked device or as a personal desktop. If personal desktop printerinclude reason.) Networked MPC4504ex

3. Identify all functions that the equipment will perform (i.e. Print, Copy, Fax, Scan, Color) Print, Copy, Fax, Scan, Color, w/Staple Finisher

4. Identify all physical addresses where the equipment will be delivered for usage (align device to address). 402 W. Washington St Indianapolis, IN 46207 FSSA/DMHA W353 (Contract Management)

5. Identify the average total monthly volume this requested device will fulfill. 2000 B&W, 2000 Color

6. Identify all make and models that will be eliminated as a result of the new devices, while identifying whether the eliminated devices are lease returns or owned. Replacing Ricoh MPC4502 (Lease Expired 9/1/2017).

7. Include additional comments that would be important for the IDOA reviewer. This lease will serve 20 employees in the contract management office and is the only resource available.

Periods of Performance: 2/1/18-6/30/18 7/1/18-6/30/19 7/1/19-6/30/20 7/1/20-6/30/21

7/1/21-1/31/22

Click "Return."

ſ	Requisitions		1
[	?	Help	
	BU: 00405		
	Previous PO: 13555331 Location: FSSA Contract Management W353		
	Number of machines: 1		
	Point of Contact: Jonathan Huth 317-232-1146		
	Justification Questions/Answers for Ricoh MED's		
	1. Was Chris Johnson, Ricoh Account Manager, or Phil Napariu, Senior Technology Specialist involved in recommending this requested device? (Yes/No) Yes		
	<ol> <li>Identify make and model of all requested devices. (If printer-include whether it will be used as a networked device or as a personal desktop. If personal desktop printer-include reason.) Networked</li> </ol>		
	MPC4504ex		
	3. Identify all functions that the equipment will perform (i.e. Print, Copy, Fax, Scan, Color) Print, Copy, Fax, Scan, Color, w/Staple Finisher		
	4. Identify all physical addresses where the equipment will be delivered for usage (align device to address).		
	402 W. Washington St Indianapolis, IN 46207 FSSA/DMHA W353 (Contract Management) 5. Identify the average total monthly volume this requested device will fulfill. 2000 B&W, 2000 Color		
	6. Identify all make and models that will be eliminated as a result of the new devices, while identifying		
	whether the eliminated devices are lease returns or owned. Replacing Ricoh MPC4502 (Lease Expired 9/1/2017).		
	7. Include additional comments that would be important for the IDOA reviewer. This lease will serve 20		
	employees in the contract management office and is the only resource available.	$\sim$	
	Periods of Performance		
	Return		

Underneath these comments, make sure "Approval Justification" is checked.

*Requisition Type: QPA	V V		
Comments 🕜			
BU: 00405			
Previous PO: 13555331			
Send to Vendor	Show at Receipt Shown	at Voucher	Approval Justification
💭 Check Budget	R Pre-Check Budget		
Save & submit	Save & preview approvals	× Cancel requis	sition Find more items

After everything has been entered correctly and you have checked for accuracy, click "Save & Submit." Budget Check will be taken care of after your requisition has been reviewed.

*Requisition Type: QPA		~		
Comments 🕐				
BU: 00405 Previous PO: 13555331				
Send to Vendor	Show at Receipt	🗌 Shown a	at Voucher	Approval Justification
💭 Check Budget	Re-Check Budge	et		
🖳 Save & submit	Save & preview app	provals	× Cancel requisit	tion Find more items

You have now submitted the requisition for a new Ricoh lease. Contact Mike Huth at <u>jonathan.huth@fssa.in.gov</u> and give him the requisition number for review. Once your requisition has passed all approvals a purchase order will be entered and submitted to Ricoh. Ricoh will then make contact with you to set a delivery date and time.

If you have any questions or run into problems contact Mike Huth, or Garry Lear if Mike is not available.