RICOH Requisition Guide
Copiers, Printers, Fax Machines, Scanners, and Multifunction Devices
Original 2/16/2018   Revision 2/22/2018

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

- ESP XG-PCS-15D
- BRIDGE UNIT BU3070
- MP C4504EX
- FAX OPTION TYPE M20
- LCIT PB3260
- FINISHER SR3210
- CONFIGURE ASSEMBLY FOR RICOH MPC4504EX
- MPC4504EX STARTUP SUPPLIES

48 Month Lease	$ 127.23 / month
B&W Service	$ .0055 / B&W impressions
Color 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.
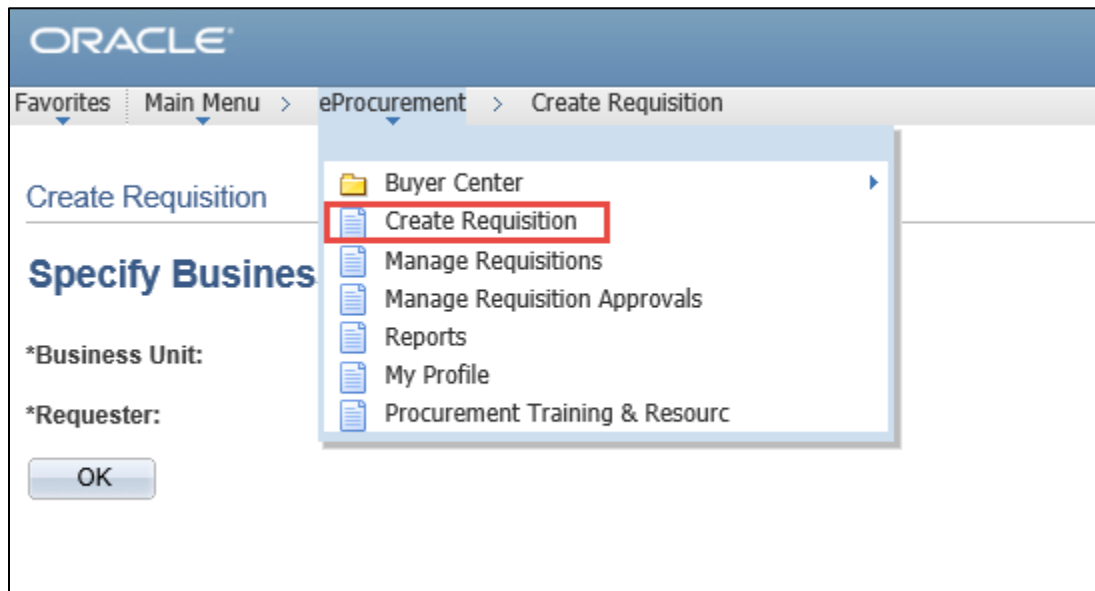
Enter your Business Unit and Requester ID, and click OK.

2

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.

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

Step 3. Enter Ricoh Punchout.

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

Then click on "Ricoh, USA."

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.
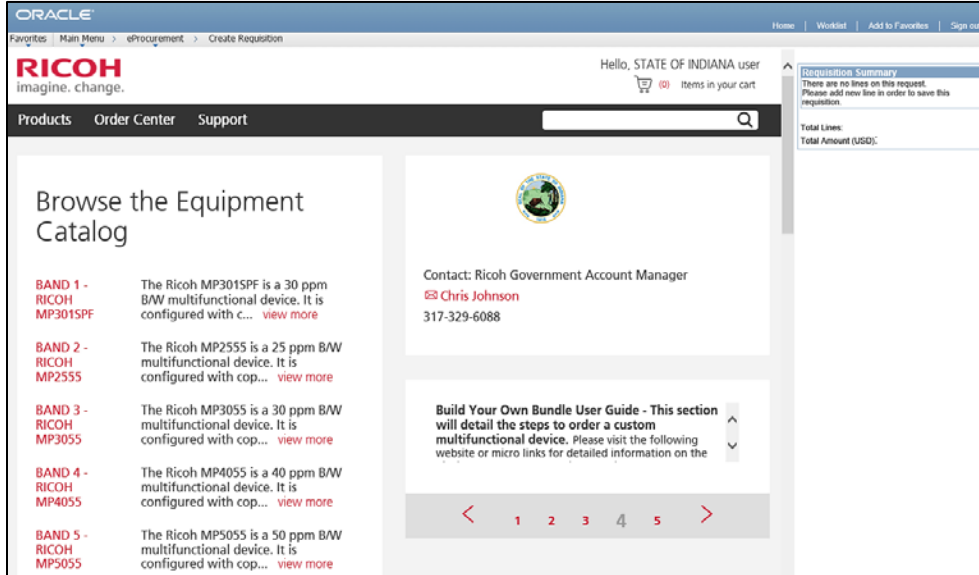
Step 4. Search for Machine/Product.

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:
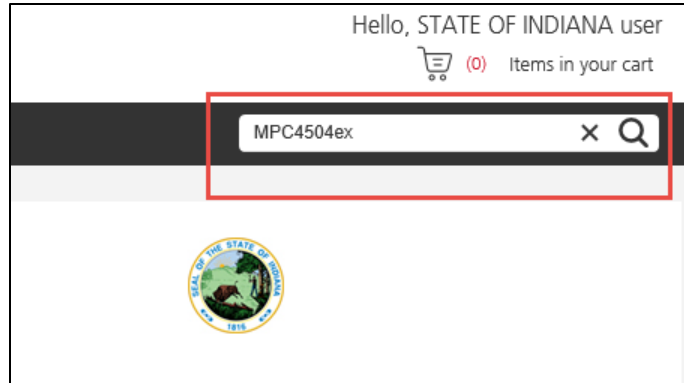
Ricoh MPC4504ex $127.29 / month

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."
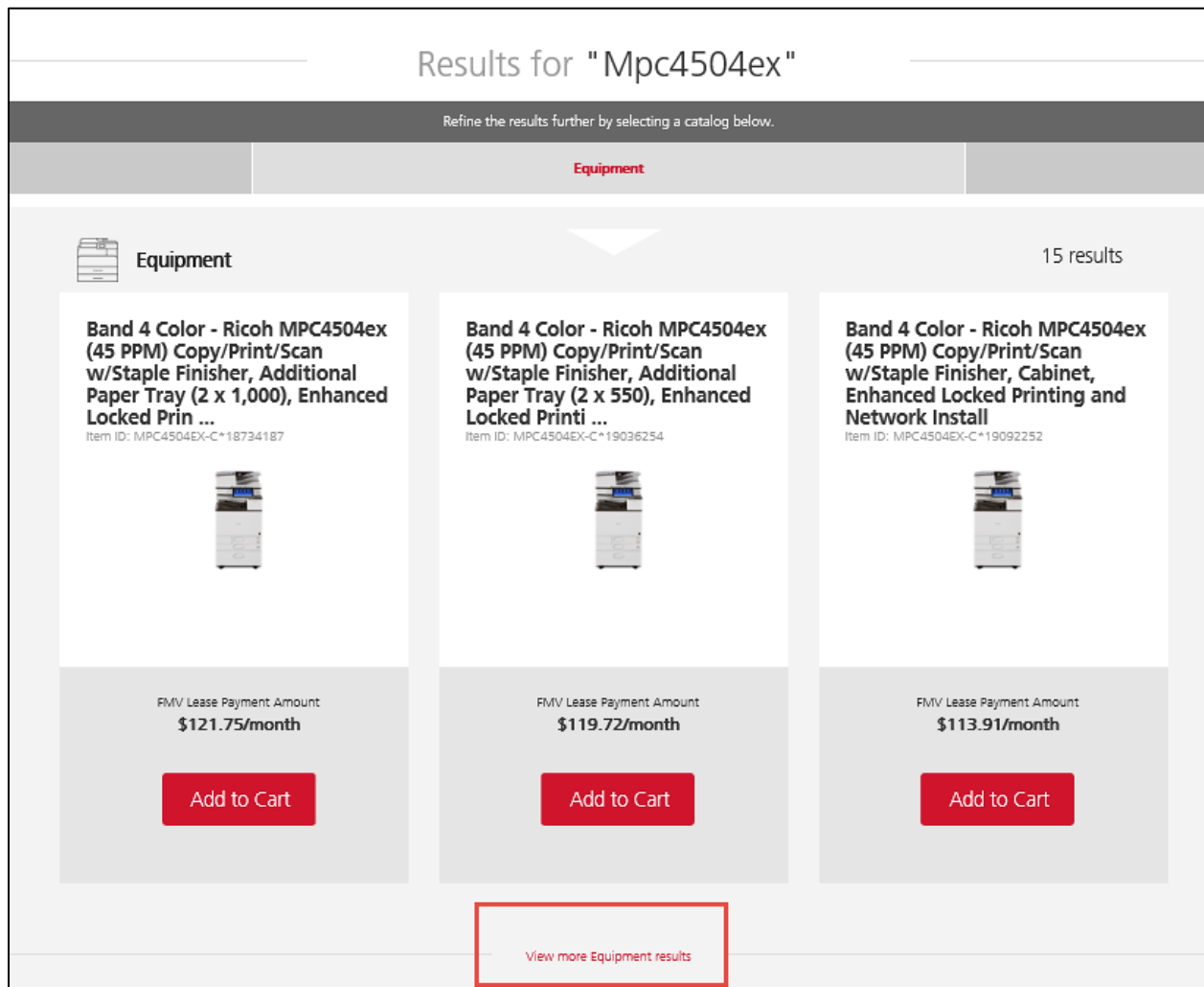
Once you have found the correct product at the correct price, click "Add to Cart."
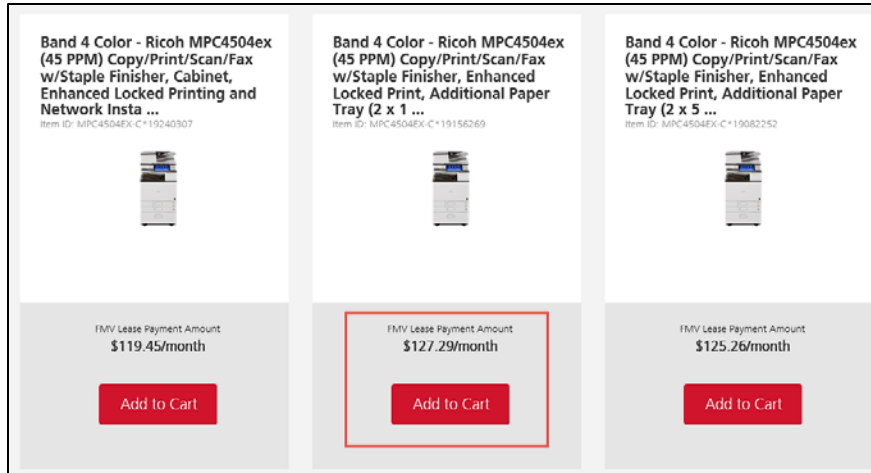
Clicking "Add to Cart" will bring you to a screen that says you've successfully added the product to your cart. Next use the same search bar in the upper right to search for "Service."
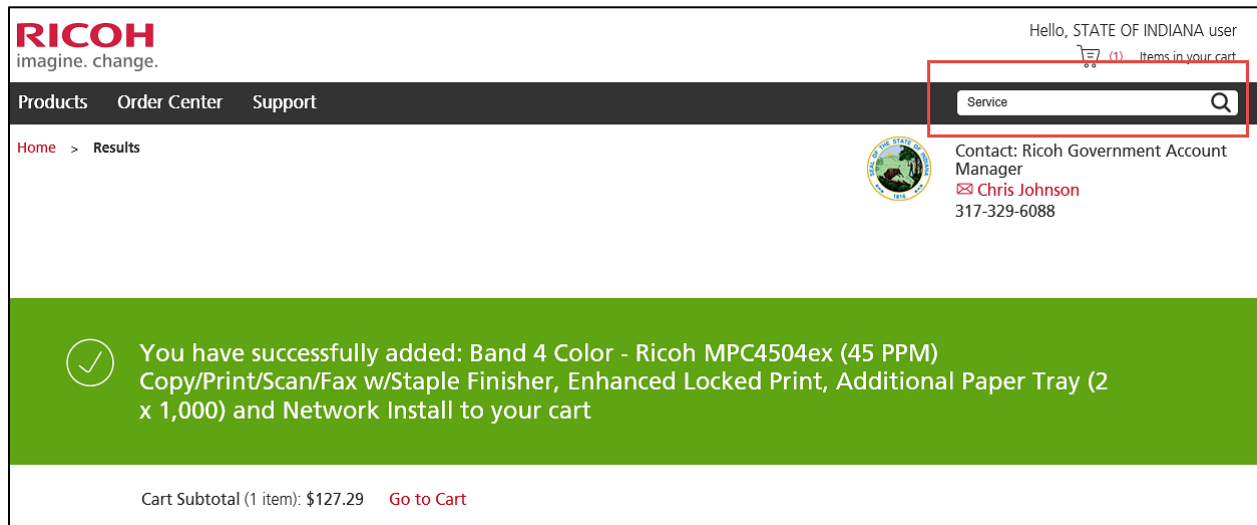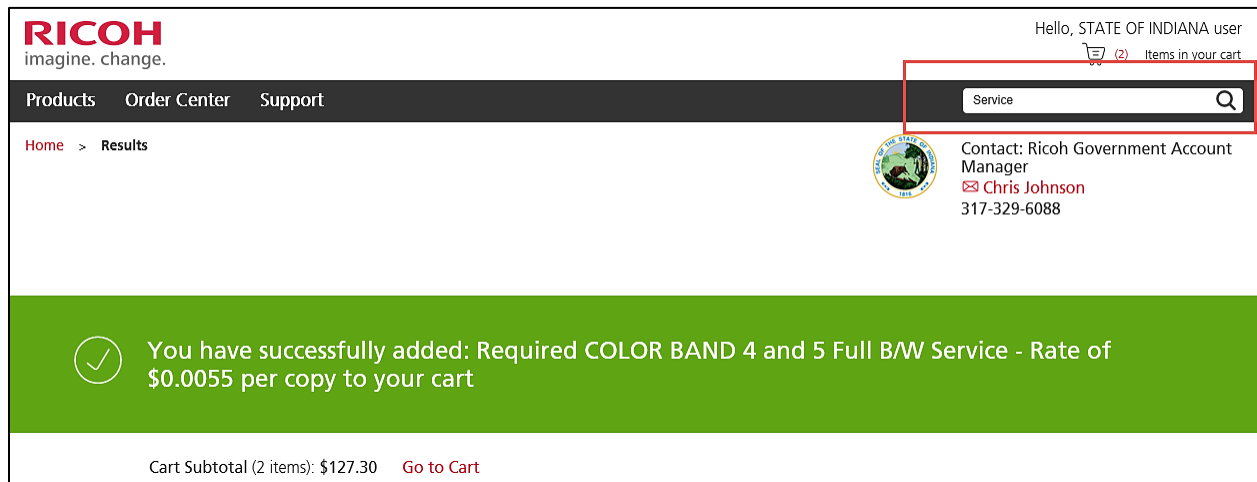

Step 5. Search for B&W/Color Service.

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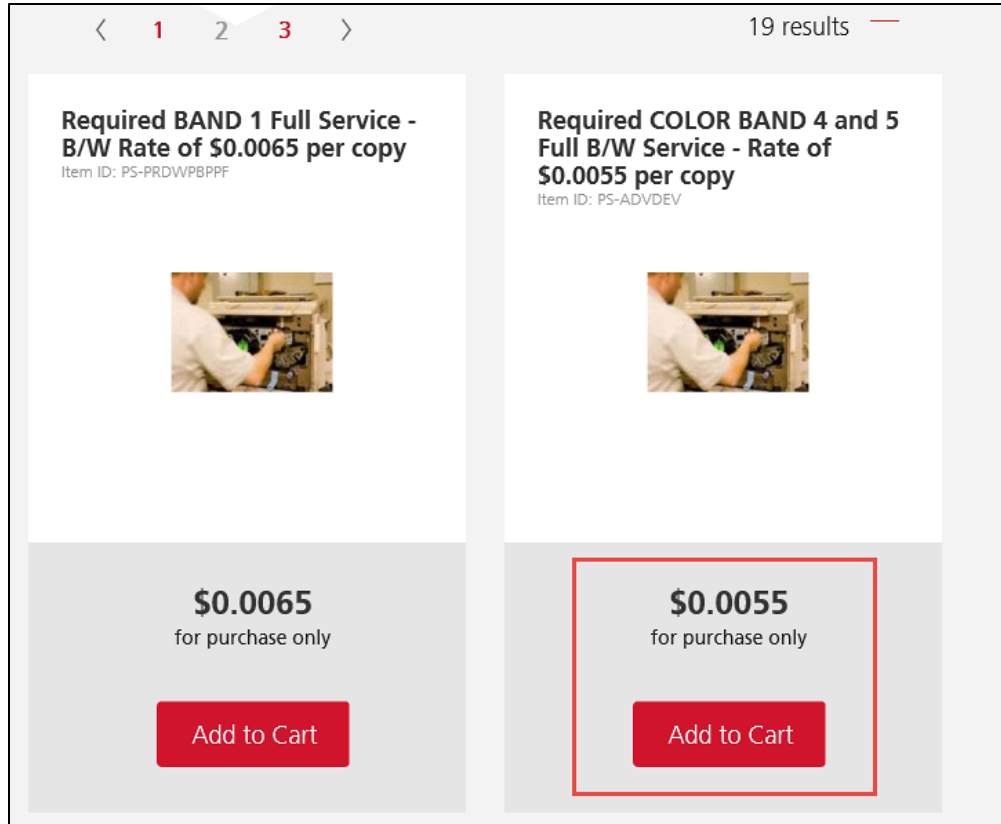
After you add that to the cart, it will return you to the screen after you searched for "Service."

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).


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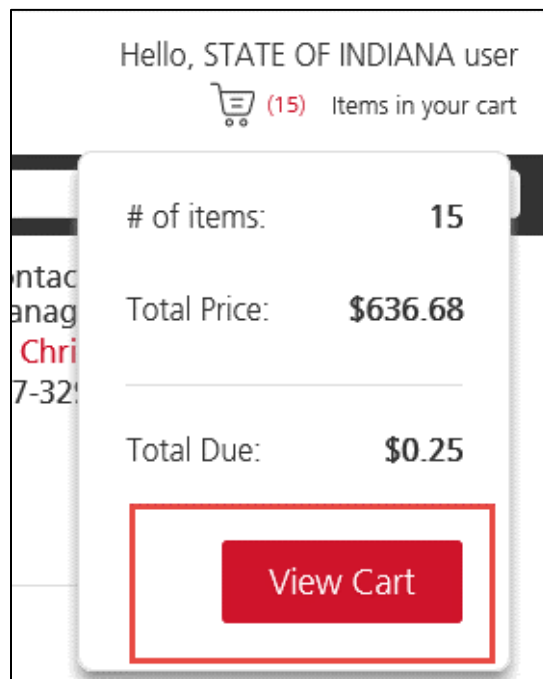
You will now be able to see all of the lines of your cart, and his is your chance to make sure you have the correct product and rates in each line. You also can change the order of the lines here if necessary.

Showing 1-15 of 15 cart lines

List order

[1]

Band 4 Color - Ricoh MPC4504ex (45 PPM) C
Item ID: MPC4504EX-C*19156269
UNSPSC Code: 80161800
Lease: Lease: FMV | Lease Payment Amount: 127.29/Monthly

List order

[2]

Top

Required COLOR BAND 4 and 5 Full B/W Serv
Item ID: PS-ADVDEV
UNSPSC Code: 80161800

List order

[3]

Top

Required COLOR BAND 4 and 5 Full Service -
Item ID: PS-CONN1
UNSPSC Code: 80161800

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

Cart Total: $636.68

Submit

By clicking Submit you agree that the order shall be governed by your master agreement with Ricoh.

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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.

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."

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

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).

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	Description	Vendor Name	Quantity	UOM	Price	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	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 - Ricoh MP	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
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	RICOH USA INC FKA IKON OFFICE SOLUTIONS	24,000.0000	Each	0.00550	132.000
9	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE 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	RICOH USA INC FKA IKON OFFICE SOLUTIONS	24,000.0000	Each	0.00550	132.000
12	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE 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	RICOH USA INC FKA IKON OFFICE SOLUTIONS	16,000.0000	Each	0.00550	88.000
15	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE 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.

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	UOM	Price	Total
▽ ☐ 1	RICOH: Band 4 Color - Ricoh MP	RICOH USA INC FKA IKON OFFICE SOLUTIONS	4.0000	Month	127.29000	509.160

☐ Consolidate with other Reqs   ☐ Override Suggested Vendor

Shipping Line: 1   Due Date: ___   Quantity: 4.0000   Price: 127.29000
Status: Active   *Ship To: 405FSSA17   Modify Onetime Address
Attention To: Huth, Jonathan-00405

*Distribute By: Qty   SpeedChart: ___

Accounting Lines   Personalize | Find | View All   First 1 of 1 Last
Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	
1	Open		405FSSA28	4.0000	100.0000	509.160	00405	➕➖

▽ ☐ 2	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8,000.0000	Each	0.00550	44.000

☐ Consolidate with other Reqs   ☐ Override Suggested Vendor

Shipping Line: 1   Due Date: ___   Quantity: 8,000.0000   Price: 0.00550
Status: Active   *Ship To: 405FSSA17   Modify Onetime Address
Attention To: Huth, Jonathan-00405

*Distribute By: Qty   SpeedChart: ___

Accounting Lines   Personalize | Find | View All   First 1 of 1 Last
Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	
1	Open		405FSSA28	8,000.0000	100.0000	44.000	00405	➕➖

▽ ☐ 3	RICOH: Required COLOR BAND 4 a	RICOH USA INC FKA IKON OFFICE SOLUTIONS	8,000.0000	Each	0.04000	320.000

☐ Consolidate with other Reqs   ☐ Override Suggested Vendor

Shipping Line: 1   Due Date: ___   Quantity: 8,000.0000   Price: 0.04000
Status: Active   *Ship To: 405FSSA17   Modify Onetime Address
Attention To: Huth, Jonathan-00405

*Distribute By: Qty   SpeedChart: ___

Accounting Lines   Personalize | Find | View All   First 1 of 1 Last
Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	
1	Open		405FSSA28	8,000.0000	100.0000	320.000	00405	➕➖

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

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:

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.

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.

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	
Comments ❓	
☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☑ Approval Justification	
🗎 Check Budget 🗎 Pre-Check Budget	
🗎 Save & submit 🗎 Save & preview approvals ✖ Cancel requisition Find more items	
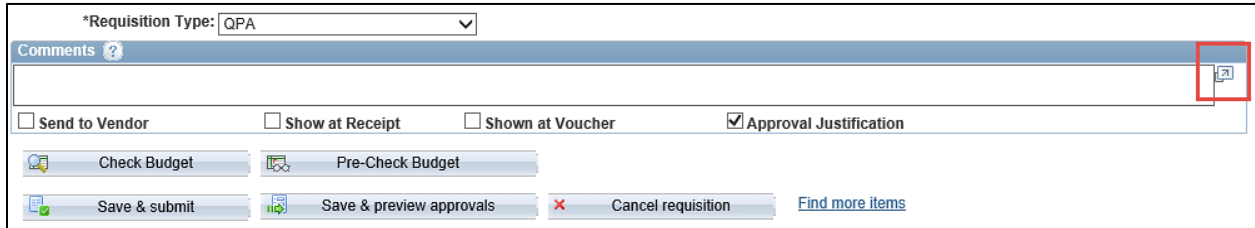
You will now have a much larger area to type in. Copy and paste the following text into this box:

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 printer-include 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."

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

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 at Voucher		☑ Approval Justification
📰 Check Budget	🖳 Pre-Check Budget			
📑 Save & submit	📑 Save & preview approvals	✖ Cancel requisition		Find more items

You have now submitted the requisition for a new Ricoh lease. Contact Mike Huth at jonathan.huth@fssa.in.gov 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.