

Processing of Special Request Documents in ORPIN, both agency user and DPO.

The following is a general example of one type of document under “Special Requests”, in which SPO is only trying to display how an agency user will be notified when they have a step to progress, where to find it and how to progress the document to the next stage.

menu

[Close](#)

[Print](#)

Document

Data

Contact Information

- Address
- Designated Procurement Officer

[Check Integrity](#)

[Process History](#)

[Delete](#)

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[Refresh](#)

[Creation](#)

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Authorized Agency staff will fill out the request document and select the create button.

Department of Administrative Services, State Services Division

Delegation of Purchase Authority Request State Procurement and Contracting

A delegation request under ORS 279A.075 and OAR 125-246-0170(8) is to be made through ORPIN or in writing to the state Chief Procurement Officer of the department of Administrative Services, State Services Division (SSD), State Procurement Office (DAS SPO). Your Request must be dated and signed by the agency Designated Procurement Officer (DPO), or designee. This delegation of purchase authority request is to be used by all state agencies subject to the Department of Administrative Services purchasing authority pursuant to ORS 279A.140.

To: Dianne Lancaster, Chief Procurement Officer DAS SSD State Procurement Office 1225 Ferry Street SE U140 Salem, OR 97301-4268	Phone: 503-378-4721 Fax: 503-373-1626
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Date	Agency Name: ODOT - Central Services
Agency 6-digit Number: 730000-CS	Name of Designated Procurement Officer (DPO): Denna Coleman
Address: 455 Airport Rd SE Bldg K Salem, OR 97301	DPO Number: 1 (999) 986-2665
	DPO Fax Number: 1 (999) 986-2630
Expenditure Account Number: 568994479	
Received Date:	DAS SPO File #: DELEGATE-90-06
AGENCY MUST PROVIDE THE FOLLOWING INFORMATION	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Does a price agreement exist for any or all of the product(s) or service(s)?
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Is the product(s) or service(s) available through the Inmate Program?

A similar page will display to the authorized agency user

Approval - Microsoft Internet Explorer provided by DAS

OREGON

Close

Review/Approve

(Test)

Submit/Return

File #: DELEGATE-90-06 02/07/2007 12:39 PM

Current Step: Creation

Next Step: *DPO Approval

Person Responsible for Next Step: * Select Person Responsible

Send email to person responsible for the document?

* Indicates a required field

Select Person Responsible

- ODOT - Central Services --
- ODOT - Oregon Department of Transportation --
- Agency, DPO
- ODOT - Agency - Transportation Commission --
- Foster, Diana L
- OAC Agencies... --
- DAS Authority Agencies --
- Executive --
- State Government --
- ORPIN System --

Current step

Next Step

Select Party

For this demonstration only two individuals are assigned a DPO role.

Approval - Microsoft Internet Explorer provided by DAS

OREGON

Close

Review/Approve

(Test)

Submit/Return

File #: DELEGATE-90-06 02/07/2007 12:39 PM

Current Step: Creation

Next Step: *DPO Approval

Person Responsible for Next Step: * Foster, Diana L

Send email to person responsible for the document?

* Indicates a required field

The authorized agency user will select the proper DPO to send the document to for approval

An e-mail will be generated from the ORPIN system to the selected DPO.

A similar message shall appear in the DPO'S e-mail account -

Diana, Please approve this document and move to the next process step.

¶

The ORPIN System can be found at: http://orpinalt.oregon.gov/v224p_test/open.dll/.

¶

Special Request
Request for Delegation

If you have any questions with respect to the document, please contact Denna (Ph: 1 (999) 986-2665).

If you have any questions, please contact the <http://www.oregon.gov/DAS/SSD/SPO/ORPIN-Contact-info.shtml> 378-4642

(2.24.32 Test)

Message from agency user

System Id's who request came from

System identified document titles

This mock up was done in test ignore all other references

The document is now in the control of the DPO -

Complete the following steps:

Step 1 - DPO logs into ORPIN

menu

- ORPIN Home
- [Login to ORPIN](#)
- [Supplier Registration](#)
- [Browse](#)
- [Registration of a Public \(tax supported\) Entity](#)
- [FAQ](#)
- [Subscription Levels](#)
- [How to disable your popup blocker](#)

e-Procurement ORPIN
(Test)
Access, Browse and Compete on Opportunities at any time.

Login to ORPIN ?

User Name:

Password (case sensitive):

Having trouble logging in? [Click here](#)

The DPO has received the e-mail so they would log into ORPIN as they normally would

Step 2 - DPO goes to “My Documents” to select search method

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- [My Documents](#)
- [Browse Suppliers](#)
- [Create Documents](#)
- [Verify/Change Your Information](#)
- [Browse Commodity Code](#)
- [Reporting/Inquiry](#)
- [ORPIN Time](#)
- [Exit from ORPIN](#)

Hello Diana Foster

ODOT - Agency - Transportation Commission

The last time you logged onto the system was: **01/24/2007 10:42 AM**

Welcome to ORPIN

The Navigation menu on the left includes links to all functions you have been authorized to use in the ORPIN system.

Internal User Help

- [How to progress a PR to SPQ](#) (updated 01/05/2006)
- [QRF Price Determination Request](#) (updated 01/05/2006)
- [QRF Contract Amendment w/Price Adjustments](#) (updated 01/05/2006)
- Special Requests (delegation, exemption, special procurement, sole source) etc.- To be posted
- Client Initiated Amendment - To be posted

Select "My Documents"

Step 3 - DPO selects search to find document

The image shows a web application interface. On the left is a dark green sidebar menu with the word "menu" at the top. The menu items are: [Browse Opportunities](#), [Statewide Contract Search](#), [Award Search](#), [Browse Opportunity Notices and Results](#), **▶ My Documents** (with a sub-menu), [Browse Suppliers](#), [Create Documents](#), [Verify/Change Your Information](#), and [Browse Commodity Code](#). The sub-menu under "My Documents" contains: [Document Search](#), [To Do List](#), and [Distribution List Maintenance](#). A red arrow points from the text "Select the 'To Do List' in either location" to the "To Do List" item in this sub-menu.

The main content area is titled "My Documents (Test)". It contains two sections: **Document Search** (with a description: "Search for documents by person, organization, Supplier Registration number.") and **Distribution List Maintenance** (with a description: "Create or edit distribution lists"). To the right of this content is a separate section titled "To Do List" with the description "Search for documents you have responsibility for." A red arrow points from the text "Select the 'To Do List' in either location" to this "To Do List" section.

Select the "To Do List" in either location

Step 4 - DPO searches for document

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- ▶ My Documents
 - Document Search
 - ▶ • To Do List
 - Distribution List Maintenance
- [Browse Suppliers](#)
- [Create Documents](#)
- [Verify/Change Your Information](#)
- [Browse Commodity Code](#)

My Documents

(Test)

To Do List

Responsible Person: Foster, Diana

"Issued By" Organization:

"Issued For" Organization:

Use Organization Hierarchy for "Issued For" Organization? Yes No

Search Method:

Document Type:

You can usually leave the selection settings alone and just click on "Submit"

Step 5 - DPO selects document from list that displays

menu

- [Browse Opportunities](#)
- [Statewide Contract Search](#)
- [Award Search](#)
- [Browse Opportunity Notices and Results](#)
- ▶ **My Documents**
 - Document Search
 - ▶ • **To Do List**
 - Distribution List Maintenance
- [Browse Suppliers](#)
- [Create Documents](#)
- [Verify/Change Your Information](#)
- [Browse Commodity Code](#)

My Documents

(Test)

To Do List

Responsible Person: Foster, Diana

"Issued By" Organization:

"Issued For" Organization:

Use Organization Hierarchy for "Issued For" Organization? Yes No

Search Method:

Document Type:

1 matching record(s)

	Document	Amend	Document Type	Document SubType	Created Date	Status
1	 DELEGATE-90-06		Special Request	Request for Delegation	02/07/2007	

 **Click on the appropriate document from the e-mail**

Step 6 - DPO reviews document for completeness

menu

Close

Print

Document

Data

Contact Information

Check Integrity

Revert

Process

History

Forward

Refresh

DPO Approval

Help



The Document displays, DPO does whatever reviews of document needed.
 Department of Administrative Services, State Services Division

**Delegation of Purchase Authority Request
 State Procurement and Contracting**

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 DAS SSD State Procurement Office
 1225 Ferry Street SE U140
 Salem, OR 97301-4268
 Phone: 503-378-4721
 Fax: 503-373-1626

Date	Agency Name:
02/07/2007	ODOT - Central Services
Agency 6-digit Number:	Name of Designated Procurement Officer (DPO):
730000-CS	Denna Coleman
Address:	DPO Number:
455 Airport Rd SE Bldg K Salem, OR 97301	1 (999) 986-2665
	DPO Fax Number:
	1 (999) 986-2630
Expenditure Account Number:	
568994479	
Received Date:	DAS SPO File #:
	DELEGATE-90-06
AGENCY MUST PROVIDE THE FOLLOWING INFORMATION	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Does a price agreement exist for any or all of the product(s) or service(s)?
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Is the product(s) or service(s) available through the Inmate Program?

Step 7 - Review shows document not complete. DPO can choose to correct, complete the information or Revert the document back to the authorized agency user

menu

- Close
- Print
- Document
- Data
- Contact Information
- Check Integrity
- Revert
- Process History
- Forward
- Refresh
- DPO Approval
- Help

 If information is missing DPO can either put it in the document or "Revert" the document back to the authorized agency user to fill in.
 Department of Administrative Services, State Services Division

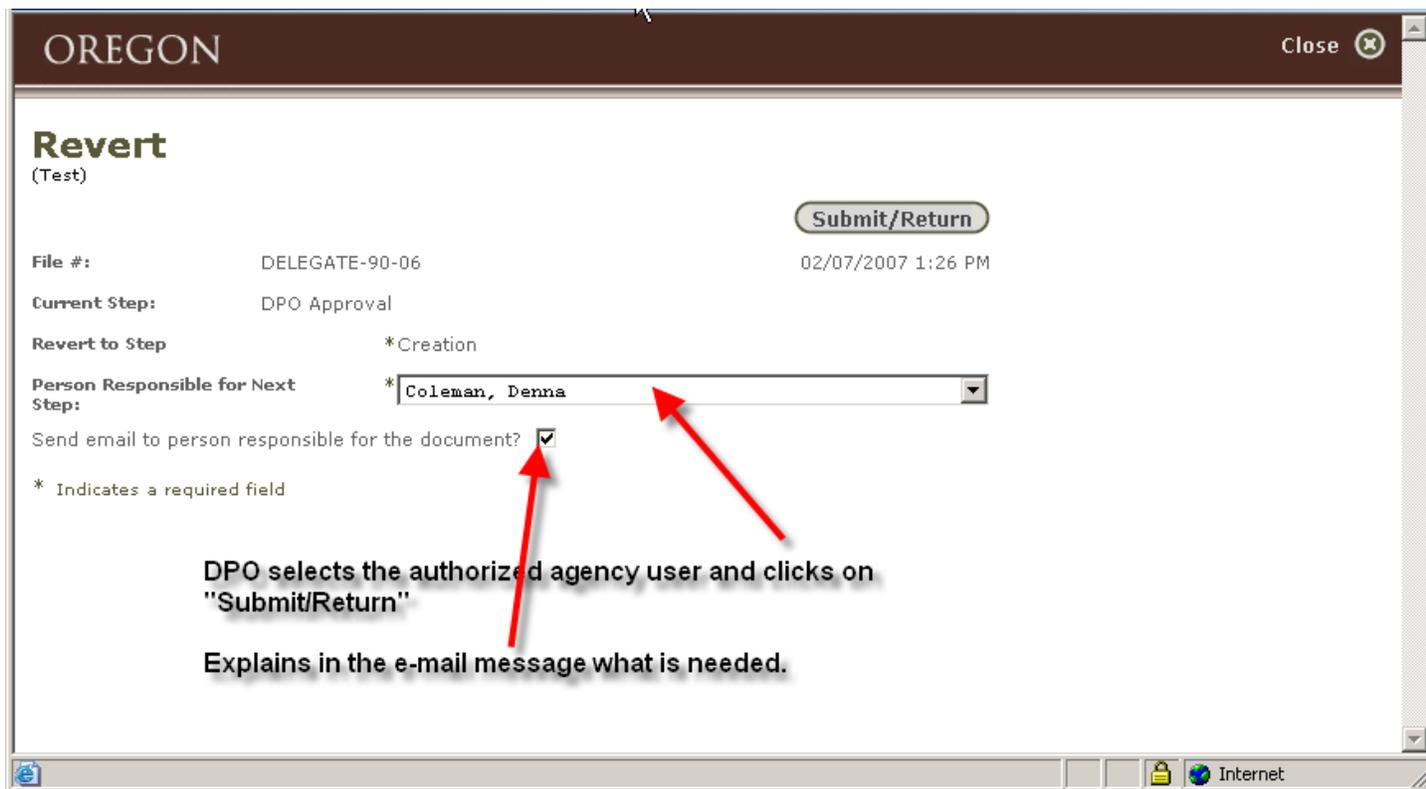
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Address: 455 Airport Rd SE Bldg K Salem, OR 97301	DPO Number: 1 (999) 986-2665 DPO Fax Number: 1 (999) 986-2630
Expenditure Account Number: 568994479	
Received Date:	DAS SPO File #: DELEGATE-90-06
AGENCY MUST PROVIDE THE FOLLOWING INFORMATION	
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Step 8 - DPO reverts document back to authorized agency user



OREGON Close

Revert

(Test)

Submit/Return

File #: DELEGATE-90-06 02/07/2007 1:26 PM

Current Step: DPO Approval

Revert to Step: *Creation

Person Responsible for Next Step: *Coleman, Denna

Send email to person responsible for the document?

* Indicates a required field

DPO selects the authorized agency user and clicks on "Submit/Return"

Explains in the e-mail message what is needed.

Step 9 - Authorized agency user gets e-mail and fills in missing information on the document being created, and then sends back to DPO.

Step 10 - DPO follows steps 1 through 8 again. If 8 is ok then move to step 11.

Step 11 - DPO approves the document and moves it to the next step by clicking on the “DPO Approval” selection

menu

[Close](#)

[Print](#)

[Document](#)

[Data](#)

[Contact Information](#)

[Check Integrity](#)

[Revert](#)

[Process History](#)

[Forward](#)

[Refresh](#)

[DPO Approval](#)

[Help](#)

Clicks on the DPO Approval selection

Department of Administrative Services, State Services Division

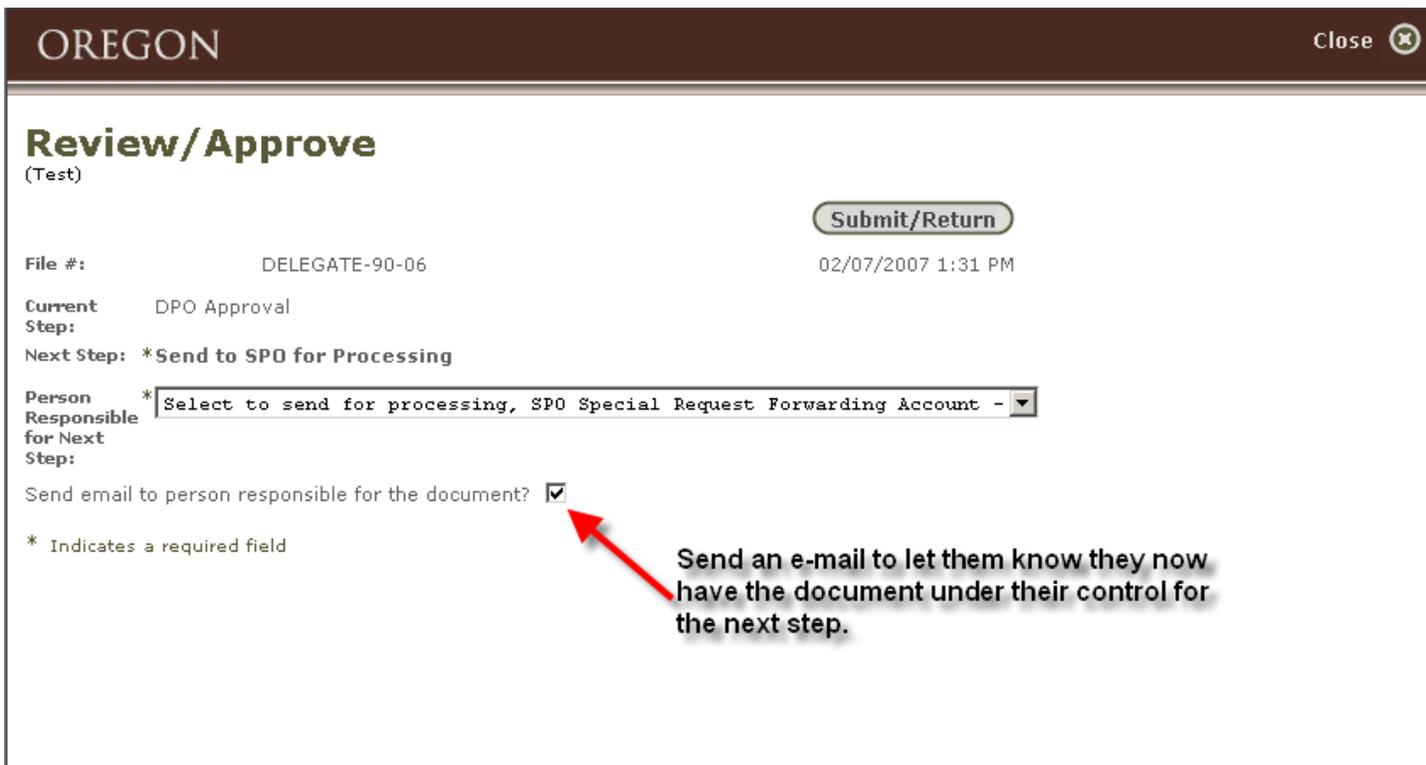
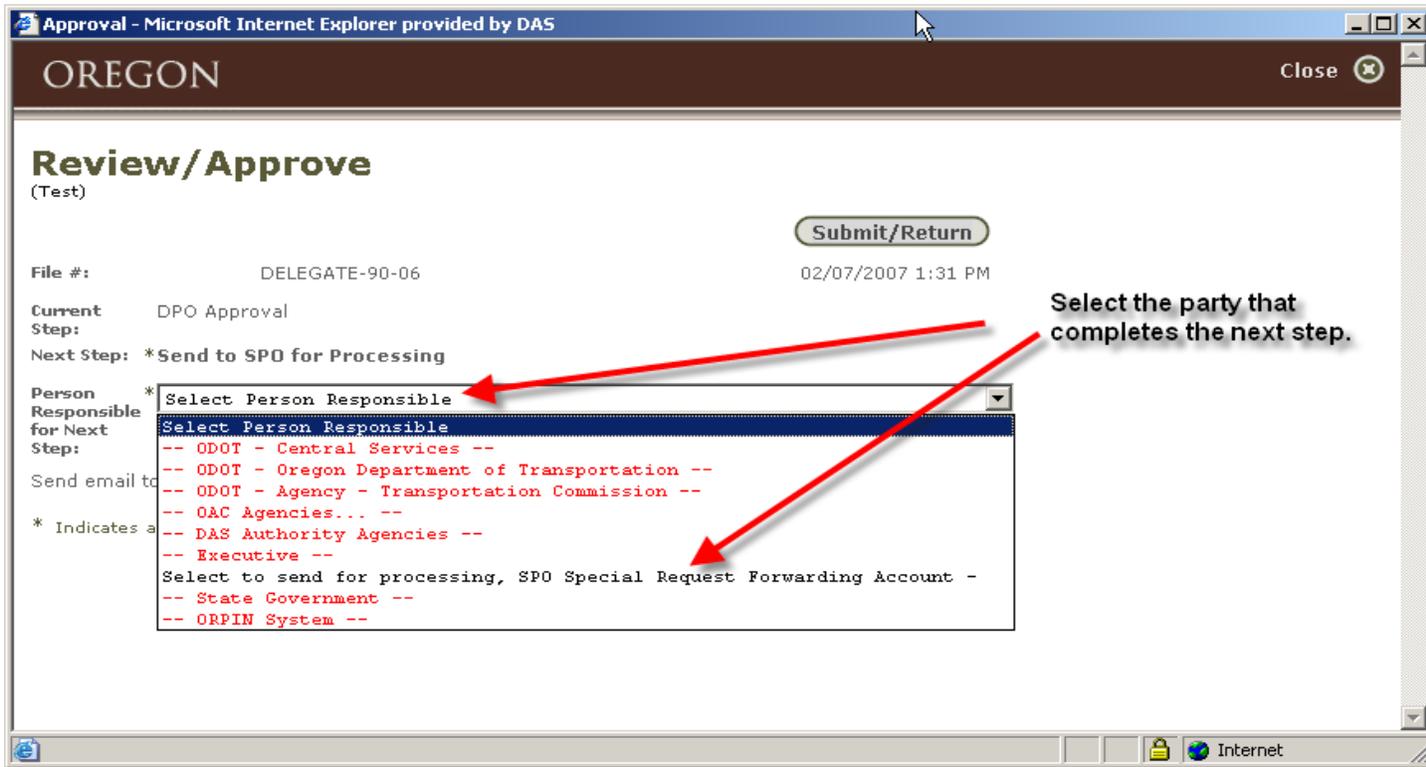
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Step 12 - DPO selects the responsible party for the next step in the workflow process, and clicks on "Submit/Return". The document will leave the DPO'S control. For this type of document the next step will be "Send to SPO". The responsible person(s) will be different in other types of documents.



DPO is currently done with this document.