

**Entering a Purchase Requisition**  
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The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

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## Entering a Purchase Requisition

### Entering a Purchase Requisition Overview

When purchasing a commodity, an agency must first determine if it is available from an existing contract. If so, the contract must be used to procure the item. Please refer to the AS Materiel Division – State Purchasing Bureau website for more information.

#### **Overview – Entering a Purchase Requisition, Non-Contract/Non-Stock Commodity**

Agencies can generate purchases for commodities that are less than \$10,000 without processing through AS Materiel Division, State Purchasing Bureau.

With the exception of "Exception Orders", the total value of the Purchase Requisition will determine the process applied to the procurement of the item(s). If the purchase is for an item that has been identified as an "Exception Order", follow appropriate procedures for those purchases. **See Document Flows and Menu Selections.**

If a State contract does not already exist for a required item and the total value does not exceed \$2000; an agency can pay the vendor through NIS Accounts Payable without creating a PO. Or, the agency can choose to purchase the item(s) with a Purchase Order through NIS Procurement. Please note: Agencies are strongly urged to obtain a minimum of three bids on purchases for goods over \$2000.

If a State contract does not already exist for a required item and the total value of the order will not exceed \$10,000, the agency, board, or commission (agency) has the option to either utilize the Purchase Requisition process or enter a Purchase Order directly.

If a State contract does not already exist for a required item, and the total value of the order will exceed \$10,000, the agency must utilize the Purchase Requisition process.

Purchase Requisition Process:

Total value is between \$2000 and \$10,000; it is highly recommended that an agency obtain the best price for the item(s) that they purchase by receiving a minimum of three bids from vendors. The agency may choose to make the purchase via three processes:

- Enter a Purchase Requisition (OR) → Generate a Quotation Request (OQ) → Generate a Purchase Order (OP)
- Enter a Purchase Requisition (OR) → Generate a Purchase Order (OP)
- Enter a Purchase Order (OP) directly

Total value is between \$10,000 and \$24,999, AS Materiel Division, State Purchasing Bureau must be involved in the procurement of the item(s).

- In order for AS Materiel Division, State Purchasing Bureau to approve a requisition, agencies must include an order attachment indicating the vendors contacted and bids received, or,

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- AS Materiel Division - State Purchasing Bureau will either process the purchase for the agency, or give the agency authority to process the purchase.

Total value equal to or greater than \$25,000, AS Materiel Division – State Purchasing Bureau will process the purchase for the agency.

**Order Type:** OR

**Description:** Requisition \*(optional)

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Comm Req (OR)

\* optional if a Purchase Order (OP) will be entered directly. The Purchase Requisition (OR) is required for purchases with a total value equal to or greater than \$10,000.

### Overview – Entering a Purchase Requisition for an Exception Order

State Statute requires purchase of certain items to be made through specific agencies. The end user must determine if an item that they wish to purchase falls within this category of "Exception Orders." Once this is determined, the end user must initiate the purchase using a requisition defined in the "Exception Orders" menu. (Link to current Direct Purchase Authority letter from DAS Materiel Division Administrator.)

Exception Orders (ex. firearms, motor vehicles, IT equipment, etc.) are routed to specified agencies through the use of Approval Routes. End users must estimate the total value of the purchase to route the document to the appropriate entity. If you are unable to determine an estimated value, you must enter a total equal to or greater than \$5.00.

**Order Type:** OO

**Description:** Restricted Requisition (does not route outside agency)

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Direct Purchase Authority Req (OO)

**Order Type:** OT

**Description:** Requisition for Communications Equipment

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Communications Equip Req (OT)

**Order Type:** OW

**Description:** Requisition for Equipment, Print Services, or Firearms thru AS Materiel Division, State Purchasing Bureau or establish a commodity contract under \$10,000

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter through SPB Req (OW)

**Order Type:** OI

**Description:** Requisition for Vehicles not on contract thru AS – Transportation Services Bureau

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Vehicle Req (OI)

**Order Type:** ON

**Description:** IT Equipment and Services not on contract

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter IT Equip & Srvcs Req (ON)

#### **Overview – Entering a Purchase Requisition to Generate a Commodity Contract (OR)**

If a State contract does not already exist for a required item, and an agency desires a commodity contract, it must enter a Purchase Requisition for AS Materiel Division, State Purchasing Bureau to generate a contract.

**Order Type:** OR

**Description:** Requisition for Commodity Contract and one time purchase

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Comm Req (OR)

#### **Overview – Entering a Purchase Requisition for Services**

Any agency can identify the need for a service contract. It is the responsibility of each agency to ensure that the process used complies with State Statutes and other governing authorities. If the state agency processes the service, there are five possible process flows:

1. Direct Pay for items less than \$500 (less than \$25,000 as per Agency, Board, and Commission memo dated January 16, 2004, reference memo for requirements) Link to ABC memo
2. Purchase Requisition (optional) → Purchase Order - optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit proposals.
3. Purchase Requisition → Contract → Purchase Order
4. Purchase Requisition → Quotation Request → Purchase Order
5. Purchase Requisition → Quotation Request → Contract → Purchase Order

The system has been configured to allow a state agency to request that AS Materiel Division, State Purchasing Bureau process the service contract. This is done by entering a Purchase Requisition (O5). Please contact AS Materiel Division – State Purchasing Bureau at (402) 471-2401 to assure resources are available.

**Order Type:** O3

**Description:** Requisition for Service – Processed by Agency \* (optional)

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ Agency Req (O3)

**Order Type:** O5

**Description:** Requisition for Service – Processed by State Purchasing Bureau

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ SPB Req (O5)

**Order Type:** Z6

**Description:** Requisition for Services - Exempt per State Statute

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service- Exempt Req (Z6)

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\* optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit proposals.

### Navigation

#### **Order Type:** OR

**Description:** Requisition \* (optional) - required to set up contract or one time purchase

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Comm Req (OR)

#### **Order Type:** OO

**Description:** Restricted Requisition (does not route outside agency)

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Direct Purchase Authority Req (OO)

#### **Order Type:** OT

**Description:** Requisition for Communications Equipment

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Communications Equip Req (OT)

#### **Order Type:** OW

**Description:** Requisition for Equipment, Print Services, or Firearms Thru AS Materiel Division, State Purchasing Bureau or Commodity Contract is less than \$10,000

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter through SPB Req (OW)

#### **Order Type:** OI

**Description:** Requisition for Vehicles not on contract thru AS Transportation Services Bureau

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Vehicle Req (OI)

#### **Order Type:** ON

**Description:** IT Equipment and Services not on contract thru the OCIO

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter IT Equip & Srvcs Req (ON)

#### **Order Type:** O3

**Description:** Requisition for Service – Processed by Agency \*\* (optional)

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ Agency Req (O3)

#### **Order Type:** O5

**Description:** Requisition for Service – Processed by Bureau

**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ SPB Req (O5)

#### **Order Type:** Z6

**Description:** Requisition for Services - Exempt per state statute #73-501 - 73-509

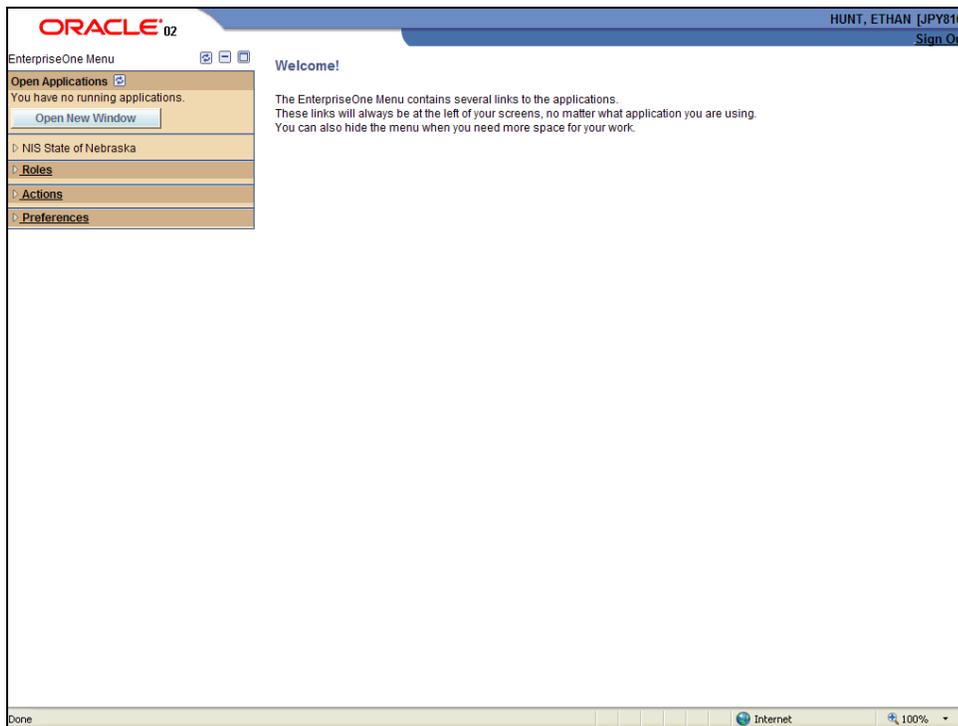
**Navigation:** Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service- Exempt Req (Z6)

- \* OR is optional if a Purchase Order (OP) will be entered directly. The Purchase Requisition (OR) is required if a Quotation Request (OQ) will be used to solicit bids.
- \*\* O3 is optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit proposals.

## Entering a Purchase Requisition Lesson

### Procedure

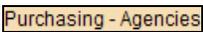
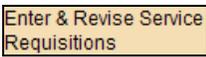
In this lesson you will learn how to enter a Purchase Requisition.

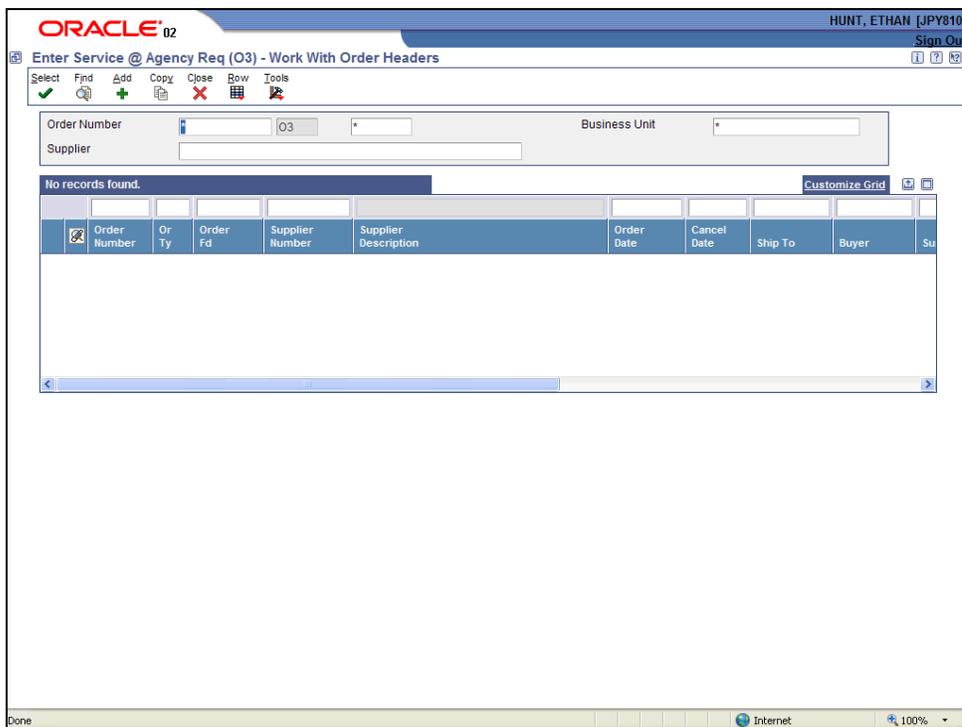


Step	Action
1.	<p><b>Warning:</b> The menu path for this lesson uses Requisition for Service Processed by Agency (O3). <b><u>For the specific menu path when you enter a purchase requisition refer to the Navigation section of the Overview.</u></b> Be sure to use the appropriate menu path for your Order Type.</p> <p>Click the <b>NIS State of Nebraska</b> link.</p> <p><b>NIS State of Nebraska</b></p>

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## Entering a Purchase Requisition

Step	Action
2.	Click the <b>Purchasing - Agencies</b> link. 
3.	Click the <b>Requisitions - Agency</b> link. 
4.	Click the <b>Enter &amp; Revise Service Requisitions</b> link. 
5.	Click the <b>Enter Service @ Agency Req (O3)</b> link. 



Step	Action
6.	Click the <b>Add</b> button. 

Step	Action
7.	<p>In the <b>Supplier</b> field use 999999 (Best Source – Generic Supplier Address Book number ) when total value is estimated to be greater than \$2,000 and acquiring bids</p> <p>If you are purchasing items less than \$10,000 and not creating your Purchase Order through the use of a Quotation Request, you can enter the Address Book number of the vendor from whom you will purchase the goods. As a second "Text Attachment", include the names of vendors from whom you solicited bids and their responses, or attach PDF responses as file attachment.</p> <p>Use the Vendor number if the commodity or service is a Sole Source or this document will not require bidding and the vendor is known.</p>
8.	<p>In the <b>Ship to</b> field enter the address book number of the location where services are to be performed.</p> <p><b>Note:</b> The <b>Ship to</b> number will automatically populate the <b>Send Invoice To</b> field. The <b>Send Invoice To</b> field can be overridden if necessary</p>
9.	<p>In the <b>Buyer</b> field enter the address book number of the buyer who is responsible for the bidding of the contract.</p>
10.	<p>In the <b>Business Unit</b> field enter the Business Unit which is applicable to the order.</p>

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## Entering a Purchase Requisition



Step	Action
11.	<p>In the <b>Requested</b> field enter the date when the service contract will begin.</p> <p>If this field is not populated, the current date will default.</p> <p><b>Note:</b> You can type the date in MM/DD/YY format or you can use the Visual Assist tool (calendar icon).</p>
12.	<p>The <b>Promised Delivery</b> field is the date the vendor has promised delivery or can begin service. This information is used for tracking vendor performance – the system will compare the date received against the promised date. It is important to enter a valid Promised Delivery date.</p> <p>If you do not know the promised delivery date leave it blank. It will default to the current date, but can be overridden later.</p>
13.	<p>The <b>Cancel Date</b> field is the date you would like the requisition to no longer be active in the NIS system. The order should be completed and paid by this date. This field will remain blank unless you enter a date.</p>
14.	<p>The <b>New/Renew</b> and <b>Agency</b> fields are used to indicate if American Recovery &amp; Reinvestment Act (ARRA) funds are being utilized.</p>
15.	<p>If ARRA funds are being utilized you will enter an "A" in the <b>New/Renew</b> field.</p>
16.	<p>If ARRA funds are being utilized "ARRA" must be entered into the <b>Agency</b> field.</p>
17.	<p>In the <b>AB / Contact</b> field enter the address book number and name of the employee who has the most knowledge of the contract and could answer in depth questions regarding the contract. This may be different than the Agency contact or Buyer.</p>
18.	<p>You can add attachments to the Header if necessary. To do so click <b>Form</b> and <b>Attachments</b>. After adding your attachments click <b>Save</b> to retrun to the the Order Header screen.</p> <p>If you are not going to add attachments to the header procede to the next step.</p>
19.	<p>Click the <b>OK</b> button.</p> 

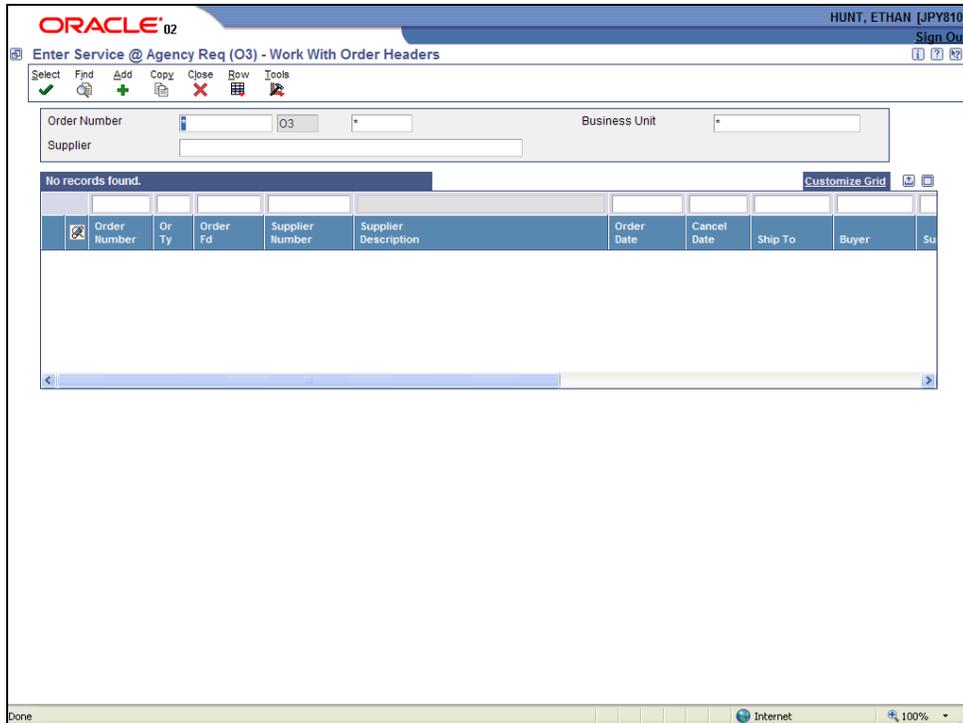
Step	Action
20.	<p>Enter the NIGP Code in the <b>NIGP Number / Inventory Number</b> field.</p> <p>To find an applicable 5-digit code use the Visual Assist tool. Note that all Services will be greater than 90000. This field will not print on the purchasing documents.</p>
21.	Enter the quantity of the item you are ordering in the <b>Quantity Ordered</b> field.
22.	The <b>Tr. UoM</b> field stands for Transaction Unit of Measure. The system defaults to EA (each). You can override this with the appropriate unit of measure if necessary. Other options can be found using the Visual Assist tool.
23.	Enter the cost per unit in the <b>Unit Cost</b> field.
24.	Enter a description pertaining to the specific detail line in the <b>Description 1</b> field. This field is limited to 30 characters. What is entered here will print on all purchasing documents. Be as specific as possible.
25.	If necessary enter a description pertaining to the specific detail line in the <b>Description 2</b> field. This field is limited to 30 characters. What is entered here will print on all purchasing documents.
26.	In the <b>Account Number</b> field enter an account number which references the agency's business unit and object account which will be funding the purchase. The format will be "Business Unit.Object Code". For example, 12345678.987654.
27.	If applicable scroll over to the <b>Dev Request</b> field and enter the appropriate dev code.

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## Entering a Purchase Requisition

Step	Action
28.	Add line attachments if desired. Refer to the Work With Attachments ( <a href="http://www.das.state.ne.us/nis/training_8.1/sys_bscs/L2_007_Working_with_Attachments/Training%20Guide/Working%20With%20Attachments_TRAIN.pdf">http://www.das.state.ne.us/nis/training_8.1/sys_bscs/L2_007_Working_with_Attachments/Training%20Guide/Working%20With%20Attachments_TRAIN.pdf</a> ) work instructions for details about adding line attachments.  Also you can add additional lines if needed.
29.	When you are finished click the <b>OK</b> button. 
30.	The order number will be displayed in the <b>Previous Order</b> field. You should make note of it in the event you wish to do more work with this Order Number at a later time.

Step	Action
31.	If you want to continue with a new order you can do so from the <b>Order Header</b> screen and follow the steps provided in this work instruction.  If you are finished click the <b>Cancel</b> button. 



Step	Action
32.	Click the <b>Close</b> button. 
33.	You have successfully completed this lesson. <b>End of Procedure.</b>