

Generate a ZG (Purchase Order) for an N or S line type from an OJ (Requisition from Contract)

Overview

NIS Policies

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/>.

NIS Navigation

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Steps

Start this instruction from the Gen CSI Inventory/Floor Stock PO (ZG) from Contract Req (OJ) – Work with Order Release window.

Order Number	Or Ty	Order Fd	Chg Order	Line Number	2nd Item Number	Quantity Open	Amount Open
No records found.							

1. Enter the order number in the **Order Number** field, if known, to minimize the search.
 You can do a search based on any information criteria in QBE line.
2. Click **Find**.

Order Number	Or Ly	Order I.d	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Amount Open	Request Date	Description	Business Unit	Ship Num
28672	OJ	52510	000	1,000	42506-TF-CR-150-604	100.0000	EA		09/22/2006	INDIANA EXEC CHARCOAL	46070025	5
26789	OJ	52510	000	1,000	18090-752009	55.0000	LB	78.38	11/14/2006	SODIUM LINEAR ALKYL BENZENE	46070025	5
27449	OJ	52510	000	1,000	42661-TEST	8.0000	EA	80.00	12/28/2006	THIS IS A TEST NUMBER ONLY	46070020	5

3. Choose the **Order Number** desired.



Click on the “paperclip” to view line attachments. Be sure to look at any pertinent attachments.

4. Click **Select**. The Gen CSI Stock PO (ZG) from Contract Req (OJ) - Order Release window appears.

5. Review and update as required.

Header Information:

- Business Unit – change the Business Unit if this step was not completed in the req (OJ) process.
- Supplier – DO NOT CHANGE
- Buyer – Should be blank. If filled in, delete the number.
- Ship To – change to reflect a delivery location for your Warehouse only if not completed in the req (OJ) process or if now determined the order will direct ship.
- 557816 = CSI Warehouse

Release Information TAB – Review:

- Release Qty – Should reflect the quantity you are ordering
 - Release Amt – DO NOT CHANGE
- Changes made to the order release will be reflected on the generated Purchase Order. They do not change the original Purchase Requisition.

Detail Information TAB – Review:

The screenshot shows the 'Release Information' tab of the 'Gen CSI Stock PO (ZG) from Contract Req (OJ) - Order Release' window. The header includes 'Supplier: 500004 TENSAR POLYTECHNOLOGIES INC', 'Business Unit: 46070020', 'Buyer', 'Ship To: 557877 CORRECTIONS - NE STATE PENITEN', and 'Order Number: 27449 OJ 52510 000 1,000'. A 'Release' button is visible. The 'Detail Information' section contains fields for 'Inventory Number: 42661-TEST', 'Supplier Item Number', 'Account Number', 'Type/Subledger', and 'Lot/SN'.

- Description – Review but DO NOT CHANGE

Dates TAB – Review:

The screenshot shows the 'Dates' tab of the same window. It displays a table of dates:

Requested	02/12/2007	Cancel Date	
Promised Delivery	02/12/2007	Order Date	12/28/2006
G/L Date	02/12/2007	Planned Effective	12/28/2006

- Requested – date to receive order
- Promised Delivery – date the vendor can meet
- G/L Date – DO NOT CHANGE
- Cancel Date – LEAVE BLANK
- Planned Effective – DO NOT CHANGE

6. Click **OK**.



If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat Steps 5 & 6 for each detail line that you wish to include on the Purchase Order.

- Click **Form, Generate Order**. The CSI Gen Stock PO (ZG) from Contract Req (OJ) - Generated Purchase Orders window appears.



 The new Order Number and Or Ty (Order Type) will appear and should be noted if you wish to do more work with them or facilitate searches later.

- Click **Close**.
- Click **Close**.

You may Revise the Purchase Order and review any pertinent information such as confirming and non confirming, delivery address, and/or add additional information about the product you are requesting, such as freight.

To revise a ZG purchase order:

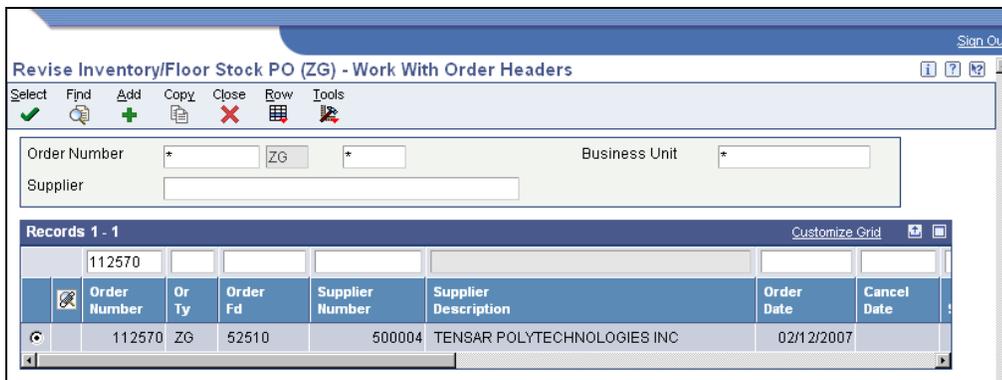
You will then need to revise and add the T line and whether the order is confirming or non-confirming.

Shop Supervisor -- Roles: Procurement

 Shop Supervisor's and Staff can revise a document. Inmate clerks cannot revise documents.

State of Nebraska > Dist & Mfg - CSI > Purchasing > CSI Purchase Order > Inventory/Floor Stock Purchase Order > Revise Inventory/Floor Stock PO (ZG)

- Enter in the ZG number that was just generated.



- Click on the correct **Order Number** is selected and click on **Select**.

 **Changes to the Order Header do not automatically update on the Detail Lines. To populate ALL information from the Order Header to the Order Detail Lines, click Form, Header to Detail, Populate. Please review the Detail lines to ensure the information is correct. Please note: the information from the Order Header will NOT populate to Detail lines that are cancelled or closed (Status = 999).**

3. Click **Form, Additional Info**. The Order Header – Additional Information window appears.

- Indicate the shop number and if the order is Confirming or Non Confirming in the Reference Field

4. Click **OK**.

5. Click **OK**.

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Revise Inventory/Floor Stock PO (ZG) - Order Detail

OK Cancel Form Row Tools

Order Detail Line Defaults

Order Number 112570 ZG 52510 Business Unit 46070020

Supplier 500004 TENSAR POLYTECHNOLOGI... Order Revision 0

Ship To 557877 CORRECTIONS - NE STATE P... Order Date 02/12/2007

Hold Code BLANK - HOLD CODES 42HC

Retainage %

Records 1 - 2 Customize Grid

	NIGP Number / Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. Uoi
<input type="checkbox"/>	42661-TEST	TXT	61	8.0000	EA	10.0000	80.00	EA
<input type="checkbox"/>								

6. To add the T line, click on the next line:

Complete the following information for freight, pallet fee, fuel surcharge or any other fee:

- NIGP Number: TXT
- Quantity Ordered: 1
- Tr UOM: EA
- Unit Cost: \$0.01 (for purchase requisitions only)
- Description: Write in the new Shop #, a "+" sign, Quoted Freight or Estimated Freight. If it is FOB Destination, type the shop number and FOB Destination. Also include the dollar amount in the description.

For Example:

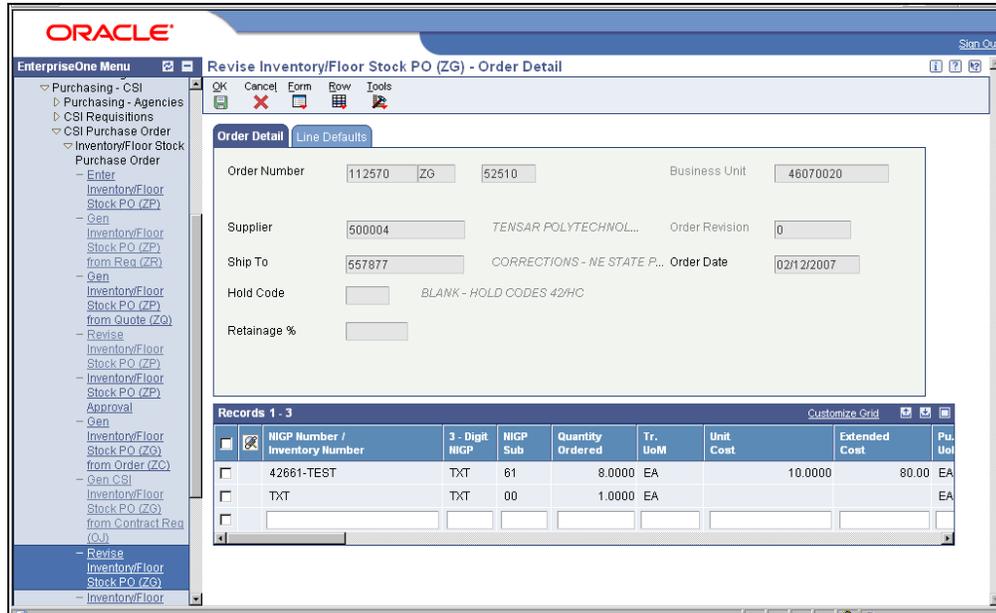
- NN, + Quoted Freight \$XX.XX
- NN, + Estimated Freight \$XX.XX
- NN, FOB Destination
- NN, No Freight, P/U
- If, in addition to freight, there will be a pallet fee, fuel surcharge or any other miscellaneous fee, you will need to add another line for that charge. Enter the NIGP Code, Quantity, UOM, Unit Cost (if necessary) and the description.

For Example:

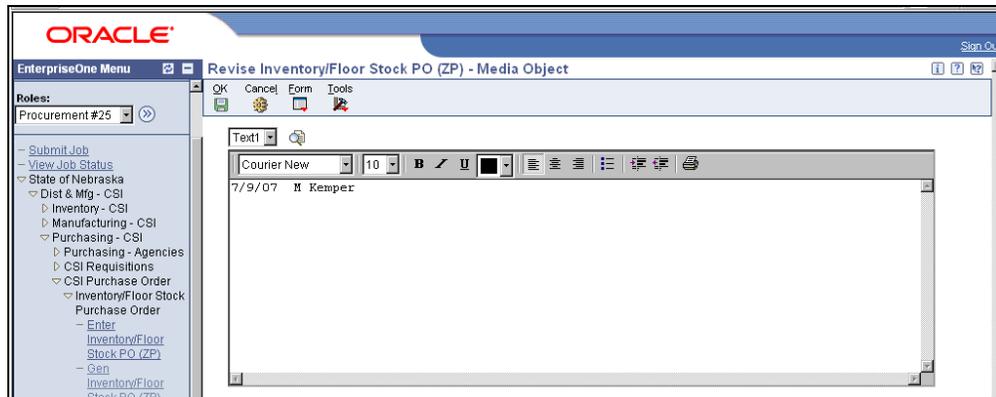
- NN, +Pallet Fee \$XX.XX
- NN, +Fuel Surcharge \$XX.XX

- NN, +EPA Fee \$XX.XX
- Scroll over to Ln Ty: Type in "T"

 Freight Quote is when a vendor gives you an amount for freight. Freight Estimate is when a vendor gives you a guess for freight. FOB Destination is when the vendor pays freight.



7. Click OK.



8. After revising a purchase order, the above box will appear. Type in the date, your first initial, and your last name.