

Revising a Procurement Document

Overview

After a procurement document is entered or generated, modifications can be made to the document. For example, you can increase the quantity of an item, revise the cost of an item, or add new detail lines to the procurement document. You can also make revisions to any active (not gray) field on the order header. Once an order is revised, NIS creates a record of the revisions and tracks these revisions.

Order revisions are based on the number of instances an order is modified, not the number of fields modified. The revisions will be sequential starting with 1.

Line revisions are based on the number of instances a detail line has been modified.

This work instruction shows how to [Revise a Procurement Document](#).

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 Administrative Services website:

<http://www.das.state.ne.us/>.

Navigation

Dependent upon the type of document you want to revise. Choose one of the following:

- Purchasing – Agencies > Requisitions – Agency > Enter & Revise [Commodity or Service] Requisition > Revise Req [Document Type]
- Purchasing – Agencies > Quotation Requests – Agency > [Commodity or Service] Quotation Request – Agency > Revise [Comm or Service] Quote [Document Type]
- Purchasing – Agencies > Contracts – Service (O4) – Agency > Revise Service Contract (O4)
- Purchasing – Agencies > Purchase Orders – Agencies > Commodity Purchase Order - Agency > Revise Commodity PO – Agency > Revise PO [Document Type]
- Purchasing – Agencies > Purchase Orders – Agencies > Service Purchase Order – Agency > Revise Service PO (O9)
- Inventory Purchasing - Agencies > Stock Requisition > Revise Stock Req (ZR)
- Inventory Purchasing - Agencies > Stock Quotation Request > Revise Stock Quote (ZQ)
- Inventory Purchasing - Agencies > Stock Blanket Order > Revise Stock Blanket Order (ZC)

- Inventory Purchasing - Statewide > Stock Purchase Order > Revise Stock PO (ZP)

 Once a document is at an approved status, it can only be revised by accessing it through the Revise Menu selection(s). This includes cancelling a line - if the line has been approved, it can only be canceled via the Revise menus.

"Approved" documents will have a Next Status Code greater than or equal to the number listed below:

- 120 Pre-Requisition
- 120 Purchase Requisition
- 215 Contract
- 280 Purchase Order

Status can be viewed on any Order Detail Line of any procurement document.

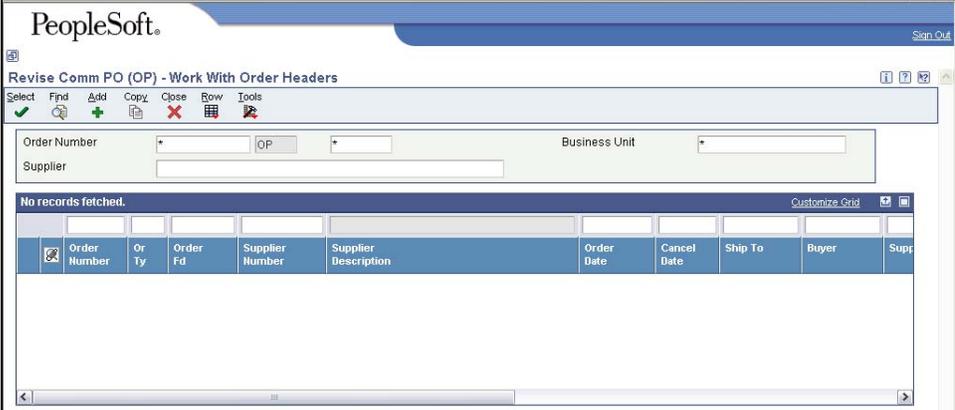
| Records 1 - 2 | | | | | | | |
|---------------|--------------|----------------|--------------|----------------|-------------|-------------|--|
| Line Number | Branch/Plant | Ship To Number | Buyer Number | Carrier Number | Last Status | Next Status | |
| 1.000 | 65050001 | 999999 | 999999 | 999999 | 110 | 120 | |

Steps

Revise a Procurement Document

Start this instruction from the Work with Order Headers window.

 The following example illustrates a change to a Commodity Purchase Order (OP).



1. Enter the **order number** to revise into the Order Number field.
2. Click **Find**.

PeopleSoft. Sign Out

Revise Comm PO (OP) - Work With Order Headers

Select Find Add Copy Close Row Tools

Order Number 46323 OP Business Unit

Supplier

Records 1 - 1 Customize Grid

| Order Number | Or Ty | Order Fd | Supplier Number | Supplier Description | Order Date | Cancel Date | Ship To | Buyer | Supp |
|--------------|-------|----------|-----------------|-------------------------------|------------|-------------|---------|---------|------|
| 46323 | OP | 22710 | 500277 | LATSCHS INC - PURCHASE ORDERS | 03/02/2006 | | 558552 | 1117504 | |

3. Choose the Order Number desired.
4. Click **Select**. The Order Header window appears.

PeopleSoft. Sign Out

Revise Comm PO (OP) - Order Header

OK Cancel Form Tools

Order Number 46323 OP Order Fd 22710 Business Unit 27227150

Address Numbers **Dates**

Supplier 500277 LATSCHS INC - PURCHASE ORDERS

Ship to 558552 ROADS LINCOLN CENTRAL COMPLEX

Buyer 1117504 MILLER, LINDSEY

Invoice To 250227 ROADS LINCOLN CENTRAL COMPLEX

Pmt. Remark

Description

Print Message

Order Date 03/02/2006

Requested 04/01/2006

Promised Delivery 03/02/2006

Cancel Date

Tax Expt Code Hold Code BLANK - HOLD CODES 42/HC

Tax Rates/Area Approval Code 1117504

Certificate Retainage %

Tax ID 470579461 Ordered By NISLMILLER

Person/Corp. ID Order Taken By

Payment Terms AIA Document Y

Messages

5. Modify Order Header information as required.



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).

6. Click **OK**. The Order Detail window appears.

PeopleSoft. Sign Out

Revise Comm PO (OP) - Order Detail

Order Detail | Line Defaults

Order Number: 46323 OP 22710 Business Unit: 27227150

Supplier: 500277 LATSCHS INC - PURCHASE ORDERS Order Revision: 0

Ship To: 558552 ROADS LINCOLN CENTRAL COMPLEX Order Date: 03/02/2006

Hold Code: BLANK - HOLD CODES 42HC

Retainage %:

| Records 1 - 2 | NIGP Number/ Inventory Number | 3 - Digit NIGP | NIGP Sub | Quantity Ordered | Tr. UoM | Unit Cost | Extended Cost | Pu. UoM | Description 1 |
|--------------------------|----------------------------------|-------------------|-------------|---------------------|------------|--------------|------------------|------------|---------------|
| <input type="checkbox"/> | 60089 | 600 | 89 | 1.0000 | EA | 500.0000 | 500.00 | EA | Typewriter |

7. Modify or add detail line(s) as required. Any change(s) will update the revision number on the purchasing document.
 - To cancel a line on the Purchase Order, choose the line you wish to cancel and click **Row, Cancel Line**. To cancel an entire Purchase Order, all lines on the Purchase Order must be cancelled in this manner.
 - To cancel all lines on a Purchase Order, click **Form, Cancel Order**
8. Click **OK**. Enter Text Attachment appears – this is tied to the Revision that you have created.
9. Enter details on the changes that you made to the document.
 - Also include the date of the change and the initials of the person who made the change. (Ex. 9/18/06 – LM)

PeopleSoft. Sign Out

Revise Comm PO (OP) - Media Object

Text1

Courier New 10 B U

Increased quantity to two (2).
Changed Buyer.

10. Click **OK**. You will return to the Work with Order Headers window.
11. Click **Close**.

