

# 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, cancel a line, add a text line attachment, 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.

## 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/>.

## Navigation

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

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

For ZR

NIS State of Nebraska > Dist & Mfg - CSI > Purchasing > CSI Requisitions > Enter Revise Inventory/Floor Stock Requisition > Revise Inventory/Floor Stock Req (ZR)

For OJ

NIS State of Nebraska > Dist & Mfg - CSI > Purchasing > CSI Requisitions > Enter Revise Inventory/Floor Stock Requisition > Revise Contract Req (OJ)

For ZP

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

For ZG

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

## Steps

Start this instruction from the Work with Order Headers window.

 The following example illustrates a change to a Contract Requisition (OJ)

Order Number	Or Ty	Order Fd	Supplier Number	Supplier Description	Order Date	Cancel Date	Ship To	Buyer	Sup
27770	OJ	52510	525390	HARCROS CHEMICALS - OMAHA	01/31/2007		557816	1218741	

1. Enter the **Order Number** to revise into the Order Number field.
2. Click **Find**.
3. Choose the Order Number desired.
4. Click **Select**. The Order Header window appears.

 As an example only: This order was entered to show the screen below.

Order Number: 27770 OJ 52510 Business Unit: 46070025

**Address Numbers**

Supplier: 525390 HARCROS CHEMICALS - OMAHA  
 Ship to: 557816 CORRECTIONS - CORNHUSKER ...  
 Buyer: 1218741 DCSB304 KAREN GILBERT  
 Send Invoice To: 250035 CORRECTIONS, NEBRASKA DEPART...  
 Pmt. Remark: CA-6016A  
 Description: Chemicals  
 Print Message: [ ]

**Dates**

Order Date: 01/31/2007  
 Requested: 01/31/2007  
 Promised Delivery: 01/31/2007  
 Cancel Date: [ ]

Tax Expt Code: [ ] Hold Code: [ ] BLANK - HOLD CODES 42/HC  
 Tax Rate/Area: [ ] Approval Code: 100386  
 Certificate: [ ] Retainage %: [ ]  
 Tax ID: 510259017 Ordered By: NISKMCKAY  
 Person/Corp. ID: C 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.

Order Detail		Line Defaults	
Order Number	27770 OJ 52510	Business Unit	46070025
Supplier	525390 HARCROS CHEMIC...	Order Revision	1
Ship To	557816 CORRECTIONS - CORNHUSK...	Order Date	01/31/2007
Hold Code	BLANK - HOLD CODES 42/HC		
Retainage %			

Records 1 - 5										Customize Grid
	NIGP Number/ Inventory Number	3 - Digit	Report Code 2	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1	
<input type="checkbox"/>	18090-752009	180	90	50.0000	LB	1.4250	71.25	LB	SODIUM LINEAR ALK	▲
<input type="checkbox"/>	18004-601003	180	04	100.0000	LB	0.2000	20.00	LB	SODIUM SULFATE, C	▼

7. Modify or add detail line(s) as required.

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.

On contract orders, EVERY order needs to have a freight T-line type. The line needs to be added on the purchase req or during the revision process. If the purchase order has been approved, you CANNOT add the t-line.

 Inmates cannot cancel lines.

 To cancel a line on the Purchase Order, choose the line you wish to cancel and click **Row, Cancel Line**

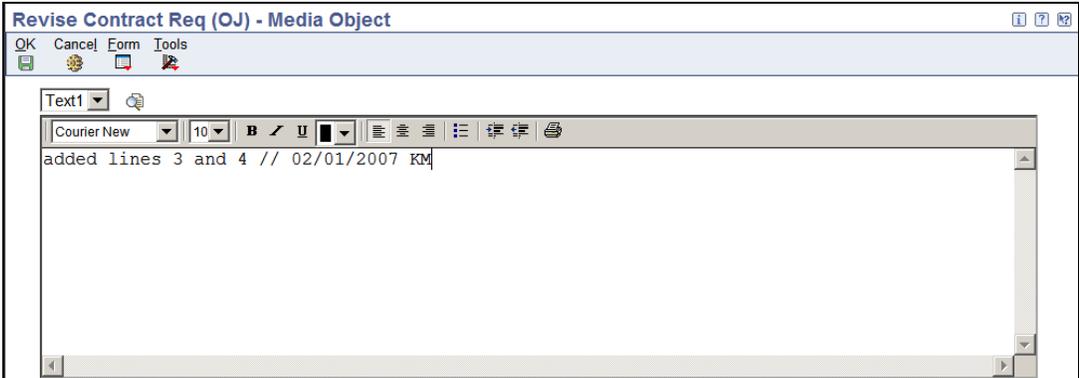
 To cancel an entire Purchase Order, click **Form, Cancel Order**. Add a form attachment with an explanation of the revision.

 A line attachment needs to be added on why a line is cancelled.

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. You must include the date and your initials.

 Use a text attachment when it is specific to a specific line or lines in the order detail. If a text attachment needs to be added to the entire order, use an order header attachment.



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

11. Click **Close**.