

Revising a Procurement Document
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SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. 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.

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Revising a Procurement Document

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 a procurement document is revised, the system 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.

Revising a Procurement Document Lesson

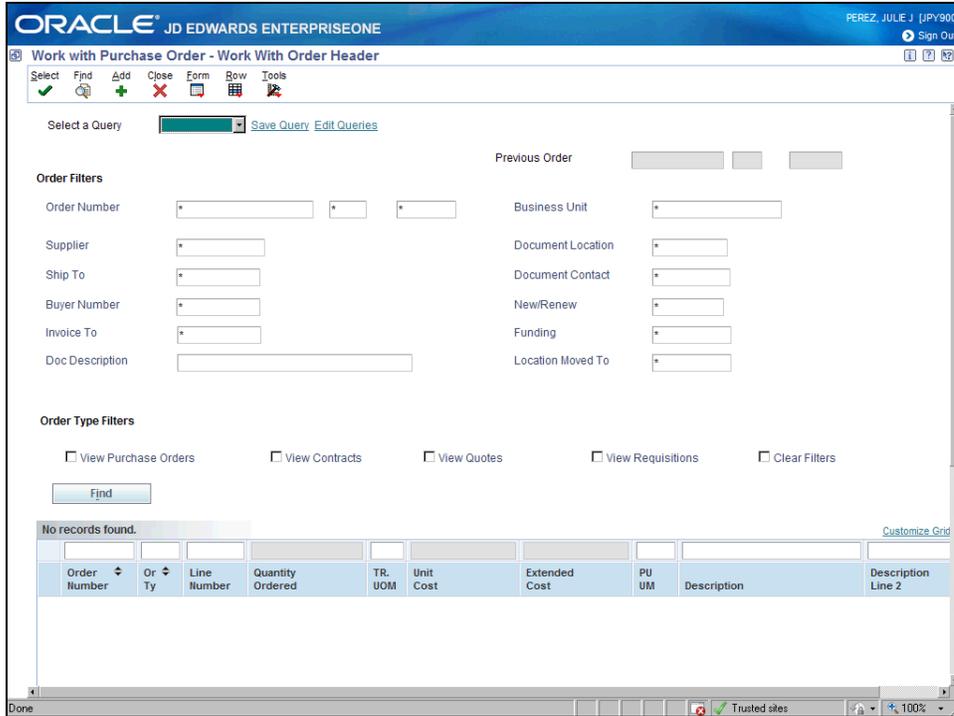
Procedure

In the following lesson a Purchase Order is revised. The process for Revising a Procurement Document is the same for Requisitions, Quotation Requests, Purchase Orders, and Contracts.

Step	Action
1.	Click the State of Nebraska link. State of Nebraska
2.	Click the Purchasing - Agencies link. Purchasing - Agencies
3.	Click the Purchase Orders - Agency link. Purchase Orders - Agency
4.	Click the Work with Purchase Order link. Work with Purchase Order

Training Guide

Revising a Procurement Document



Step	Action
5.	Narrow search for the Procurement Document to revise using the Order Filters , Order Type Filters and the Query by Example (QBE) line. 
6.	Once filtering data is entered, click the Find button. 
7.	Select the Radio button on a row in the grid that contains the Procurement Document to be revised. 
8.	Click the Select button. 

The screenshot displays the 'Work with Purchase Order - Order Header' window in Oracle JD Edwards EnterpriseOne. The window title is 'ORACLE JD EDWARDS ENTERPRISEONE' and the user is 'PEREZ, JULIE J [JPY900]'. The window contains several tabs: 'Order Header', 'Additional Properties', and 'Category Codes'. The 'Order Header' tab is active, showing the following information:

- Order Number:** 303259, **OP**, 23730, **Business Unit:** 37302301
- Address Numbers:**
 - Supplier:** 3260933, **DELL MARKETING - PURCHASE ORDE**
 - Ship To:** 558754, **WORKERS COMPENSATION COURT**
 - Buyer:** 114537, **MCMAHON, JENNIFER**
 - Send Invoice To:** 250284, **WORKERS COMPENSATION COURT**
- Dates:**
 - Entered Date:** 03/08/2010
 - Requested:** 03/08/2010
 - Prom Del Date:** 04/03/2010
 - Cancel Date:** (empty)
- Pmt Remark:** (empty)
- Description:** (empty)
- Print Message:** (empty)
- Tax Expl Code:** (empty), **Hold Code:** (empty), **BLANK - HOLD CODES 42/HC**
- Tax Rate/Area:** (empty), **Approval Code:** 124271
- Certificate:** (empty), **Retainage %:** (empty)
- Tax ID:** 742616805, **Ordered By:** UATMFERGUS
- Person/Corp. ID:** N, **Order Taken By:** (empty)
- Payment Terms:** (empty), **Net 30 Days from Invoice Date**, **S**

The window also includes a 'Messages' section at the bottom, which is currently empty. The window title bar shows 'Done' and 'Trusted sites'.

Step	Action
9.	<p>Order Header</p> <p>Modify information on the Order Header as needed.</p> <p>Note: 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.</p> <p>Review the Detail lines to ensure the information is correct.</p> <p>Note: Information from the Order Header will NOT populate to Detail lines that are cancelled or closed (Status = 999).</p>

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Step	Action
10.	<p>Additional Properties</p> <p>Update data in the Additional Properties fields as needed.</p>

ORACLE® JD EDWARDS ENTERPRISEONE

Perez, Julie J [JPV900] Sign Out

Work with Purchase Order - Order Header

OK Cancel Form Tools

Order Header Additional Properties Category Codes

Property 01 Property 07

Property 02 Property 08

Property 03 Property 09

Property 04 Property 10

Property 05 Property 11

Property 06 Cancel Flag

Document Description SOFTWARE FOR OFFICE

Date 01

Date 02

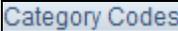
Date and Time 01

Date and Time 02

Document Location 558754 WORKERS COMPENSATION COURT

Document Contact 114537 MCMAHON, JENNIFER

Done Trusted sites 100%

Step	Action
11.	Click the Category Codes tab. 

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Work with Purchase Order - Order Header

OK Cancel Form Tools

Order Header Additional Properties Category Codes

New/Renew

Extension

Funding

Location Moved To

Category Code 05

Category Code 06

Category Code 07

Category Code 08

Category Code 09

Category Code 10

Category Code 11

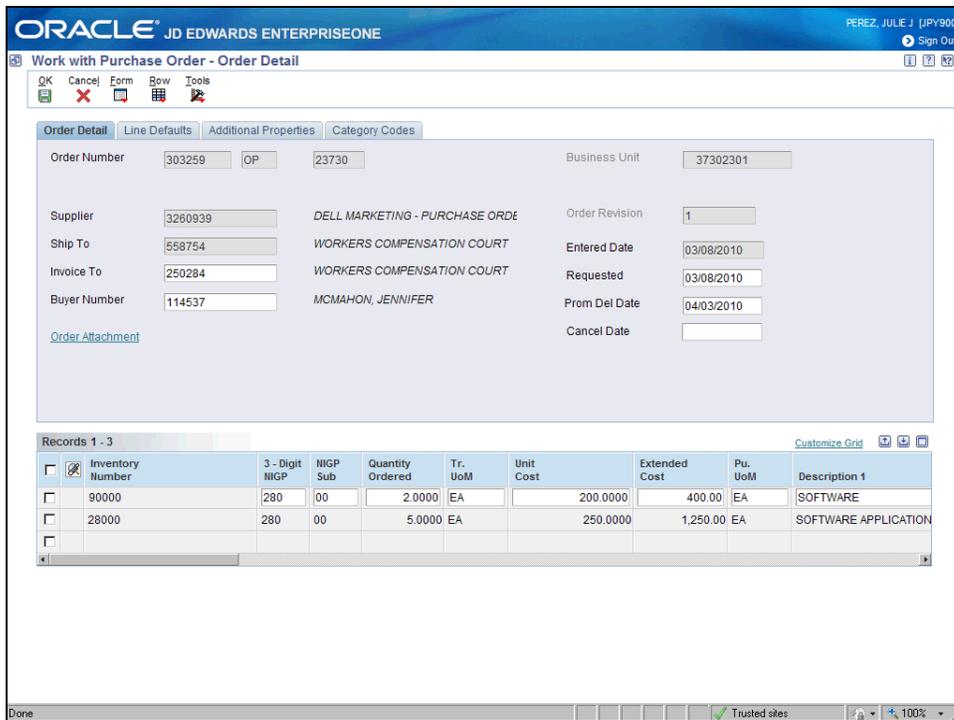
Category Code 12

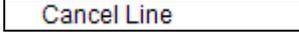
Done Trusted sites 100%

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Step	Action
12.	Category Codes Update fields as needed.
13.	Click the OK button. 
14.	Order Detail Modify or add detail line(s) as required. Any change(s) will update the revision number on the purchasing document.



Step	Action
15.	To Cancel a line on the Procurement Document, select the radio button on the Row to be cancelled. 
16.	Click the Row button. 
17.	Click the Cancel Line menu. 

ORACLE® JD EDWARDS ENTERPRISEONE

Perez, Julie J [JPV900] Sign Out

Work with Purchase Order - Order Detail

OK Cancel Form Row Tools

Order Detail Line Defaults Additional Properties Category Codes

Order Number 303259 OP 23730 Business Unit 37302301

Supplier 3260939 DELL MARKETING - PURCHASE ORDE Order Revision 2

Ship To 558754 WORKERS COMPENSATION COU Entered Date 03/08/2010

Invoice To 250284 WORKERS COMPENSATION COURT Requested 03/08/2010

Buyer Number 114537 MCMAHON, JENNIFER Prom Del Date 04/03/2010

Cancel Date

Order Attachment

Records 1 - 3 Customize Grid

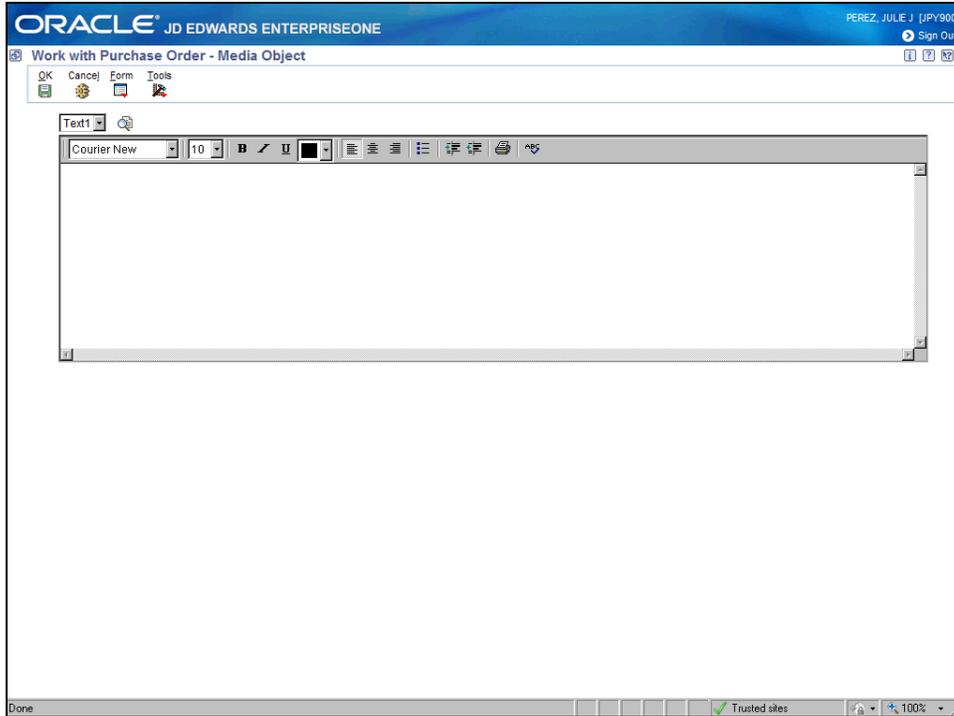
<input type="checkbox"/>	<input type="checkbox"/>	Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	90000	200	00	2.0000	EA	200.0000	400.00	EA	SOFTWARE
<input type="checkbox"/>	<input type="checkbox"/>	28000	280	00	5.0000	EA	250.0000	1,250.00	EA	SOFTWARE APPLICATION

Done Trusted sites 100%

Step	Action
18.	Note the row that was cancelled now has lines through it and the statuses for the cancelled line are 980 - 999.
19.	To cancel all lines on a Purchase Order, click Form, Cancel Order
20.	Line Defaults Functionality can be used to add new lines to the Procurement Document.
21.	Click the OK button. 

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Step	Action
22.	Information entered in the Text Attachment is tied to the Revision. Click in the field.
23.	Enter details on revision(s) made to the document. Include the date of the change and your initials. (Ex. 9/18/06 – LM)
24.	Click the OK button. 
25.	Click the Close button. 
26.	End of Procedure.