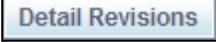


All Order Inquiry Lesson

Step	Action
1.	Click the State of Nebraska link. State of Nebraska
2.	Click the Purchasing - Agencies link. Purchasing - Agencies
3.	Click the Inquiries & Reports link. Inquiries & Reports
4.	Click the Purchasing Inquiries link. Purchasing Inquiries
5.	Click the All Order Inquiry link. All Order Inquiry
6.	<p>Inquiries can be narrowed by using either:</p> <p>Order Filters and Query By Example, (QBE) fields on the grid</p> <p>Order Type Filters to view specified categories of documents (Purchase Orders, Contracts, Quotes, and Requisitions) regardless of Document Type.</p> <p>Note: These filters are independent of each other. The Order Type Filters functionality overrides the Order Filters and QBE.</p>
7.	Enter the Document Number into the Order Number field.
8.	<p>Order Type - Enter the order type in the Order Type field (Represented by a 2 character combination)</p> <p>Standard Order Types:</p> <p>Purchase Requisition: OR, OT, OW, ON, OI, OO, O3, O5, ZR, Z6 Quotation Request: OQ, OF, Z1 Purchase Order: OP, OG, O9, O6, OU, Z8, OH, ZP, ZG, ZO Contract: OC, O4, ZC</p>
9.	<p>Business Unit</p> <p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p>

Step	Action
10.	<p>Supplier</p> <p>Address Book number of Vendor providing goods or services.</p> <p>Primarily "V" search type Address Book records.</p> <p>For this lesson we are not going to enter any information in this field.</p>
11.	<p>Ship To</p> <p>Address to which the goods are to be delivered or the location where services are to be performed</p> <p>Primarily "F" search type Address Book records.</p>
12.	<p>Buyer Number</p> <p>Address book number of Responsible Buyer</p> <p>Primarily "E" or "B" search type Address Book Records; can be "X" or "N" search type Addresss Book Records</p>
13.	<p>Invoice To</p> <p>The address book number the vendor sends the invoice to.</p>
14.	<p>Doc Description</p> <p>This is a free text field; therefore, it is not recommended for "searching"</p>
15.	<p>Document Location</p> <p>Identifies the facility where a commodity or service requisition was established, this field can be pulled from the address book.</p> <p>This must be a Address Book Search Type of "F" - facility</p>
16.	<p>Document Contact</p> <p>Identifies the primary person responsible for the commodity or service requisition. This field can be pulled from the address book.</p> <p>This must be an Address Book Search Type of "B, E, N, or X".</p>
17.	<p>New/Renew</p> <p>Mandatory field for Contracts</p> <p>New or Renewed documents</p>

Step	Action
18.	<p>Funding</p> <p>Funding sources such as ARRA (American Recovery and Reinvestment Act) funds, if populated</p>
19.	<p>Location Moved To</p> <p>If document has been moved to Records Management this field should be populated with "RM"</p>
20.	<p>Selecting Order Type Filters boxes narrows inquiry search down to specified categories of documents (Purchase Orders, Contracts, Quotes, and Requisitions) regardless of Document Type.</p> <p>This is beneficial if the Order Type is unknown.</p> <p>Note: The Order Type Filters functionality overrides the Order Filters and QBE.</p>
21.	<p>Once Order Filters fields are populated click the Find button to populate the grid.</p> 
22.	<p>Detail grid populates based on Order Filters and Order Type Filters criteria.</p> <p>Select the order line for inquiry by clicking on the appropriate radio button.</p>
23.	<p>Click the Detail Revisions button.</p> 
24.	<p>Order Detail tab indicates information from the Order Header that populates to the Order Details</p>
25.	<p>Some Grid Date is available through the Detail Revision screen. This portion of instruction provides detailed information to fields/data not available on the All Order Inquiry Grid.</p>
26.	<p>NIGP/Inventory Number (in the grid)</p> <p>NIGP Number/Inventory Number – represents the NIGP commodity code for items to be purchased. All applicable 5-digit codes for Services will be > 90000. All Commodity Codes will be <90000.</p> <p>3-Digit NIGP – three-digit prefix to a commodity code</p> <p>NIGP Sub – the two-digit commodity code suffix</p>

Step	Action
27.	<p>Account Number - Business Unit and Object Account tied to the detail line for the procurement document</p> <p>The following fields populate based on the Account Number:</p> <p>Cost Center - Business Unit for this detail line of the document Obj Acct - Object Account tied to this detail line of the document Sub Subledger - Used by some agencies to further define object accounts SBL Type - Used by some agencies to further define object accounts</p>
28.	Dev Request - Information Regarding Split Lines of Coding
29.	Report Code 4 - Restrict Order Information – specific to certain agencies
30.	Tag Number - Fixed Asset Number assigned to this purchase, if applicable
31.	Invoice To - Address Book Record to which vendor will send invoice.
32.	<p>Tax Rate/Area - not applicable Expl Code - not applicable</p>
33.	Line Defaults tab is only used when adding or revising a procurement document
34.	Data on the Additional Properties tab provides information about the document: Document Description, Document Location, and Document Contact
35.	For contracts, the system is designed to require data on the Category Codes tab. Data includes information about the Renewal status for contracts.
36.	<p>To exit Order Detail, click the Cancel button.</p> 
37.	Purchasing Ledger - tracks all history of a procurement document
38.	<p>Click the Find button.</p> 
39.	<p>PA Commitment – provides encumbrance data based on an encumbering purchase orders.</p> <p>Inquiry can be narrowed using header fields and QBE line,</p>
40.	Document Inquiry - primarily focuses on detail lines of a specified document. Provides information regarding originating documents or generated documents.
41.	<p>Order Addresses – provides additional information on Supplier or Ship To addresses.</p> <p>Note: Supplier and Ship To address book numbers can be modified for documents without affecting address book records.</p>
42.	Approvals - inquiry on approval status of procurement documents
43.	Enter the approver address book number into the Approver field.
44.	Enter the date into the Order Date field.

Step	Action
45.	<p>Selecting Order Type Filters boxes narrows inquiry search down to specified categories of documents (Purchase Orders, Contracts, Quotes, and Requisitions) regardless of Document Type.</p> <p>o This is beneficial if the Order Type is unknown.</p> <p>NOTE: The Order Type Filters functionality overrides the Order Filters and QBE.</p> <input data-bbox="354 506 396 548" type="checkbox"/>
46.	<p>To begin a new search using Order Type Filters, click the Clear Filters option.</p> <input data-bbox="354 600 396 642" type="checkbox"/>
47.	<p>Order Number Or Ty (Order Number Order Type)</p> <p>Number and Type that identify an original document.</p> <p>This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, etc.</p>
48.	<p>Line Number - Unique line number to a specific order. Displayed sequentially.</p>
49.	<p>Quantity Ordered TR. UOM (Transaction Unit of Measure) - Quantity of units ordered on a specific line of an order.</p>
50.	<p>Unit Cost - Cost per unit</p> <p>For Requisitions, this is estimated.</p>
51.	<p>Extended Cost – Calculation based on the Quantity Ordered and Unit Cost fields.</p>
52.	<p>Pu. UM - Purchase Unit of Measure must be the same Unit of Measure in the Tr. UoM field.</p>
53.	<p>Description 1 - descriptive data pertaining to the specific detail line</p>
54.	<p>Description 2 - descriptive data pertaining to the specific detail line</p>
55.	<p>Order Fd (Order Fund) - Fund associated with Business Unit</p>
56.	<p>Supplier Number Supplier Description - Vendor supplying goods or services.</p> <p>This is the same for the entire document.</p>
57.	<p>Dates -</p> <p>Entered Date - date procurement document was created in system</p> <p>Request Date - date goods or services are needed</p> <p>Promised Delivery - requested date for this item or service; does not need to be the same as the overall contract period – some Service Contracts span multiple years, etc.</p> <p>Cancel Date - date after which goods or services will not be accepted; date that a Contract will expire.</p>

Step	Action
58.	Ship To - Location where items or services will be received
59.	Buyer - Buyer responsible for the procurement document
60.	Reference Information - data entered in these fields is at Agency discretion
61.	Order Amount - Cumulative dollar amount of all lines on an order
62.	Business Unit - An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.
63.	Order By - User ID of individual who created or generated the document
64.	<p>Contract Location</p> <p>Identifies the facility where a purchasing document was established</p> <p>If this is a contract, the physical location of documentation</p> <p>This must be a Address Book Search Type of "F" - facility</p>
65.	<p>Contract Description - overall description of procurement document</p> <p>If contract, mandatory field</p>
66.	<p>Order Status (Last Stat Next Stat)</p> <p>Based on Status Codes defined in system</p> <p>Status Codes vary depending upon Document Type (Purchase Order, Contract, Quote, or Requisition)</p> <p>Provide information about the document status</p>
67.	<p>Ln Ty – Line Type</p> <p>Enter the appropriate Line Type for your order.</p> <p>J - Non-Inventory or Non-Stock Item; Represents "G/L Account Number," it indicates that a purchase is going to be made against a specific account and that funds will be drawn from that Business Unit and Object Account</p> <p>S - Inventory; Represents the item being order is purchased good or raw material for stock.</p> <p>N - Non-Stock Item; Represents a good that is used to manufacture a Finished Inventory item. But not counted in Inventory</p> <p>T - Text Line; indicates that text will be included on this line, but there will not be any funds/accounts associated with this line.</p> <p>X - Outside Operations; Do Not use for this process</p>

Step	Action
68.	Click the Close button. 
69.	You have successfully completed this lesson. End of Procedure.