

Entering a Purchase Requisition

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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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Entering a Purchase Requisition

Entering a Purchase Requisition Overview

When purchasing a commodity, an agency must first determine if it is available from an existing contract. If so, the contract must be used to procure the item. Please refer to the AS Materiel Division – State Purchasing Bureau (<http://www.das.state.ne.us/materiel/>) website for more information.

Overview – Entering a Purchase Requisition, Non-Contract/Non-Stock Commodity

Agencies can generate purchases for commodities that are less than \$10,000 without processing through AS Materiel Division, State Purchasing Bureau.

With the exception of "Exception Orders", the total value of the Purchase Requisition will determine the process applied to the procurement of the item(s). If the purchase is for an item that has been identified as an "Exception Order", follow appropriate procedures for those purchases. [See Document Flows and Menu Selections.](#)

If a State [contract](#) does not already exist for a required item and the total value does not exceed \$2000; an agency can pay the vendor through NIS Accounts Payable without creating a PO. Or, the agency can choose to purchase the item(s) with a Purchase Order through NIS Procurement. Please note: Agencies are strongly urged to obtain a minimum three bids on purchases for goods over \$2000.

If a State contract does not already exist for a required item and the total value of the order will not exceed \$10,000, the agency, board, or commission (agency) has the option to either utilize the Purchase Requisition process or enter a Purchase Order directly.

If a State contract does not already exist for a required item, and the total value of the order will exceed \$10,000, the agency must utilize the Purchase Requisition process.

Purchase Requisition Process:

- Total value is between \$2000 and \$10,000; it is highly recommended that an agency obtain the best price for the item(s) that they purchase by receiving a minimum of three bids from vendors. The agency may choose to make the purchase via three processes:
- Enter a Purchase Requisition (OR) → generate a Quotation Request (OQ) → generate a Purchase Order (OP)
- Enter a Purchase Requisition (OR) → generate a Purchase Order (OP)
- Enter a Purchase Order (OP) directly
- Total value is between \$10,000 and \$24,999, AS Materiel Division, State Purchasing Bureau must be involved in the procurement of the item(s).
- In order for AS Materiel Division, State Purchasing Bureau to approve a requisition, agencies must include an order attachment indicating the vendors contacted and bids received, or,
- AS Materiel Division - State Purchasing Bureau will either process the purchase for the agency, or give the agency authority to process the purchase.

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- Total value equal to or greater than \$25,000, AS Materiel Division – State Purchasing Bureau will process the purchase for the agency.

Order Type - Description
Navigation

OR - Requisition * (optional)

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

* Optional if a Purchase Order (OP) will be entered directly. The Purchase Requisition (OR) is required for purchases with a total value equal to or greater than \$10,000.

Overview – Entering a Purchase Requisition for an Exception Order

State Statute requires purchase of certain items to be made through specific agencies. The end user must determine if an item that they wish to purchase falls within this category of "Exception Orders." Once this is determined, the end user must initiate the purchase using a requisition defined in the "Exception Orders" menu. ([Link to current Direct Purchase Authority letter from DAS Materiel Division Administrator.](#))

Exception Orders (ex. firearms, motor vehicles, IT equipment, etc.) are routed to specified agencies through the use of Approval Routes. End users must estimate the total value of the purchase to route the document to the appropriate entity. If you are unable to determine an estimated value, you must enter a total equal to or greater than \$5.00.

Order Type
Description
Navigation

OO - Restricted Requisition (does not route outside agency)

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

OT - Requisition for Communications Equipment

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

OW - Requisition for Equipment, Print Services, or Firearms Thru AS Materiel Division, State Purchasing Bureau

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

OI - Requisition for Vehicles Thru AS – Transportation Services Bureau

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

ON - IT Equipment and Services

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

Overview – Entering a Purchase Requisition to Generate a Commodity Contract (OR)

- If a State contract does not already exist for a required item, and an agency desires a commodity contract, it must enter a Purchase Requisition for AS Materiel Division, State Purchasing Bureau to generate a contract.

Order Type - Description

Navigation

OR - Requisition for Commodity Contract

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

Overview – Entering a Purchase Requisition for Services

Any agency can identify the need for a service contract. It is the responsibility of each agency to ensure that the process used complies with State Statutes and other governing authorities. If the state agency processes the service, there are five possible process flows:

1. Direct Pay for items less than \$500 (less than \$25,000 as per Agency, Board, and Commission memo dated January 16, 2004, reference memo for requirements) [Link to ABC memo](#)

2. Purchase Requisition (optional) → Purchase Order

* Optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit bid.

3. Purchase Requisition → Contract → Purchase Order

4. Purchase Requisition → Quotation Request → Purchase Order

5. Purchase Requisition → Quotation Request → Contract → Purchase Order

The system has been configured to allow a state agency to request that AS Materiel Division, State Purchasing Bureau process the service contract. This is done by entering a Purchase Requisition (O5). Please contact AS Materiel Division – State Purchasing Bureau at (402) 471-2401 to assure resources are available.

Order Type - Description

Navigation

O3 - Requisition for Service – Processed by Agency * (optional)

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

* Optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit bid.

O5 - Requisition for Service – Processed by Bureau

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

Z6 - Requisition for Services - Exempt

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

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

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Navigation: Purchasing > Purchasing – Statewide > see below
Order Type - Description
Navigation

OR - Requisition * (optional)

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

* OR is optional if a Purchase Order (OP) will be entered directly. The Purchase Requisition (OR) is required if a Quotation Request (OQ) will be used to solicit bids

OO - Restricted Requisition (does not route outside agency)

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

OT - Requisition for Communications Equipment

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

OW - Requisition for Equipment, Print Services, or Firearms Thru AS Materiel Division, State Purchasing Bureau

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

OI - Requisition for Vehicles Thru AS Transportation Services Bureau

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

ON - IT Equipment and Services

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

O3 - Requisition for Service – Processed by Agency ** (optional)

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

** O3 is optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit bid.

O5 - Requisition for Service – Processed by Bureau

Purchasing – Agencies > Requisitions – Agency > Work with Requisition

Z6 - Requisition for Services - Exempt

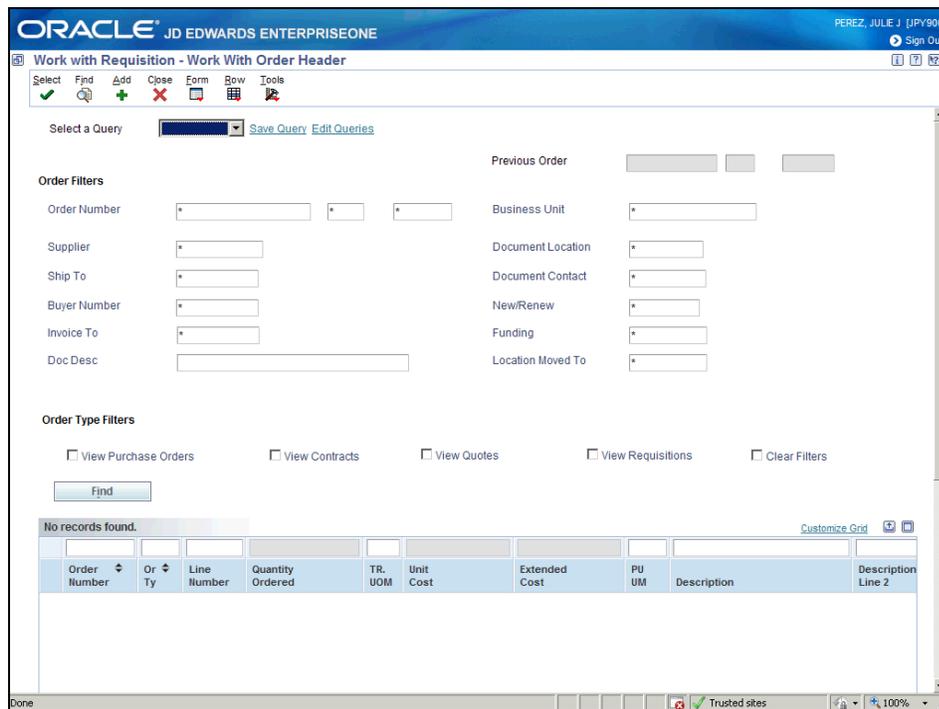
Purchasing – Agencies > Requisitions – Agency > Work with Requisition

Entering a Purchase Requisition Lesson

Procedure

In this lesson you will learn how to enter a purchase requisition.

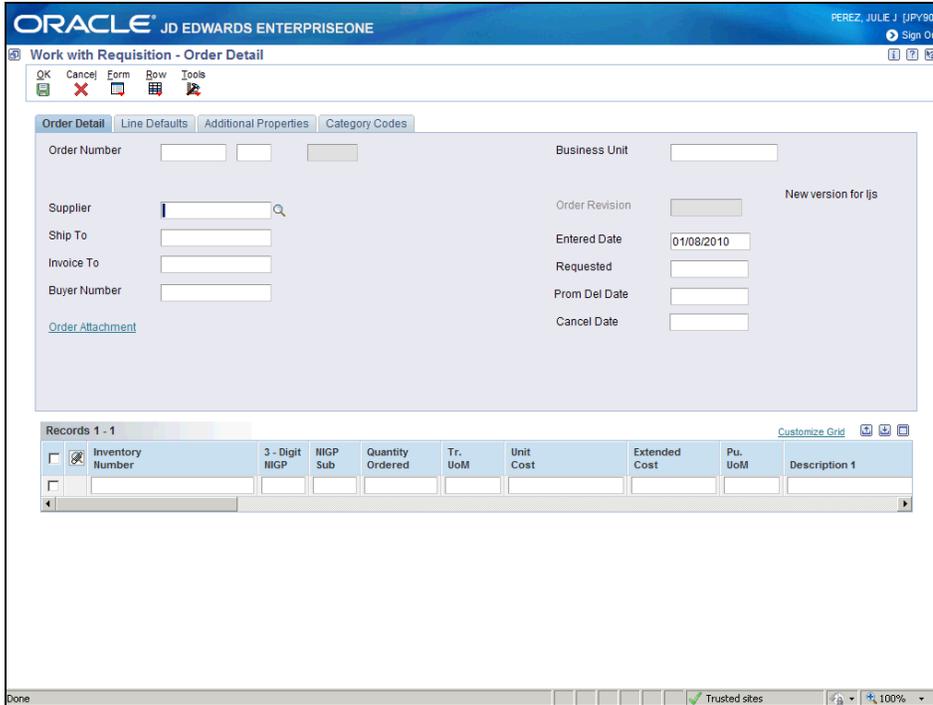
Step	Action
1.	End User MUST know the document type (listed) to enter a Commodity or Service requisition. (OR, O8, ZR, OO, OT, OW, OI, ON, O3, O5, Z6) The screens shown in this work instruction may not reflect what the end-user will see.
2.	Click the State of Nebraska link.
3.	Click the Purchasing - Agencies link.
4.	Click the Requisitions - Agency link.
5.	Click the Work with Requisition link.



Step	Action
6.	Click the Add button.

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Step	Action
7.	Enter Header Information for this Requisition
8.	<p>Supplier</p> <ul style="list-style-type: none"> o Use 999999 (Best Source – Generic Supplier Address Book number) when total value is estimated to be greater than \$2,000 and acquiring bids o If you are purchasing items less than \$10,000 and not creating your Purchase Order through the use of a Quotation Request, you can enter the Address Book number of the vendor from whom you will purchase the goods. On the second Order Header "Text Attachment", enter the names of vendors from whom you solicited bids and their responses. o Use the Vendor number if the commodity or service is a Sole Source or this document will not require bidding and the vendor is known. o Primarily "V" search type Address Book records. <p>NOTE: This should NEVER be an "E" search type Address Book record.</p>

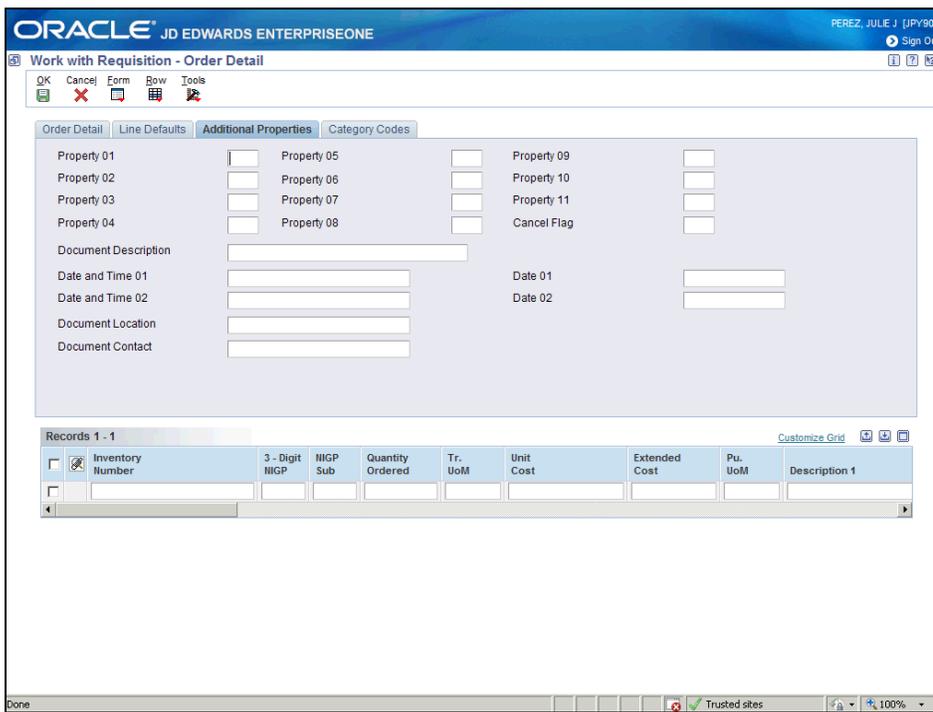
Step	Action
9.	<p>Ship To</p> <ul style="list-style-type: none"> o Address to which the goods are to be delivered or the location where services are to be performed o If multiple locations, A/B # 559783 (FACILITY, MULTIPLE ADDRESSES) can be used o Primarily "F" search type Address Book records.
10.	<p>Invoice To - the address the Vendor will send their invoice to</p> <p>Automatically populates but can be overridden</p>
11.	<p>Buyer Number - Individual who is primarily responsible for this document at the AGENCY</p> <ul style="list-style-type: none"> o If the Purchase Requisition is required to go through AS Materiel – State Purchasing Bureau, they will populate this field with the address book number of the Buyer who is responsible for bidding this document
12.	<p>Business Unit - BU accountable for the order</p>
13.	<p>Dates</p> <ul style="list-style-type: none"> o All dates default to current date but can be overridden o Entered Date – The date this Purchase Requisition is entered into NIS o Requested – The date you want to receive the item; change date to accommodate formal bidding process. If the requisition is to establish a contract, this date may be used to indicate the beginning date of the contract. o Prom Del Date – The date that the vendor has promised delivery. This information is used for tracking vendor performance – the system will compare the date received against the promised date. It is important to enter a valid Promised Delivery date. If the requisition is to establish a contract, this date is used as the contract renewal date. You do not need to populate this date until needed. o Cancel Date – Will remain blank unless you enter data. This can reflect the last date the requisition is valid. It is not necessary to enter a cancel date at this level.

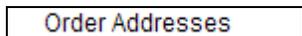
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Step	Action
14.	<p>An Order Number has three components:</p> <ul style="list-style-type: none"> o Order Number - system assigned o Order Type - defined by user at time of entry o Order Fund - automatically assigned based on Business Unit <p>Order Type - the second field of the Order Number.</p> <p>Note: It is mandatory to enter an Order Type (Document Type).</p> <p>The following order types are specific to Requisitions:</p> <ul style="list-style-type: none"> o OR - Requisition for Commodity Contract o OO - Restricted Requisition o OT - Requisition for Communications Equipment o OW - Requisition for Equipment, Print Services, or Firearms Thru AS Materiel Division, State Purchasing Bureau o OI - Requisition for Vehicles Thru AS – Transportation Services Bureau o ON - IT Equipment and Services o O3 - Requisition for Service – Processed by Agency (optional) o O5 - Requisition for Service – Processed by Bureau o Z6 - Requisition for Services – Exempt
15.	<p>Click the Additional Properties tab.</p> <p>Additional Properties</p>



Step	Action
16.	Data on the Additional Properties tab provides information about the document: Document Description, Document Location, and Document Contact
17.	<p>Document Description</p> <ul style="list-style-type: none"> o Highly Recommend o Populate for a commodity or service requisition, this field can be used for free form text. It is helpful to fill this field in at the requisition level. Populate with data that describes the goods/services being procured. This information will print on reports. o This field can hold up to 30 alpha/numeric characters
18.	<p>Document Location</p> <ul style="list-style-type: none"> o Mandatory o Identifies the facility where a commodity or service requisition was established, this field can be pulled from the address book. o This must be a Address Book Search Type of "F" - facility
19.	<p>Document Contact</p> <ul style="list-style-type: none"> o Mandatory o Identifies the primary person responsible for the commodity or service requisition. This field can be pulled from the address book. o This must be an Address Book Search Type of "B, E, N, or X".
20.	<p>Order Addresses</p> <ul style="list-style-type: none"> o This step is optional. o This enables an end-user to modify the addresses tied to a "supplier" address book number or a "ship to" address book number for the current document. These changes will transfer to generated documents, but will not change the address book record. If generating a Purchase Order or Contract from the requisition, the end-user must click Form, Refresh on the Order Address Information window to populate the form with the correct mailing name and appropriate information
21.	<p>Click the Form button.</p> 
22.	<p>Click the Order Addresses menu.</p> 

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Step	Action
23.	At the Order Level, either the Supplier Address or the Ship to Address can be updated to reflect an address different than the address on the Address Book record. Change the mailing information as needed.
24.	To revise/view the Ship To address; click the Ship To option. 
25.	Click the OK button. 
26.	Click the Order Detail tab. 

Step	Action
27.	Enter Detail Lines for this Requisition DO NOT CLICK ON "OK" BUTTON
28.	The new Order Number Order Type will appear and should be recorded if you wish to do more work with them or facilitate searches later.
29.	<p>Inventory Number</p> <ul style="list-style-type: none"> o 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. This field will not print on the purchasing documents. o 3-Digit NIGP – Will populate from the NIGP Number/Inventory Number; this is the three-digit prefix to a commodity code o NIGP Sub – Will populate from the NIGP Number/Inventory Number; this is the two-digit commodity code suffix <p>3-Digit NIGP and NIGP Sub automatically populate from the data entered in the NIGP Number/Inventory Number field but can be overridden.</p>
30.	Inventory Number - Provides data regarding the type of item you are purchasing.

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Step	Action
31.	<p>3-Digit NIGP field will populate from the NIGP Number/Inventory Number; this is the three-digit prefix to a commodity code</p> <p>You must enter data in the 3-Digit NIGP field for all additional lines.</p>
32.	<p>NIGP Sub field will populate from the NIGP Number/Inventory Number; this is the two-digit commodity code suffix</p>
33.	<p>Quantity Ordered – Enter the quantity of the item that you require.</p>
34.	<p>Tr. UoM – Transaction Unit of Measure. System defaults to EA; override this with the appropriate unit of measure if necessary. Other options can be found using the visual assist.</p>
35.	<p>Unit Cost – the estimated cost per unit.</p>
36.	<p>Extended Cost – The system will automatically populate this field based on the Quantity Ordered and Unit Cost fields.</p>
37.	<p>Pu. UoM - Purchase Unit of Measure. Defaults to the same Unit of Measure in the Tr. UoM field.</p> <p>Pu. UoM must equal Tr. UoM or an error will occur.</p>
38.	<p>Description 1 – This is free text – will print on all purchasing documents; enter descriptive data pertaining to the specific detail line. System will capitalize the text.</p>
39.	<p>Description 2 – This is free text – will print on purchasing documents; enter descriptive data that you want to appear in NIS. System will capitalize the text.</p>
40.	<p>Account Number – valid business unit and object account from the Chart of Accounts.</p>
41.	<p>The following fields populate based on the Account Number:</p> <p>Cost Center Obj Acct Sub SBL Type Subledger</p>
42.	<p>Business Unit - Automatically populates from the Business Unit on the Order Header. This can be revised on the detail line.</p>
43.	<p>Line Number - Automatically populates in sequence</p>

Step	Action
44.	<p>Ln Ty – Line Type</p> <p>Enter the appropriate Line Type for your order.</p> <ul style="list-style-type: none"> o 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 o S - Inventory; Represents the item being order is purchased good or raw material for stock. o N - Non-Stock Item; Represents a good that is used to manufacture a Finished Inventory item. But not counted in Inventory o T - Text Line; indicates that text will be included on this line, but there will not be any funds/accounts associated with this line. o X - Outside Operations; Do Not use for this process <p>If this is a requisition for Supply Inventory, the Line type will be "S."</p>
45.	<p>Dev Request - Deviation Request for Commodities and Services:</p> <ul style="list-style-type: none"> o Exception Orders o Emergency Purchases o Direct Purchase Authority, DPA o Statewide Contract Use o Deviation Process
46.	<p>Report Code 4 – Used ONLY for Purchasing for Inventory</p> <p>Identifies Master Planning Family</p>
47.	<p>Other fields on a detail line may be required by your Agency. Fill these required.</p>
48.	<p>Line Attachments -</p> <p>Line Attachments: Text (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)</p> <p>Line Attachments: OLE (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)</p>
49.	<p>Add as many detail lines as necessary to the Requisition.</p> <p>Use the down arrow on the keyboard to move the cursor to the next line if required.</p> <p>Remember: You must enter data in the 3-Digit NIGP field for all additional lines.</p>
50.	<p>Click the OK button.</p> 

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Step	Action
51.	Click the Cancel button. 
52.	Click the Close button. 
53.	You have successfully completed this lesson. End of Procedure.