

Generating a Quotation Request from 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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Generating a Quotation Request from a Purchase Requisition

Generating a Quotation Request from a Purchase Requisition Overview

Once a Purchase Requisition is created, you can generate a Quotation Request. From this request, you receive price quotes from different suppliers to identify the supplier offering the best price that meets your specifications.

Navigation paths tend to change as the system is developed. If you are unable to find the Order Type below, please call the OCIO Help Desk (402) 471-4636.

Order Type/ Description Navigation

OQ Quote for Commodity Purchase =< \$9999

Purchasing – Agencies > Quotation Requests – Agency > Commodity Quotation Request – Agency > Gen Comm Quote (OQ) from [type] Req [(document type)]

OF Quote => \$10,000

Processed by AS Materiel Division, State Purchasing Bureau

Z1 Quote for Services

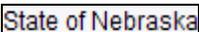
Purchasing – Agencies > Quotation Requests – Agency > Service Quotation Request – Agency > Gen Service Quote (Z1) from [type] Req [(document type)]

ZQ Quote for Stock

Inventory Purchasing - Statewide > Stock Quotation Request > Gen Stock Quote (ZQ) from Req

Generating a Quotation Request from a Purchase Requisition Lesson

Procedure

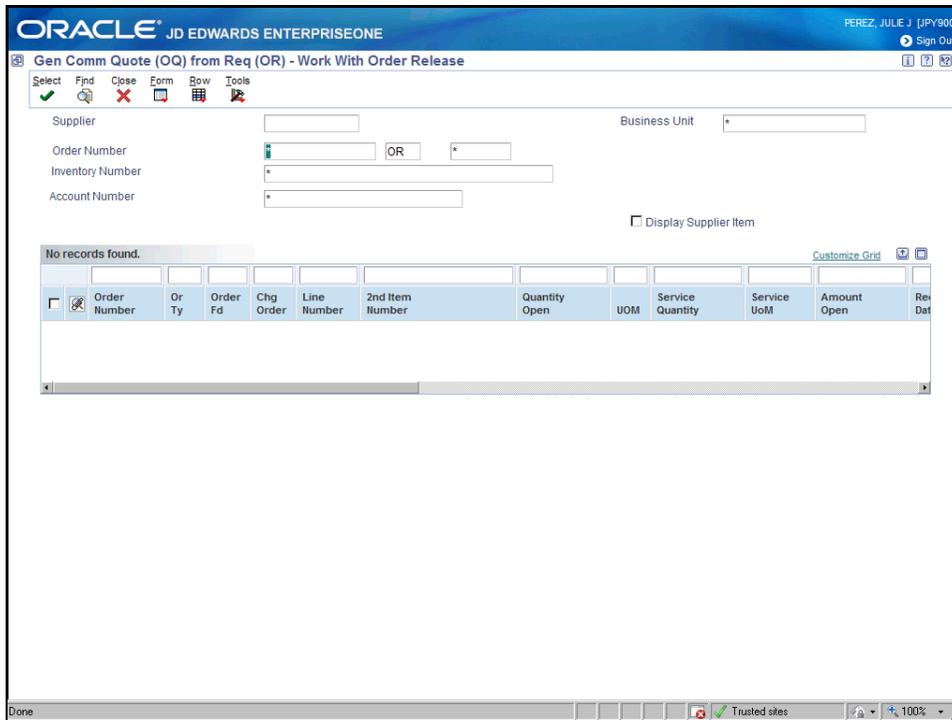
Step	Action
1.	Click the State of Nebraska link. 

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Step	Action
2.	Click the Purchasing - Agencies link. Purchasing - Agencies
3.	Click the Quotation Requests - Agency link. Quotation Requests - Agency
4.	Click the Commodity Quotation Request - Agency link. Commodity Quotation Request - Agency
5.	Click the Gen Comm Quote (OQ) from Req (OR) link. Gen Comm Quote (OQ) from Req (OR)



Step	Action
6.	Enter the order number in the Order Number field (and Order Type if not defaulted), to minimize the search.
7.	Click the Find button. 
8.	Choose the row(s) in the grid reflecting the detail lines from which you want to generate a quotation request. <i>Note:</i> It is possible to choose detail lines from multiple requisitions to generate a single quotation request. 

Step	Action
9.	Click the Row button. 
10.	Click the Order Release menu. 

The screenshot displays the Oracle JD Edwards EnterpriseOne interface for generating a quotation request. The main window title is "Gen Comm Quote (OQ) from Req (OR) - Order Release". The header section includes fields for Supplier (999999), Buyer (100378), Ship To (878925), and Order Number (48357). The "Release Information" tab is selected, showing a Release Qty of 100.0000 and a Release Amt of 7,500.00. Other fields include Qty To Date, Original Qty, Unit Cost, and Line Type.

Step	Action
11.	<p>Header Information</p> <p>Review and update the following fields on the Header as required:</p> <ul style="list-style-type: none"> o Branch/Plant - Note: 9000 is not a valid Branch/Plant for a Quotation; this will result in an Error o Buyer o Ship To <p>Note: Changes made to the order release will be reflected on the generated Quotation Request. They do not change the original Purchase Requisition.</p>

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Step	Action
12.	<p>Release Information</p> <p>Release Qty automatically populates from the Requisition. This can be increased or decreased during this process.</p> <p>Release Amt is calculated using Release Quantity and Unit Cost</p>
13.	<p>Detail Information</p> <p>Inventory Number - autopopulates from Requisition.</p> <p>Description 01 - Autopopulates from Requisition. Update as necessary</p> <p>Account Number - Update as necessary</p>
14.	<p>Dates</p> <p>Requested - Update as necessary</p> <p>Promised Delivery - Update as necessary</p>
15.	<p>Click the OK button.</p> <p><i>Note:</i> If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat Steps for each detail line that you wish to include on the Quotation Request.</p> 

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ORACLE JD EDWARDS ENTERPRISEONE PEREZ, JULIE J [JPY900] Sign Out

Gen Comm Quote (OQ) from Req (OR) - Work With Order Release

Select Find Close Form Row Tools

Supplier: [] Business Unit: *

Order Number: 48357 OR *

Inventory Number: *

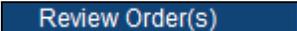
Account Number: *

Display Supplier Item

Records 1 - 4 Customize Grid

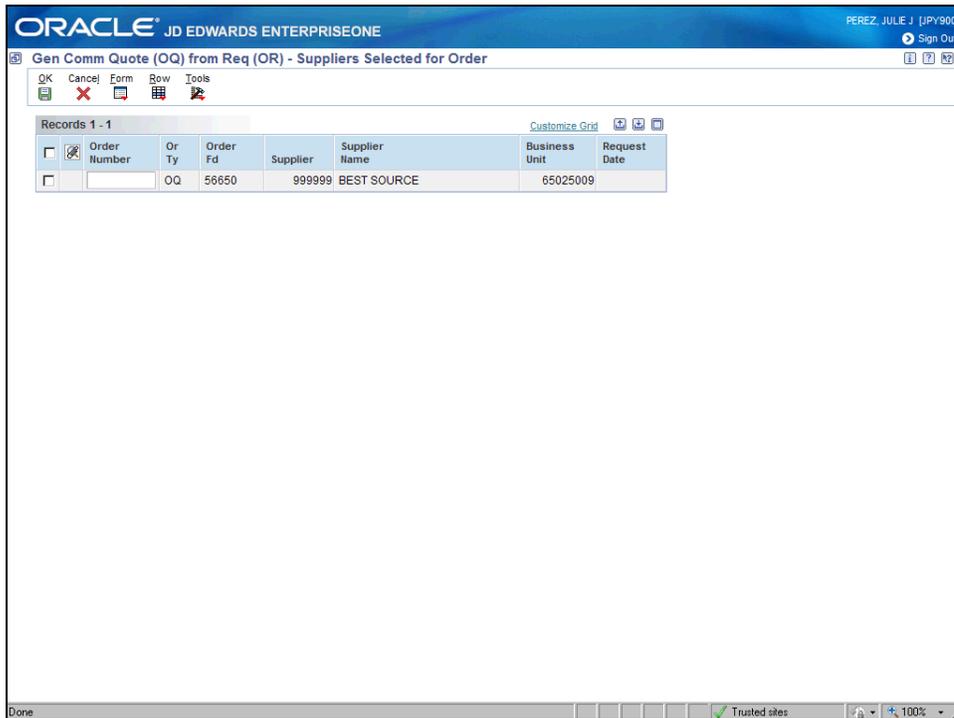
	Order Number	Or Ty	Order Fd	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Service Quantity	Service UoM	Amount Open	Req Date
<input type="checkbox"/>	48357	OR	00001	000	2.000	92000	50.0000	EA	.0000	EA	3,750.00	0
<input type="checkbox"/>	48357	OR	00001	000	4.000	92000	25.0000	EA	.0000	EA	250.00	0
<input type="checkbox"/>	48357	OR	00001	000	5.000	92000	5.0000	EA	.0000	EA	75.00	0
<input type="checkbox"/>	48357	OR	00001	000	6.000	92000	10.0000	EA	.0000	EA	75.00	0

Done Trusted sites 100%

Step	Action
16.	Optional, view Quotation Request prior to generation, click the Form button. 
17.	Click the Review Order(s) menu. 

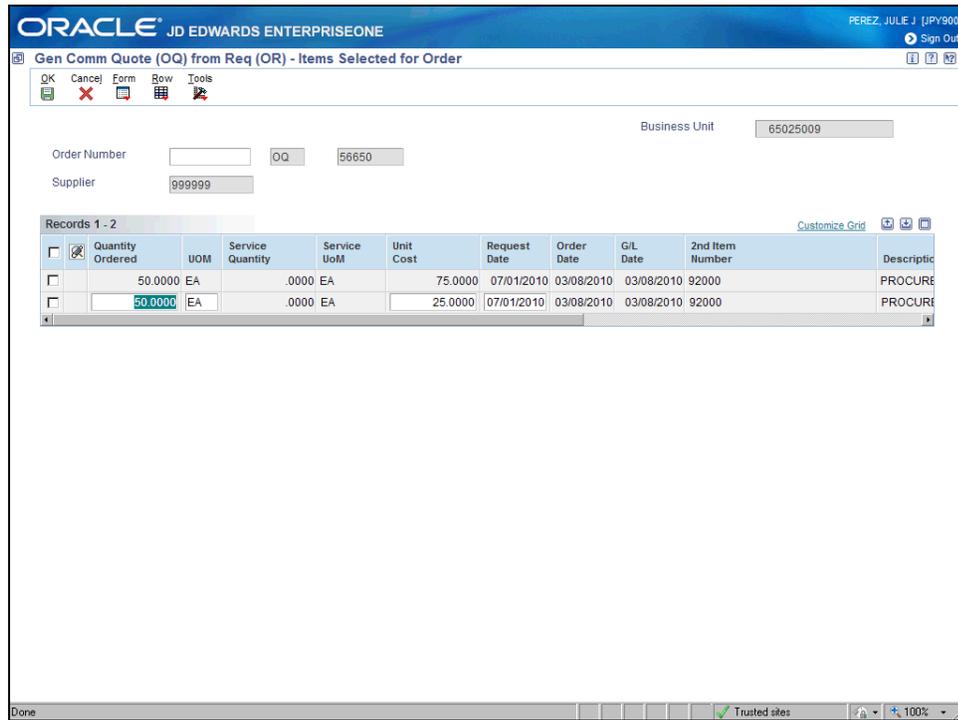
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Step	Action
18.	Check the box on the Row for the document to review. <input type="checkbox"/>
19.	Click the Row button.
20.	Click the Details menu.

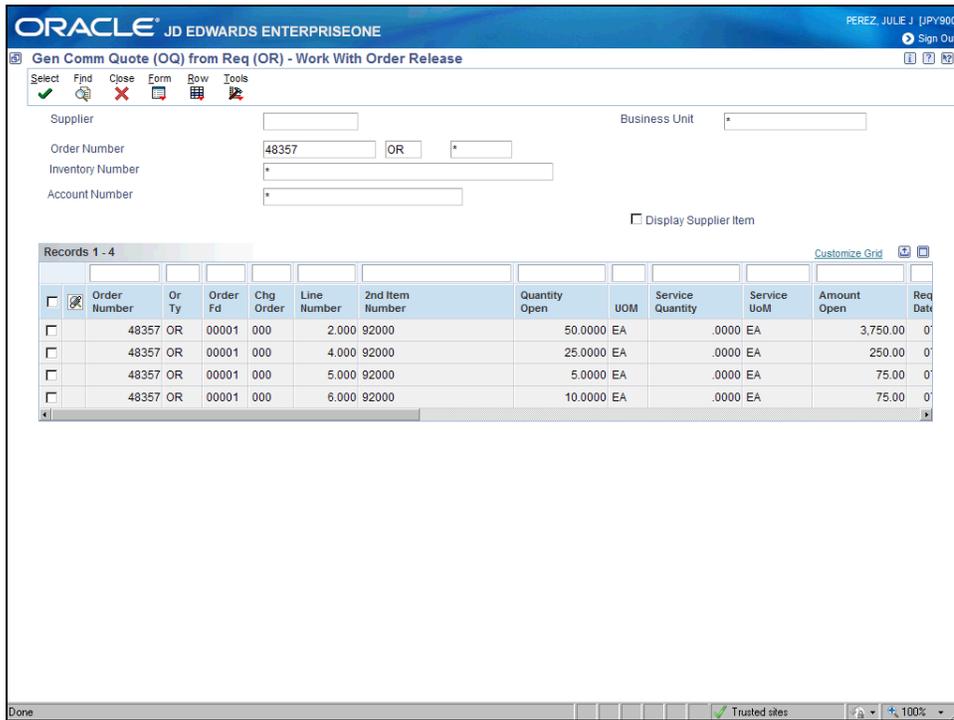
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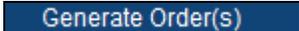


Step	Action
21.	Click the Cancel button. 
22.	Click the Cancel button. 

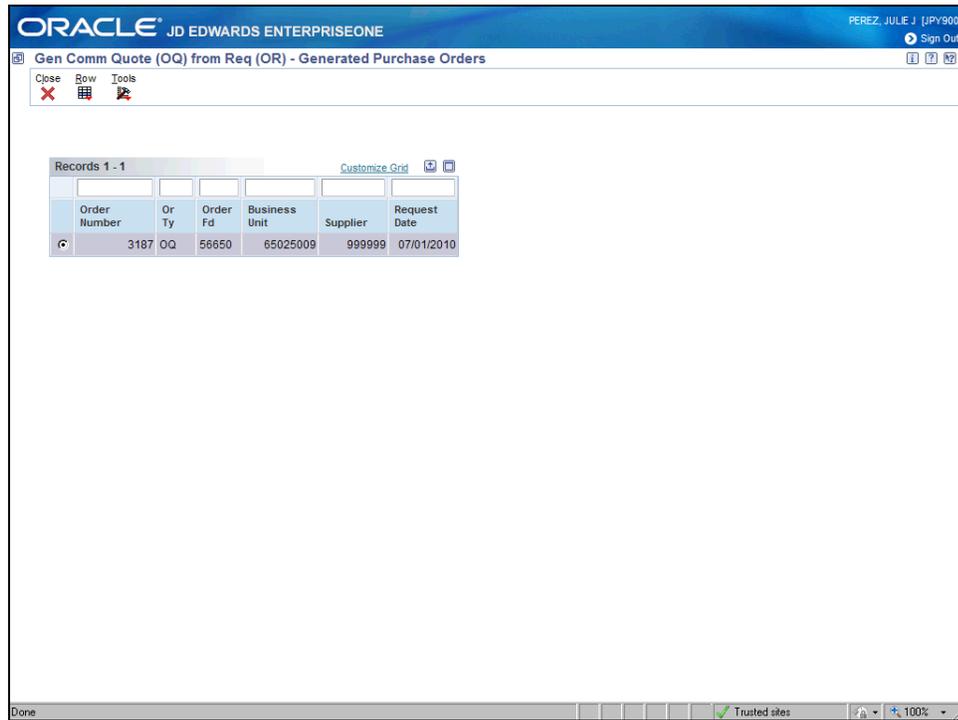
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Step	Action
23.	<p>Generate the Quotation Request</p> <p>Click the Form button.</p> 
24.	<p>Click the Generate Order(s) menu.</p> 
25.	<p>The new Order Number and Or Ty (Order Type) will appear and should be recorded</p> <p>If any changes need to be made to this new document, reference the Revising a Procurement Document training guide.</p>

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Step	Action
26.	Click the Close button. 
27.	Click the Close button. 
28.	End of Procedure.