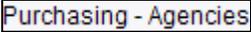


## Entering a Purchase Order Direct Lesson

Step	Action
1.	End User MUST know the document type (listed) to enter a Commodity or Service Purchase Order (OP, ZO, Z8, ZP, or O9)  The screens shown in this work instruction may not reflect what the end-user will see.
2.	Click the <b>State of Nebraska</b> link. 
3.	Click the <b>Purchasing - Agencies</b> link. 
4.	Click the <b>Purchase Orders - Agency</b> link. 
5.	Click the <b>Work with Purchase Order</b> link. 
6.	Click the <b>Add</b> button. 
7.	<b>Enter Header Information for this Purchase Order</b>
8.	<b>Supplier</b>  The Address Book number of the vendor from whom you will purchase the goods  o Primarily "V" search type Address Book records.  <b>NOTE:</b> This should NEVER be an "E" or "FD" search type Address Book record.
9.	<b>Ship To</b> - 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 The Ship To number will automatically populate the Send Invoice To field.  o Primarily "F" search type Address Book records.
10.	<b>Invoice To</b> - the address the Vendor will send their invoice to  o Automatically populates but can be overridden  o Primarily "S" search type Address Book records if the invoice will not be sent to the "Ship To" address.

Step	Action
11.	<p><b>Buyer Number</b> - Individual who is primarily responsible for this document at the AGENCY</p> <p>Optional – enter the Search Type “B” address book number of the responsible buyer for the Purchase Order.</p>
12.	<p><b>Business Unit</b> - BU accountable for the Purchase Order.</p>
13.	<p><b>Entered Date</b> - Current date will automatically populate.</p>
14.	<p><b>Requested Date</b> - The date when you want the purchase order to be filled or delivered.</p> <p>If not filled in, current date will automatically populate.</p>
15.	<p><b>Prom Del Date</b> - The date the supplier promised to deliver this order.</p> <p>The system uses this date in conjunction with the receipt date to evaluate supplier performance.</p>
16.	<p><b>Cancel Date - DO NOT ENTER A CANCEL DATE</b></p>
17.	<p>An <b>Order Number</b> has three components:</p> <ul style="list-style-type: none"> <li>o Order Number - system assigned</li> <li>o Order Type - defined by user at time of entry</li> <li>o Order Fund - automatically assigned based on Business Unit</li> </ul> <p><b>Order Type</b> - the second field of the Order Number</p> <p><b>Note:</b> It is mandatory to enter an Order Type (Document Type).</p> <p>The following order types are specific to Purchase Orders that can be created Directly through this process:</p> <ul style="list-style-type: none"> <li>o OP - Commodity</li> <li>o ZO - Direct Purchase Authority Order</li> <li>o Z8 - Service PO (2-way Voucher Match)</li> <li>o ZP - Stock Commodity Purchase Order</li> <li>o O9 - Services</li> </ul> <p>If there is a contract, you <b>MUST</b> generate an O9 from the Service Contract.</p>
18.	<p>Click in the <b>Order Number Order Type</b> field.</p> <div style="border: 1px solid black; width: 40px; height: 20px; margin-left: 20px;"></div>
19.	<p>Enter the appropriate Order Type into the <b>Order Number Order Type</b> field.</p>
20.	<p>Click the <b>Additional Properties</b> tab.</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-left: 20px;">Additional Properties</div>
21.	<p>Data on the <b>Additional Properties</b> tab provides information about the document: Document Description, Document Location, and Document Contact</p>

Step	Action
22.	<p><b>Document Description</b></p> <ul style="list-style-type: none"> <li>o Highly Recommend</li> <li>o Populate for a commodity or service purchase order, this field can be used for free form text. Populate with data that describes the goods/services being procured. This information will print on reports.</li> <li>o This field can hold up to 30 alpha/numeric characters</li> </ul> <p>Click in the <b>Document Description</b> field.</p>
23.	<p><b>Document Location</b></p> <ul style="list-style-type: none"> <li>o Mandatory</li> <li>o Identifies the facility where a commodity or service requisition was established, this field can be pulled from the address book.</li> <li>o This must be a Address Book Search Type of “F” - facility</li> </ul>
24.	<p><b>Document Contact</b></p> <ul style="list-style-type: none"> <li>o Mandatory</li> <li>o Identifies the primary person responsible for the commodity or service requisition. This field can be pulled from the address book.</li> <li>o This must be an Address Book Search Type of “B, E, N, or X”.</li> </ul>
25.	<p><b>Enter Detail Lines for this Purchase Order</b></p>
26.	<p><b>NIGP Number/Inventory Number</b> NIGP/Inventory Number</p> <ul style="list-style-type: none"> <li>o <b>NIGP Number/Inventory Number</b> – represents the NIGP commodity code for items to be purchased. All applicable 5-digit codes for Services will be &gt; 90000. All Commodity Codes will be &lt;90000. This field will not print on the purchasing documents.</li> <li>o <b>3-Digit NIGP</b> – Will populate from the NIGP Number/Inventory Number; this is the three-digit prefix to a commodity code</li> <li>o <b>NIGP Sub</b> – Will populate from the NIGP Number/Inventory Number; this is the two-digit commodity code suffix</li> </ul> <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>
27.	<p><b>Quantity Ordered</b> - Enter the quantity of the item that you require.</p>

Step	Action
28.	<b>Tr. UoM</b> - 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.
29.	<b>Unit Cost</b> – the estimated cost per unit.
30.	<b>Extended Cost</b> – The system will automatically populate this field based on the Quantity Ordered and Unit Cost fields.
31.	<b>Pu. UoM</b> - Purchase Unit of Measure. Defaults to the same Unit of Measure in the Tr. UoM field.  Pu. UoM must equal Tr. UoM or an error will occur.
32.	<b>Description 1</b> – This is free text – will print on all purchasing documents; enter descriptive data pertaining to the specific detail line. System will capitalize the text.
33.	<b>Description 2</b> – This is free text – will print on purchasing documents; enter descriptive data that you want to appear in NIS. System will capitalize the text.
34.	<b>Account Number</b> – valid business unit and object account from the Chart of Accounts.
35.	The following fields populate based on the <b>Account Number</b> :  <b>Cost Center</b> <b>Obj Acct</b> <b>Sub</b> <b>SBL Type</b> <b>Subledger</b>
36.	<b>Business Unit</b> - Automatically populates from the Business Unit on the Order Header. This can be revised on the detail line.
37.	<b>Ln Ty</b> – Line Type  Enter the appropriate Line Type for your order.  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

Step	Action
38.	<p><b>Dev Request</b> - Deviation Request for Commodities and Services:</p> <ul style="list-style-type: none"> <li>o Exception Orders</li> <li>o Emergency Purchases</li> <li>o Direct Purchase Authority, DPA</li> <li>o Statewide Contract Use</li> <li>o Deviation Process</li> </ul>
39.	<p><b>Report Code 4</b> – Used ONLY for Purchasing for Inventory</p> <p>Identifies Master Planning Family</p>
40.	<p>Other fields on a detail line may be required by your Agency. Fill these as required.</p>
41.	<p><b>Line Attachments</b> -</p> <p>Line Attachments: Text (to Detail Lines) if desired. (Please refer to the work instructions to <b>Enter Attachments to Detail Lines</b>)</p> <p>Line Attachments: OLE (to Detail Lines) if desired. (Please refer to the work instructions to <b>Enter Attachments to Detail Lines</b>)</p>
42.	<p>Add as many detail lines as necessary to the Purchase Order</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> <p>The new Order Number and Or Ty (OP) will appear on the Order Detail Tab and should be noted if you wish to do more work with them or facilitate searches later.</p>
43.	<p>Click <b>Order Detail</b> tab to view Order.</p> 
44.	<p>Click <b>OK</b> to return to the Work with Purchase Order – Order Detail screen.</p> <p>You may enter a new PO or Close out of the application.</p> 
45.	<p>Click the <b>Cancel</b> button.</p> 
46.	<p>Click the <b>Close</b> button.</p> 
47.	<p>You have successfully completed this lesson.</p> <p><b>End of Procedure.</b></p>