

Entering a Purchase Order Direct

COPYRIGHT & TRADEMARKS

Copyright © 1998, 2009, Oracle and/or its affiliates. All rights reserved.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

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.

Table of Contents

Entering a Purchase Order Direct	1
Entering a Purchase Order Direct Overview	1
Entering a Purchase Order Direct Lesson.....	1

Entering a Purchase Order Direct

Entering a Purchase Order Direct Overview

Under certain circumstances, a purchase order for Inventory and Non-Inventory commodities may be entered directly without the requirement of requisition or quote. The purchase order value must be less than \$10,000 and cannot have a pre-established commodity contract.

The following order types are specific to Purchase Orders that can be created directly through this process:

- o OP - Commodity
- o ZO - Direct Purchase Authority Order
- o Z8 - Service PO (2-way Voucher Match)
- o ZP - Stock Commodity Purchase Order
- o O9 - Services

If there is a contract, you **MUST** generate an O9 from the Service Contract.

Entering a Purchase Order Direct Lesson

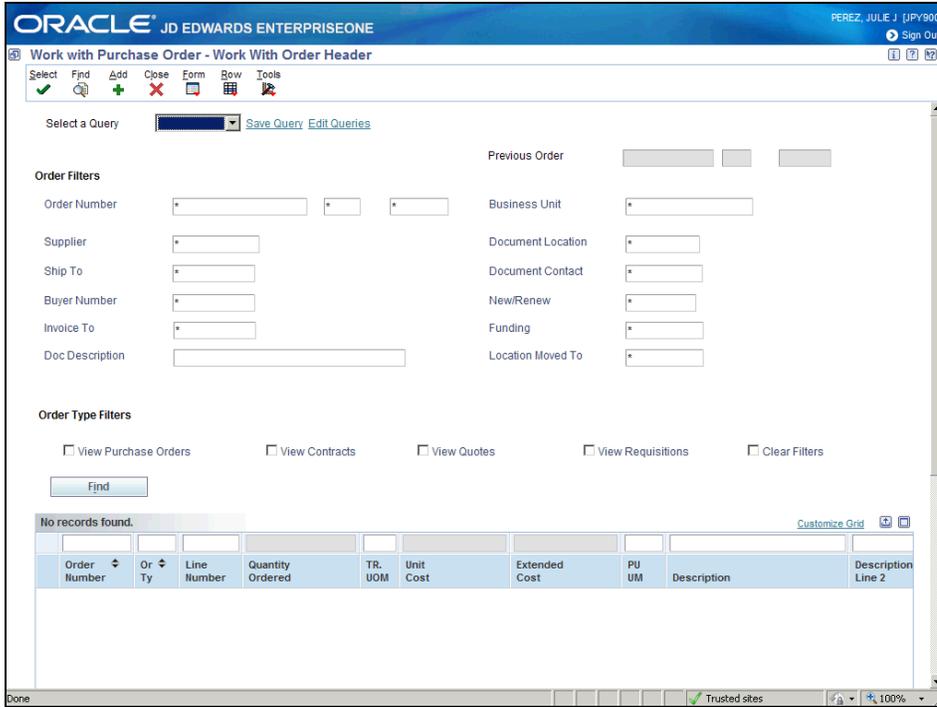
Procedure

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

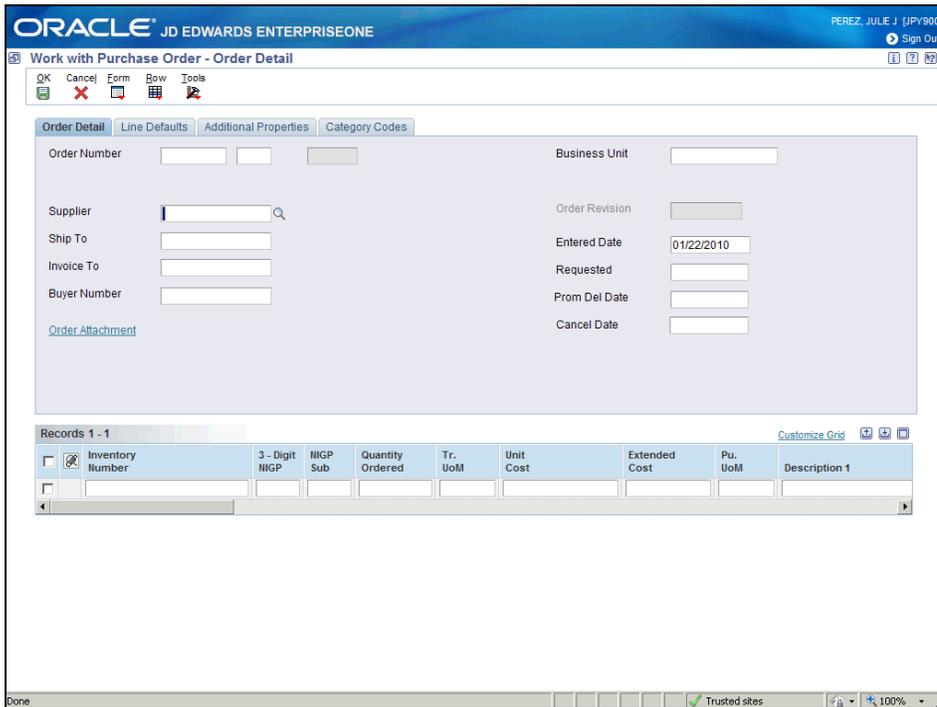
Step	Action
1.	End User MUST know the document type (listed) to enter a Commodity or Service Purchase Order (OP, ZO, Z8, ZP, or O9) The screens shown in this work instruction may not reflect what the end-user will see.
2.	Click the State of Nebraska link. State of Nebraska
3.	Click the Purchasing - Agencies link. Purchasing - Agencies
4.	Click the Purchase Orders - Agency link. Purchase Orders - Agency
5.	Click the Work with Purchase Order link. Work with Purchase Order

Training Guide

Entering a Purchase Order Direct



Step	Action
6.	Click the Add button. 



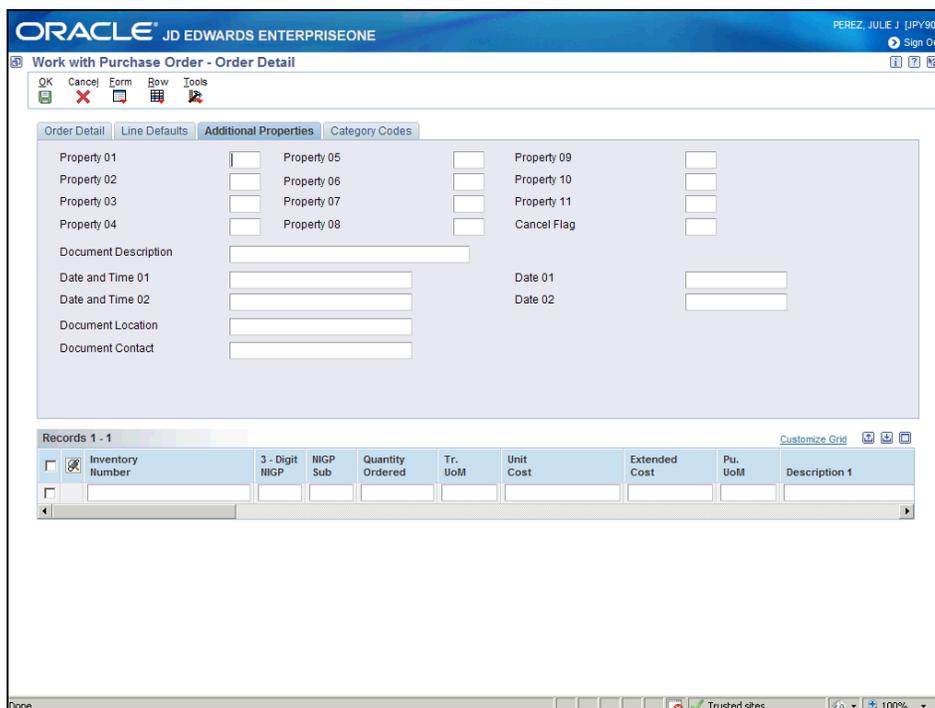
Step	Action
7.	Enter Header Information for this Purchase Order
8.	<p>Supplier</p> <p>The Address Book number of the vendor from whom you will purchase the goods</p> <ul style="list-style-type: none"> o Primarily "V" search type Address Book records. <p>NOTE: This should NEVER be an "E" or "FD" search type Address Book record.</p>
9.	<p>Ship To - Address to which the goods are to be delivered or the location where services are to be performed</p> <ul style="list-style-type: none"> 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.	<p>Invoice To - the address the Vendor will send their invoice to</p> <ul style="list-style-type: none"> 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.
11.	<p>Buyer Number - 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.	Business Unit - BU accountable for the Purchase Order.
13.	Entered Date - Current date will automatically populate.
14.	<p>Requested Date - 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>Prom Del Date - 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.	Cancel Date - DO NOT ENTER A CANCEL DATE

Training Guide

Entering a Purchase Order Direct



Step	Action
17.	<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 Purchase Orders that can be created Directly through this process:</p> <ul style="list-style-type: none"> o OP - Commodity o ZO - Direct Purchase Authority Order o Z8 - Service PO (2-way Voucher Match) o ZP - Stock Commodity Purchase Order o O9 - Services <p>If there is a contract, you MUST generate an O9 from the Service Contract.</p>
18.	<p>Click in the Order Number Order Type 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 Order Number Order Type field.</p>
20.	<p>Click the Additional Properties tab.</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-left: 20px;">Additional Properties</div>



Step	Action
21.	Data on the Additional Properties tab provides information about the document: Document Description, Document Location, and Document Contact
22.	<p>Document Description</p> <ul style="list-style-type: none"> o Highly Recommend 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. o This field can hold up to 30 alpha/numeric characters <p>Click in the Document Description field.</p>
23.	<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
24.	<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”.
25.	Enter Detail Lines for this Purchase Order

Training Guide

Entering a Purchase Order Direct



Step	Action
26.	<p>NIGP Number/Inventory Number NIGP/Inventory Number</p> <ul style="list-style-type: none"> o 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. 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>
27.	<p>Quantity Ordered - Enter the quantity of the item that you require.</p>
28.	<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>
29.	<p>Unit Cost – the estimated cost per unit.</p>
30.	<p>Extended Cost – The system will automatically populate this field based on the Quantity Ordered and Unit Cost fields.</p>
31.	<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>
32.	<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>
33.	<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>
34.	<p>Account Number – valid business unit and object account from the Chart of Accounts.</p>
35.	<p>The following fields populate based on the Account Number:</p> <p>Cost Center Obj Acct Sub SBL Type Subledger</p>
36.	<p>Business Unit - Automatically populates from the Business Unit on the Order Header. This can be revised on the detail line.</p>

Step	Action
37.	<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
38.	<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
39.	<p>Report Code 4 – Used ONLY for Purchasing for Inventory</p> <p>Identifies Master Planning Family</p>
40.	Other fields on a detail line may be required by your Agency. Fill these as required.
41.	<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>
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 Order Detail tab to view Order.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Order Detail</div>

Training Guide

Entering a Purchase Order Direct

Step	Action
44.	Click OK to return to the Work with Purchase Order – Order Detail screen. You may enter a new PO or Close out of the application. 
45.	Click the Cancel button. 
46.	Click the Close button. 
47.	You have successfully completed this lesson. End of Procedure.