

**Generating a Purchase Order (OG) from a Commodity
Contract (OC)**

Created on 3/19/2010 11:11:00 AM

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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.



Training Guide

Generating a Purchase Order (OG) from a Commodity Contract (OC)

Table of Contents

Generating a Purchase Order (OG) from a Commodity Contract (OC)	1
Generating a Purchase Order (OG) from a Commodity Contract (OC) Overview	1
Generating a Purchase Order (OG) from a Commodity Contract (OC) Lesson	1

Generating a Purchase Order (OG) from a Commodity Contract (OC)

Generating a Purchase Order (OG) from a Commodity Contract (OC) Overview

AS Materiel Division, State Purchasing Bureau manages contracts for commodities. These contracts are generated from Purchase Requisitions that are created by agencies. In order to accurately determine contract usage, agencies must generate Purchase Orders from the existing commodity contracts.

Either the agency or AS Materiel Division, State Purchasing Bureau can create/manage Service Contracts.

This Training Guide shows how to Generate a Purchase Order (OG) from an Existing Commodity Contract (OC). These instructions can be used to generate other types of Purchase Orders from existing Commodity contracts.

Order Type/ Description Navigation

OC > OG Generate Commodity Purchase Order from Commodity Contract
 Purchasing – Agencies > Purchase Orders – Agencies > Commodity Purchase Order – Agency > Generate Commodity PO – Agency > Gen Comm PO (OG) from Contract (OC)

OC > O6 Generate IT Equip & Svcs Purchase Order from Commodity Contract
 Purchasing – Agencies > Purchase Orders – Agencies > Commodity Purchase Order – Agency > Generate Commodity PO – Agency > Gen IT Equip & Svcs PO (O6) from Comm Contract (OC)

OC > OU Generate Vehicle Purchase Order from Commodity Contract
 Purchasing – Agencies > Purchase Orders – Agencies > Commodity Purchase Order – Agency > Generate Commodity PO – Agency > Gen Vehicle PO (OU) from Contract (OC)

Generating a Purchase Order (OG) from a Commodity Contract (OC) Lesson

Procedure

The following steps/screenshots show an example of Generating a Commodity PO (OG) from a Commodity Contract (OC). The steps are the same for generating any type of Purchase Order from a Commodity Contract.

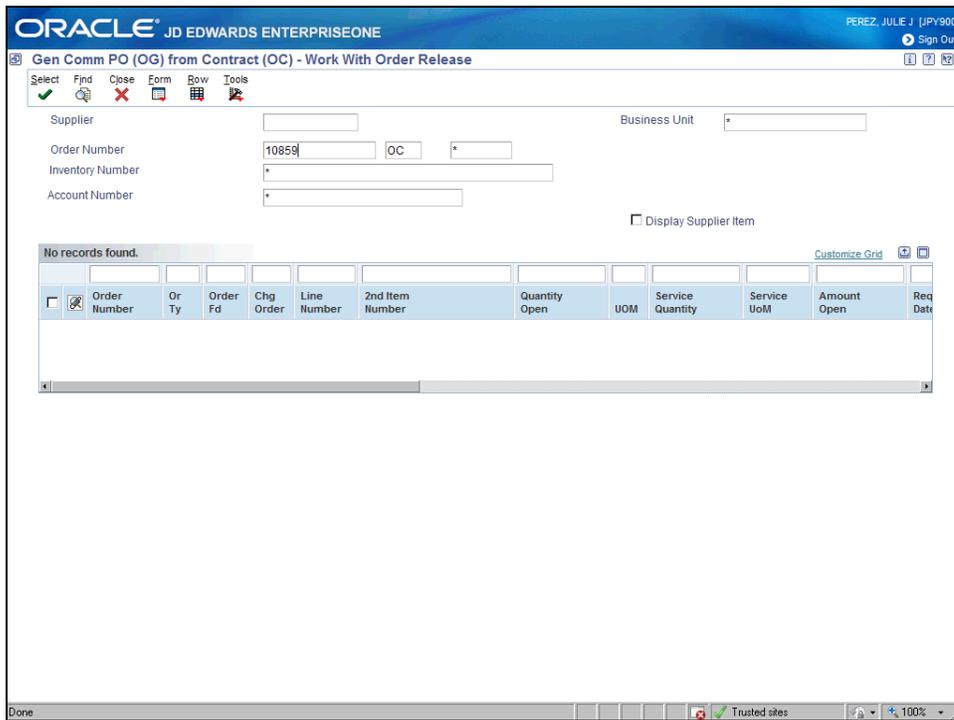
Step	Action
1.	Click the State of Nebraska link. 

Training Guide

Generating a Purchase Order (OG) from a Commodity Contract (OC)



Step	Action
2.	Click the Purchasing - Agencies link. Purchasing - Agencies
3.	Click the Purchase Orders - Agency link. Purchase Orders - Agency
4.	Click the Commodity Purchase Order - Agency link. Commodity Purchase Order - Agency
5.	Click the Generate Commodity PO - Agency link. Generate Commodity PO - Agency
6.	Click the Gen Comm PO (OG) from Contract (OC) link. Gen Comm PO (OG) from Contract (OC)
7.	Enter any known information in the header or Query by Example (QBE) line to minimize the search. For example, in the "Description" QBE field, you can enter a search text using " * " wild cards at the beginning and the end of the text to search for specific contracts.



Step	Action
8.	To populate the grid with all available detail lines on the Contract, click the Find button. 

Step	Action
9.	Choose the row(s) in the grid reflecting the detail lines from which you want to generate a Purchase Order. 
10.	Click the Row button. 
11.	Click the Order Release menu. 

The screenshot displays the Oracle JD Edwards EnterpriseOne interface for generating a Purchase Order from a Commodity Contract. The window title is "Gen Comm PO (OG) from Contract (OC) - Order Release". The header section includes fields for Supplier (501042), Buyer (576679), Ship To (559783), and Order Number (10859). The "Release Information" tab is selected, showing a Release Qty of 49.0000, Release Amt of 7,479.36, and other related values. The interface also includes a "Tools" menu with options like Release, Close, and Cancel.

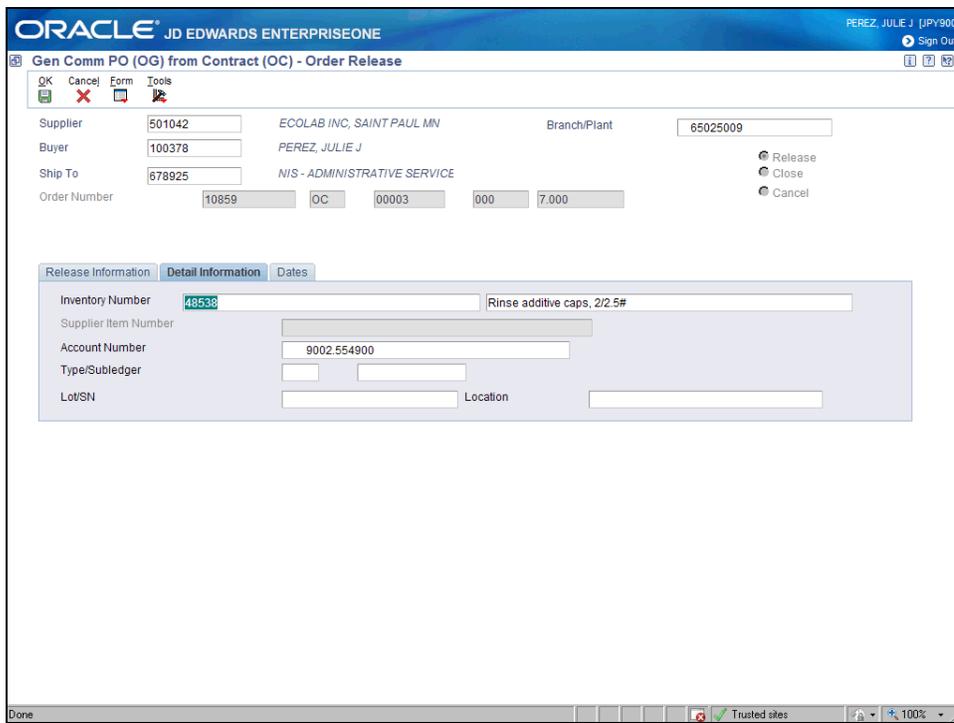
Step	Action
12.	<p>Header Information</p> <p>Review and update the following fields on the Header as required:</p> <ul style="list-style-type: none"> o Supplier - update with vendor o Branch/Plant - Note: 9002 is not a valid Branch/Plant for a Purchase Order; this will result in an Error o Buyer o Ship To <p>Note: Changes made to the order release will be reflected on the generated Purchase Order. They do not change the Contract.</p>

Training Guide

Generating a Purchase Order (OG) from a Commodity Contract (OC)



Step	Action
13.	<p>Release Information</p> <p>Release Qty - Quantity for Purchase Order will populate – change this quantity. If quantity is not changed, there will be no more units of this item to be released to subsequent PO's and you will be ordering a large quantity of this item.</p> <p>Release Amt is calculated using Release Quantity and Unit Cost</p>
14.	<p>Click the Detail Information tab.</p> <p>Detail Information</p>



Step	Action
15.	<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 with a valid Account Number for your agency</p>
16.	<p>Click the Dates tab.</p> <p>Dates</p>

ORACLE® JD EDWARDS ENTERPRISEONE

PEREZ, JULIE J [JPY900] Sign Out

Gen Comm PO (OG) from Contract (OC) - Order Release

Supplier: 501042 ECOLAB INC, SAINT PAUL MN Branch/Plant: 65025009

Buyer: 100378 PEREZ, JULIE J

Ship To: 878925 NIS - ADMINISTRATIVE SERVICE

Order Number: 10859 OC 00003 000 7.000

Release Information | Detail Information | **Dates**

Requested: 03/15/2010 Cancel Date: 03/31/2010

Promised Delivery: 03/15/2010 Order Date: 03/16/2009

G/L Date: 03/15/2010 Planned Effective: 04/01/2009

Done Trusted sites 100%

Step	Action
17.	<p>Dates</p> <p>Requested - Update as necessary</p> <p>Promised Delivery - Update as necessary</p> <p><i>Note:</i> Changes made to the Cancel Date from this screen do not update the Purchase Order. Additional steps are included in this training manual.</p>
18.	<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 Purchase Order.</p> 

Training Guide

Generating a Purchase Order (OG) from a Commodity Contract (OC)



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

Gen Comm PO (OG) from Contract (OC) - Work With Order Release

Select Find Close Form Row Tools

Supplier: _____ Business Unit: _____

Order Number: 10859 OC * _____

Inventory Number: _____

Account Number: _____

Display Supplier Item

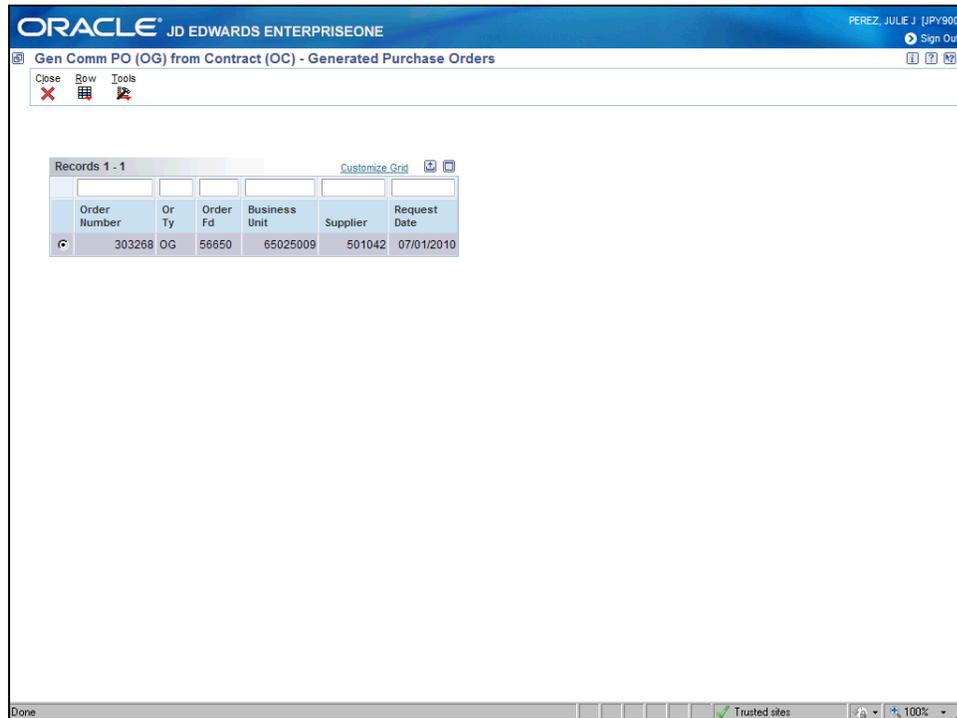
Records 1 - 14 [X] [Y] Customize Grid

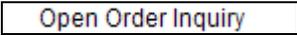
<input type="checkbox"/>	Order Number	Or Ty	Order Fd	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Service Quantity	Service UoM	Amount Open	Req Date
<input type="checkbox"/>	10859	OC	00003	000	1.000	48538	713.0000	CS	.0000		27,101.13	0.
<input type="checkbox"/>	10859	OC	00003	000	2.000	48538	1541.0000	CS	.0000		83,029.08	0.
<input type="checkbox"/>	10859	OC	00003	000	3.000	48538	3.0000	CS	.0000		230.88	0.
<input type="checkbox"/>	10859	OC	00003	000	4.000	48538	19.0000	CS	.0000		1,074.26	0.
<input type="checkbox"/>	10859	OC	00003	000	6.000	48538	521.0000	CS	.0000		57,065.13	0.
<input type="checkbox"/>	10859	OC	00003	000	7.000	48538	44.0000	CS	.0000		6,716.16	0.
<input type="checkbox"/>	10859	OC	00003	000	8.000	48538	343.0000	CS	.0000		32,320.89	0.
<input type="checkbox"/>	10859	OC	00003	000	9.000	48538	18.0000	CS	.0000		1,396.80	0.
<input type="checkbox"/>	10859	OC	00003	000	11.000	48538	329.0000	CS	.0000		50,218.56	0.
<input type="checkbox"/>	10859	OC	00003	000	12.000	48538	3.0000	CS	.0000		265.89	0.
<input type="checkbox"/>	10859	OC	00003	000	14.000	48538	294.0000	CS	.0000		15,302.70	0.
<input type="checkbox"/>	10859	OC	00003	000	15.000	48538	188.0000	CS	.0000		8,518.28	0.
<input type="checkbox"/>	10859	OC	00003	000	18.000	48538	495.0000	CS	.0000		43,352.10	0.
<input type="checkbox"/>	10859	OC	00003	000	19.000	48538	18.0000	CS	.0000		722.16	0.

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Step	Action
19.	Click the Form button. 
20.	Click the Generate Order(s) menu. 
21.	The new Order Number and Or Ty (Order Type) will appear and should be recorded.
22.	The newly generated purchase order will need to be revised to update the Send Invoice To field and remove the Cancel Date .
23.	If the existing commodity contract has a \$ UOM (Unit of Measure), if desired revise the purchase order to change the UOM to EA (Each) and correct the Qty (Quantity) and Unit Cost. (Ex: Release Qty=1500, UOM= \$, Unit Cost=1)

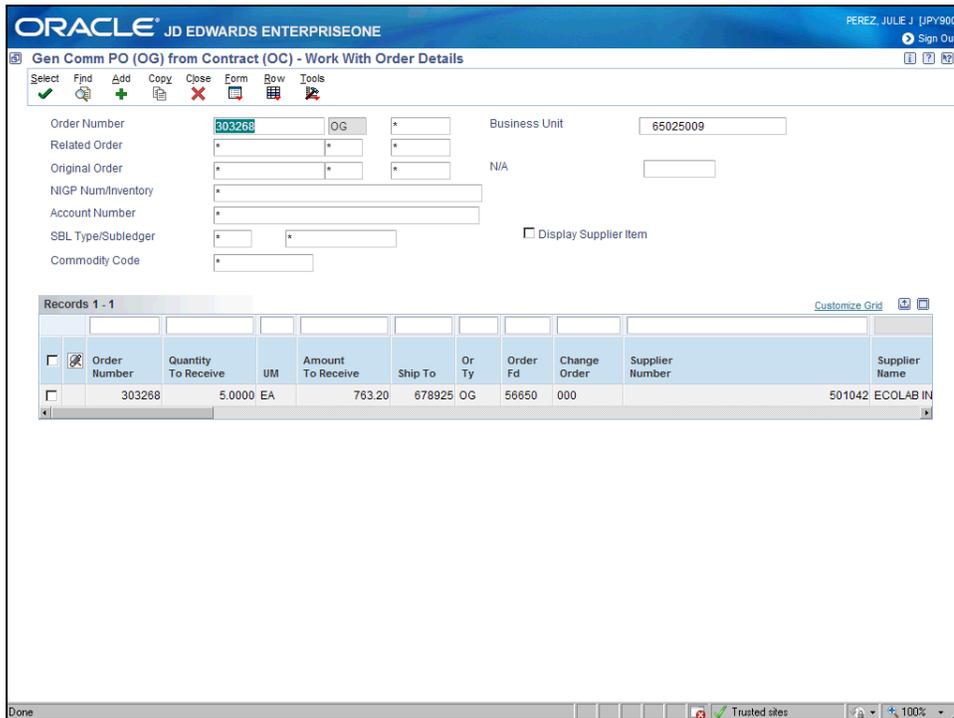
Training Guide Generating a Purchase Order (OG) from a Commodity Contract (OC)



Step	Action
24.	Click the Row button. 
25.	Click the Open Order Inquiry menu. 

Training Guide

Generating a Purchase Order (OG) from a Commodity Contract (OC)



Step	Action
26.	Choose the row(s) in the grid reflecting the detail lines from which you want to generate a Purchase Order. 
27.	Click the Row button. 
28.	Click the Header Revision menu. 

Step	Action
29.	<p>Send Invoice To</p> <p>Delete the information from this field and press the tab key. The correct Send Invoice To address book number will default. This can be overridden with another address book number if needed.</p>
30.	<p>Cancel Date - remove the cancel date.</p>
31.	<p>Click the Form button.</p> 
32.	<p>Click the Header To Detail menu.</p> 
33.	<p>Click the Populate menu.</p> 
34.	<p>Click the OK button.</p> 
35.	<p>Verify Header changes populated to detail lines and revised as needed.</p> <p>Add additional lines pending the agency's rules and regulations.</p>

Training Guide

Generating a Purchase Order (OG) from a Commodity Contract (OC)

ORACLE® JD EDWARDS ENTERPRISEONE PEREZ, JULIE J (JPY900) Sign Out

Gen Comm PO (OG) from Contract (OC) - Order Detail

OK Form Row Tools

Order Detail Line Defaults Additional Properties Category Codes

Order Number 303268 OG 56650 Business Unit 65025009

Supplier 501042 ECOLAB INC, SAINT PAUL MN Order Revision 0

Ship To 678925 NIS - ADMINISTRATIVE SERVICES Entered Date 03/15/2010

Invoice To 678943 AS - NIS Requested 07/01/2010

Buyer Number 100378 PEREZ, JULIE J From Del Date 07/01/2010

Order Attachment Cancel Date

POPULATE HEADER TO DETAIL

Records 1 - 2 Customize Grid

Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
48538	485	38	5.0000	EA	152.6400	763.20	EA	RINSE ADDITIVE CAPS. 2

Done Trusted sites 100%

Step	Action
36.	Click the OK button. 
37.	Warning Error notifies that "Event still in Process." This is okay. Click the OK button. 
38.	Click the Close button. 
39.	Click the Close button. 
40.	Click the Close button. 
41.	End of Procedure.