

Generating a PO (O9) from an Existing Service Contract (O4)
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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 PO (O9) from an Existing Service
Contract (O4)

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Generating a PO (O9) from an Existing Service Contract (O4)

Generating a PO (O9) from an Existing Service Contract (O4) Overview

The Service Contract is non-encumbering and not budget checked. Purchase Orders will be generated from the Service Contract. The end user can generate multiple Purchase Orders from a single Service Contract.

Generating a PO (O9) from an Existing Service Contract (O4) Lesson

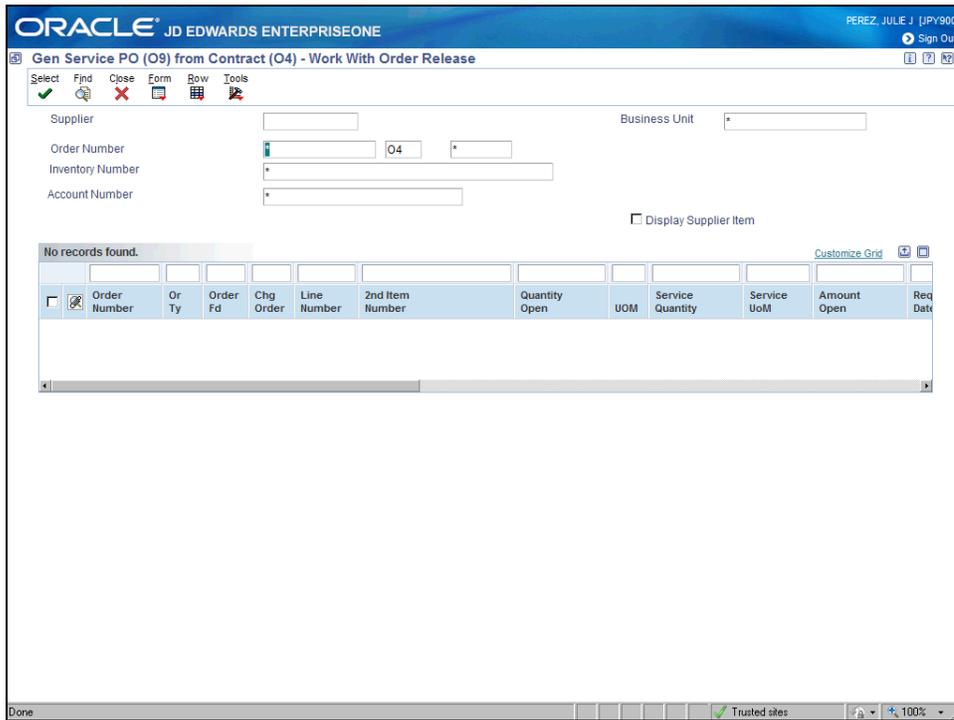
Procedure

In this lesson you will learn how to generate a Purchase Order from an existing Service Contract.

| Step | Action |
|------|---|
| 1. | Click the State of Nebraska link. State of Nebraska |
| 2. | Click the Purchasing - Agencies link. Purchasing - Agencies |
| 3. | Click the Purchase Orders - Agency link. Purchase Orders - Agency |
| 4. | Click the Service Purchase Order - Agency link. Service Purchase Order - Agency |
| 5. | Click the Generate Service PO - Agency link. Generate Service PO - Agency |
| 6. | Click the Gen Service PO (O9) from Contract (O4) link. Gen Service PO (O9) from Contract (O4) |

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Generating a PO (O9) from an Existing Service Contract (O4)



| Step | Action |
|------|---|
| 7. | Enter the order number in the Order Number field, to minimize the search. |
| 8. | Click the Find button.  |
| 9. | Click the check box of the desired Order Number and Detail Line on the grid.  |
| 10. | Click the Row button.  |
| 11. | Click the Order Release menu.  |

| Step | Action |
|------|---|
| 12. | <p>HEADER INFORMATION</p> <p>Review the following fields on the Header and make changes if needed.</p> <p>Business Unit – a valid Business Unit for your agency Supplier – Leave this value – it reflects the vendor that received the contract award. Buyer –you can populate with the address book record for the individual in your agency who will be responsible for the Purchase Order Ship To – change to reflect a delivery location for your agency</p> <p>Note: The Send Invoice To field cannot be changed when generating a Service Contract from a Requisition. When finished generating the Service Contract, the agency will need to revise the document.</p> |
| 13. | <p>Release Information</p> <p>Release Qty field will populate with the quantity of the contract. Change this quantity to the number of items to order on Purchase Order</p> <p>Note: 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> |
| 14. | <p>Do not change the Release Amt field. This will automatically calculate when Release Qty field is updated.</p> |

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Gen Service PO (O9) from Contract (O4) - Order Release

Supplier: 1790581 BELL MEDICAL INC Branch/Plant: 65025009

Buyer: 4455871 HUNT, ETHAN

Ship To: 557767 AS MATERIEL, STATE PURCHASING

Order Number: 42304 O4 56650 000 1.000

Release Information | **Detail Information** | Dates

Inventory Number: 93818 CPR EQUIPMENT MAINTENANCE

Supplier Item Number: [Empty]

Account Number: 65025009.527100

Type/Subledger: [Empty]

Lot/SN: [Empty] Location: [Empty]

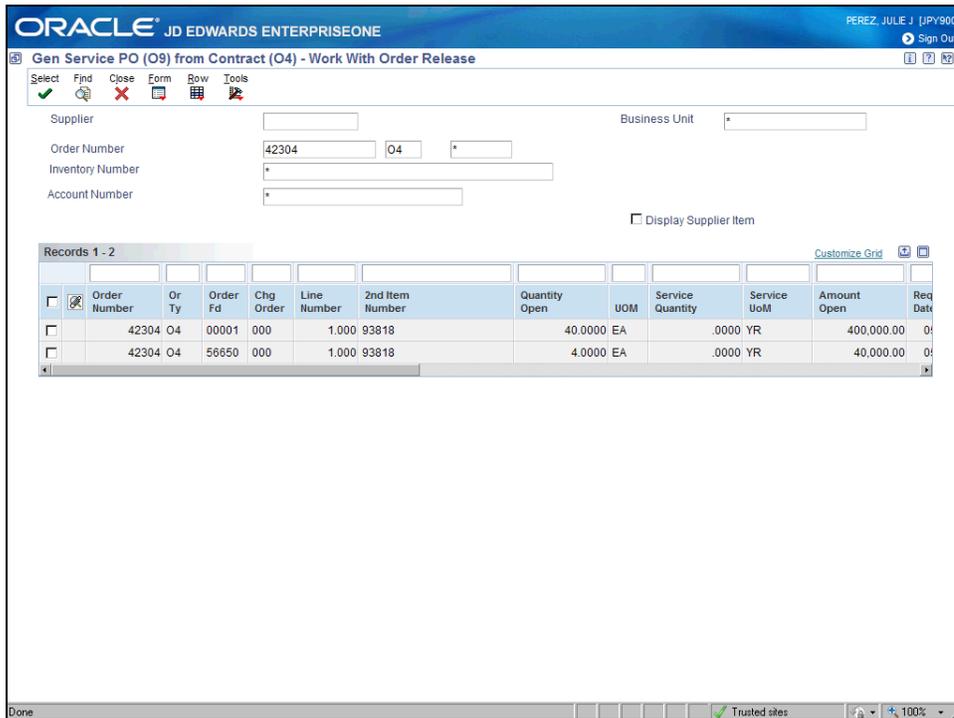
Done Trusted sites 100%

| Step | Action |
|------|--|
| 15. | <p>Detail Information</p> <p>Review the Account Number field. Change to a valid Account Number for your agency if necessary.</p> |

| Step | Action |
|------|--|
| 16. | <p>Dates</p> <p>Review the Requested field. Enter the date you want to receive the order. This field automatically populates with the requested date from the contract.</p> |
| 17. | <p>In the Promised Delivery field enter the day you expect the order to be received. This field automatically populates with the current date. This must be changed for accurate reporting.</p> |
| 18. | <p>The G/L Date field defaults from the G/L Date from the contract.</p> |
| 19. | <p>The Cancel Date field will automatically default to the Cancel date of the contract. To alleviate encumbrance issues this date must be removed.</p> |
| 20. | <p>When you are finished click the OK button.</p>  |

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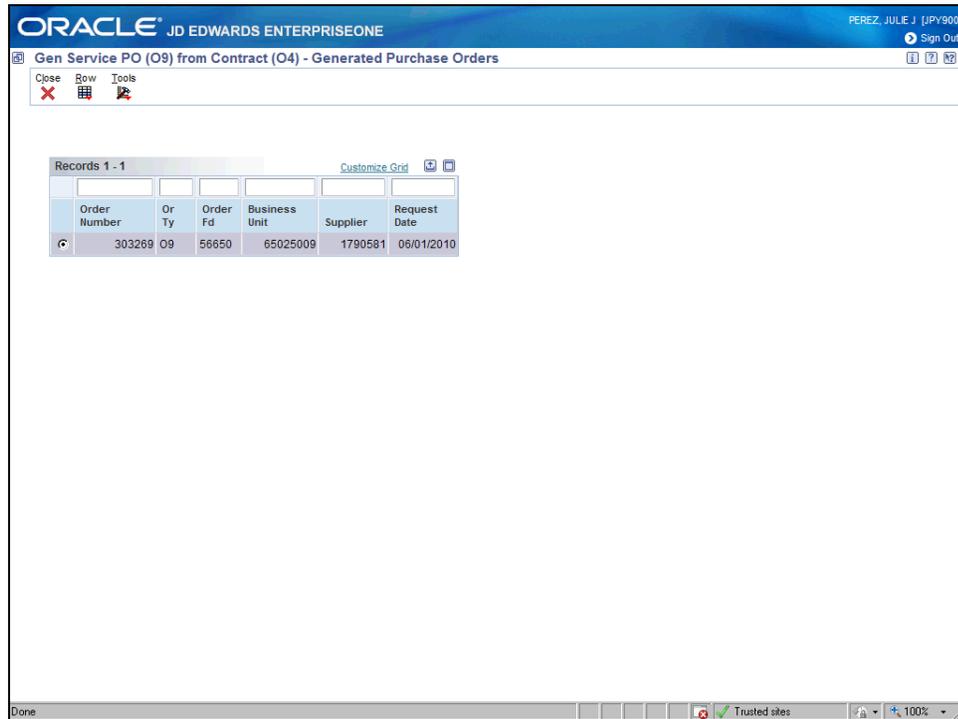
Generating a PO (O9) from an Existing Service Contract (O4)

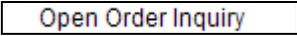


| Step | Action |
|------|--|
| 21. | If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat the previous steps for each Inventory Number that you wish to include on the Service Contract. |
| 22. | <p>If you want to review the contract before it is generated follow these steps.</p> <p>Click Form, Review Order. The Gen PO (O9 or Z8) from Service Contract (O4) - Suppliers Selected window appears.</p> <p>Choose the order(s) to review prior to generation.</p> <p>Click Row, Details. The Gen PO (O9 or Z8) from Service Contract (O4) - Items Selected for Order window appears.</p> <p>When you are finished reviewing click Cancel.</p> <p>If you do not wish to review the contract skip to the next step.</p> |
| 23. | <p>Click the check box of the Order Number in the Detail Line.</p>  |
| 24. | <p>Click the Form button.</p>  |
| 25. | <p>Click the Generate Order(s) menu.</p>  |

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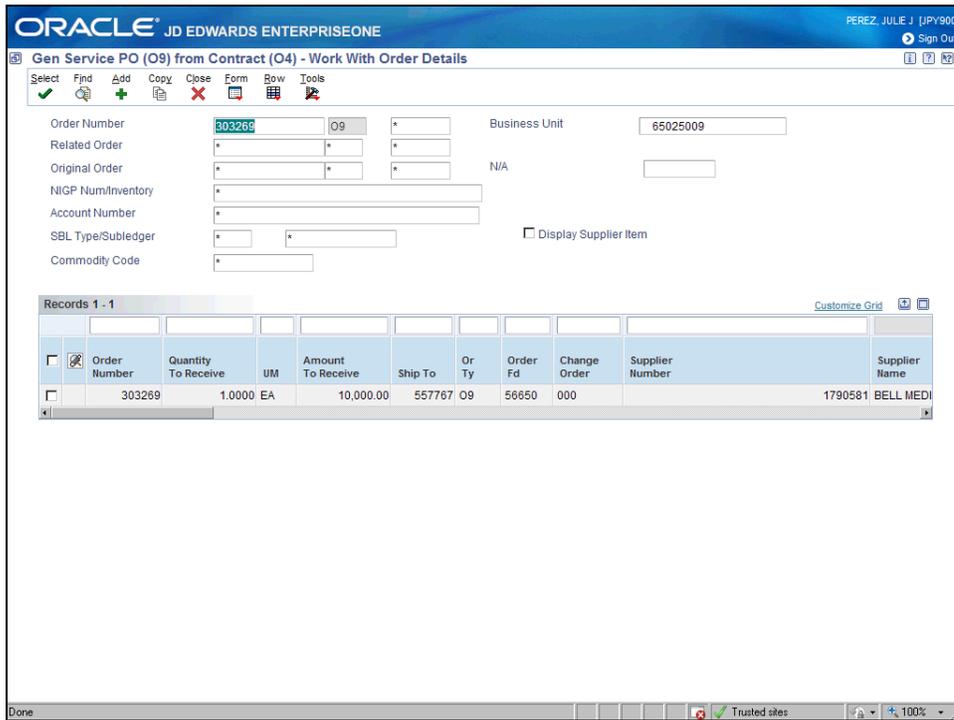
Generating a PO (O9) from an Existing Service Contract (O4)



| Step | Action |
|------|--|
| 26. | The new Order Number and Or Ty (Order Type) will appear and should be recorded for future use. |
| 27. | The newly generated purchase order will need to be revised. Click the Row button.  |
| 28. | Click the Open Order Inquiry menu.  |

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| Step | Action |
|------|---|
| 29. | Choose the document by clicking the check box in the detail line. <input type="checkbox"/> |
| 30. | Click the Row button. |
| 31. | Click the Header Revision menu. |

Training Guide Generating a PO (O9) from an Existing Service Contract (O4)

The screenshot displays the 'Gen Service PO (O9) from Contract (O4) - Order Header' window in Oracle JD Edwards EnterpriseOne. The window title bar includes the user name 'PEREZ, JULIE J' and session ID 'JIPY900'. The main content area is divided into several sections:

- Order Header:** Order Number (303269), O9, 56650, Business Unit (65025009).
- Address Numbers:** Supplier (1790581), Ship To (557767), Buyer (4455871), Send Invoice To (557767).
- Dates:** Entered Date (03/15/2010), Requested (06/01/2010), Prom Del Date (06/01/2010), Cancel Date (05/03/2015).
- Supplier Information:** BELL MEDICAL INC, AS MATERIEL, STATE PURCHASING, HUNT, ETHAN, AS MATERIEL, STATE PURCHASING.
- Payment Terms:** Net 30 Days from Invoice Date.
- Other Fields:** Tax Expt Code, Tax Rate/Area, Certificate, Tax ID (431059774), Person/Corp. ID (C), Hold Code (BLANK - HOLD CODES 42/HC), Approval Code (100378), Retainage %, Ordered By (NISJPerez), Order Taken By.

| Step | Action |
|------|---|
| 32. | <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> |

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Gen Service PO (O9) from Contract (O4) - Order Header

Order Header Additional Properties Category Codes

Order Number 303269 O9 56650 Business Unit 65025009

Address Numbers Dates

Supplier 1790581 BELL MEDICAL INC Entered Date 03/15/2010

Ship To 557767 AS MATERIEL, STATE PURCHASING Requested 06/01/2010

Buyer 4455871 HUNT, ETHAN Prom Del Date 06/01/2010

Send Invoice To 557767 AS MATERIEL, STATE PURCHASING Cancel Date 05/03/2015

Pmt Remark

Description

Print Message

Tax Expl Code Hold Code BLANK - HOLD CODES 42/HC

Tax Rate/Area Approval Code 100378

Certificate Retainage %

Tax ID 431059774 Ordered By NISJPerez

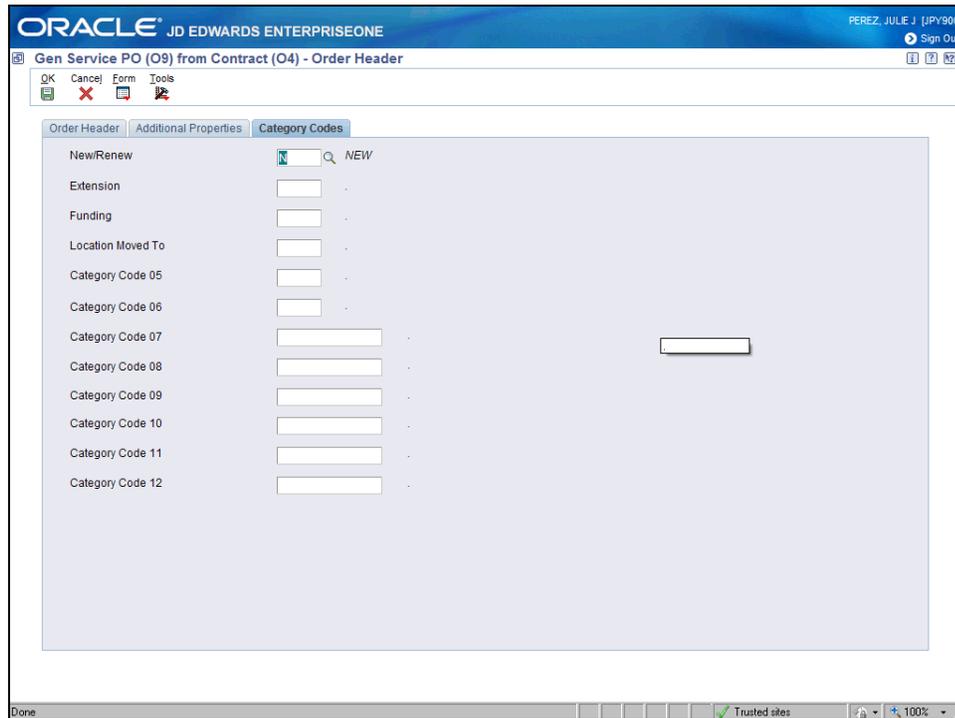
Person/Corp. ID C Order Taken By

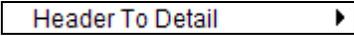
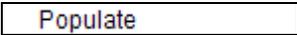
Payment Terms Net 30 Days from Invoice Date

Messages

Done Trusted sites 100%

| Step | Action |
|------|---|
| 33. | Cancel Date - remove the cancel date. |
| 34. | Data on the Additional Properties tab provides information about the document: Document Description, Document Location, and Document Contact |
| 35. | Click the Category Codes tab. Category Codes |



| Step | Action |
|------|---|
| 36. | Category Codes |
| 37. | Click in the Funding field.  |
| 38. | If American Recovery & Reinvestment Act (ARRA) funds are being used for this purchase enter " AR " into the Funding field. |
| 39. | When you are finished updating the Header click the Form button.  |
| 40. | Click the Header To Detail menu.  |
| 41. | Click the Populate menu. This will make all relevant changes made to the Header appear in the Detail Line as well. POPULATE HEADER TO DETAIL will appear on the Order Detail tab showing the information from the Header populated to the Detail Line. If you forgot to populate from the Header to the Detail Line you will need to manually update the Detail Line.  |
| 42. | Click the OK button.  |

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Gen Service PO (O9) from Contract (O4) - Order Detail

Order Detail | Line Defaults | Additional Properties | Category Codes

Order Number: 303269 O9 56650 Business Unit: 65025009

Supplier: 1790581 BELL MEDICAL INC Order Revision: 0

Ship To: 557767 AS MATERIEL, STATE PURCHASING Entered Date: 03/15/2010

Invoice To: 557767 AS MATERIEL, STATE PURCHASING Requested: 06/01/2010

Buyer Number: 4455871 HUNT, ETHAN Prom Del Date: 06/01/2010

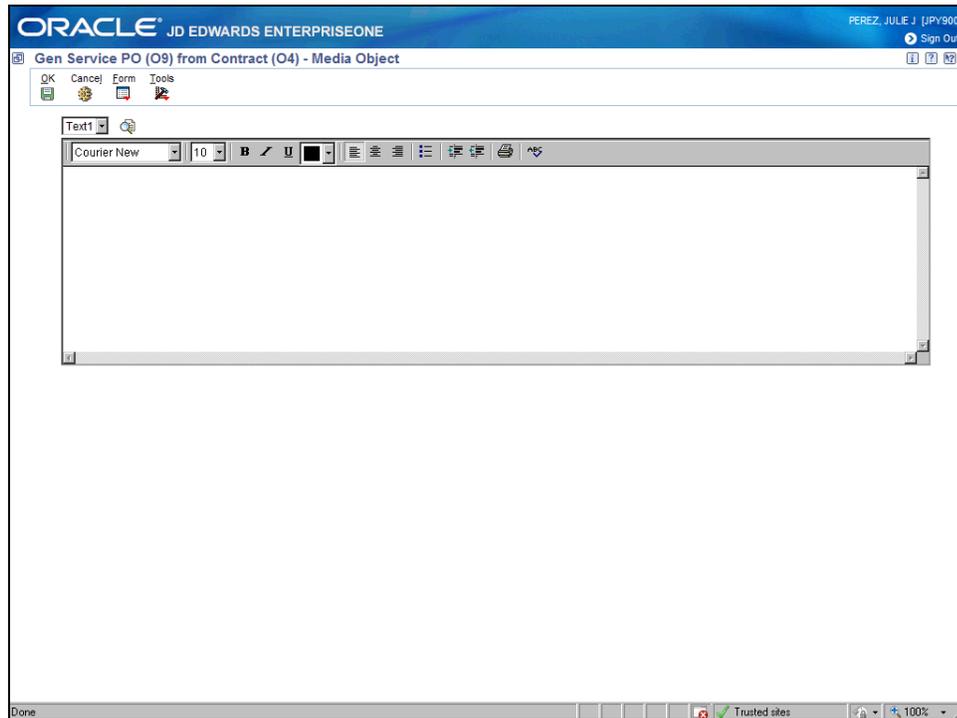
Cancel Date:

POPULATE HEADER TO DETAIL

Records 1 - 2

| Inventory Number | 3 - Digit NIGP | NIGP Sub | Quantity Ordered | Tr. UoM | Unit Cost | Extended Cost | Pu. UoM | Description 1 |
|------------------|----------------|----------|------------------|---------|------------|---------------|---------|---------------------------|
| 93818 | 938 | 18 | 1.0000 | EA | 10000.0000 | 10,000.00 | EA | CPR EQUIPMENT MAINTENANCE |

| Step | Action |
|------|--|
| 43. | Click the OK button.  |
| 44. | A Warning Error - Event Still in Process will occur. This is okay. Click the OK button.  |



| Step | Action |
|------|---|
| 45. | Enter the desired information into the field. Enter " Purchase Order from a Contract ". |
| 46. | Since you made changes to the Purchase Order you will need to document what changes you made. |
| 47. | Click the OK button.  |
| 48. | Click the Close button.  |
| 49. | Click the Close button.  |
| 50. | Click the Close button.  |
| 51. | You have successfully completed this lesson. End of Procedure. |