

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.

This work instruction shows how to [Generate a Quotation Request from a Purchase Requisition](#).

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. 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 Administrative Services website:

<http://www.das.state.ne.us/>.

Navigation

 Navigation paths tend to change as the system is developed. If you are unable to find the Order type below, please call the NIS help desk (402) 471-4636.

Click Roles, Procurement or Inventory.
(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

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 DAS 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

Steps

Generate a Quotation Request from a Purchase Requisition

Start this instruction from the Work with Order Release window.

-  The windows shown in this work instruction may not reflect what the end-user will see.

1. Move cursor to Order Number field.
2. Enter the **order number** in the Order Number field (and order type if not defaulted), to minimize the search.
3. Click **Find**.

4. Choose the row(s) in the grid reflecting the detail lines from which you want to generate a quotation request.

-  It is possible to choose detail lines from multiple requisitions to generate a single quotation request.

5. Click **Row – Order Release**. The Order Release window appears.

The screenshot shows the 'Gen Comm Quote (OQ) from Req (OR) - Order Release' window in PeopleSoft. The window has a header section with the following fields:

- Supplier: 939986 (BEST SOURCE)
- Buyer: 1117504 (MILLER, LINDSEY)
- Ship To: 568552 (ROADS LINCOLN CENTRAL COMPLEX)
- Branch/Plant: 27227160

Below the header is a 'Release Information' tab with the following fields:

- Release Qty: 1.0000
- Release Amt: 500.00
- Qty To Date: [empty]
- Original Qty: 1.0000
- Original Amt: 500.00
- Unit Cost: 500.0000
- Purchasing UOM: EA
- Line Type: J

6. Review and update the following fields on the Header as required:

- Branch/Plant
- Buyer
- Ship To

7. Review and update the **Release Quantity** on the Release Information tab. This field can be increased or decreased during this process.

8. Review and update the **Account Number** on the Detail Information tab.

9. Review and update the **Promised Delivery** field on the Dates tab.

 Changes made to the order release will be reflected on the generated Quotation Request. They do not change the original Purchase Requisition.

10. Click **OK**.

 If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat Steps 6-10 for each detail line that you wish to include on the Quotation Request.

 Steps 11-15 are optional if you want to review the newly generated quotation request before the document number is assigned. If you do not wish to review the quotation request, skip to step 13.

11. Click **Form, Review Order(s)**

12. Choose the row you wish to review.

13. Click **Row, Details** to view the detail lines.

14. Click **Cancel**

15. Click **Cancel**

16. Click **Form – Generate Order**. The Generated Purchase Orders window appears.



PeopleSoft. Sign Out

Gen Comm Quote (OQ) from Req (OR) - Generated Purchase Orders

Close Row Tools

Records 1 - 1 Customize Grid

Order Number	Or Ty	Order Co	Branch/Plant	Supplier	Request Date
898	OQ	22710	27227150	999999	04/01/2008

 The new Order Number and Or Ty (Order Type) will appear and should be recorded. If any changes need to be made to this new document, follow the work instructions for [Revising a Purchasing Document](#).

17. Click **Close**.

18. Click **Close**.