

# **Generating a Purchase Order from a Purchase Requisition**

## **Overview**

A Purchase Requisition for a service or commodity can be generated directly into a Purchase Order.

Exception Orders require exception processing and routing based on State Statute and/or Direct Purchase Authority Letters from AS Materiel Division Administrator.

In some cases, once an Agency has initiated a Requisition (OR, OW, ON, OI), AS Materiel, State Purchasing Bureau will generate a Requisition (OO), and the agency will generate a Purchase Order (ZO).

In other cases, a Purchase Order may be generated from the Purchase Requisition once it has been approved by the respective AS division. (Ex. IMS for IT Equipment and Services purchases, Transportation Services Bureau for Vehicle purchases, etc.)

Agencies should not generate a Purchase Order from a Purchase Requisition if the total value of the Purchase Requisition is greater than \$10,000. Agencies must wait until a State Purchasing Buyer contacts them to proceed with the procurement process.

This work instruction shows how to [Generate a Purchase Order 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/>.

## **NIS Navigation**

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

Order Type	Description	Navigation
OR → OP	Purchase Order generated from a Purchase Requisition	Purchasing-Agencies > Purchase Orders-Agencies > Commodity Purchase Order-Agency > Generate Commodity PO-Agency > Gen Comm PO (OP) from Req (OR)

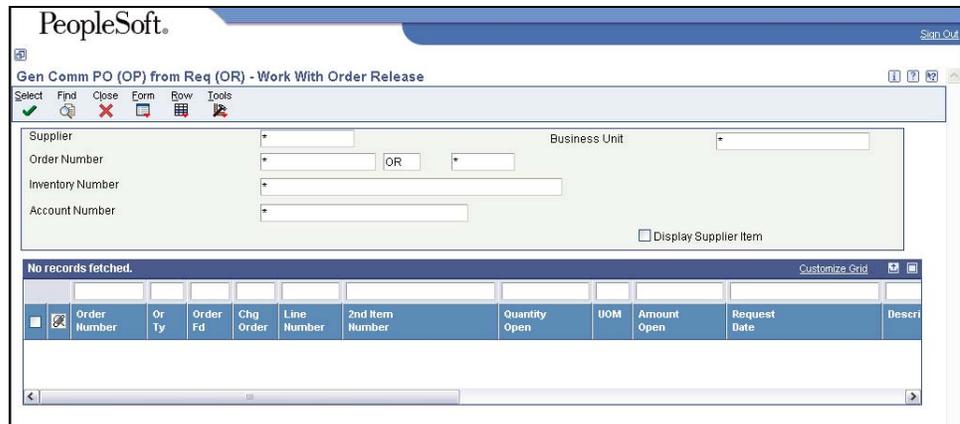
Order Type	Description	Navigation
ON → OP	Purchase Order generated from a Requisition for IT Equipment and Services	Purchasing-Agencies > Purchase Orders-Agencies > Commodity Purchase Order-Agency > Generate Commodity PO-Agency > Gen Comm PO (OP) from IT Equip & Svcs (ON)
OI → OP	Purchase Order generated from a Requisition for Vehicles	Purchasing-Agencies > Purchase Orders-Agencies > Commodity Purchase Order-Agency > Generate Commodity PO-Agency > Gen Comm PO (OP) from Vehicle Req (OI)
OO → ZO	Purchase Order generated from a Requisition created by State Purchasing Bureau	Purchasing-Agencies > Purchase Orders-Agencies > Commodity Purchase Order-Agency > Generate Commodity PO-Agency > Gen Direct Purchase Auth PO (ZO) from Req (OO)
O3 → O9	Purchase Order generated from a Requisition for Services	Purchasing-Agencies > Purchase Orders-Agencies > Service Purchase Order-Agency > Generate Service PO-Agency > Gen Service PO (O9) from Agency Req (O3)
Z6 → O9	Purchase Order generated from Exempt Service Requisition	Purchasing-Agencies > Purchase Orders-Agencies > Service Purchase Order-Agency > Generate Service PO-Agency > Gen Service PO (O9) from Exempt Req (Z6)

## Steps

### Generate a Purchase Order from a Purchase Requisition

 The following is an example of generating a Purchase Order (OP) from a Requisition (OR). The window titles will be different depending on the type of Purchase Order being generated.

Start this instruction from the Gen Comm PO (OP) from Req (OR) – Work with Order Release window.



1. Enter the **order number** in the Order Number field, if known, to minimize the search.
-  Can do a search based on Document Type, Account Number, Inventory Number, Business Unit or Supplier if you do not know the Order Number.
2. Click **Find**.

3. Choose the Order Number desired.
-  Be sure to look at any pertinent attachments.
4. Click **Row, Order Release**. The Gen Comm PO (OP) from Req (OR) - Order Release window appears.

5. Review and update the following fields on the Header as required:
  - **Branch/Plant** – change to a Business Unit reflected in the Account Number for this item for your agency
  - **Supplier** – enter the address book number for the vendor who will provide the good or service.
  - **Buyer** – enter the address book record for the individual in your agency who will be responsible for the Purchase Order.
  - **Ship To** – verify that this number reflects a delivery location for your agency
6. Review and update the following fields on the Release Information tab.

- **Release Qty** - the quantity entered on the Requisition will populate - change this quantity if you do not want to release the entire Requisition. If quantity is not changed, there will be no more units of this item to be released to subsequent PO's.
  - **Release Amt** – Allow to automatically calculate
7. Review and update the **Account Number** on the Detail Information tab.
  8. Review and update the following fields on the Dates tab:
    - **Requested** – date to receive order
    - **Promised Delivery** – date the vendor can meet
-  Changes made to the order release will be reflected on the generated Purchase Order. They do not change the original Purchase Requisition.
9. Click **OK**. You will return to the Work with Order Release window.
    -  If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat Steps 5-9 for each detail line that you wish to include on the Purchase Order.
  10. Click **Form, Generate Order**. The Gen Comm PO (OP) from Req (OR) – Generated Purchase Orders window appears.



Order Number	Or Ty	Order Co	Branch/Plant	Supplier	Request Date
46322	OP	22710	27227150	999999	03/02/2008

-  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](#).
11. Click **Close**.
  12. Click **Close**.