

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.

This work instruction shows how to [Enter a Purchase Order Directly](#).

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

Click Roles, Procurement.

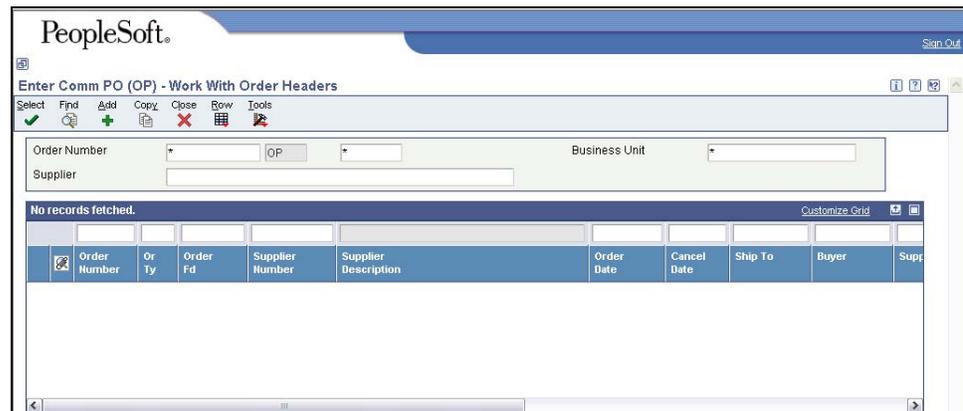
(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

Purchasing – Agencies > Purchase Orders – Agency > [Commodity or Service]
Purchase Order – Agency > Enter [Comm or Service] PO [(OP), (O9), or (Z8)]

Steps

Enter a Purchase Order Directly

Start this instruction from the Work with Order Header window.



1. Click **Add**. The Enter a Purchase Order (OP) - Order Header window appears.

PeopleSoft® Sign Out

Enter Comm PO (OP) - Order Header ? ? ?

OK Cancel Form Tools

Order Number OP Business Unit

Address Numbers		Dates	
Supplier	<input type="text"/> <input type="button" value="Q"/>	Order Date	<input type="text"/>
Ship to	<input type="text"/>	Requested	<input type="text"/>
Buyer	<input type="text"/>	Promised Delivery	<input type="text"/>
Invoice To	<input type="text"/>	Cancel Date	<input type="text"/>
Pmt. Remark <input type="text"/>			
Description <input type="text"/>			
Print Message <input type="text"/>			

Tax Expt Code	<input type="text"/>	Hold Code	<input type="text"/> BLANK - HOLD CODES 42/HC
Tax Rate/Area	<input type="text"/>	Approval Code	<input type="text"/>
Certificate	<input type="text"/>	Retainage %	<input type="text"/>
Tax ID	<input type="text"/>	Ordered By	NISLMILLER
Person/Corp. ID	<input type="text"/>	Order Taken By	<input type="text"/>
Payment Terms	<input type="text"/>	AIA Document	<input type="checkbox"/> Y

Messages

2. Complete the following fields:

- **Business Unit** - BU accountable for the order
- **Supplier Number** - enter the Address Book number of the vendor from whom you will purchase the goods.
- **Ship To** - address to which the goods are to be delivered or the location where services are to be performed.
 - The Ship To number will automatically populate the Send Invoice To field.
 - Your login ID will default to the Ordered By field.
- **Requested Date** - Enter the date when you want the purchase order to be filled or delivered
 - Today's date will automatically populate in the **Order Date** field. If the Requested Date is not filled in, it will default to today's date as well.
- **Promised Delivery** – Enter the date that the supplier promised to deliver this order. The system uses this date in conjunction with the receipt date to evaluate supplier performance.

Order Header

Order Number: 22710 Business Unit: 27227150

Address Numbers

Supplier: 504016 OFFICE MAX, LINCOLN
 Ship to: 558552 ROADS LINCOLN CENTRAL...
 Buyer: 1117504 MILLER, LINDSEY
 Invoice To: 250227 ROADS LINCOLN CENTRAL CO...

Dates

Order Date: 03/02/2006
 Requested: 04/01/2006
 Promised Delivery: 04/01/2006
 Cancel Date: []

Tax

Tax Expt Code: [] Tax Rate/Area: []
 Certificate: [] Tax ID: 752197703
 Person/Corp. ID: [] Payment Terms: []

Hold Code: BLANK - HOLD CODES 42/HC

Approval Code: [] **Retainage %**: []

Order By: NISLMILLER **Order Taken By**: []

AIA Document: Y

3. Click **OK**. The Order Detail window will appear.

The Order Number will display in the upper Order Detail tab.

Order Detail

Order Number: 46324 Business Unit: 27227150

Supplier: 504016 OFFICE MAX, LINCOLN Order Revision: []
 Ship To: 558552 ROADS LINCOLN CENTRAL COMPLEX Order Date: 03/02/2006
 Hold Code: BLANK - HOLD CODES 42/HC
 Retainage %: []

Records: 1 - 1

NIGP Number/ Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
[]	[]	[]	[]	[]	[]	[]	[]	[]

4. Complete the following information in the grid:

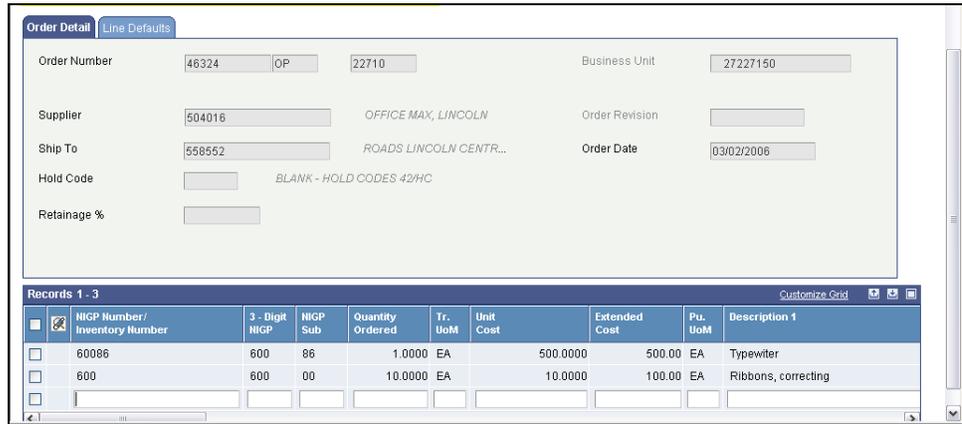
- **NIGP Number/Inventory Number** – represents the NIGP commodity code for items to be purchased. All applicable 5-digit codes for Services will be > 90000. All Commodity Codes will be <90000. This field will not print on the purchasing documents.
- **3-Digit NIGP** –three-digit prefix to a commodity code
- **NIGP Sub** – two-digit commodity code suffix

3-Digit NIGP and NIGP Sub automatically populates from the data entered in the NIGP Number/Inventory Number field but can be overridden.

- **Quantity Ordered** – Enter the quantity of the item that you require.
- **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.

- **Unit Cost** – the estimated cost per unit
 - **Extended Cost** – The system will automatically populate this field based on the Quantity Ordered and Unit Cost fields.
 - **Pu. UoM** - Defaults to the same Unit of Measure in the Tr. UoM field.
 -  Pu. UoM must equal Tr. UoM or an error will occur.
 - **Description 1** – This is free text – will print on all purchasing documents; enter descriptive data pertaining to the specific detail line.
 - **Description 2** – This is free text – *will* print on purchasing documents; enter descriptive data that you want to appear in NIS.
 - **Account Number** – valid business unit and object account from the Chart of Accounts.
 - **Report Code 3** – Commodities and Services use to identify:
 - Exception Orders
 - Emergency Purchases
 - DPA
 - Statewide Contract Use
 - Deviation Process
 - **Report Code 4** – Used ONLY for Purchasing for Inventory
 - Identifies Master Planning Family
 - **Ln Ty** – Defaults **J** for Non-Stock items; end-user can add a **T** Line type that indicates the Line is text information.
 -  "J" 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.
 -  "T" represents "Text Line," it indicates that text will be included on this line, but there will not be any funds/accounts associated with this line.
 -  If this is a requisition for supply Inventory, the Line type will be "S."
 - Other fields as required by your agency
 - Line Attachments: Text (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)
 - Line Attachments: OLE (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)
5. Use the down arrow on the keyboard to move the cursor to the next line if required
-  Additional fields will be defaulted in, such as Extended Cost and Line Type.
 -  If you have additional items to order, repeat steps 4 and 5 until the order is complete.

 The new Order Number and Or Ty (OP) will appear and should be noted if you wish to do more work with them or facilitate searches later.



	NIGP Number/ Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
<input type="checkbox"/>	60086	600	86	1.0000	EA	500.0000	500.00	EA	Typewriter
<input type="checkbox"/>	600	600	00	10.0000	EA	10.0000	100.00	EA	Ribbons, correcting
<input type="checkbox"/>									

6. Click **OK** to return to the Order Header window.
7. Click **Cancel** to return to the Work with Header screen.
8. Click **Close**.