

Generating a Purchase Order from an Existing 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 work instruction 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.

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.)

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)

Steps

-  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.

Generate a Purchase Order from an Existing Commodity Contract

Start this instruction from the Work with Order Release window.

-  Enter any known information in the header or 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. This field is case sensitive.

1. Click **Find**.

Order Number	Or Ty	Order Fd	Chg Order	Line Number	2nd Mem Number	Quantity Open	UOM	Amount Open	Request Date	Descri
11096	OC	00001	000	2.000	76006	110.0000	EA	3,976.50	09/14/2004	plow b
11096	OC	00001	000	3.000	76006	800.0000	EA	45,564.00	09/14/2004	carbid
11096	OC	00001	000	4.000	76006	1000.0000	EA	101,250.00	09/14/2004	carbid

- Choose the desired **Order Number** and corresponding detail line on the grid.
- Click **Row, Order Release**. The Order Release window appears.

4. Complete the following fields in the header:

- **Branch/Plant** – change to a valid Business Unit for your agency
- **Supplier** – Leave this value – it reflects the vendor that received the contract award.
- **Buyer** – clear this field to make it blank; 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

 The Send Invoice To field cannot be changed when generating a Purchase Order from a contract. When finished generating the Purchase Order, the agency will need to revise the document. Please follow the work instructions for Revising a Purchasing Document and change the Send Invoice To field on the Order Header and Order Detail screens.

5. Complete the following fields on the Release Information tab:

- **Release Qty** – Quantity for Contract 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.
- **Release Amt** – Allow to automatically calculate

6. Click the **Detail Information** tab.

7. Complete the following field on the Detail Information tab:
 - **Account Number** - verify a valid Account Number for your agency
8. Click the **Dates** tab.

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

Supplier: 500233 MIDWEST SERVICE & SALES COMPAN Branch/Plant: 27227150
 Buyer: 1117504 MILLER, LINDSEY
 Ship To: 250227 ROADS LINCOLN CENTRAL COMPLEX
 Order Number: 11096 OC 00001 000 2.000

Release Information **Detail Information** **Dates**

Requested: 03/02/2006 Cancel Date:
 Promised Delivery: 03/02/2006 Order Date: 09/14/2004
 G/L Date: 03/02/2006 Planned Effective: 09/14/2004

9. Complete the following information on the **Dates** tab:
 - **Requested** – date to receive order
 - **Promised Delivery** – date the vendor can meet
10. Click **OK**.
11. Click **Form, Generate Order**. (or click **Close**, then **OK** on the popup window.) The Generated Purchase Orders window appears.

PeopleSoft
Gen Comm PO (OG) from Contract (OC) - Generated Purchase Orders

Order Number	Or Ty	Order Id	Business Unit	Supplier	Request Date
112773	OG	56512	65050000	507000	03/23/2007

- The new Order Number and Or Ty (Order Type) will appear and should be recorded for future use.
12. The newly generated purchase order will need to be revised to update the Send Invoice To field and remove the Cancel Date. To make these revisions click **Row, Open Order Inquiry**. The Work with Order Details window appears.
 - 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)

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

Order Number: 112773 | BranchPlant: 65050008

Order Number	Quantity To Receive	UM	Amount To Receive	Ship To	Or Ty	Order Id	Change Order	Supplier Number	Supplier Name
112773	1.0000	M	39.60	557768	OG	56512	000	507000	AMERICAN MINORITY BUSINESS F

13. Choose the document and click **Row, Header Revision**. The Order Header window appears.

PeopleSoft
Gen Comm PO (OG) from Contract (OC) - Order Header

Order Number: 112773 | Business Unit: 65050008

Address Numbers

Supplier: 507000 AMERICAN MINORITY BUSINESS FOR
 Ship to: 557768 DAS MATERIEL - STATE PRINT SHG
 Buyer: 1117504 JOE, GI
 Send Invoice To: 250011 DAS MATERIEL

Dates

Order Date: 03/23/2007
 Requested: 03/23/2007
 Promised Delivery: 03/23/2007
 Cancel Date: 06/15/2008

Print Remark: CA-5990A
 Description: Pressure Seal Forms

Tax Expt Code: | Hold Code: BLANK - HOLD CODES 424HC
 Tax Rate/Area: | Approval Code: 1117504
 Certificate: | Retainage %:
 Tax ID: 411725179 | Ordered By: NISLMILLER
 Person/Corp. ID: C | Order Taken By:
 Payment Terms: | AIA Document: Y

14. Update the following fields:

- **Send Invoice To** - 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.
- **Cancel Date** - remove the cancel date.

15. Click **Form, Header to Detail, Populate**.

16. Click **OK**. The Order Detail window appears.

17. Verify Header changes populated to detail lines and revised as needed.

18. Add additional lines pending the agency's rules and regulations.

19. Click **OK** to return to the Work with Order Details window.

20. Click **Close** to return to the Generated Purchase Orders window.

21. Click **Close** to return to the Work with Order Release window.

22. Click **Close** to return to the menu.