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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

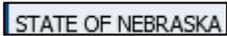
The Service Contract is non-encumbering and not budget checked. Purchase Orders will be generated from the Service Contract. The end user can generate multiple Purchase Orders from a single Service Contract.

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

Procedure

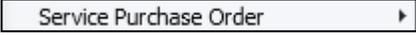
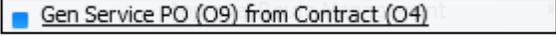
In this lesson you will learn how to generate a Purchase Order from CONTRACT 76500 O4 or 76501 O4.

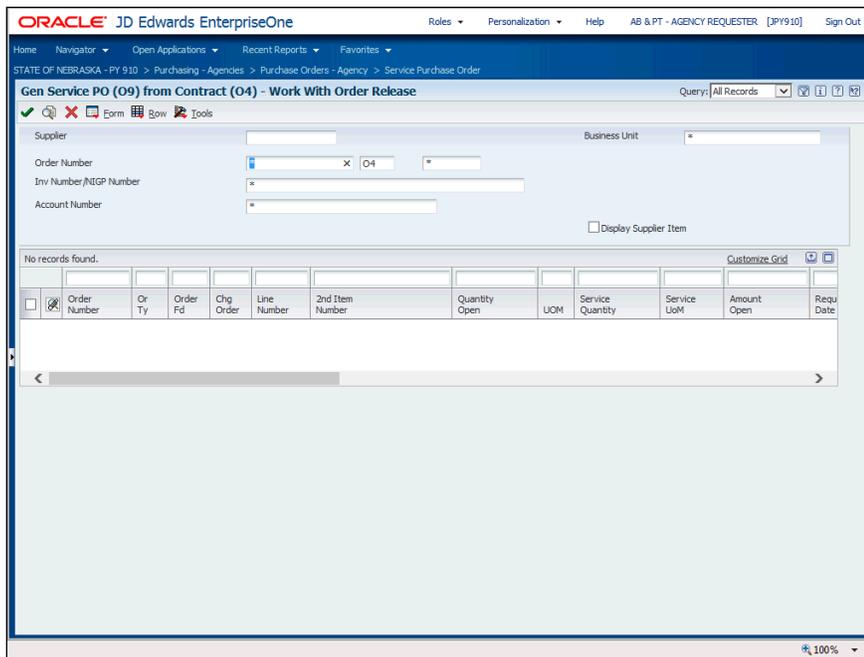


Step	Action
1.	Click the Navigator menu. 
2.	Click the State of Nebraska link. 
3.	Click the Purchasing - Agencies link. 

Training Guide for Generating a Purchase Order for Moving Services



Step	Action
4.	Click the Purchase Orders - Agency link. 
5.	Click the Service Purchase Order link. 
6.	Click the Gen Service PO (O9) from Contract (O4) link. 



Step	Action
7.	Enter 76500 O4 (Moving) or 76501 O4 (Installation) 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 Select button. 

The screenshot shows the Oracle JD Edwards EnterpriseOne interface for the 'Gen Service PO (09) from Contract (04) - Order Release' form. The form is titled 'STATE OF NEBRASKA - PY 910 > Purchasing - Agencies > Purchase Orders - Agency > Service Purchase Order'. The main header area contains fields for Supplier (4203420), Buyer (1218671), Ship To (557819), and Order Number (65057). The Release Information section is expanded, showing fields for Release Qty (3500.0000), Release Amt (34,825.00), Original Qty (3500.0000), and Original Amt (34,825.00). The form also includes a 'Detail Information' tab and a 'Dates' tab. The interface is in English and shows a 100% zoom level.

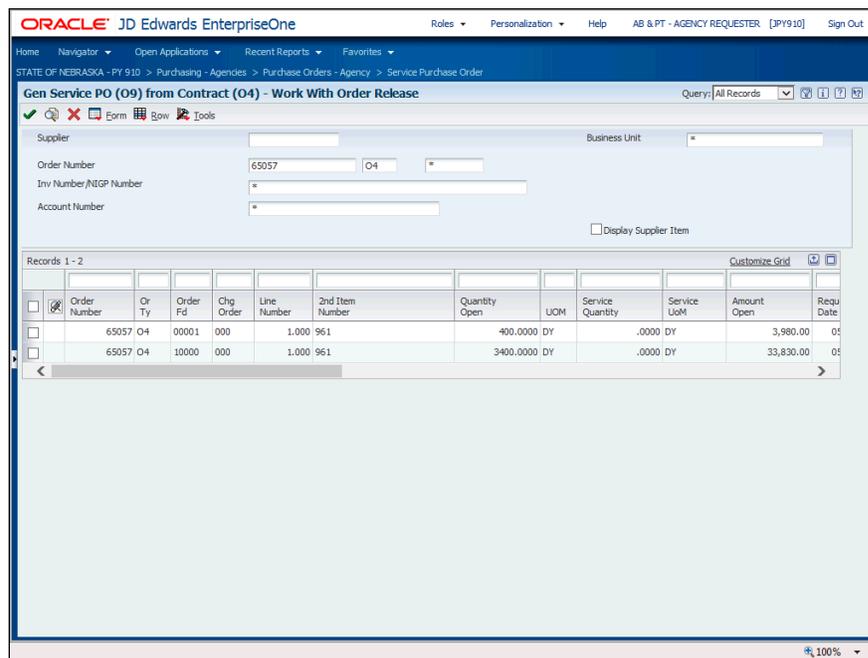
Step	Action
11.	<p>HEADER INFORMATION</p> <p>Review the following fields on the Header and make the following changes:</p> <p>Business Unit – a valid Business Unit for your agency Supplier – vendor that received the project bid. Use one of the following:</p> <ul style="list-style-type: none"> • 4203420 Office Innovations LLC • 631076 Office Installation Specialists Inc. • 1744140 World Class Office Installers Inc. <p>Buyer - populate with the address book record for the individual in your agency who will be responsible for the Purchase Order</p> <p>Ship To – change to reflect a delivery location for your agency</p>
12.	<p>Release Information</p> <p>Release Qty Field will populate with the quantity of the contract. Change this to match the Request for Quote total cost submitted by the contractor.</p> <p><i>Note:</i> 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>
13.	<p>The Release Amt will automatically calculate when Release Qty Field is updated.</p>

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Step	Action
14.	<p>Detail Information</p> <p>Review the Account Number Field. Change to a valid Account Number for your agency. The account number is made up of your business unit and object code.</p>

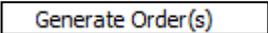
Step	Action
15.	Dates Review the Requested Field. Enter the date you want to receive the order. This Field automatically populates with the requested date from the contract.
16.	In the Promised Delivery Field enter the day contractor will perform the move. This Field automatically populates with the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

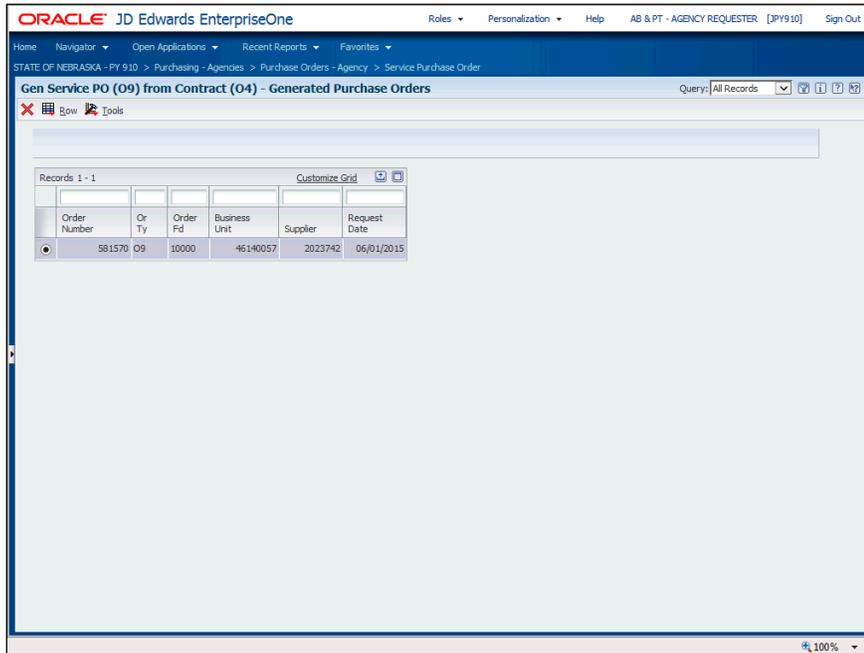


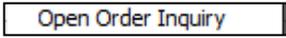
Step	Action
20.	If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat the previous steps for each line that you wish to include on the Service Contract.

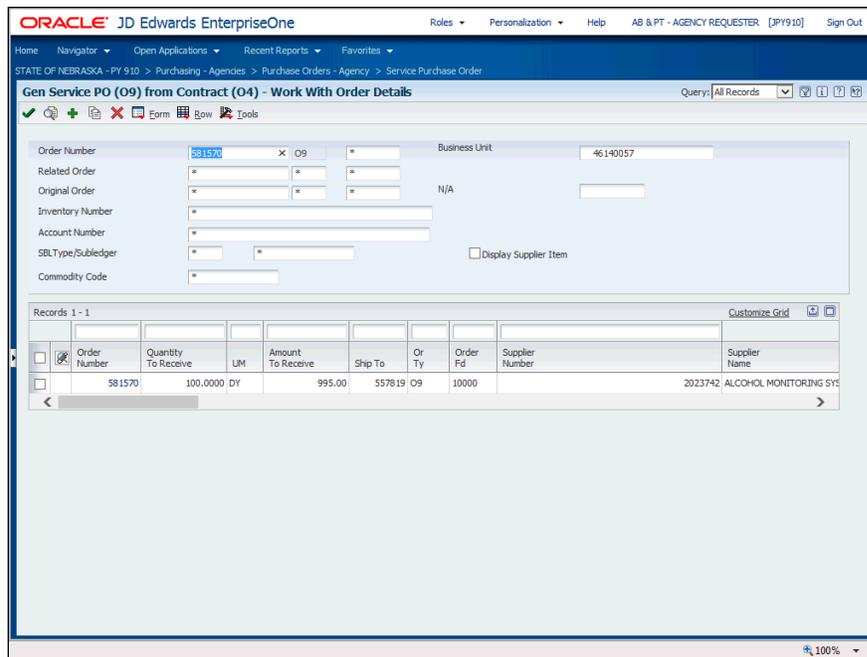
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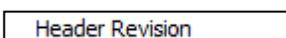


Step	Action
21.	<p>If you want to review the Purchase Order before it is generated follow these steps.</p> <p>Click Form, Review Order. The Gen PO (O9) from Service Contract (O4) - Suppliers Selected window appears.</p> <p>Choose the order(s) to review prior to generation.</p> <p>Click Row, Details. The Gen PO (O9) 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>
22.	<p>Click the check box of the Order Number in the Detail Line.</p> <input type="checkbox"/>
23.	<p>Click the Form button.</p> 
24.	<p>Click the Generate Order(s) menu.</p> 



Step	Action
25.	The new Order Number and Or Ty (Order Type) will appear and should be recorded for future use. This is your purchase order number along with the document type which is an O9.
26.	The newly generated purchase order will need to be revised. Click the Row button. 
27.	Click the Open Order Inquiry menu. 



Step	Action
28.	Choose the document by Clicking the check box in the detail line. 
29.	Click the Row button. 
30.	Click the Header Revision menu. 

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STATE OF NEBRASKA - PY 910 > Purchasing - Agencies > Purchase Orders - Agency > Service Purchase Order

Gen Service PO (09) from Contract (04) - Order Header

Order Header Additional Properties Category Codes

Order Number 581570 09 10000 Business Unit 46140057

Supplier 2023742 ALCOHOL MONITORING SYSTEMS INC

Ship To 557819 CORRECTIONS - COMM CORREC CTR

Buyer 1218671 JEFFREY LAABS (DCS)

Send Invoice To 809852 CORRECTIONS - CENTRAL OFFICE #

Entered Date 05/04/2015

Requested 06/01/2015

Promised Delivery 06/01/2015

Cancel Date 06/30/2016

Alcohol and home monitoring

Hold Code BLANK - HOLD CODES 42/HIC

Approval Code 572007

Ordered By 9ABREQ1

Order Taken By

Payment Terms Net 30 Days from Invoice Date AIA Document Y

Step	Action
31.	<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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STATE OF NEBRASKA - PY 910 > Purchasing - Agencies > Purchase Orders - Agency > Service Purchase Order

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Payment Terms Net 30 Days from Invoice Date AIA Document Y

Step	Action
32.	Cancel Date - remove the cancel date.

Step	Action
33.	Click the Additional Properties tab. 
34.	Data on the Additional Properties tab provides information about the document: Document Description, Document Location, and Document Contact
35.	Click in the Document Contact field and delete the information. Input the address book number of the person who is the contact for this order.

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ORACLE JD Edwards EnterpriseOne Roles Personalization Help AB & PT - AGENCY REQUESTER [PY1910] Sign Out

Home Navigator Open Applications Recent Reports Favorites

STATE OF NEBRASKA - PY 910 > Purchasing - Agencies > Purchase Orders - Agency > Service Purchase Order

Gen Service PO (09) from Contract (04) - Order Header

Form Tools

Order Header Additional Properties Category Codes

Property 01	<input type="text"/>	Property 07	<input type="text"/>
Property 02	<input type="text"/>	Property 08	<input type="text"/>
Property 03	<input type="text"/>	Property 09	<input type="text"/>
Property 04	<input type="text"/>	Property 10	<input type="text"/>
Property 05	<input type="text"/>	Property 11	<input type="text"/>
Property 06	<input type="text"/>	Cancel Flag	<input type="text"/>

Document Description ALCOHOL AND HOME MONITORING

Insurance Expiration

Bond Expiration

Date and Time 01

Date and Time 02

Document Location 809852 CORRECTIONS - CENTRAL OFFICE #

Document Contact 1218671 JEFFREY LAARS (DCS)

100%

Step	Action
36.	Click the OK button.
	

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Home Navigator Open Applications Recent Reports Favorites

STATE OF NEBRASKA - PY 910 > Purchasing - Agencies > Purchase Orders - Agency > Service Purchase Order

Gen Service PO (09) from Contract (04) - Order Detail

Form Bow Tools

Order Detail Line Defaults Additional Properties Category Codes

Order Number: 581570 09 10000 Business Unit: 46140057

Supplier: 2022742 ALCOHOL MONITORING SYSTEMS INC Order Revision: 0

Ship To: 557819 CORRECTIONS - COMM CORREC CTR Entered Date: 05/04/2015

Invoice To: 809852 CORRECTIONS - CENTRAL OFFICE # Requested: 06/01/2015

Buyer Number: 1218671 JEFFREY LAABS (DCS) Prom Del Date: 06/01/2015

Cancel Date:

POPULATE HEADER TO DETAIL

Order Attachment

ALL CHANGES TO THE HEADER MUST BE MADE THROUGH HEADER REVISIONS

Records 1 - 2 Customize Grid

Line Number	NSGP Number/ Inventory Number	3-Digit NSGP	NSGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
1.000	961	058	00	100.0000	DY	9.9500	995.00	DY	CCCL ALCOHOL HOME MONITOR

Step	Action
37.	Click the OK button. 

ORACLE JD Edwards EnterpriseOne

Home Navigator Open Applications Recent Reports Favorites

STATE OF NEBRASKA - PY 910 > Purchasing - Agencies > Purchase Orders - Agency > Service Purchase Order

Gen Service PO (09) from Contract (04) - Media Object

Cancel Form Tools

Text1

Courier New 10 B U

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Step	Action
38.	Since you made changes to the Purchase Order you will need to document what changes you made. Enter " Revised send invoice to location, revised document contact, removed cancel date from order header. YOUR INITIALS, DATE OF CHANGE ".
39.	Click the OK button. 
40.	Click the Close button. 
41.	Click the Close button. 
42.	End of Procedure.