Generating an OJ (Stock Requisition) from a ZC (Contract Order for Stock)

Overview

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 Department of Administrative Services website: http://www.das.state.ne.us/.

Navigation

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Steps

Generate a Stock Requisition from an Existing Contract Order for Stock

Start this instruction from the Gen CSI Contract Req (OJ) from Stock Contract (ZC) – Work with Order Release window.

✎ Enter any known information in the header or QBE line to minimize the search.

Example:

- 46070099 in the Business Unit Field

- Contract Order Number _ _ _ _ _ _-ZC

1. Click **Find**.

2. Choose the desired **Order Number** and **Detail Line** on the grid.

3. Click **Select**. Gen CSI Contract Req (OJ) from Stock Contract (ZC) – Order Release window appears.

4. Change desired fields as necessary on the Header:

    *   Business Unit – change the Business Unit from 46070099 to the business unit ordering the product (ie: 46070025, 46070020, etc.)

    *   Supplier – DO NOT CHANGE

    *   Buyer – Delete name and leave blank

    *   Ship To – change to reflect a delivery location for your Warehouse

        o   557816 = CSI Warehouse (will default to this number)

        o   Change number only if the order is a direct shipment.

Release Information TAB – Review:

*   **Release Qty – Should reflect the quantity you are ordering**

    o   Click into the empty Buyer space above and verify the quantity is correct.

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

    DO NOT DEPLETE THE ENTIRE CONTRACT!!!!! If Release Qty is equal to or greater than the request quantity contact DCS Purchasing at 479-5612 to have them increase the ZC Stock Contract. Please provide the contract number and line number.

Detail Information TAB – Review:

- Description – Review but DO NOT CHANGE

Dates TAB – Review:

- Requested – date to receive order

- Promised Delivery – date the vendor can meet

- G/L Date – DO NOT CHANGE

- Cancel Date – DELETE

- Planned Effective – DO NOT CHANGE

5. Click **OK**. The Work with Order Release window appears.

   If multiple rows were chosen, the Order release window refreshes with the next item. Repeat steps 4 and 5 for each detail line that you wish to include on the Purchase order.

6. Click **Form, Generate Order**. The CSI Contract Req (OJ) from Stock Contract (ZC) Generated Purchase Orders window appears.

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

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

8. Click **Close**.

- Shop Supervisors may Revise the Contract Req and review any pertinent information such as delivery address, and/or add additional information about the product you are requesting, such as freight. Follow Revising a Purchasing Document Work Instruction.