# Creating a Requisition for Stock

## Overview

You create a requisition to obtain approval for stock items you want to purchase.

To generate a requisition, you must enter order header information such as Supplier Address Book number, Branch/Plant (warehouse) and Ship To address. The order detail information provides the specific information about stock items that you want to purchase such as Inventory Number, Quantity, and possibly Cost (if different from the current cost defined in NIS).

Substitute items can be defined in NIS. The substitutes or replacements are based on the cross-references types.

This work instruction shows how to Create a Requisition for Stock.

## 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/.
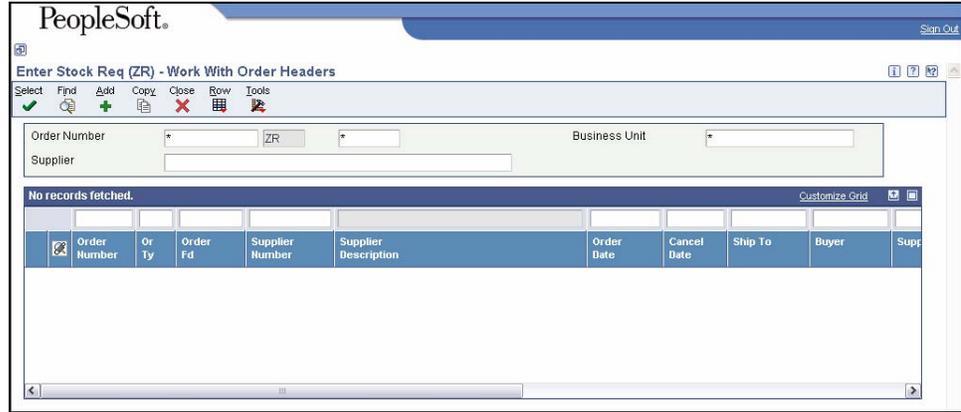
## Navigation

Click Roles, Inventory.

(Citrix users – right click on the menu, choose Apply Roles, choose Inventory.)

Inventory > Inventory – Purchasing Statewide > Stock Requisition > Enter Stock Req (ZR)
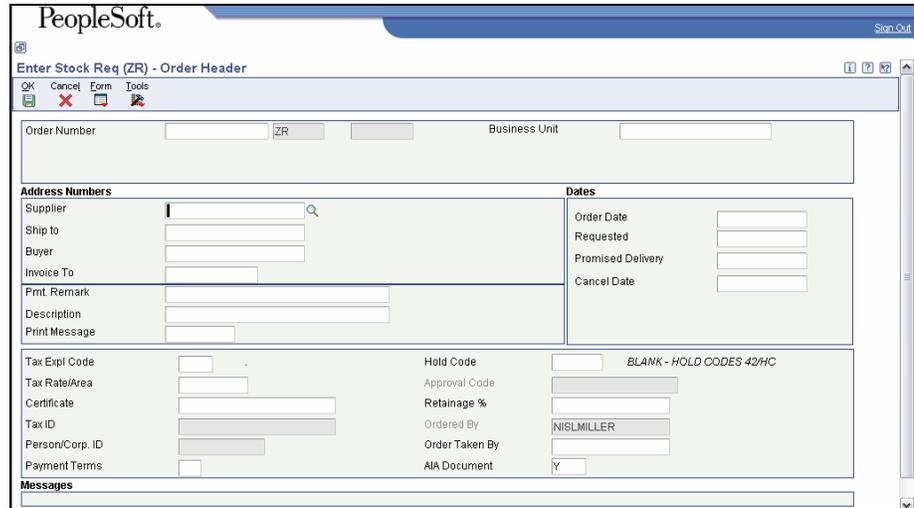
# Steps

## Create a Requisition for Stock

Start this instruction from the Inventory Enter Stock Non-Contract $0 - $4999 (ZR) – Work with Order Headers window.



1.  Click **Add**.  The Enter Stock Non-Contract $0 - $4999 (ZR) – Order Header window appears.



2.  Complete the following fields:

    *   **Address Numbers**

        – Supplier - use 999999 (Generic Supplier Address Book number) when you are going to get quotes from multiple suppliers.

        – Ship To - where supplier will send the bill to for payment

        – Send Invoice To - automatically populates but can be overridden

        – Payment Remark - optional

        – Description - optional

    *   Branch/Plant

    *   **Dates** – defaults to current date but can be overridden

- Requested
- Promised Delivery
- Cancel Date

3. Click **OK**. The Enter Stock Req (ZR) – Order Detail window appears.
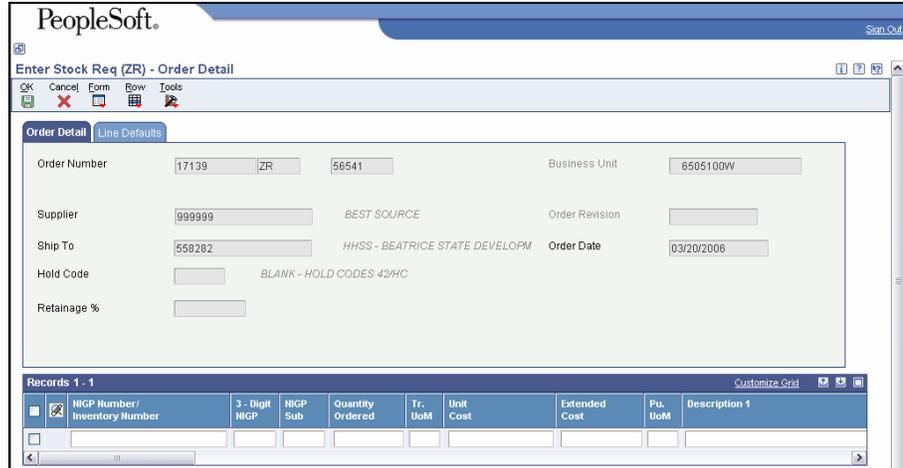


✏️ The new Order Number and Or Ty (Order Type) will appear and should be noted if you wish to do more work with them or facilitate searches later.

4. Complete the following information:

- Inventory Number
- Quantity Ordered
- Report Codes

✏️ Use the down arrow on the keyboard to move the cursor to the next line if required.

A warning sign (⚠️) will be displayed if a substitute item exists and will be indicated by a check mark on the far left column of the row. If you want to use or view a substitute item, continue with Step 5.

If no substitute item exists, proceed to Step 11.

5. Choose the Inventory Number with the substitute item.

6. Click **Row**, **Substitute Items**. The Enter Stock Non-Contract $0 - $4999 (ZR) – Substitute Items window appears.



7. Enter an asterisk * in the Supplier field.

8. Click **Find**.

9. Choose the desired Inventory Number, if not defaulted.

10. Click **OK**. The Inventory Number is substituted.



11. Click **OK** to return to the Order Header window.

12. Click **Cancel**.

13. Click **Close**.