

Entering a Purchase Requisition

When purchasing a commodity, an agency must first determine if it is available from an existing contract. If so, the contract must be used to procure the item. Please refer to the [DAS Materiel Division – State Purchasing Bureau](#) website for more information.

Overview – Entering a Purchase Requisition, Non-Contract/Non-Stock Commodity

Agencies can generate purchases for commodities that are less than \$10,000 without processing through AS Materiel Division, State Purchasing Bureau.

With the exception of "Exception Orders", the total value of the Purchase Requisition will determine the process applied to the procurement of the item(s). If the purchase is for an item that has been identified as an "[Exception Order](#)", follow appropriate procedures for those purchases. [See Document Flows and Menu Selections.](#)

If a State [contract](#) does not already exist for a required item and the total value does not exceed \$2000; an agency can pay the vendor through NIS Accounts Payable without creating a PO. Or, the agency can choose to purchase the item(s) with a Purchase Order through NIS Procurement. Please note: Agencies are strongly urged to obtain a minimum three bids on purchases for goods over \$2000.

If a State contract does not already exist for a required item and the total value of the order will not exceed \$10,000, the agency, board, or commission (agency) has the option to either utilize the Purchase Requisition process or enter a Purchase Order directly.

If a State contract does not already exist for a required item, and the total value of the order will exceed \$10,000, the agency must utilize the Purchase Requisition process.

Purchase Requisition Process:

- Total value is between \$2000 and \$10,000; it is highly recommended that an agency obtain the best price for the item(s) that they purchase by receiving a minimum of three bids from vendors. The agency may choose to make the purchase via three processes:
 - Enter a Purchase Requisition (OR) → generate a Quotation Request (OQ) → generate a Purchase Order (OP)
 - Enter a Purchase Requisition (OR) → generate a Purchase Order (OP)
 - Enter a Purchase Order (OP) directly

- Total value is between \$10,000 and \$24,999, AS Materiel Division, State Purchasing Bureau must be involved in the procurement of the item(s).
 - In order for AS Materiel Division, State Purchasing Bureau to approve a requisition, agencies must include an order attachment indicating the vendors contacted and bids received, or,
 - AS Materiel Division - State Purchasing Bureau will either process the purchase for the agency, or give the agency authority to process the purchase.
- Total value equal to or greater than \$25,000, AS Materiel Division – State Purchasing Bureau will process the purchase for the agency.

Order Type	Description	Navigation
OR	Requisition * (optional)	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Comm Req (OR)

* optional if a Purchase Order (OP) will be entered directly. The Purchase Requisition (OR) is required for purchases with a total value equal to or greater than \$10,000.

Overview – Entering a Purchase Requisition for an Exception Order

State Statute requires purchase of certain items to be made through specific agencies. The end user must determine if an item that they wish to purchase falls within this category of "Exception Orders." Once this is determined, the end user must initiate the purchase using a requisition defined in the "Exception Orders" menu. [\(Link to current Direct Purchase Authority letter from DAS Materiel Division Administrator.\)](#)

Exception Orders (ex. firearms, motor vehicles, IT equipment, etc.) are routed to specified agencies through the use of Approval Routes. End users must estimate the total value of the purchase to route the document to the appropriate entity. If you are unable to determine an estimated value, you must enter a total equal to or greater than \$5.00.

Order Type	Description	Navigation
OO	Restricted Requisition (does not route outside agency)	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Direct Purchase Authority Req (OO)
OT	Requisition for Communications Equipment	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Communications Equip Req (OT)
OW	Requisition for Equipment, Print Services, or Firearms Thru AS Materiel Division, State Purchasing Bureau	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter through SPB Req (OW)

Order Type	Description	Navigation
OI	Requisition for Vehicles Thru AS – Transportation Services Bureau	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Vehicle Req (OI)
ON	IT Equipment and Services	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter IT Equip & Srvcs Req (ON)

Overview – Entering a Purchase Requisition to Generate a Commodity Contract (OR)

- If a State contract does not already exist for a required item, and an agency desires a commodity contract, it must enter a Purchase Requisition for AS Materiel Division, State Purchasing Bureau to generate a contract.

Order Type	Description	Navigation
OR	Requisition for Commodity Contract	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Comm Req (OR)

Overview – Entering a Purchase Requisition for Services

Any agency can identify the need for a service contract. It is the responsibility of each agency to ensure that the process used complies with State Statutes and other governing authorities. If the state agency processes the service, there are five possible process flows:

1. Direct Pay for items less than \$500 (less than \$25,000 as per Agency, Board, and Commission memo dated January 16, 2004, reference memo for requirements) [Link to ABC memo](#)
2. Purchase Requisition (optional) → Purchase Order
* optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit bid.
3. Purchase Requisition → Contract → Purchase Order
4. Purchase Requisition → Quotation Request → Purchase Order
5. Purchase Requisition → Quotation Request → Contract → Purchase Order

The system has been configured to allow a state agency to request that AS Materiel Division, State Purchasing Bureau process the service contract. This is done by entering a Purchase Requisition (O5). Please contact AS Materiel Division – State Purchasing Bureau at (402) 471-2401 to assure resources are available.

Order Type	Description	Navigation
O3	Requisition for Service – Processed by Agency * (optional)	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ Agency Req (O3)
O5	Requisition for Service – Processed by Bureau	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ SPB Req (O5)
Z6	Requisition for Services - Exempt	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service-Exempt Req (Z6)

* optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit bid.

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

Purchasing > Purchasing – Statewide > see below

Order Type	Description	Navigation
OR	Requisition * (optional)	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Comm Req (OR)
OO	Restricted Requisition (does not route outside agency)	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Direct Purchase Authority Req (OO)
OT	Requisition for Communications Equipment	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Communications Equip Req (OT)
OW	Requisition for Equipment, Print Services, or Firearms Thru AS Materiel Division, State Purchasing Bureau	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter through SPB Req (OW)

Order Type	Description	Navigation
OI	Requisition for Vehicles Thru AS Transportation Services Bureau	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter Vehicle Req (OI)
ON	IT Equipment and Services	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Commodity Requisition > Enter IT Equip & Srvcs Req (ON)
O3	Requisition for Service – Processed by Agency ** (optional)	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ Agency Req (O3)
O5	Requisition for Service – Processed by Bureau	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service @ SPB Req (O5)
Z6	Requisition for Services - Exempt	Purchasing – Agencies > Requisitions – Agency > Enter & Revise Service Requisitions > Enter Service-Exempt Req (Z6)


* OR is optional if a Purchase Order (OP) will be entered directly. The Purchase Requisition (OR) is required if a Quotation Request (OQ) will be used to solicit bids.

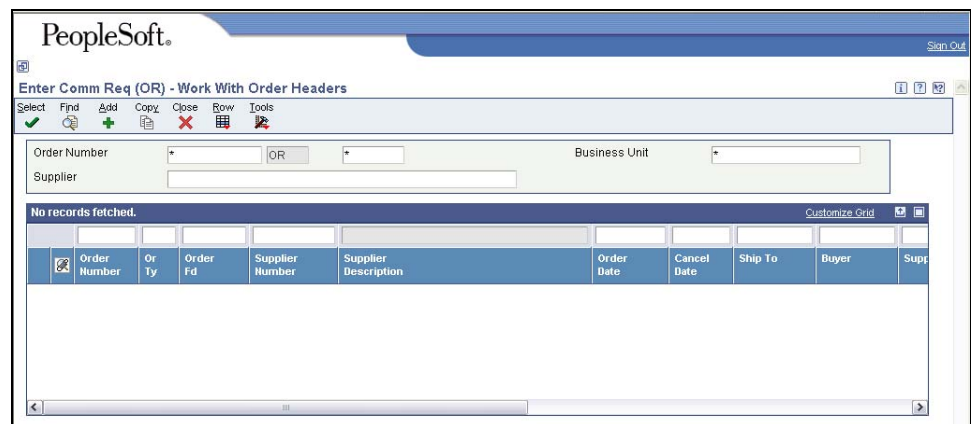
** O3 is optional if a Purchase Order (O9) will be entered directly. The Purchase Requisition (O3) is required if a Quotation Request (Z1) will be used to solicit bid.

Steps

Enter a Purchase Requisition

Start this instruction from the Work with Order Headers window. Appropriate Document Type will populate in Second Field of Order Number.

 The windows shown in this work instruction may not reflect what the end-user will see.



1. Click **Add**. The Order Header window appears.

2. Complete the following fields:

- **Address Numbers**

- Supplier:

- Use 999999 (Best Source – Generic Supplier Address Book number) when total value is estimated to be greater than \$2,000 and acquiring bids



- If you are purchasing items less than \$10,000 and not creating your Purchase Order through the use of a Quotation Request, you can enter the Address Book number of the vendor from whom you will purchase the goods. On the second Order Header "Text Attachment", enter the names of vendors from whom you solicited bids and their responses.

- Use the Vendor number if the commodity or service is a Sole Source or this document will not require bidding and the vendor is known.



- Primarily "V" search type Address Book records.

- Ship To – address to which the goods are to be delivered or the location where services are to be performed; If multiple locations, A/B # 559783 (FACILITY, MULTIPLE ADDRESSES) can be used



- Primarily "F" search type Address Book records.

- Buyer – Individual who is primarily responsible for this document at the AGENCY.








- If the Purchase Requisition is required to go through AS Materiel – State Purchasing Bureau, they will populate this field with the address book number of the Buyer who is responsible for bidding this document

- Send Invoice To – automatically populates but can be overridden



- Primarily "S" search type Address Book records if the invoice will not be sent to the "Ship To" address.

- Payment Remark – optional; for a commodity or service requisition, this field can be used for free form text. The information will not be printed on any reports, but may be useful as additional information.
 -  This field can hold up to 30 alpha/numeric characters
 - Contract Location/Desc –
 - Commodities - optional; can be used for free form text (up to 30 alpha/numeric characters). The information will not be printed on the contract; however it will print on the Contracts with Originating Doc Type report, and may be useful as additional information.
 - Services - required; used to identify where the contract will be physically located. The information will not be printed on the contract; however it will print on the Contracts with Originating Doc Type report. This field is mandatory and agencies must include the location of the contract.
 - **Business Unit** – BU accountable for the order
 - **Dates** – defaults to current date but can be overridden
 - Order Date – The date this Purchase Requisition is entered into NIS
 - Requested – The date you want to receive the item; change date to accommodate formal bidding process.
 -  If the requisition is to establish a contract, this date may be used to indicate the beginning date of the contract.
 - Promised Delivery – The Date that the vendor has promised delivery.
 -  This information is used for tracking vendor performance – the system will compare the date received against the promised date. It is important to enter a valid Promised Delivery date.
 - Cancel Date – Will remain blank unless you enter data. This can reflect the last date the requisition is valid.
3. Click **Form, Order Addresses**. The Order Address Information window appears.
-  This step is optional. It enables an end-user to modify the addresses tied to a "supplier" address book number or a "ship to" address book number for the current document. These changes will transfer to generated documents, but will not change the address book record. If generating a Purchase Order or Contract from the requisition, the end-user must click **Form, Refresh** on the Order Address Information window to populate the form with the correct mailing name and appropriate information.
4. The Address Type area defaults to Supplier.
-  To change Ship to address information, select **Ship to**.

PeopleSoft®

Enter Comm Req (OR) - Order Address Information

Ship To # 558552

Mailing Name DEPT OF ROADS CENTRAL COMPLEX

Address Line 1 1500 NE HWY 2

Address Line 2

Address Line 3

Address Line 4

Postal Code 68502

City LINCOLN

State NE NEBRASKA

Country USA

County

Address Type

Supplier

Ship To

5. Change the mailing information as needed.
6. Click **OK**.
7. Click **Form, Additional Info**. The Order Header – Additional Information window appears.

PeopleSoft®

Enter Comm Req (OR) - Order Header - Additional Information

Pricing Group BLANK 40/PC

Freight Handling Code

Cost Rule BLANK - LANDED COSTS 41/P5

Send Method PRINTMAIL

Evaluated Receipt N

Supplier SO

Reference

Delivery Instructions Line 1

Adjustment Schedule

8. Complete the following fields:
 - **Reference** – Enter the free form text (up to 25 alphanumeric characters) that you want to print on your purchasing document.
 - **Delivery Instructions** – Enter the free form text (2 fields with up to 30 alphanumeric characters) that you want to print on your purchasing document.
9. Click **OK** to return to the Order Header.
10. Click **OK**. The Order Detail window appears.

PeopleSoft. Sign Out

Enter Comm Req (OR) - Order Detail

Order Detail Line Defaults

Order Number: 17132 OR 22710 Business Unit: 27227150

Supplier: 999999 BEST SOURCE Order Revision:

Ship To: 558552 ROADS LINCOLN CENTRAL COMPLEX Order Date: 03/02/2006

Hold Code: BLANK - HOLD CODES 42HC

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

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

11. 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
 -  Use the down arrow on the keyboard to move the cursor to the next line if required. You must enter data in the **3-Digit NIGP** field for all additional lines.
 -  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)
12. Click **OK** to return to the Order Header window.
 13. Click **Cancel**.
 14. Click **Close**.