

# CREATE ORDERS ON BEHALF OF OTHERS (SELF-SERVICE PROCUREMENT)



## **QUICK REFERENCE GUIDE INV-12**

#### Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Create Orders on Behalf of Others (Self-Service Procurement) in the North Carolina Financial System (**NCFS**).

## Introduction and Overview

This QRG covers the creation of orders on behalf of others (Self-Service Procurement) in NCFS.

## **Initiate Consumption Requisition**

To Initiate Consumption Requisition in NCFS, please follow the steps below:

- 1. Log in to the NCFS portal with your credentials to access the system.
- 2. On the Home page, under the Procurement tab, click the Purchase Requisitions app.



NORTH CAROLINA OFFICE OF THE STATE CONTROLLER



3. Select **Update Requisition Preferences** from the *More Tasks* drop-down.

Requisitions (	2			More Tasks 🔻 Manage Requisitions
Shop by Catego	ory			Enter Requisition Line Request Noncatalog Item Training Super User 1 🖍 Request New Supplier
Recent Requisi	tions	View More	Recent Purchases	Update Preparer and Requester Update Requisition Preferences
19R0000037	BACON, SLICED, SMC	DKED Incomplete	No data to display.	
08R0000069	CENG-BODY STRUCT	FURE 🕑 Approved		
08R0000068	CENG-BODY STRUCT	IURE 📀 Approved		
08R0000061	CENG-BODY STRUCT	URE Incomplete		
08R0000050	CENG-BODY STRUCT	TURE 🕑 Approved		

4. On the Edit Requisition Preferences page, enter *Requisitioning BU* and *Deliver-to Location*. Click the Save and Close button.

Edit Requisition Preferences	
Select the requisitioning BU where your preferences will be applicable.	
Requisitioning BU 3000 DHHS MENTAL HEALTH ~	
Shipping and Delivery	
* Requester Super User 1, Training Q	
* Deliver-to Location 3000DHHSNI-2019 MAIL SERVICE CE	
Destination Type Expense ~	
▲ Billing	
Favorite Charge Accounts	+
Primary * Nickname * Charge Account	Delete
No data to display.	
	Save and Close Cancel

5. Select Enter Requisition Line from the *More Tasks* drop-down choice list.

quisitions (	0		More Tasks  Manage Requisition Enter Requisition Line	ns 📜 0
Shop by Catego Recent Requisit	ions View More	Recent Purchases	Request Noncatalog Item Request New Supplier Update Preparer and Requester Update Requisition Preferences	Training Super User 1 🖍
08R0000087 08R0000086	CENG-BODY STRUCTU Returned CENG-BODY STRUCTU Returned	Ō		
19R0000037 08R0000069	BACON, SLICED, SMO Returned CENG-BODY STRUCTU S Approved	BACON, SLICED, SMOKED, CHILLED.		
08R0000068	CENG-BODY STRUCTU 📀 Approved	Internally Orderable () Pounds		

6. On the Enter Requisition Line page, enter the Line Type, Item, and Quantity.

In this example, we choose: Goods for Line Type, 3000880 for Item, and 1 for Quantity.

Enter Requisition Line ⑦ Select the right Source Organization	Add to Cart Done 🕎 0
* Line Type Goods Item 3000880 Source Type * Source Organization	e Inventory V n JIRDC MAIN WAREHOUSE Select Source
Revision Source Subinventor Item Description FORK, DINNER, STAINLESS STEEL_TEST AUDIT	у •
Category Name 521520-Domestic dishes and servingware and storage containers	
Price 3.3822	
Currency USD	
✓ Delivery	
* Requester Super User 1, Training Q * Deliver-to Location	n 3000DHHSNI-2019 MAIL SERVICE CE Q
Requested Delivery Date 6/2/23 the Deliver-to Address	s FSTATION, ROAD, RALEIGHNC, 276030000, US

7. In the *Delivery* section, enter the **Requestor Name** and **Deliver to Location**. In the *Billing* section, enter the **Charge Account**, **Budget Date**, and **Percentage**.

\*\*\*Note: For the Charge Account, please make sure to only use your agencies correct Business Unit, DHHS = 3000, DAC = 5200, and DPI = 0800. Enter a valid Budget Fund, select a "5" series account number and an appropriate AMU for your facility. <u>DO NOT ENTER ZEROS FOR AMU</u>\*\*\*

⊿ Delivery				
* Requester Super User 1, Training Q	7	* Deliver-to Locati	ion 3000DHHSNI-2019 M	MAIL SERVICE CE Q
Requested Delivery Date 6/2/23		Deliver-to Addre	ess FSTATION, ROAD, R	ALEIGHNC, 276030000, US
ل Billing View ▼ Format ▼ 💥 < 🎆 Freeze 📓 Detach 🚽 Wrap				
Charge Account	* Budget Date *	Percentage Quar	ntity Amount (USD)	Funds Status Delete
3000-104177-53240000-3001070-0000	5/26/23	100	1 3.38	Not reserved
Total		100	1 3.38	

8. Select the appropriate **Source Organization** by clicking the **Select Source** link and click the **Add to Cart** button.

≡ <b>NCFS</b>									☆	Þ	Ĉ.	TS
Enter Requisition	Line ⊘	Select	the	right	Source	Organization	]	Add to 0	art	Done	ìà	•
* Line Type	Goods	~				Source Type	Inventory ~					
Item	3000880	(	Q,		I	* Source Organization	JIRDC MAIN V	VAREHOUSE	Select S	Source		
Revision Item Description	FORK, DINNER, STAI	NLESS STEEL_TE	ESTAUD	IT		Source Subinventory				•		

9. Click the cart [ 📺 1 ] icon and click the **Review** button.

				а 🗘 Тъ
Enter Requisition Lin	e		Add to Cart Do	ne 1
* Line Type	Rate Based Services ~	5	FORK, DINNER, STAINLESS STEEL TEST AUDIT \$3.38 Dozen	×
Item	م	1	Total \$3.38	
Revision	~		Review Submit	
* Item Description		aupprior		·
		/ Supplier Site		*
* Category Name	٩	Supplier Contact	۰ ×	
* Quantity	1	Phone		
* UOM Name	•	Fax		
* Price		Email		
* Currency	USD 🔻	Supplier Item		
	Negotiated			

10. Verify the details on the **Edit Requisition** page. Click the *Save* drop-down choice list **and** select the **Save and Close** button. You are redirected to the **Requisitions** dashboard.

	S							Þ	<b>Д<sup>10</sup> т</b> з
Edit Requisiti	on: 30R0000009	0		Shop	Check Funds	Manage Approvals	View PDF	Save	▼ Sub <u>m</u> it
Requisitioning BU	3000 DHHS MENTAL HEAL	LTH	Justificatio	n			Re	Save equisition Amount	and Close 3.38 USD
* Description	FORK, DINNER, STAINLES	S STEEL_TEST AUDIT					Approva	Amount	3.38 USD
Requisition Line: Use Shift or Control I Actions View	s Key to select multiple rows ar Format V 🔲 🖋	nd click Edit Multiple Lines to edit	more than one	) line.			Au.	Gillionis	
Line Desc	ription	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Statu	s	Delete
1 FORM	(, DINNER, STAINLESS STE	521520-Domestic dis	1	Dozen	3.3822 USD	3.38	Not reserved		×
Total						3.38			
Rows Selected 1	Columns Hidden 8								

11. A *Confirmation* pop-up appears. Click the **OK** button.

Requisition 30R000009 was saved.	More Tasks
ок	

## 12. On the Requisitions dashboard, you can view the Recent Requisitions.

Requisitions (	2			More Tasks 🔻	Manage Requisitions	) 照 0
Shop by Catego	Search			્	Requester Training Sup	er User 1 🦼
		·· · tore	Recent Purchases			
30R000009	FORK, DINNER, STAINL	Incomplete	No data to display.			
19R0000048	BACON, SLICED, SMO	Incomplete				
19R0000045	BACON, SLICED, SMO	Approv d				
08R0000088	Training Test	Approv d				
08R0000087	CENG-BODY STRUCTU	Returned				

## **Review Consumption Requisition and Submit for Approval**

To review consumption requisition and submit for approval in NCFS, please follow the steps below:

1. On the Home page, under the Procurement tab, click the Purchase Requisitions app.

	Good afternoon, Training Super User 1!									
<	Expenses	Procurement	My Enterprise	Tools	Configuration	Others				
	QUICK ACTIONS		APPS							
	Process	Requisitions								
	😲 Manage	Orders	Pur	chase	Purchase	Purchase Orders				
	Manage	Agreements	Requ	lisitions	Agreements					
	Hanage	Buyer Assignment Rules				+				
	Manage	Procurement Agents	My R	eceipts	Suppliers					

## 2. On the Requisitions page, click Manage Requisitions.

					а 🗘 тз
Requisitions ②			More Tasks 👻 Ma	inage Requisitions	`∰ 1
Shop by Category			٩,	Requester Training	Super User 1 🧪
Recent Requisitions	View More	Recent Purchases			View More
19R0000043 BACON, SLICED, SMO	Incomplete	<b>O</b>			
08R0000086 CENG-BODY STRUCTU.	. Returned	BACON, SLICED, SMOKED, CHILLED.			
08R0000069 CENG-BODY STRUCTU.	. Approved	Internally Orderable  Pounds			
		1 🐺 💌			

3. In the *Search Criteria* section, enter details in at least one mandatory field.

In this example, we entered **30R000009** for *Requisition*. Click the **Search** button.

	i				$\mathbf{\hat{\Box}}$	☆	P	Ĉ,	TS
Manage Requisit	tions ⑦								D <u>o</u> ne
⊿ Search			Advanced Manage Watchlist Saved	I Search	Requis	itions I Er	ntered		~
							* At leas	t one is r	equired
Requisitioning BU	3000 DHHS MENTAL HEALTH	~	Requeste	r					Q,
** Entered By	Super User 1, Training	Q	** Supplie	r					Q,
** Requisition	30R0000009		Orde	r					Q,
Description			** Iter	n					Q,
Created	~		Requisitions Requiring Attentio	n 🗸	•]				
Status	All ~								
						Sear	rch R	leset S	ave

4. In the *Search Results* section, click the **Requisition** record.

Manage Requisitions ⑦			Done
▶ Search	Adva	nced Manage Watchlist Saved Sea	rrch Requisitions I Entered ~
Search Results			
Actions View View Format View Format	📰 Detach 🛛 🚽 Wrap		
Requisitioning BU	Entered By Creation Date	Approval Amount Status	Funds Status Procurement Ord Card
3000 DHHS ME 30R0000009 FORK, DINNER	Super User 1, 5/26/23	3.38 USD Incomplete	Not reserved

5. On the **Requisition** page, click the *Actions* drop-down choice list and select **Edit.** 

	FS							Þ	Ĉ19	TS
Requisition	: 30R00000	9 (?)				Check Funds	View Life Cycle	Actions		D <u>o</u> ne
Requisitioning BU Entered By Description	3000 DHHS MENTA Training Super Use FORK, DINNER, ST AUDIT	L HEALTH or 1 AINLESS STEEL_TE:	Creation Date Status ST Justification	5/26/23 Incomplete		Requisition Amou Approval Amou Funds Stat Attachmer	Duplicate Cancel Req Delete Edit Reassign View Docun View PDF	uisition nent History		
Actions - Vie	w  v Format  v	Freeze Det	ach 🚽 Wrap	0	1 Delas	A	<b>6</b> 1-1-1-	Fund		
1	<b>73000880</b>	FORK, DINNER	521520-Domestic dishes	1 Doze	en 3.3822 USD	3.38	Incomplete	Not res	served	* *

6. On the **Edit Requisition** page, review the Requisition details and click the **Submit** button.

	FS						☆	Þ	С <mark>1</mark> 9 Т	ſS
Edit Requis	ition: 30R0000009	0		Shop	Check Funds	Manage Approvals	View PDF	Save	▼ Subm	it
Requisitionii E	g 3000 DHHS MENTAL HEA	LTH	Justificatio	on			Re	equisition Amount	3.38 USD	
* Description	n FORK, DINNER, STAINLES	SS STEEL_TEST AUDIT					Approva	Amount	3.38 USD	I
		1.					Fun	ds Status	Not reserve	эd
De misision Li							Atta	achments	None 🕂	
Requisition Li	les									
Use Shift or Cont	ol Key to select multiple rows a	nd click Edit Multiple Lines to edit	more than on	e line.						
Actions Vie	w 🔻 Format 👻 📋 🥒	🗙 🏢 Freeze 📺 Detac	h 📣 Wrap	)						
Line D	escription	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Statu	s	Delete	
1 F	RK, DINNER, STAINLESS STI	E 521520-Domestic dis	1	Dozen	3.3822 USE	3.38	Not reserved		×	
Total						3.38				

7. The *Confirmation* pop-up appears, which states that the Requisition was submitted. Click the **OK** button.

Confirmation		×
Requisition 30R0000	0009 was subm	nitted.
	View PDF	0 <u>K</u>

8. On the **Manage Requisitions** page, click the **Done** button. You are redirected to the **Requisitions** dashboard.

	Û.						Þ	Ĉ,	TS
Manage Requisit	ions 곗								D <u>o</u> ne
Search			Advanced	Manage Watchlist	Saved Search	Requisitions I	Entered		~
							** At leas	st one is i	required
Requisitioning BU		~	]	Re	equester				Q
** Entered By	Super User 1, Training	Q,		** :	Supplier			}	Q
** Requisition	30R0000009				Order				Q,
Description					** Item				Q
Created	~		Req	uisitions Requiring A	attention ~	·			
Status	All 🗸								
						Se	earch F	Reset	Save

9. On the Requisitions page, you can view the Recent Requisitions.

Requisitions ⑦	More Tasks 💌
Shop by Category  Search	ৎ
Recent Requisitions View More	Recent Purchases
30R0000009 FORK, DINNER, STAINLES SApproved	FORK, DINNER, STAINLESS STEEL_TEST
	AUDIT Internally Orderable () Dozen

## Wrap-Up

Following the steps above, you can create orders on behalf of others through the creation of Consumption Requisitions.

You can also review and submit orders following the same process in NCFS.

## Additional Resources

## Web-Based Training (WBT)

- INV100- Inventory Request
- INV107- Consumption Requisition Approvals