



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

INV

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).

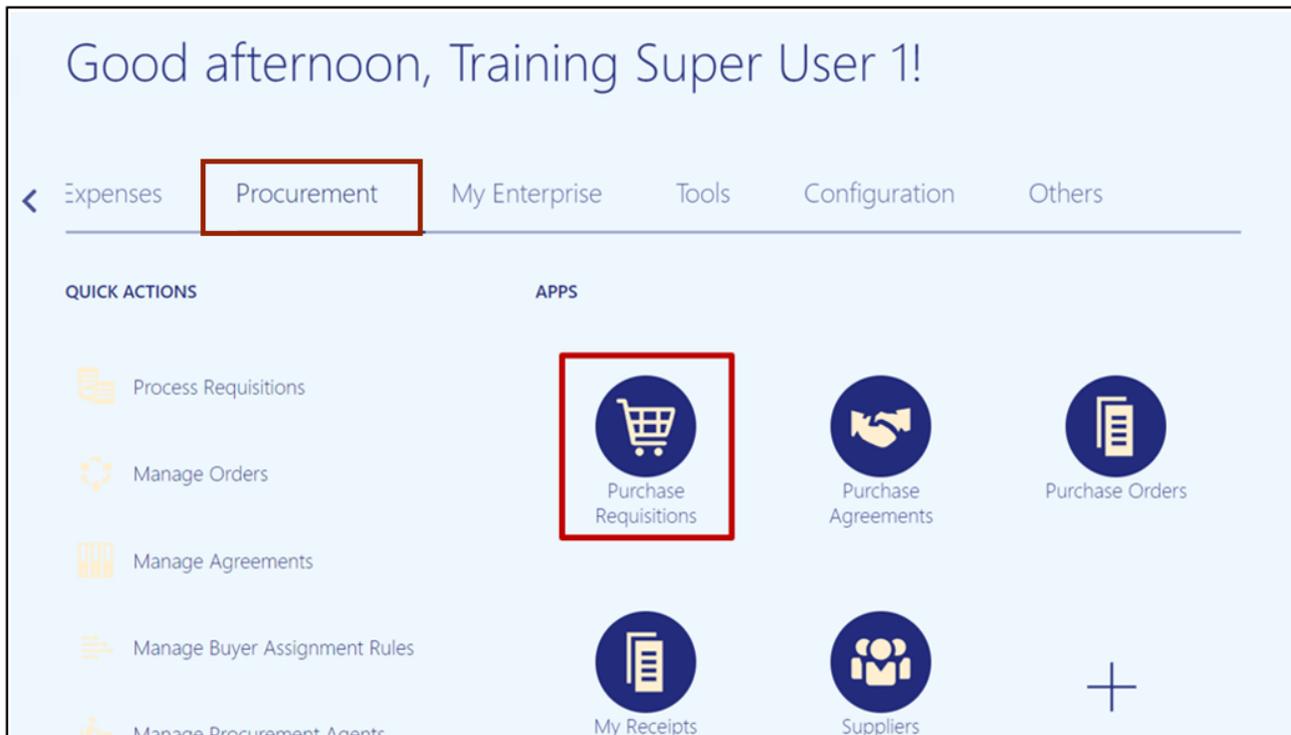
Introduction and Overview

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

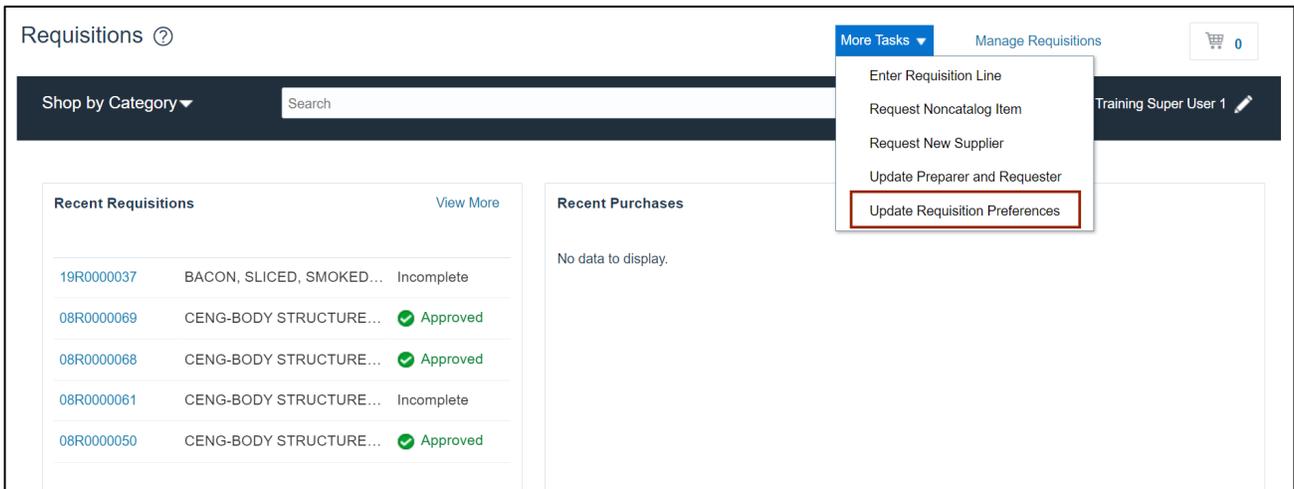
Initiate Consumption Requisition

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

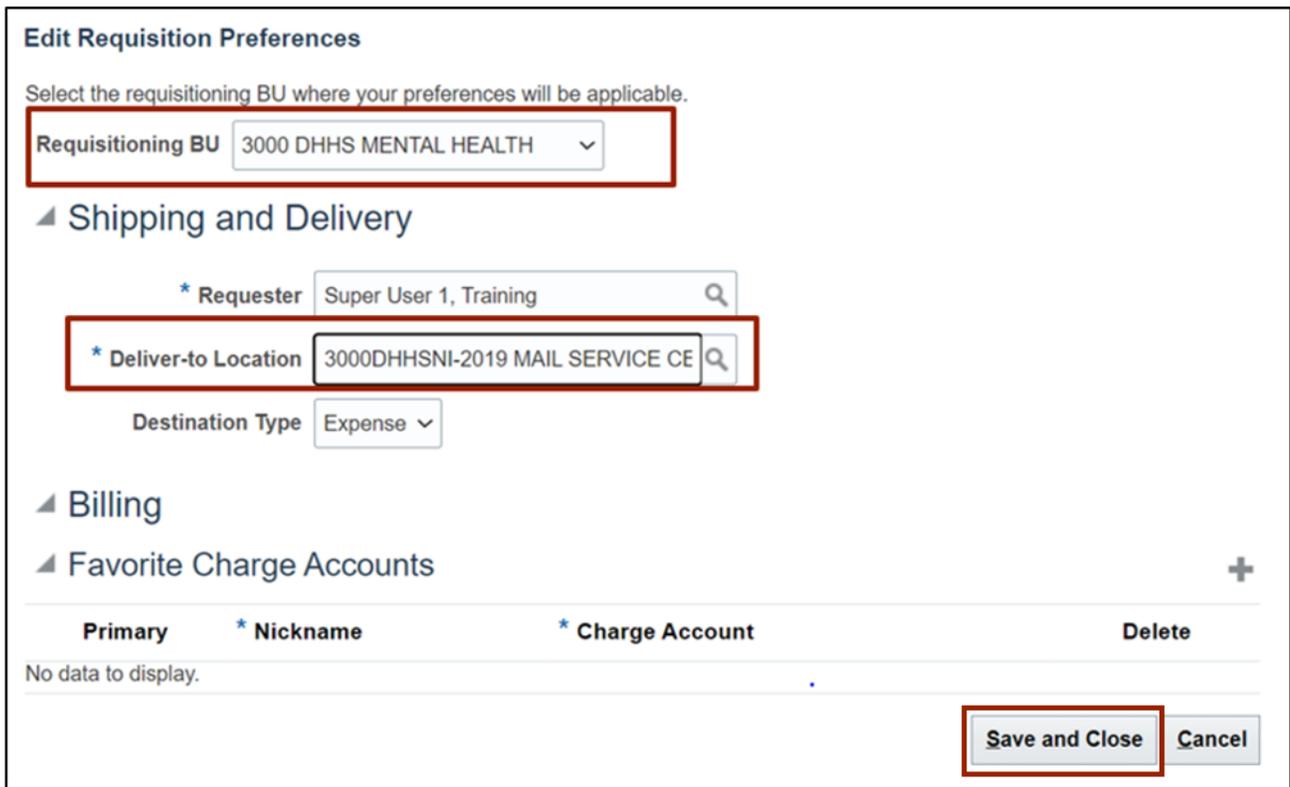
1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, under the **Procurement** tab, click the **Purchase Requisitions** app.



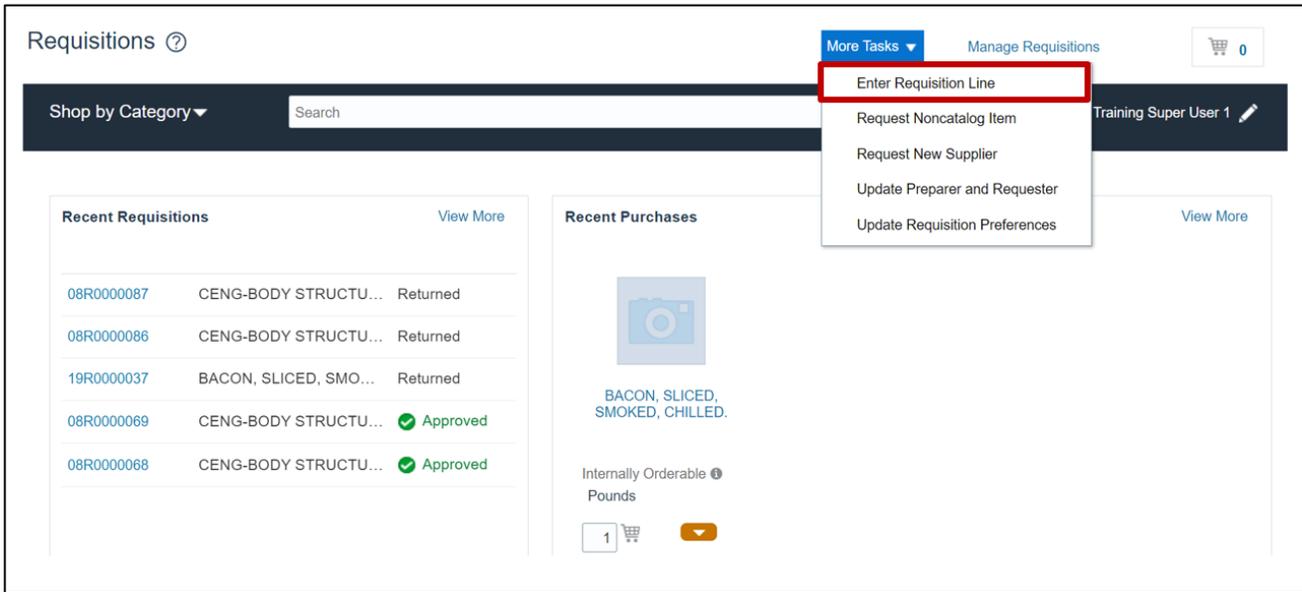
3. Select **Update Requisition Preferences** from the *More Tasks* drop-down.



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

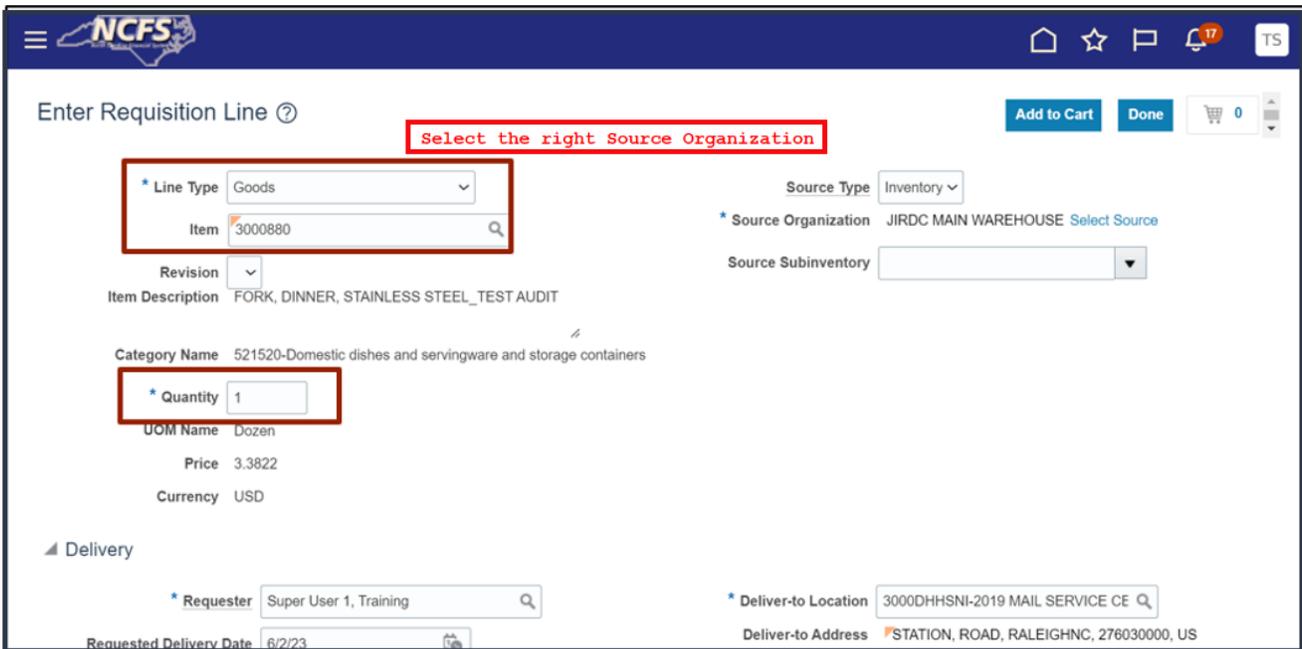


5. Select **Enter Requisition Line** from the *More Tasks* drop-down choice list.



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*.



- 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. DO NOT ENTER ZEROS FOR AMU*****

Delivery

* Requester: Super User 1, Training

* Deliver-to Location: 3000DHHSNI-2019 MAIL SERVICE CE

Requested Delivery Date: 6/2/23

Deliver-to Address: STATION, ROAD, RALEIGHNC, 276030000, US

Billing

View Format Freeze Detach Wrap

Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
3000-104177-53240000-3001070-000C	5/26/23	100	1	3.38	Not reserved	X
Total			1	3.38		

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

Enter Requisition Line ?

Select the right Source Organization

Add to Cart Done

* Line Type: Goods

Item: 3000880

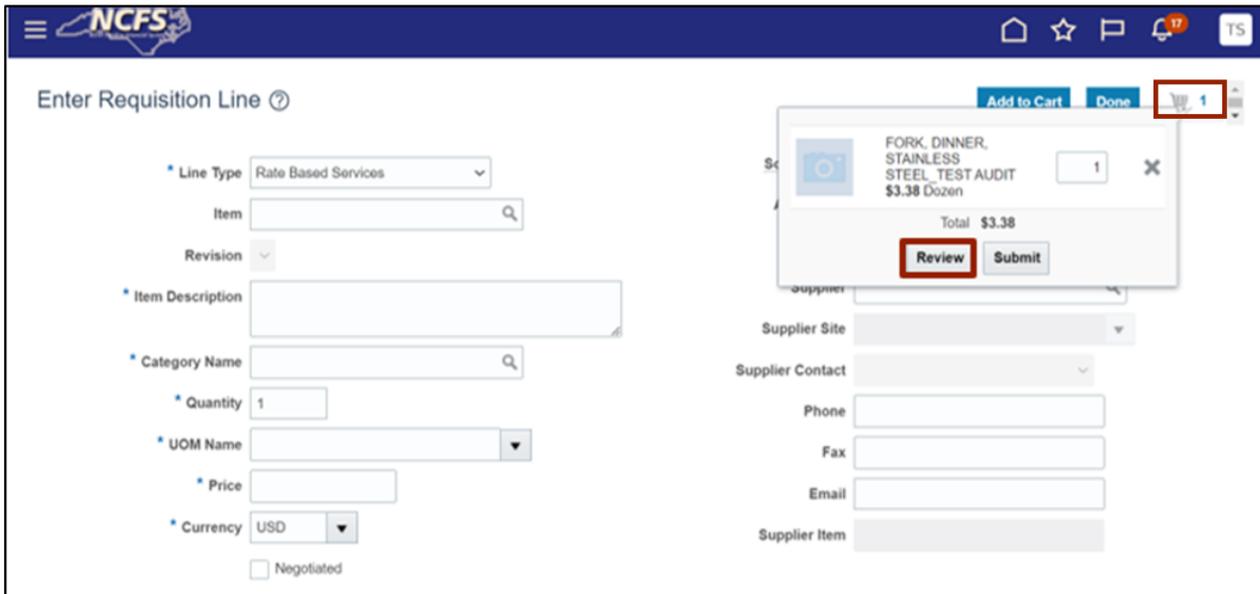
Source Type: Inventory

* Source Organization: JIRDC MAIN WAREHOUSE [Select Source](#)

Source Subinventory:

Item Description: FORK, DINNER, STAINLESS STEEL_TEST AUDIT

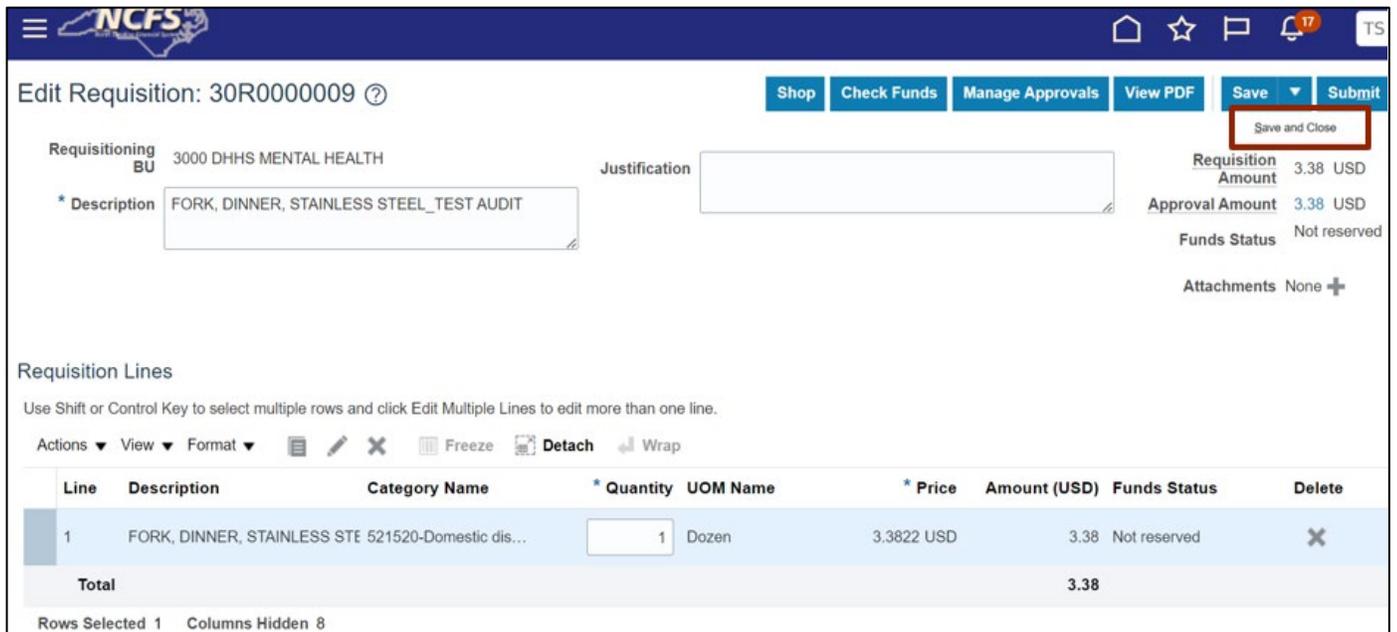
9. Click the cart [] icon and click the **Review** button.



The screenshot shows the 'Enter Requisition Line' interface. On the right, a shopping cart modal is displayed with the following details:

- Item: FORK, DINNER, STAINLESS STEEL_TEST AUDIT
- Quantity: 1
- Price: \$3.38 Dozen
- Total: \$3.38
- Buttons: Review (highlighted), Submit

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.



The screenshot shows the 'Edit Requisition: 30R0000009' page. The 'Save' dropdown menu is open, and the 'Save and Close' option is highlighted. The requisition details are as follows:

- Requisitioning BU: 3000 DHHS MENTAL HEALTH
- Description: FORK, DINNER, STAINLESS STEEL_TEST AUDIT
- Justification: [Empty field]
- Requisition Amount: 3.38 USD
- Approval Amount: 3.38 USD
- Funds Status: Not reserved
- Attachments: None

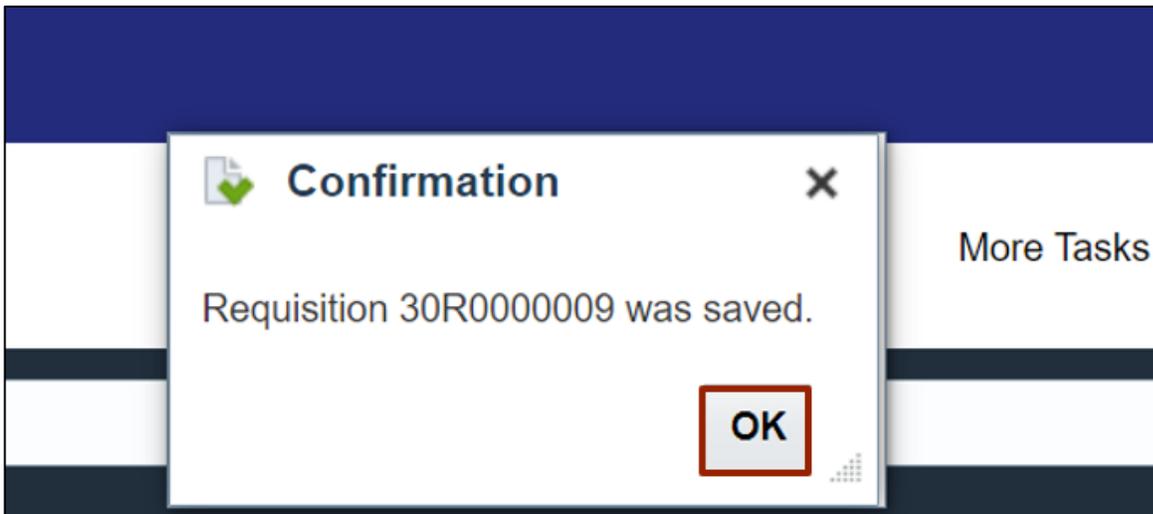
Requisition Lines

Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.

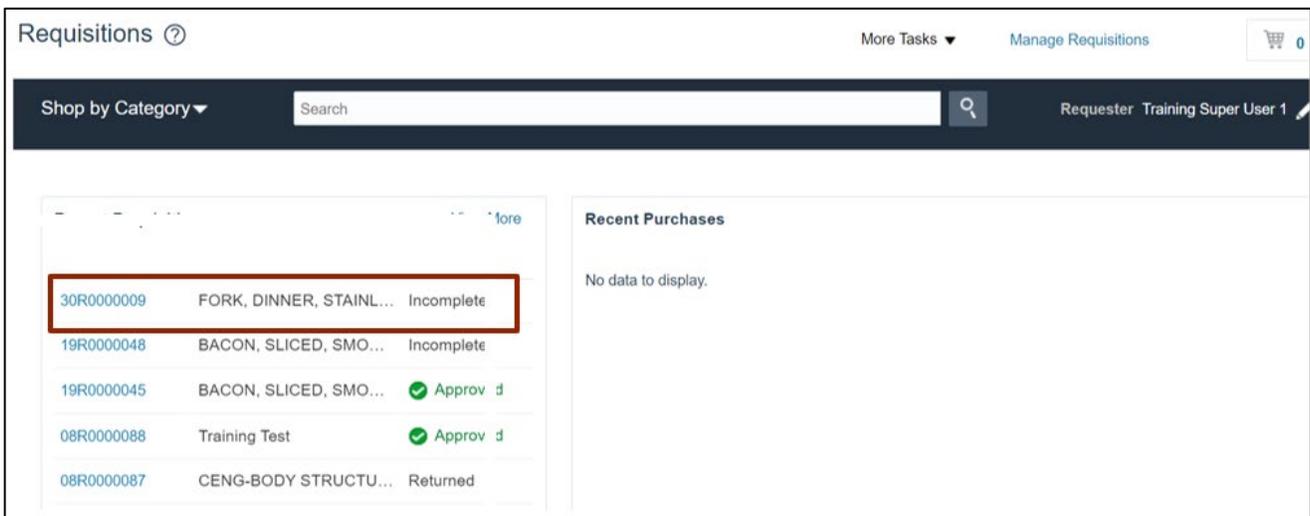
Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
1	FORK, DINNER, STAINLESS STE	521520-Domestic dis...	1	Dozen	3.3822 USD	3.38	Not reserved	X
Total						3.38		

Rows Selected 1 Columns Hidden 8

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



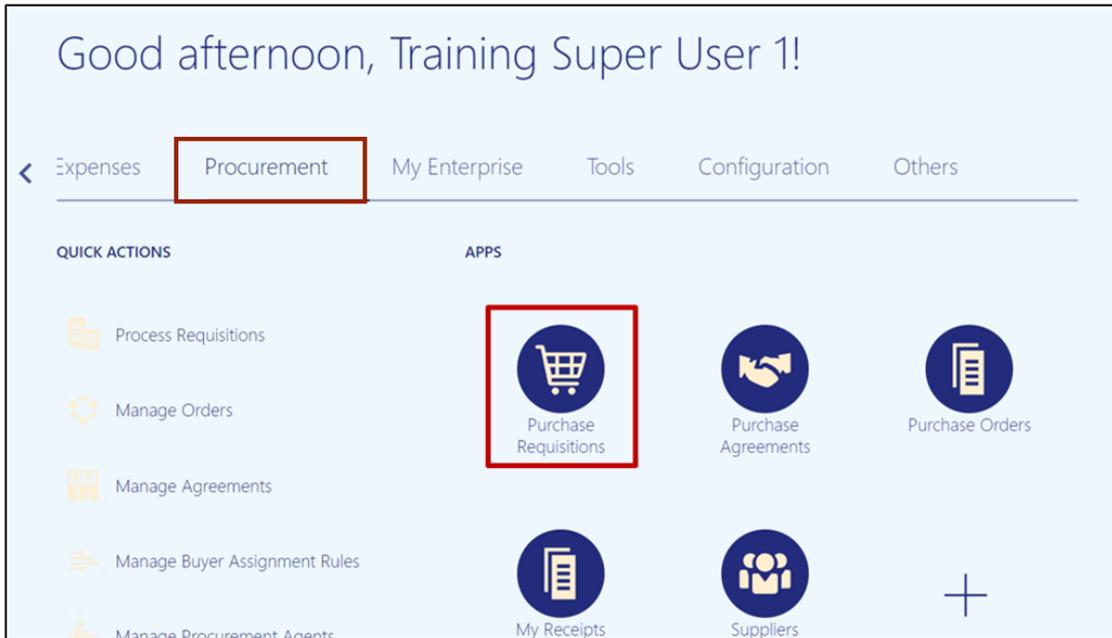
12. On the **Requisitions** dashboard, you can view the **Recent Requisitions**.



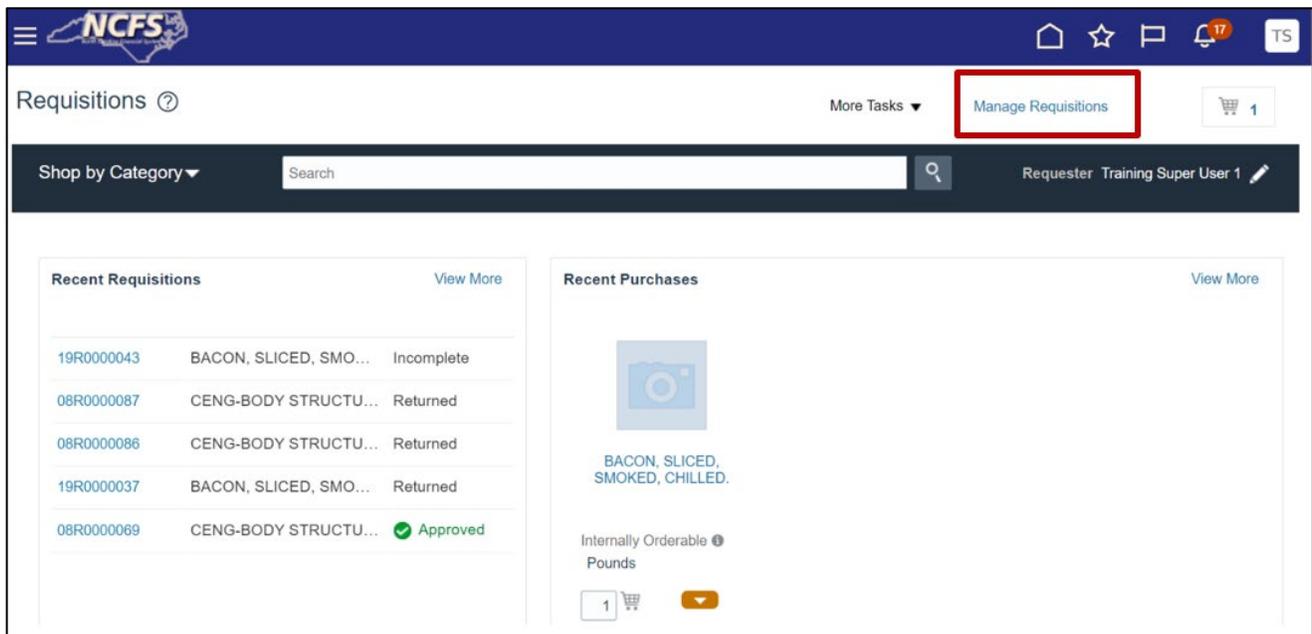
Review Consumption Requisition and Submit for Approval

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.



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



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

In this example, we entered **30R0000009** for **Requisition**. Click the **Search** button.

The screenshot shows the 'Manage Requisitions' search interface. The 'Requisition' field is highlighted with a red box and contains the value '30R0000009'. The 'Search' button is also highlighted with a red box. Other fields include 'Requisitioning BU' (3000 DHHS MENTAL HEALTH), 'Entered By' (Super User 1, Training), 'Requester', 'Supplier', 'Order', and 'Item'.

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

The screenshot shows the 'Search Results' table. The first row is highlighted with a red box, showing a requisition with ID '30R0000009' and description 'FORK, DINNER...'. The table has columns for Requisitioning BU, Requisition, Description, Entered By, Creation Date, Approval Amount, Status, Funds Status, Procurement Card, and Ord.

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Ord
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**.

The screenshot shows the 'Requisition: 30R0000009' page. The 'Actions' drop-down menu is open, and the 'Edit' option is highlighted with a red box. The page displays details for the requisition, including 'Requisitioning BU' (3000 DHHS MENTAL HEALTH), 'Entered By' (Training Super User 1), 'Description' (FORK, DINNER, STAINLESS STEEL_TEST AUDIT), 'Creation Date' (5/26/23), and 'Status' (Incomplete). The 'Requisition Lines' table is also visible at the bottom.

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status
1	3000880	FORK, DINNER...	521520-Domestic dishes ...	1	Dozen	3.3822 USD	3.38	Incomplete	Not reserved

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

NCFS

Edit Requisition: 30R0000009

Shop Check Funds Manage Approvals View PDF Save **Submit**

Requisitioning BU 3000 DHHS MENTAL HEALTH
 * Description FORK, DINNER, STAINLESS STEEL_TEST AUDIT
 Justification
 Requisition Amount 3.38 USD
 Approval Amount 3.38 USD
 Funds Status Not reserved
 Attachments None +

Requisition Lines

Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.

Actions View Format Freeze Detach Wrap

Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
1	FORK, DINNER, STAINLESS STE	521520-Domestic dis...	1	Dozen	3.3822 USD	3.38	Not reserved	X
Total						3.38		

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

Confirmation

Requisition 30R0000009 was submitted.

View PDF **OK**

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

NCFS

Manage Requisitions

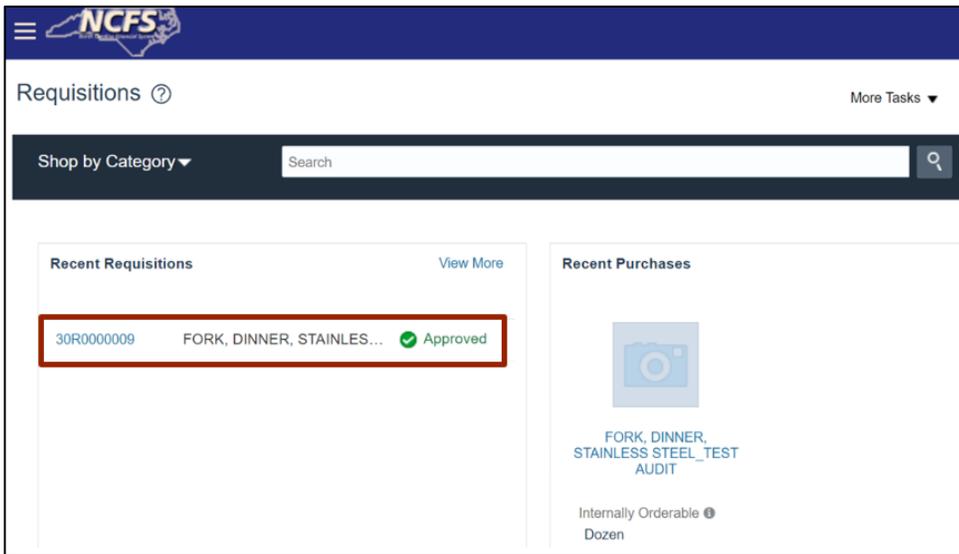
Advanced Manage Watchlist Saved Search Requisitions I Entered

Requisitioning BU
 ** Entered By Super User 1, Training
 ** Requisition 30R0000009
 Description
 Created
 Status All
 Requester
 ** Supplier
 Order
 ** Item
 Requisitions Requiring Attention

Done

Search Reset Save...

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



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