



DAC Create Orders on Behalf of Others SSP (Self-Service Procurement)

INV

QUICK REFERENCE GUIDE INV-37

Purpose

The purpose of this Quick Reference Guide (QRG) is to provide step-by-step guidance of how to Create Orders on Behalf of Others SSP (Self-Service Procurement), Review Consumption Requisitions, and Submit for Approval in the North Carolina Financial System (NCFS).

This Job Aid is to be used in conjunction with Web-Based Training (WBT) **INV100-Inventory Request** and **INV107-Consumption Requisition Approvals** as well as **INV-12 QRG** found here:

<https://www.osc.nc.gov/documents/files/inv-12-create-orders-behalf-others-self-service-procurement>

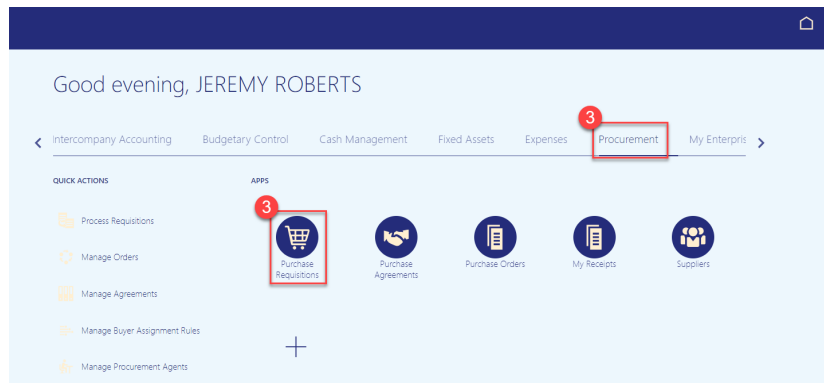
Introduction and Overview

This QRG covers the creation of SSP orders on behalf others at the Department of Adult Correction (DAC). Requestors can enter Consumption Requisitions to order goods for their locations as well as on the behalf of other locations. Requestors can review consumption requisitions and submit for approval.

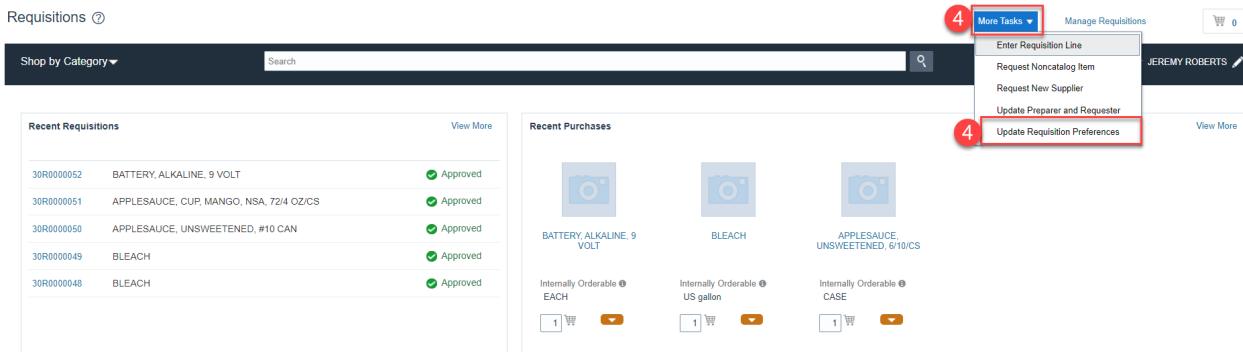
Initiate Consumption Requisition

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

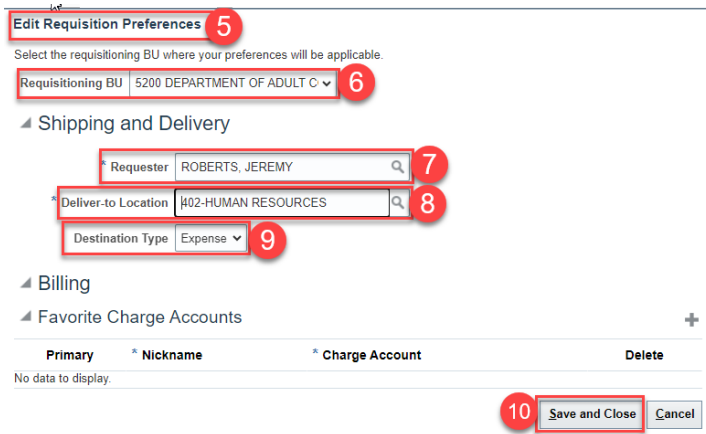
1. Navigate to the NCFS environment with this link: <https://osc.nc.gov/ncfslogin>.
2. Log in to the NCFS portal with your credentials to access the system.
3. On the **Home** page, under the **Procurement** tab, click the **Purchase Requisitions** app.



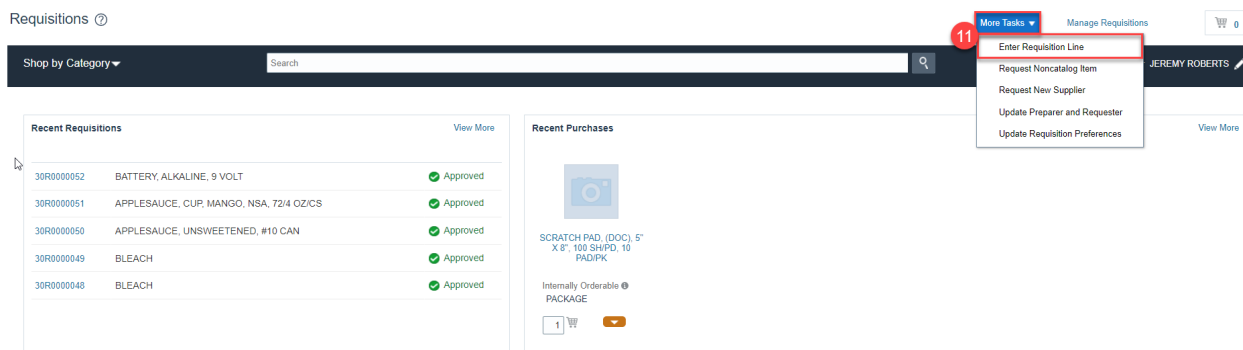
4. Select **Update Requisition Preferences** from the **More Tasks** drop-down.



5. On the **Edit Requisition Preferences** page.
6. Enter the **Requisitioning BU (Business Unit)**.
7. The **Requester** should default to your name.
8. Enter the **Deliver-to Location**.
9. **Destination Type** defaults to **Expense**.
10. Click **Save and Close** Button.



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



12. The **Enter Requisition Line** Screen Appears.
13. **Line Type** defaults to **Goods**.

14. Enter **Item Number** for ordering and the name of the item will display.

15. The **Item Description** will populate.

16. The **Category Name** will populate.

17. Enter the **Quantity** desired.

18. The **UOM Name** will default.

19. The **Price** will default.

20. The **Currency** will default to “USD”.

21. The **Source Type** will default to “Inventory” & a warning message will appear “**Select the right Source Organization**”. (This is a visual for the user to double check the Source Organization selected).

22. Select the appropriate **Source Organization** by clicking the **Select Source** link if different than default.

23. In the **Delivery** section, update the **Requestor Name**.

24. Update the **Deliver-to Location** if needed.

25. Enter the **Requested Delivery Date** if different than default date.

26. In the **Billing** section, enter the **Charge Account** or use the **Search Icon** to search the **Charge Account** needed (See below example). Click **OK**.

*****Note: For the Charge Account, please make sure to only use Business Unit, DAC = 5200. Enter a valid Budget Fund, select a "5" series account number and the appropriate AMU for your facility. DO NOT ENTER ZEROS FOR AMU*****

- 27. Enter the **Budget Date**.
- 28. Enter the **Percentage** (should always be 100%).
- 29. The **Quantity** and **Amount** fields will default.

Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
10/3/23	100	1	32.59	Not reserved	X
Total			100	1	32.59

30. Click the **Add to Cart** Button.

31. Click the **Cart** Icon and Click **Review** button.

32. Verify the details on the **Edit Requisition** page.
33. Enter a **Justification** if needed.
34. To Edit the Requisition Line, Click on **Actions** and then **Edit**.
35. Update the **Quantity** and **Source Organization** if needed.

Edit Requisition: 52R0000054 32

Requisitioning BU 5200 DEPARTMENT OF ADULT CORRECTION

* Description ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE

Justification

Requisition Amount 32.59 USD
Approval Amount 32.59 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

Actions	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
<div style="border: 1px solid red; padding: 2px;"> Duplicate Edit 34 Delete View Punchout Cart </div>	UNWEETENED, 12/46 OZ CANS/CASE	1	CASE	32.5887 USD	32.59	Not reserved	✕
					32.59		

Edit Line: 1

Line Type Goods
Item 0001866

Revision

Item Description ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE

Category Name 502023-Non alcoholic beverages

* Source Organization DAN RIVER WF - FOOD WAREHOUSE 35
Source Subinventory

* Quantity 35

UOM Name CASE
Price 32.5887
Currency USD

OK Cancel 35

36. Update the **Delivery** and **Billing** information if needed.

Line 1: Details

Delivery

* Requester ROBERTS, JEREMY

* Deliver-to Location 402-HUMAN RESOURCES

Requested Delivery Date 10/10/23

Deliver-to Address 2020 YONKERS ROAD, RALEIGHNC, 276990000, WAKE, US

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
5200-108120-53410007-5204580-0001	10/3/23	100	1	32.59	Not reserved	✕
Total				32.59		

Source

Source Organization DAN RIVER WF - FOOD WAREHOUSE
Source Subinventory

37. Click the **Save** drop-down choice list and select the **Save and Close** button.

Edit Requisition: 52R0000054

Requisitioning BU 5200 DEPARTMENT OF ADULT CORRECTION

* Description ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE

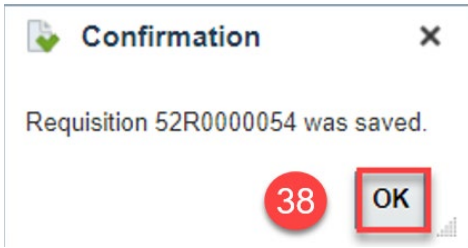
Justification

Requisition Amount 32.59 USD
Approval Amount Calculate Amount with Tax
Funds Status Not reserved
Attachments None

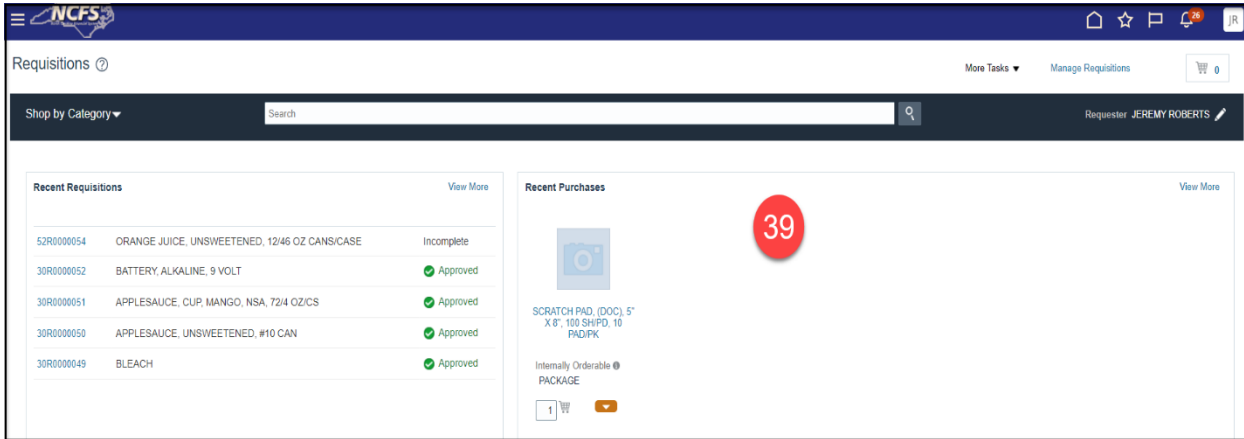
Shop Check Funds Manage Approvals View PDF 37 Save Submit
Save and Close

Requisition Lines

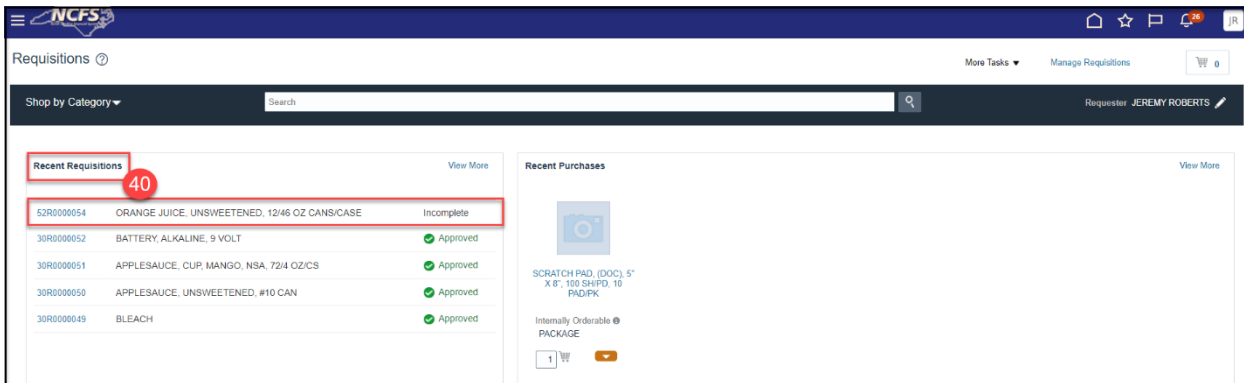
38. A **Confirmation** pop-up appears. Click the **Ok** button.



39. You are redirected to the **Requisitions dashboard**.



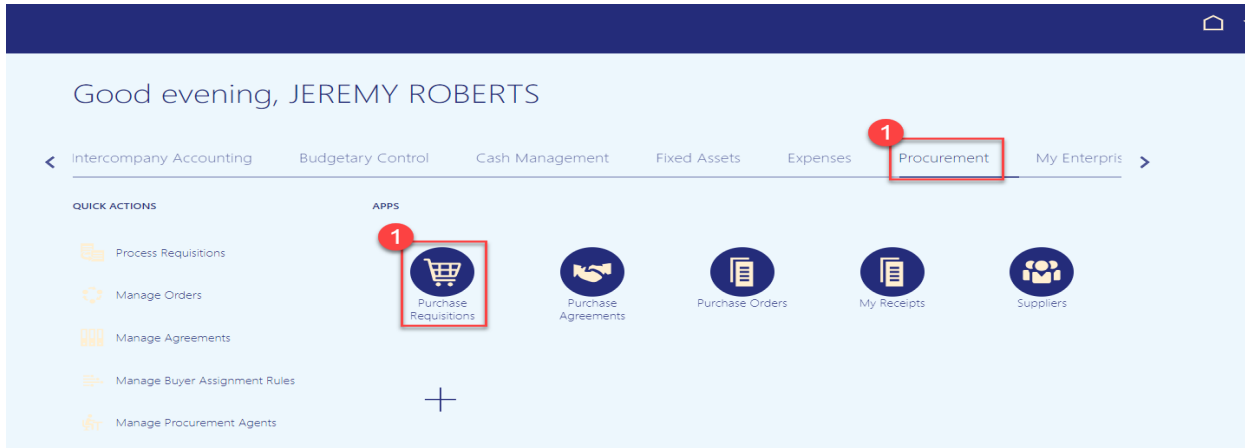
40. On the **Requisitions dashboard**, you can view the **Recent Requisitions**.



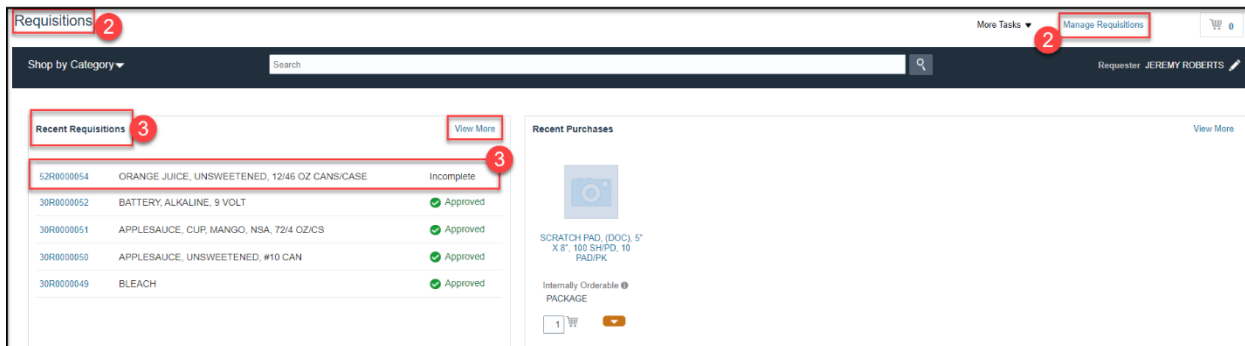
Review and Submit DAC Consumption Requisitions

To review DAC consumption requisitions, 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. Under **Recent Requisitions** you can select recently entered requisitions to manage also.



5. Enter the **Requisitioning BU**.
6. **Entered by** will default to your name but can be updated.
7. In the **Search Criteria** section, enter details in at least one mandatory field indicated by **
 - a. **Requisition**
 - b. **Supplier**
 - c. **Item number**
8. Narrow the search further by entering the following fields:
 - a. **Description (example: Orange, Juice, or Unsweetened)**
 - b. **Created time frame**
 - c. **Status**
 - d. **Requestor**
 - e. **Order**
 - f. **Requisitions Requiring Attention** changed to **"YES"** will show requisitions that need approval.

9. Click **Search** button.

The screenshot shows the 'Manage Requisitions' search interface. Red callouts are placed over the following elements: 5 (Requisitioning BU dropdown), 6 (Entered By search field), 7 (Requisition search field), 8 (Description search field), 8 (Created dropdown), 8 (Status dropdown), 8 (Requester search field), 7 (** Supplier search field), 8 (Order search field), 7 (** Item search field), 8 (Requisitions Requiring Attention dropdown), and 9 (Search button).

10. Under **Search Results** the list of **Requisitions** will show, Click the **Requisition** number that needs managing.

The screenshot shows the 'Search Results' table. A red callout '10' points to the first row of the table, which is highlighted in blue. The table has the following columns: Requisitioning BU, Requisition, Description, Entered By, Creation Date, Approval Amount, Status, Funds Status, Procurement Card, Order, Order Status, and Emergency Purchase Order.

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
5200 DEPARTM...	52R0000054	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	ROBERTS, JE...	10/3/23	32.59 USD	Incomplete	Not reserved				
5200 DEPARTM...	52R0000031	SCRATCH PAD, (DOC), 5" X 8", 100 SH/PD, 10 PAD/PK	ROBERTS, JE...	5/24/23	18.95 USD	Approved	Reserved		23003	Open	

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

The screenshot shows the 'Requisition: 52R0000054' page. A red callout '11' points to the 'Edit' option in the 'Actions' dropdown menu. The page displays requisition details and a table of requisition lines.

Requisition Details:

- Requisitioning BU: 5200 DEPARTMENT OF ADULT CORRECTION
- Entered By: JEREMY ROBERTS
- Description: ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE
- Creation Date: 10/3/23
- Status: Incomplete
- Justification:
- Requisition Amount: 32.59 USD
- Approval Amount: 32.59 USD
- Funds Status: Not reserved
- Attachments: None

Requisition Lines Table:

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1	0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	502023-Non alcoholic be...	1	CASE	32.5887 USD	32.59	Incomplete	Not reserved		



12. On the **Edit Requisition** page, review the Requisition details and Click the **Submit** button.

Edit Requisition: 52R0000054

Requisitioning BU: 5200 DEPARTMENT OF ADULT CORRECTION

* Description: ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE

Justification: [Empty]

Requisition Amount: 32.59 USD
Approval Amount: 32.59 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	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	502023-Non alcohol...	1	CASE	32.5887 USD	32.59	Not reserved	X
Total						32.59		

Rows Selected: 1 Columns Hidden: 8

Line 1: Details

Delivery

* Requester: ROBERTS, JEREMY
Requested Delivery Date: 10/10/23

* Deliver-to Location: 402-HUMAN RESOURCES
Deliver-to Address: 2020 YONKERS ROAD, RALEIGH, NC 276990000, WAKE, US

Billing

Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
5200-108120-53410007-5204580-0001	10/3/23	100	1	32.59	Not reserved	X
Total				100	1	32.59

Source

Source Organization: DAN RIVER WF - FOOD WAREHOUSE
Source Subinventory:

13. If you receive the **Funds Check Warning**, Click **“View Funds Check Results”** to view the warning status.

Warning

Funds check has warnings. Do you want to submit the requisition? (POR-2010424)

13 **View Funds Check Results** Yes No

14. View the advisory warning, then Click **Done** to return to the **Funds Check Warning**.

Funds Check: Requisition 52R0000054

View: Transaction

Transaction Lines Impacted by Control Budgets

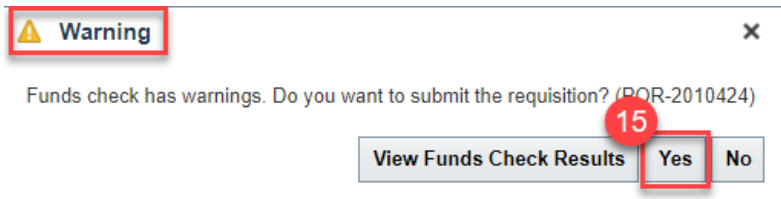
View Format Funds Status: Warning

Line-Di	Status	Requested	Charge Account	Budget Account	Budget Period	Control Budget	Budget Manager
1-1	Advisory warning insuff	32.59 USD	5200-108120-53410007-5204580-0	5200-108120-53099999	FYS_J...	NC Agency to Account D...	SHANNON

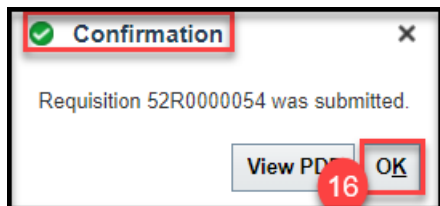
14 **Done**



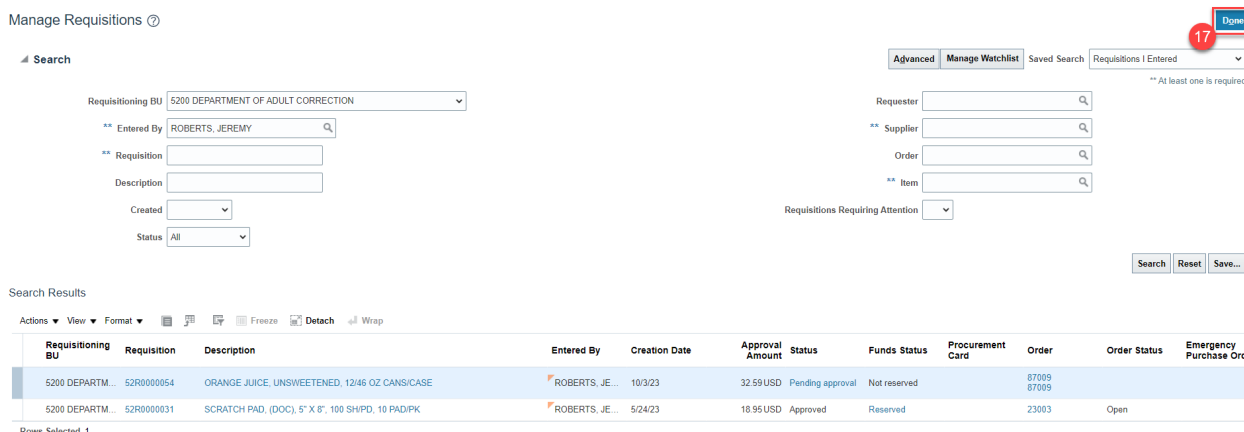
15. Click **YES**.



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

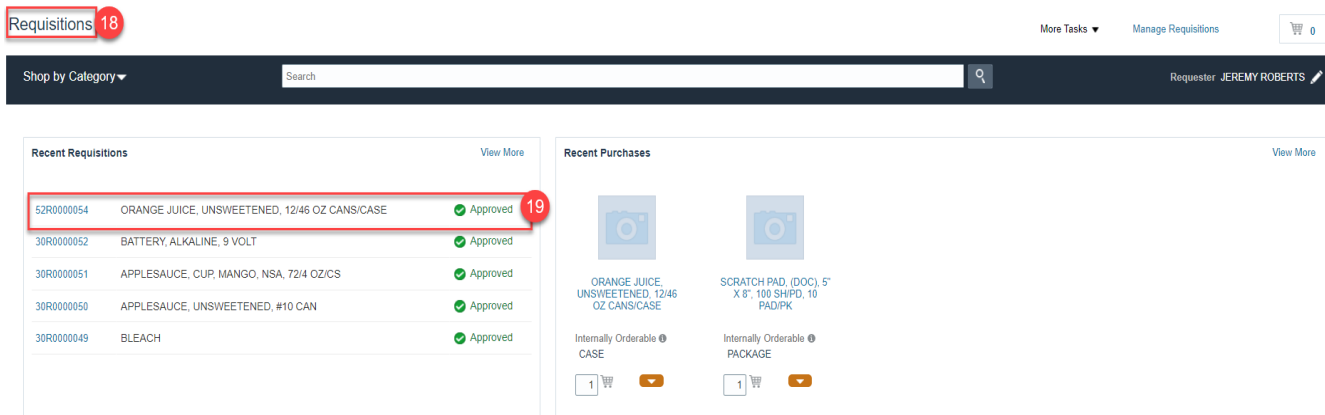


17. On the **Manage Requisitions** page, click the **Done** button. You are redirected to the **Requisitions** dashboard.




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

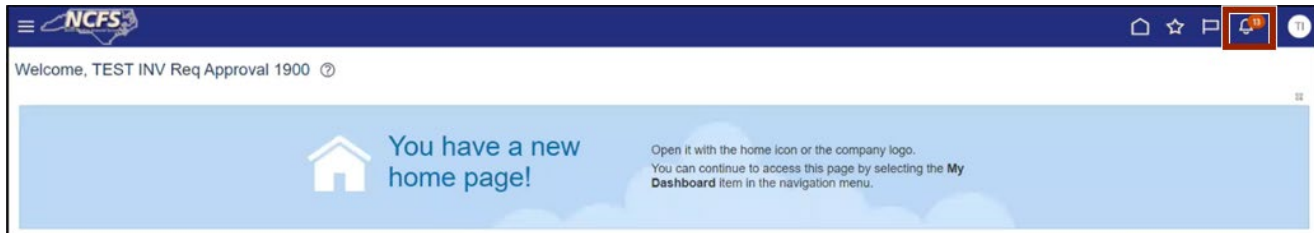
19. Status should now show **“Approved”**.



Approve Customer Orders

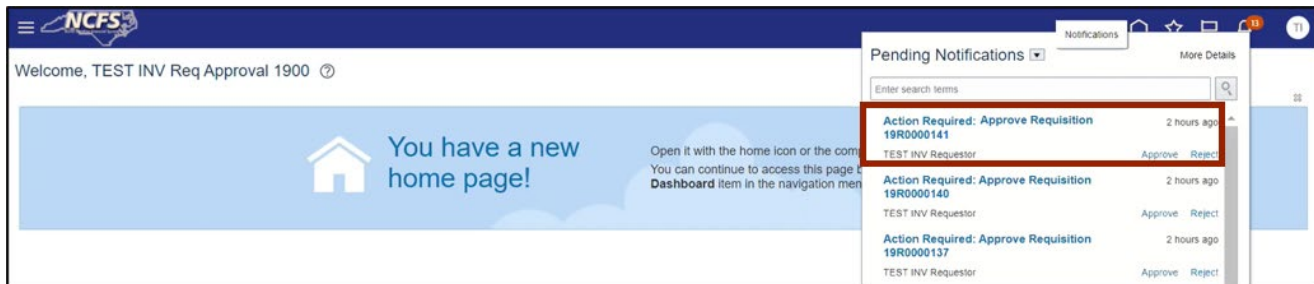
To Approve Customer Orders in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **landing** page, click the **Notifications** [] icon.

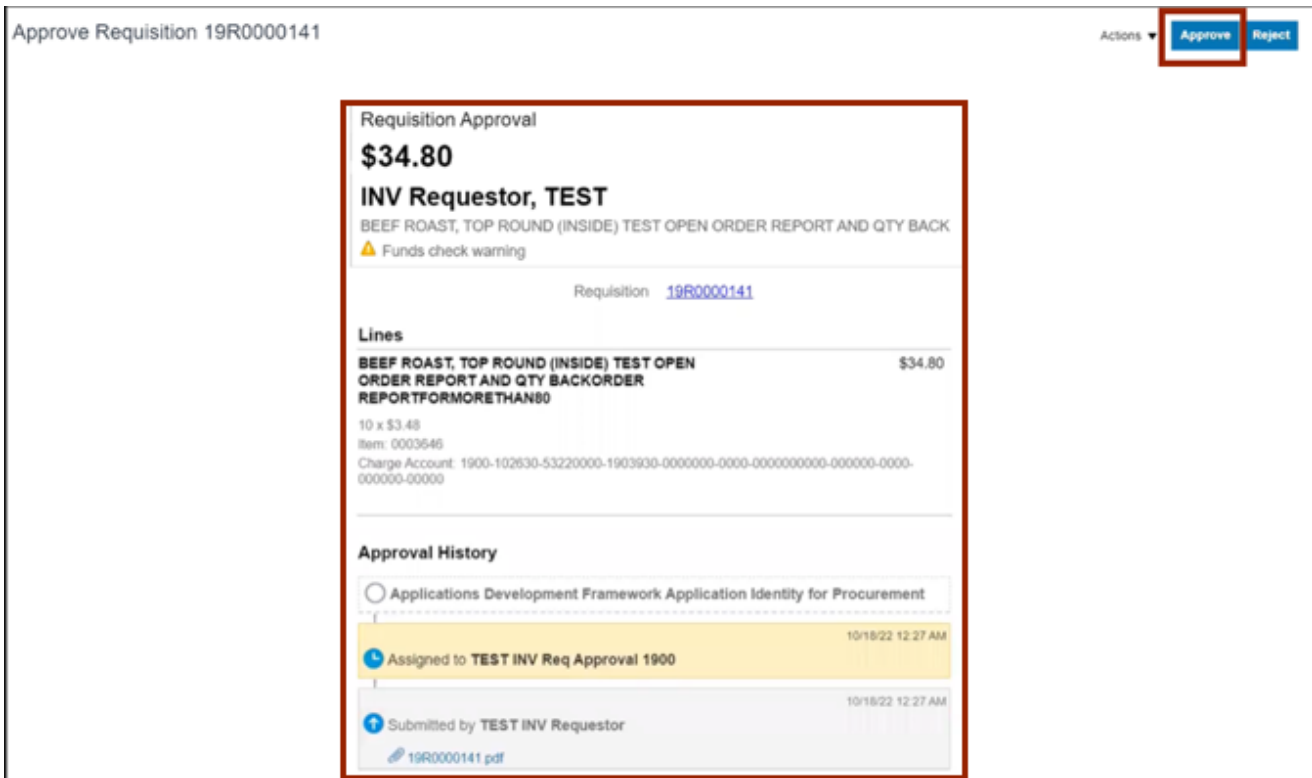


3. The *Pending Notifications* pop-up appears. On this pop-up, click the **Approve Requisition** notification.

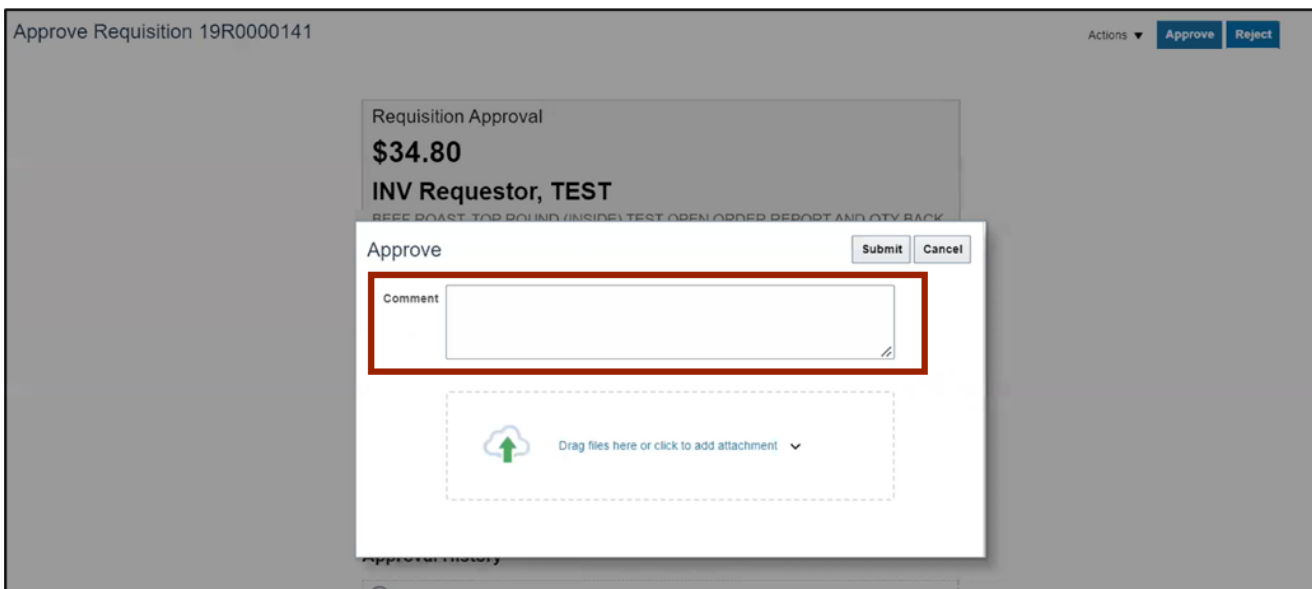
In this example, we choose the Action Required: Approve Requisition 19R0000141 notification link.



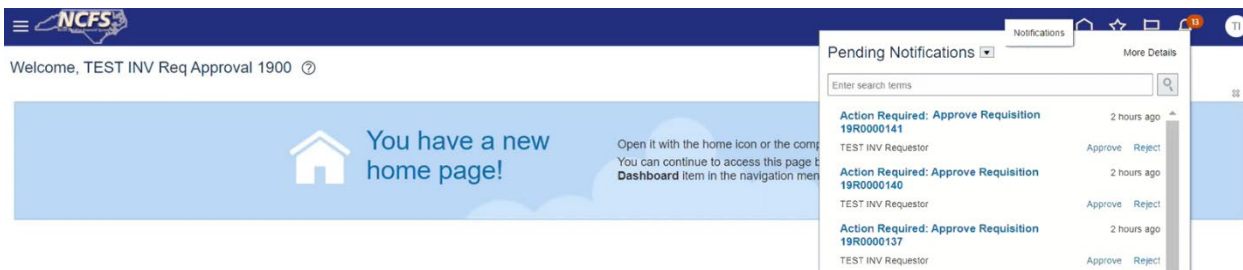
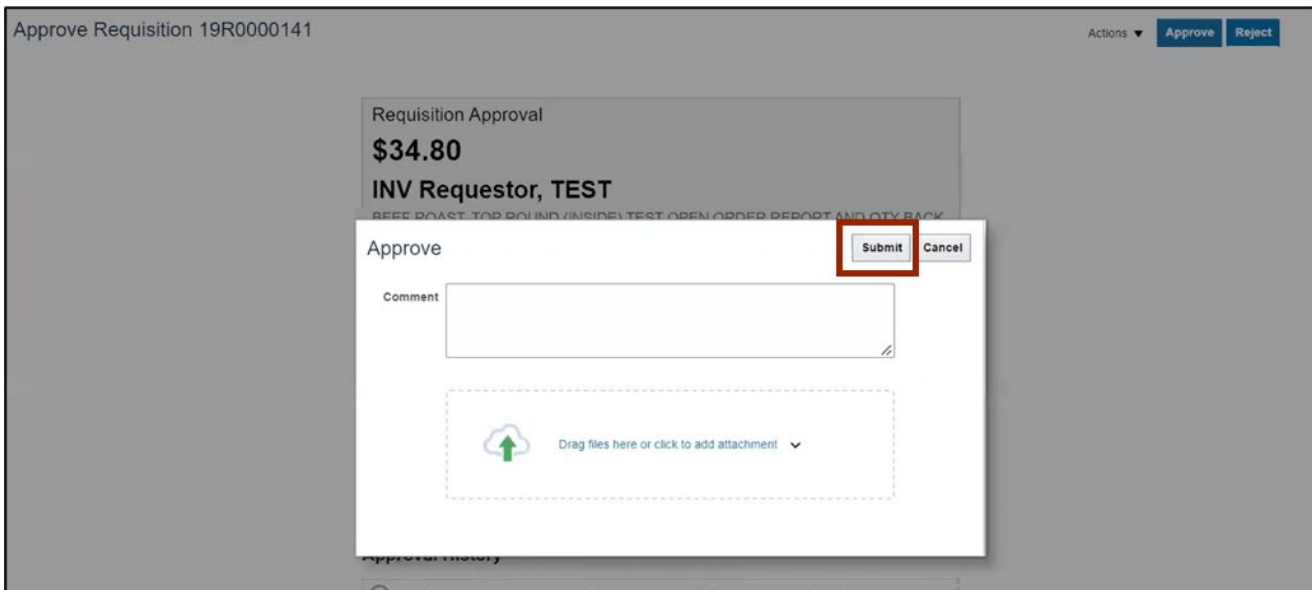
- The **Approve Requisition** page opens with all the requisition details to review for errors/accuracy. On the **Approve Requisition** page, click the **Approve** button.



- The *Approve* pop-up appears. On the *Approve* pop-up, enter the reasons on the *Comment* field to approve a customer order.



6. Click the **Submit** button. You are now redirected to the landing page.



Wrap-Up

This QRG covers the creation of SSP orders on behalf others at the Department of Adult Correction (DAC) in NCFS.

Additional Resources

- INV 100: Inventory Request (WBT)
- INV 107: Consumption Requisition Approvals (WBT)
- INV-12: <https://www.osc.nc.gov/documents/files/inv-12-create-orders-behalf-others-self-service-procurement> (QRG)