



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

INV

QUICK REFERENCE GUIDE INV-38

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>.

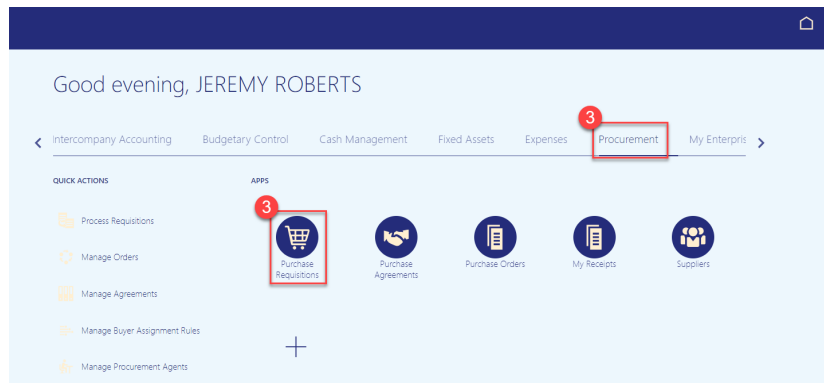
Introduction and Overview

This QRG covers the creation of SSP orders on behalf others at the Department of Public Instruction (DPI). 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.

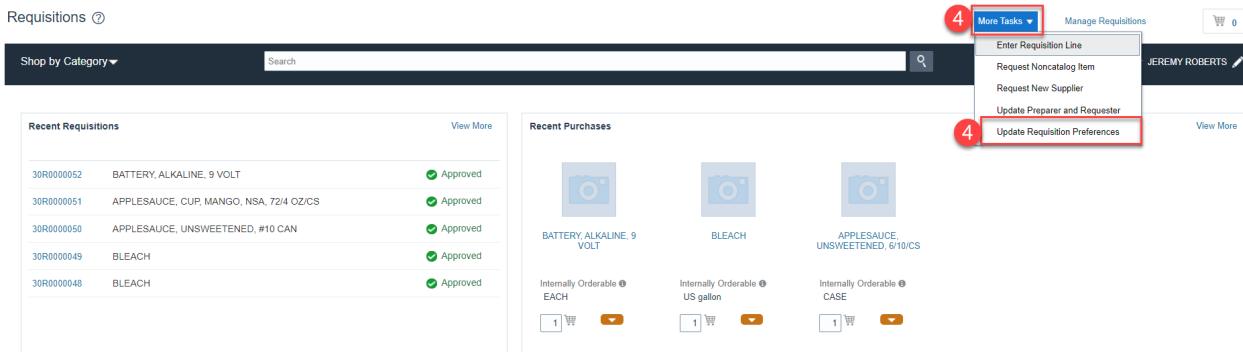
Initiate Consumption Requisition

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

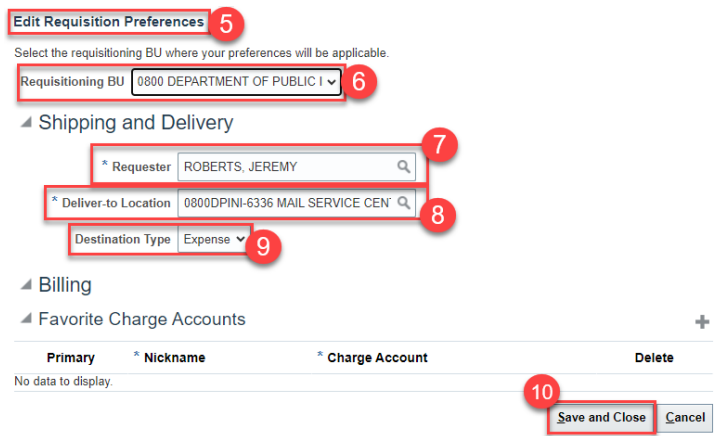
1. Navigate to the NCFS environment with this link: <https://osc.nc.gov/ncfslogin>.
2. Log in to the NCFS portal with your credentials to access the system.
3. On the **Home** page, under the **Procurement** tab, click the **Purchase Requisitions** app.



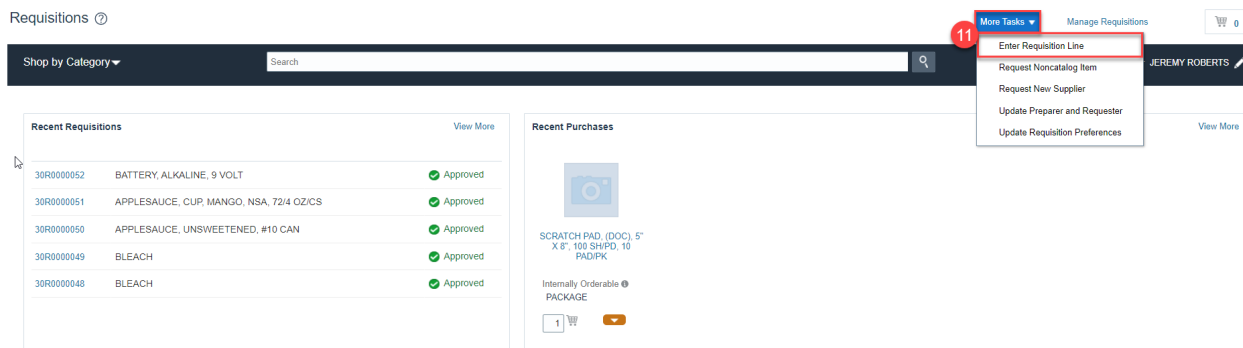
4. Select **Update Requisition Preferences** from the **More Tasks** drop-down.



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, DPI = 0800. Enter a valid Budget Fund, select a "5" series account number and the appropriate AMU for your facility. DO NOT ENTER ZEROS FOR AMU*****

Charge Account

Hide Segments

Agency: 0800 DEPARTMENT OF PUBLIC INSTRUCTION

Budget Fund: 101005 DPI 1005 STATE BOARD OF EDUCATION BC 13510

Account: 53110000 GENERAL OFFICE SUPPLIES

Agency Mgmt Unit: 00000000 DEFAULT AMU

Agency Program: 00000000 DEFAULT AGENCY PROGRAM

Funding Source: 0000 UNDESIGNATED

Project: 000000000000 DEFAULT PROJECT

Inter Fund: 00000000 DEFAULT Inter Fund NC CASH

Future 1: 00000000 DEFAULT Future 1

Future 2: 00000000 DEFAULT Future 2

Future 3: 00000000 DEFAULT Future 3

Buttons: Search, Reset, **OK**, Cancel

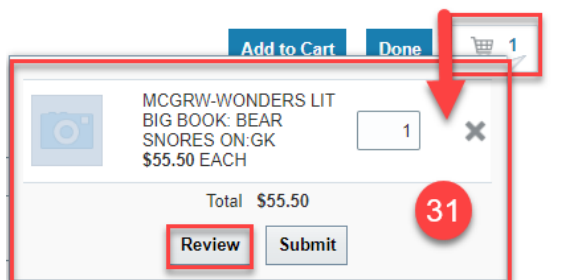
- 27. Enter the **Budget Date**.
- 28. Enter the **Percentage** (should always be 100%).
- 29. The **Quantity** and **Amount** fields will default.

Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
10/4/23	100	1	55.50	Not reserved	X
Total			100	1	55.50

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, Click **OK**.

Edit Requisition: 08R0000056 32

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION
 * Description MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK
 Justification

Requisition Amount 55.50 USD
 Approval Amount 55.50 USD
 Funds Status Not reserved

Attachments None
 Customer

NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

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	MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK	551015-Printed publi...	1	EACH	55.50 USD	55.50	Not reserved	X
						55.50		

View Purchased Cart
 Hidden 8

Edit Line: 1

Line Type Goods
 Item 9780021193127
 Revision
 Item Description MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK
 Category Name 551015-Printed publications

* Source Organization DPI TEXTBOOK WHSE Select Source
 Source Subinventory

* Quantity 1 35
 UOM Name EACH
 Price 55.50
 Currency USD

35 OK Cancel

- 36. Search and Select the appropriate **Customer** for consumption requisition only.

NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

Edit Requisition: 08R0000056 32

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION
 * Description MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK
 Justification

Requisition Amount 55.50 USD
 Approval Amount 55.50 USD
 Funds Status Not reserved

Attachments None
 Customer

NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

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	MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK	551015-Printed publi...	1	EACH	55.50 USD	55.50	Not reserved	X
						55.50		

Rows Selected 1 Columns Hidden 8

Customer dropdown menu:

- ACADEMY OF MOORE COUNTY(12588 HWY 15-01 SOUT...
- ALAMANCE COUNTY SCHOOLS(SANDRA TINSLEY1712 ...
- ALEXANDER COUNTY SCHOOLS(SHARON L MEHAFFEY ...
- ALEXANDER REG JUV DET CENTER(1806 MAIL SERVIC...
- ALLEGHANY COUNTY SCHOOLS(CINDY HOLDER85 PEA ...
- ALPHA ACADEMY(PO BOX 35476 ET FAYETTEVILLE 283...
- AMERICAN RENAISSANCE MS(217 SOUTH CENTER STR ...
- ANSON COUNTY SCHOOLS(HOLLY BERRYHWY 742 S. C. ...
- APPALACHIAN STATE UNIVERSITY(JATTN MARGARET G...

- 37. Update the **Delivery** and **Billing** information if needed.

Line 1: Details

Delivery

* Requester ROBERTS, JEREMY
 Requested Delivery Date 10/11/23
 * Deliver-to Location 0800DPINI-6336 MAIL SERVICE CEN
 Deliver-to Address #6336 MAIL SERVICE CENTER, RALEIGHNC, 276996336, WAKE, US

37

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
0800-101005-53110000-0000000-000C	10/4/23	100	1	55.50	Not reserved	X
Total				100	1	55.50



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

Edit Requisition: 08R0000056

Shop Check Funds Manage Approvals View PDF Save Submit

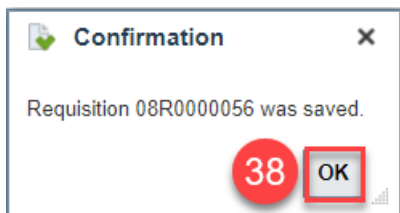
Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION Justification

* Description MCGRW-WONDERS LIT BIG BOOK BEAR SNORES ON GK

Requisition Amount 55.50 USD Approval Amount 55.50 USD Funds Status Not reserved Attachments None Customer ACADEMY OF MOORE COUNTY12588 HWY 15-01 SOUTH

NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

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



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

Requisitions

Shop by Category Search Requirer JEREMY ROBERTS

Recent Requisitions		
08R0000056	MCGRW-WONDERS LIT BIG BOOK BEAR SNORES ON GK	Incomplete
30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Approved
52R0000054	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	Approved
30R0000052	BATTERY, ALKALINE, 9 VOLT	Approved
30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	Approved

Recent Purchases			
CARN- MIRRORS&WINDOWS CONNECTING W/LIT TE G12	MCGRW-WONDERS LIT BIG BK3 COOL DOG SCHL DOG G1	MCGRW-WONDERS LIT BIG BOOK ROADWORK GK	MCGRW-WONDERS WORKSTATION ACTIVITY CARDS G2
Internally Orderable EACH	Internally Orderable EACH	Internally Orderable EACH	Internally Orderable EACH

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

Requisitions

Shop by Category Search Requirer JEREMY ROBERTS

Recent Requisitions		
08R0000056	MCGRW-WONDERS LIT BIG BOOK BEAR SNORES ON GK	Incomplete
30R0000073	APPLICATOR, COTTON TIP, NON-STERILE, 6", 100/BAG	Approved
52R0000054	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	Approved
30R0000052	BATTERY, ALKALINE, 9 VOLT	Approved
30R0000051	APPLESAUCE, CUP, MANGO, NSA, 72/4 OZ/CS	Approved

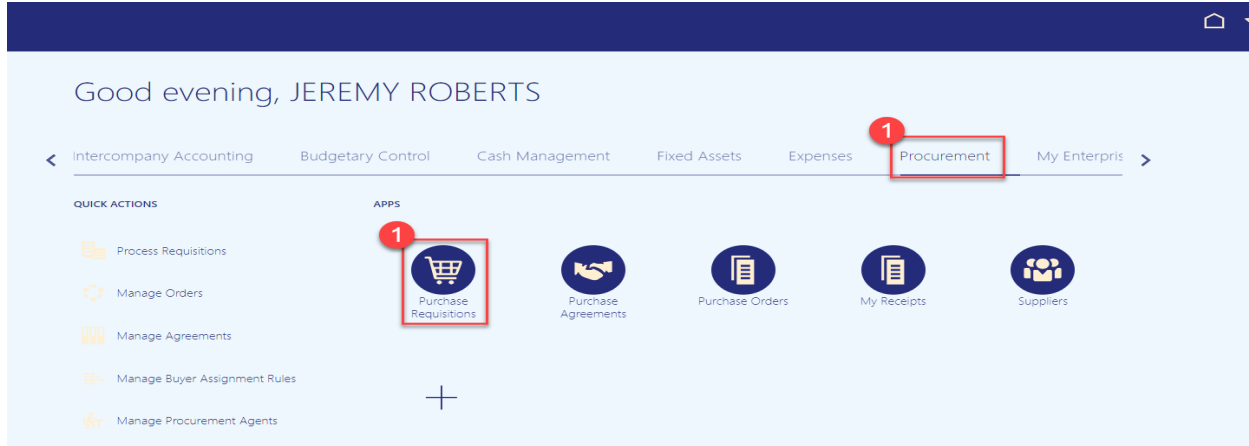
Recent Purchases			
CARN- MIRRORS&WINDOWS CONNECTING W/LIT TE G12	MCGRW-WONDERS LIT BIG BK3 COOL DOG SCHL DOG G1	MCGRW-WONDERS LIT BIG BOOK ROADWORK GK	MCGRW-WONDERS WORKSTATION ACTIVITY CARDS G2
Internally Orderable EACH	Internally Orderable EACH	Internally Orderable EACH	Internally Orderable EACH



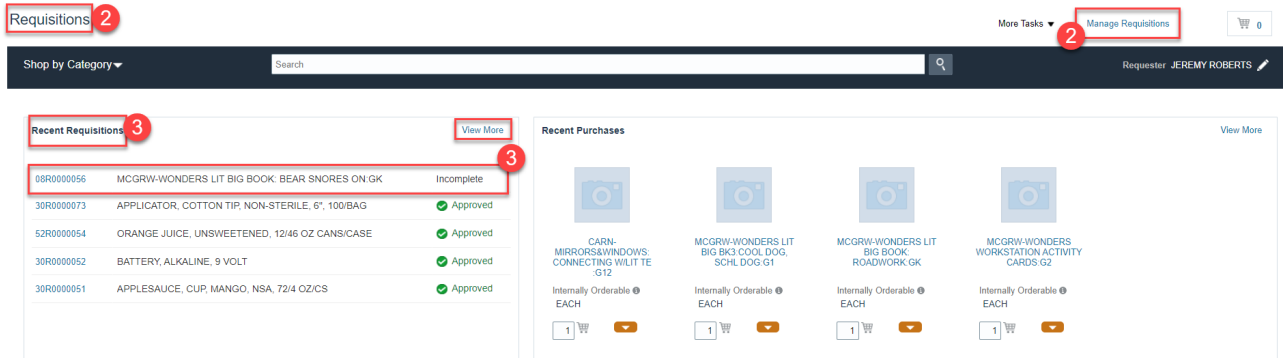
Review and Submit DPI Consumption Requisitions

To review DPI 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 text input), 7 (Requisition text input), 8 (Description text input), 8 (Created dropdown), 8 (Status dropdown), 8 (Requester text input), 7 (Supplier text input), 8 (Order text input), 7 (Item text input), 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 page. A red callout '10' points to the search results table. The table has columns for Requisitioning BU, Requisition, Description, Entered By, Creation Date, Approval Amount, Status, Funds Status, Procurement Card, Order, Order Status, and Emergency Purchase Order.

Search Results

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
0800 DEPARTM...	08R0000056	MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK	ROBERTS, JE...	10/4/23	55.50 USD	Incomplete	Not reserved				
0800 DEPARTM...	08R0000023	CARN-MIRRORS&WINDOWS: CONNECTING W/LIT TE IG12	ROBERTS, JE...	5/25/23	128.75 USD	Approved	Reserved	25003		Closed	
0800 DEPARTM...	08R0000015	MCGRW-WONDERS LIT BIG BOOK: ROADWORK GK	ROBERTS, JE...	5/4/23	111.00 USD	Approved	Reserved	15006		Closed	
0800 DEPARTM...	08R0000013	MCGRW-WONDERS WORKSTATION ACTIVITY CARDS: G2	ROBERTS, JE...	5/4/23	188.70 USD	Approved	Reserved	13004		Closed	

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

The screenshot shows the 'Requisition: 08R0000056' 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.

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1	9780021193127	MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK	551015-Printed publications	1	EACH	55.50 USD	55.50	Incomplete	Not reserved		



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

Edit Requisition: 08R0000056

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

12

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION
 * Description MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK
 Justification
 Requisition Amount 55.50 USD
 Approval Amount 55.50 USD
 Funds Status Not reserved
 Attachments None
 Customer ACADEMY OF MOORE COUNTY|12588 HWY 15-01 SOUTH

NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

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	MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK	551015-Printed publ...	1	EACH	55.50 USD	55.50	Not reserved	X
Total						55.50		

Rows Selected 1 Columns Hidden 8

Line 1: Details
 Delivery
 * Requester ROBERTS, JEREMY
 Requested Delivery Date 10/11/23
 * Deliver-to Location 0800DPINI-6336 MAIL SERVICE CEN
 Deliver-to Address F6336 MAIL SERVICE CENTER, RALEIGHNC, 276996336, WAKE, US

Billing
 View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
0800-101005-53110000-0000000-0000	10/4/23	100	1	55.50	Not reserved	X
Total				55.50		

Source
 Source Organization DPI TEXTBOOK WHSE
 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 08R0000056

View Transaction

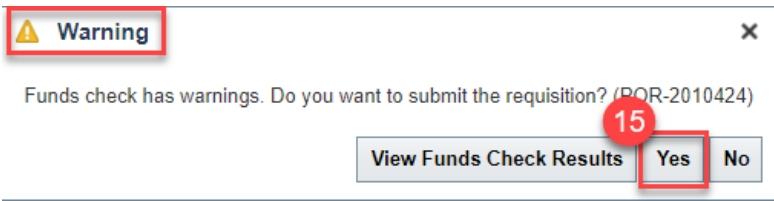
Transaction Lines Impacted by Control Budgets

View Format Funds Status Warning

Line-Di	Status	Requested	Charge Account	Budget Account	Budget Period	Control Budget	Budget Manager
1-1	Advisory warning insuff	55.50 USD	0800-101005-53110000-0000000-00	0800-101005-5309999: FYS_J...		NC Agency to Account D...	SHANNO

14 Done

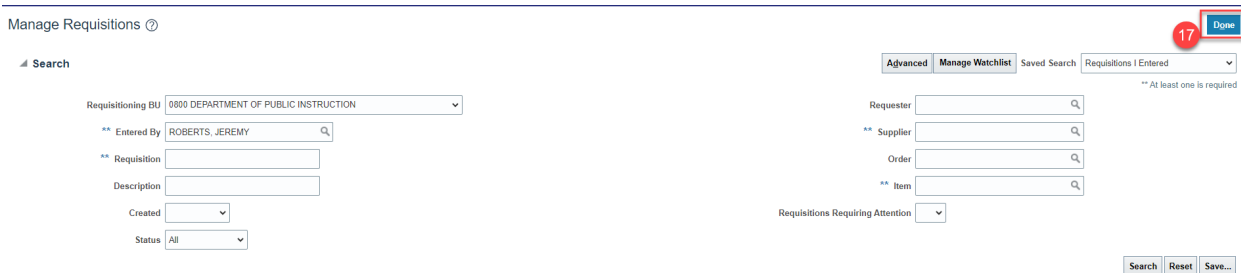
15. Click **YES**.



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.

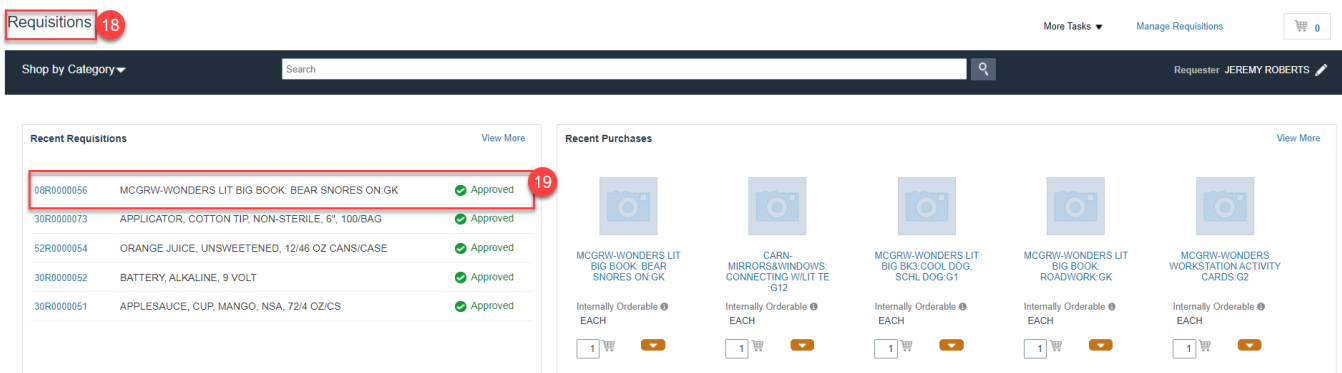


Search Results

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
0800 DEPARTM...	08R0000056	MCGRW-WONDERS LIT BIG BOOK: BEAR SNORES ON GK	ROBERTS, JE...	10/4/23	55.50 USD	Approved	Reserved		87013	Open	
0800 DEPARTM...	08R0000023	CARN-MIRRORS&WINDOWS: CONNECTING WILT TE: G12	ROBERTS, JE...	5/25/23	128.75 USD	Approved	Reserved		25003	Closed	
0800 DEPARTM...	08R0000015	MCGRW-WONDERS LIT BIG BOOK: ROADWORK GK	ROBERTS, JE...	5/4/23	111.00 USD	Approved	Reserved		15006	Closed	
0800 DEPARTM...	08R0000013	MCGRW-WONDERS WORKSTATION ACTIVITY CARDS:G2	ROBERTS, JE...	5/4/23	188.70 USD	Approved	Reserved		13004	Closed	

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

19. Status should now show **"Approved"**.



Wrap-Up

This QRG covers the creation of SSP orders on behalf others at the Department of Public Instruction (DPI) 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)