

# MANAGE PURCHASE

**ORDERS (SOURCED FROM** 

PO

# ORACLE REQUISITIONS)

**QUICK REFERENCE GUIDE PO-03** 

### Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Manage Purchase Orders in the North Carolina Financial System (**NCFS**).

# Introduction and Overview

This QRG covers the steps to manage Purchase Orders and check the details for a specific Purchase Order (PO).



#### User Tip:

The following are prerequisites to Manage Purchase Orders in NCFS:

- 1. All NCFS Purchase Orders must be sourced from approved NCFS requisitions.
- 2. All Ariba POs will be interfaced in real time from Ariba into NCFS, and these cannot be modified directly in NCFS. Instead, all modifications must be initiated directly from Ariba.



#### Manage Purchase Orders

To Manage Purchase 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 Home page, click the **Procurement** tab. Click the **Purchase Orders** app.

Cash Management	Fixed Assets	Expenses	Procurement	My Enterprise	Tools
QUICK ACTIONS		APPS			
Process Requisitions					
Manage Orders		Purchase Requisitions	Purchase	e Purchase	Orders
Manage Agreements					

3. Click the Tasks [ ] icon. Under Orders, click Manage Orders.



4. The Manage Orders page opens. Under the Search section, enter the required fields.

In this example, we choose *Procurement BU as* **0200** Administrative Office of the Courts, \*\*Order as **02P%** and *Include Closed Documents as* **Yes.** Click the **Search** button.

Note: Delete any auto-populated details in the *Buyer* field.

Overview Manage Orders	<						
Manage Orders (	D						Done
Headers Schedules							
Search		Advanced	Manage Watchlist	Saved	Search	All My Orders	~
					-1	** At least	one is required
** Keywords			**	Order	02P%		
Procurement BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	~	** Requ	isition			
** Supplier	٩			Status			~
** Buyer			Include Closed Docu	iments	Yes 🗸		
						Search Re	eset Save

5. The Manage Orders Search Results page opens. In the *Search Results* section, click the **Purchase Order**.

Manage Orders ⑦  Headers Schedules  Feaders Schedules  Search Search Results  Actions  View  Format   Freeze  Detach  Wrap  Order  Description  O2P0000015  02P0000014  02P000014  02P000014  02P000011  02P000011	Overview M	nage Orders ×
Headers       Schedules         Search       Search Results         Actions • View • Format •        Image: The pressee       Detach • Wrap         Order       Description         02P0000015       02P0000014         02P0000013       02P0000012         02P0000012       02P0000012         02P0000011       02P0000012	Manage	Orders ⑦
Search           Search Results           Actions • View • Format • • • • • • • • • • • • • • • • • • •	Headers	Schedules
Order         Description           0.02P0000015         02P0000014           02P0000013         02P0000012           02P0000012         02P0000012           02P0000011         02P0000011	Search	rch Results ▼ View ▼ Format ▼ 💉 🎵 📴 Freeze 🛒 Detach 🚽 Wrap
02P0000015           02P0000014           02P0000013           02P0000012           02P0000011		Order Description
02P0000014 02P0000013 02P0000012 02P0000011		. 02P0000015
02P0000013 02P0000012 02P0000011		02P0000014
02P0000012 02P0000011		02P0000013
02P0000011		02P0000012
		02P0000011
02P0000010		
02P0000009		02P0000010

6. The **Purchase Orders** page opens. On the *General* section, check the *PO Status, Funds Status, Buyer, Total Amount, Description, Requisition, Supplier Name, and Supplier Site* fields.

Note: To view the PO in PDF version, click the **View PDF** button.

Immedia     Operation       Immedia     Opera       Immedia     Opera<						Kenesn
Openetal     Openetal     Openetal     Openetal     INTERNATIONAL BU     INTERNATIONAL BUSINESS     Ordered     250,0       Procurement BU     OFFICE OF THE COURTS     Supplier     Supplier     BUSINESS     Ordered     250,0       Requisitioning BU     ADMINISTRATIVE OFFICE OF THE COURTS     Supplier     Supplier     For O.02PT.01     Total     70,00       Sold-to Legal Entity     NC ADMINISTRATIVE COURTS     Supplier     Contact Communication Method     Pafriziabmxd y aarkhaaszn     Description       Bill-to BU     ADMINISTRATIVE COURTS     Bill-to Location COURTS     Bill-to Location COURTS     O200AOCNI-PO BOX 2448     Requisition     02R00 BOX 2448       Order     02P0000015     Order     02P0000015     Order     Order						
0200     INTERNATIONAL BU     ADMINISTRATIVE OFFICE OF THE COURTS     Supplier     Supplier     BUSINESS MACHINE CORPORATION     Ordered     250,0       Requisitioning BU     ADMINISTRATIVE OCOURTS     Supplier Site COURTS     FO.02PT.01     Total     70,00       Requisitioning BU     ADMINISTRATIVE COURTS     Supplier     Fafiziabmxd y aarkhaaszn     Total     250,0       Sold-to Legal Entity     NC ADMINISTRATIVE COURTS     Communication Method     None     Description       Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     Bill-to Location COURTS     0200AOCNI-PO BOX 2448     Requisition     02R00 Agreement       Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     Ship-to Location     0200AOCNI-PO BOX 2448     Requisition Supplier     02R00 Order       Order     02P0000015     Supplier     Order     Order     Supplier	eral					
COURTS 0200     CORPORATION     Total Tax     0.00 I       Requisitioning BU     ADMINISTRATIVE OFFICE OF THE COURTS     Supplier Site COURTS     FO.02PT.01     Total     250,0       Sold-to Legal Entity     NC ADMINISTRATIVE COURTS     Communication Method     Total     250,0       BU     NC ADMINISTRATIVE COURTS     Contact     Sarkhaaszn     Description       Sold-to Legal Entity     NC ADMINISTRATIVE COURTS     Communication Method     None     Description       Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     Bill-to Location COURTS     0200AOCNI-PO BOX 2448     Requisition     02R00 BOX 2448       Order     02P0000015     Supplier     Order     Order	ocurement A BU C	200 DMINISTRATIVE OFFICE OF THE	Supplier	INTERNATIONAL BUSINESS MACHINE	Ordered	250,000.00 USD
Requisitioning BU     ADMINISTRATIVE OFFICE OF THE COURTS     Supplier Supplier Site     For COUPTION       Sold-to Legal Entity     OFFICE OF THE OFFICE OF THE COURTS     Supplier Communication Method     Fafnziabmxd y aarkhaaszn     Total     250,0       Sold-to Legal Entity     NC ADMINISTRATIVE OFFICE OF THE COURTS     Communication Method     None     Description       Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     Bill-to Location     0200AOCNI-PO BOX 2448     Requisition     02R0I       Order     02P0000015     Courts     Courts     Order     Order     Order	0	OURTS 200	Supplier Site	CORPORATION	Total Tax	0.00 USD
Sold-to Legal Entity     COURTS NC ADMINISTRATIVE OFFICE OF THE COURTS 0200     Contact Communication Method     aarkhaaszn None     Description       Bill-to BU     None     0200AOCNI-PO BOX 2448     Requisition     02R00 BOX 2448       Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     Bill-to Location     0200AOCNI-PO BOX 2448     Requisition     02R00 BOX 2448       Order     02P0000015     BOX 2448     Source Supplier	uisitioning A BU C	DMINISTRATIVE OFFICE OF THE	Supplier	Fafnziabmxd y	Total	250,000.00 USD
Entity     COURTS     D200     Bill-to Location     D200AOCNI-PO BOX 2448     Requisition     02R0       Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     Ship-to Location     D200AOCNI-PO BOX 2448     Requisition     02R0       Order     Order     Order     Supplier Order     Order     Order	old-to Legal	OURTS IC ADMINISTRATIVE OFFICE OF THE	Contact Communication Method	aarkhaaszn None	Description	
Bill-to BU     ADMINISTRATIVE OFFICE OF THE COURTS     DOX 2445     Source 0200AOCNI-PO BOX 2448     Source Agreement BOX 2448       Order     020000015	Entity C	OURTS	Bill-to Location	0200AOCNI-PO	Requisition	02R0000020
Order 02P0000015 Order	Bill-to BU C	DMINISTRATIVE OFFICE OF THE OURTS	Ship-to Location	0200AOCNI-PO BOX 2448	Agreement Supplier	
	Order 0	2P0000015			Order	
Status Open	Status C	open 🚯				
Funds Status Reserved	Inds Status F	eserved				
Buyer FTRAYWICK SIMPSON	Buyer 🕨	TRAYWICK SIMPSON				

Scroll down and validate the *Lines* section information. Check the *Quantity*, *UOM*, and *Price* fields.

Lines Schedules Distributions			
Actions  View  Format	Freeze	📄 Detach 🛛 📣 Wrap	
Line Item	Description	Quantity UOM	Price Ordered S
🛕 🖉 📃 1	Test req 0200	250,000 Dollar	1.00 250,000.00 O
•			•
Columns Hidden 45			

8. Validate the *Schedules* section information. Check the *Organization* field.

ctions 🔻	View <b>v</b>	Format V JH	Freeze 📺 De	tach 🚽 Wrap								
	Line	Description	Location	Requested Delivery Date	Promised Delivery Date	Quantity	UOM Name	Status	Funds Status	Life Cycle	Details	Organization
•	1	Test reg 0200	0200AOCN	5/19/23		250.000	Dollar	Open	Reserved	0		0200AOCNI

9. Validate the *Distributions* section information. Check the *Charge Account* and *Budget Date* field/

Lines	Schedules	Distributions								
Acti	ions <b>v</b> View	▼ Format ▼	T الر	Fre	eze 📰 🕻	etach	📲 Wrap			
	Line	Description	De	eliver-to	Quantity	UOM Name	Ordered	PO Charge Account	Budget Date	Fui
	1	Test req 0200	02	00AOCN	250,000	Dollar	250,000.00	0200-022001-52120001-0000000-0000000-0	5/12/23	Res
	4									•

Note: If there are changes identified and required after validation of the information on the Purchase order page, please follow the steps from step 10- 15. If there are no changes required in the PO, please skip to step 15.

10. From the Actions drop-down choice list, select Edit.

Overview	Manage Orders ×	Purchase Order: 02P0000015 ×				
Purch	nase Order: (	02P0000015 ⑦ 🔺			View PDF	Actions <b>v</b> Refresh Done
Main						Edit
						Delete
⊿ G	eneral					Acknowledge
	-	0200 ADMINISTRATIVE		INTERNATIONAL		Communicate
	Procurement BU	OFFICE OF THE COURTS 0200 ADMINISTRATIVE	Supplier	BUSINESS MACHINE CORPORATION	Order	Cancel Document
	Sold-to Legal	OFFICE OF THE COURTS	Supplier Site	O.02PT.01	Total T	Close
	Entity	OFFICE OF THE COURTS 0200 ADMINISTRATIVE	Supplier Contact	Fafnziabmxd y aarkhaaszn	То	Reopen
	Bill-to BU	OFFICE OF THE COURTS	Communication Method	None	Descripti	Hold
	Order	0220000015	Bill-to Location	0200AOCNI-PO BOX	Requisiti	Freeze
	Status	Open 🚯		2448 0200AOCNI-PO BOX	Sour	Withdraw
	Europe Official	Descend	Ship-to Location	2448	Agreeme	Withdraw

11. Make the required edit in the Purchase Order.

In this example we choose, to update *Quantity - 25,000* in the *Lines* section.

Actions 🔻	View <b>v</b> Format	• + E	/ ×	JH IF	Freeze 🗐 Det	tach 📣 Wrap				
	* Line * Type	e Edit	Item		* Description	* Category Name	Quantity	иом	* Price	Or
00	I Rate B	ased Ser 📝			Test Req 0200	801015-Business and	25,000	Dollar	1.00	25,

12. Click the **Plus** [ + ] icon to add a new line to the Purchase Order.

Actions	▼ View ▼	Format 🔻	+ 🗉	/ x	۶ R	Freeze 📓 De	tach 📣 Wrap				
	* Line	e * Type	Edit	ltem		* Description	* Category Name	Quantity	UOM	* Price	0
0		Rate Based	I Ser 🥒			Test Reg 0200	801015-Business and	25,000	Dollar	1.00	25

13. Enter the applicable details in the new line of the Purchase Order.

Lines	Schedules	Distr	ributions													
Actio	ons 🔻 View	▼ Fo	ormat 🔻	+			×	围	Ę	Freeze	Detacl	🖌 📣 Wrap				
	* L	ine	* Type		Edit	ltem				* Descriptio	on	* Category Name	Quantity	иом	* Price	Ordere
	2		Fixed P 🔻	,						Test		801015-Busii Q			1.00	1.0
	<i>i</i> 🖉 🛃 1		Rate Based	Ser	N					Test Req 020	0	801015-Business an	25,000	Dollar	1.00	25,000.0
	4															×
Colu	umns Hidden	23														

14. Enter the value in \**Description* field.

Overview Manage Orders x Purchase (	Order: 02P0000015 × Edit Document (Purchase Orde	r): 02P0000015 ×	
Edit Change Order: 1 ⑦			
Change Order * Description	1 Changes to PO	Status Amount Changed	Incomplete -225,000.00 USD
Creation Date	5/23/23	Funds Status	Not Applicable
Main General (?)			
Procurement BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	Supplier	INTERNATIONAL BUSINESS MACHINE CORPORATION
Requisitioning BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	* Supplier Site	0.02PT.01
Sold-to Legal Entity	NC ADMINISTRATIVE OFFICE OF THE COURTS	Supplier Contact	aarkhaaszn, afnziabmxd 🔻
Bill-to BU Order	02P0000015	Communication Method	None V

#### 15. Click the **Submit** button.

	TS
Check Funds     Manage Approvals     Actions ▼     Save     ▼     Submit     Cancel	
Initiating Party Buyer Initiator TRAYWICK SIMPSON	Ξ
Type Internal	<b>२</b> ा≣

16. The *Confirmation* pop-up appears, the changes done to PO are submitted for approval. Click the **OK** button.

The change or	ation der 1 for document Purchase Order number 02P0000015	was submitted for approval.
Supplie	INTERNATIONAL BUSINESS MACHINE CORPORATION	Ordered 250,000.00 USD

17. Click the **Done** button.

Note: Change Order has been submitted for approval, and once reviewed and approved, it will be completed and the PO will be updated as needed.

Over	view Manage Orders ×	Purchase Order: 02P0000015 ×					
P	urchase Order: (	02P0000015 🕐 ★			View PDF Ad	ctions <b>v</b> Refresh Do	ne
	Main						
	⊿ General						
	Procurement BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS 0200 ADMINISTRATIVE	Supplier	INTERNATIONAL BUSINESS MACHINE CORPORATION	Ordered	250,000.00 USD	
	Requisitioning BU	OFFICE OF THE COURTS	Supplier Site	O.02PT.01	Total Tax	0.00 USD	
	Bill-to BU	OFFICE OF THE COURTS 0200 ADMINISTRATIVE	Supplier Contact	Fafnziabmxd y aarkhaaszn	Total	250,000.00 USD	
	Order	02P0000015	Method	None	Description		
	Status	Open (1)	Bill-to Location	0200AOCNI-PO BOX 2448	Requisition	02R0000020	
	Funds Status	Reserved	Ship-to Location	0200AOCNI-PO BOX 2448	Source Agreement Supplier Order		

18. You are now redirected to **Manage Orders** page. You can see the submitted PO in the **Order** field and it's status under the **Status** field.

	nage Orders ×								
Manage	Orders ⑦								D <u>o</u> ne
Headers	Schedules								
► Sea	rch				A <u>d</u> vanced	Manage Watchlist	Saved Search	All My Orders	~
Search R	esults								
Actions	View 🔻 Forma	at 🕶 🕂 🗏 🖍	× 🎵 📭 💷	Freeze	Detach 🚽	Wrap			
	Order								
and a second sec		Description	Supplier	Ordered	Currency	Status	Life Cycle	Change Order	Creation Date
0	02P0000015	Description	Supplier	Ordered	<b>Currency</b> USD	Status Open	Life Cycle	Change Order	Creation Date 5/16/23
0	02P0000015	Description	Supplier INTERNATION INTERNATION	Ordered 250,000.00 250,000.00	USD USD	Open Open	Life Cycle	Change Order	<b>Creation Date</b> 5/16/23 5/16/23
0	02P0000015 02P0000014 02P0000013	Description	Supplier INTERNATION INTERNATION	Ordered 250,000.00 250,000.00 250,000.00	USD USD USD	Open Open Open	Life Cycle	Change Order 1	<b>Creation Date</b> 5/16/23 5/16/23 5/10/23

# Wrap-Up

Manage Purchase Orders using the steps above.

## Additional Resources

#### Virtual Instructor-Led Training (vILT)

• PO102: PO Buyer