



# CREATE INVENTORY REQUISITIONS (DPI)

PO

## QUICK REFERENCE GUIDE PO-13

### Purpose

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step explanation of how to Create Inventory Requisitions (DPI) in the North Carolina Financial System (NCFS).

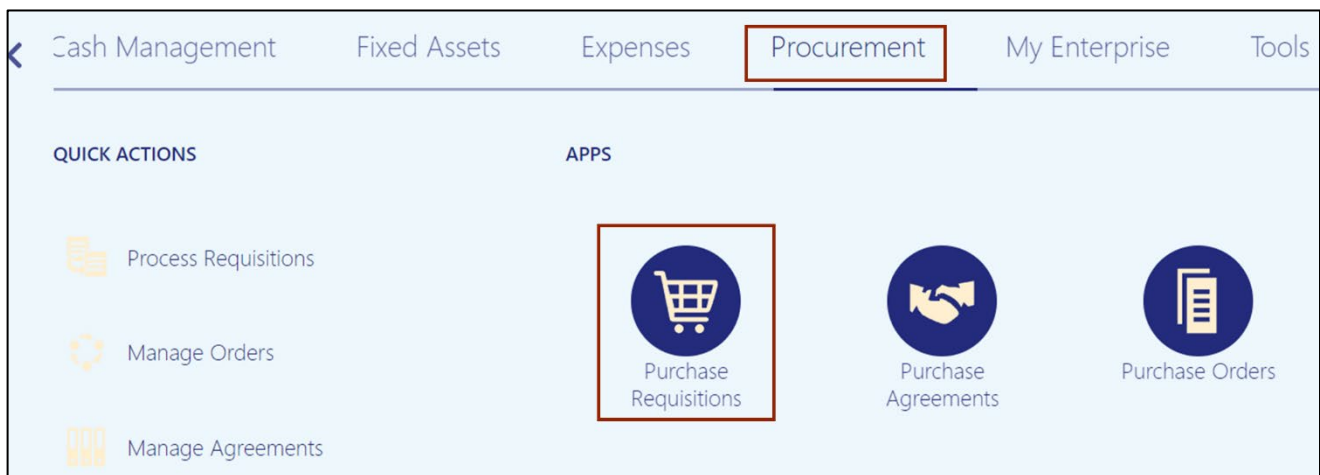
### Introduction and Overview

This QRG covers the steps to create inventory requisitions (DPI) from approved suppliers. An inventory requisition is a document used for internal purchases that identifies the need for goods. It is stocked into Inventory upon creation and ultimately its receipt.

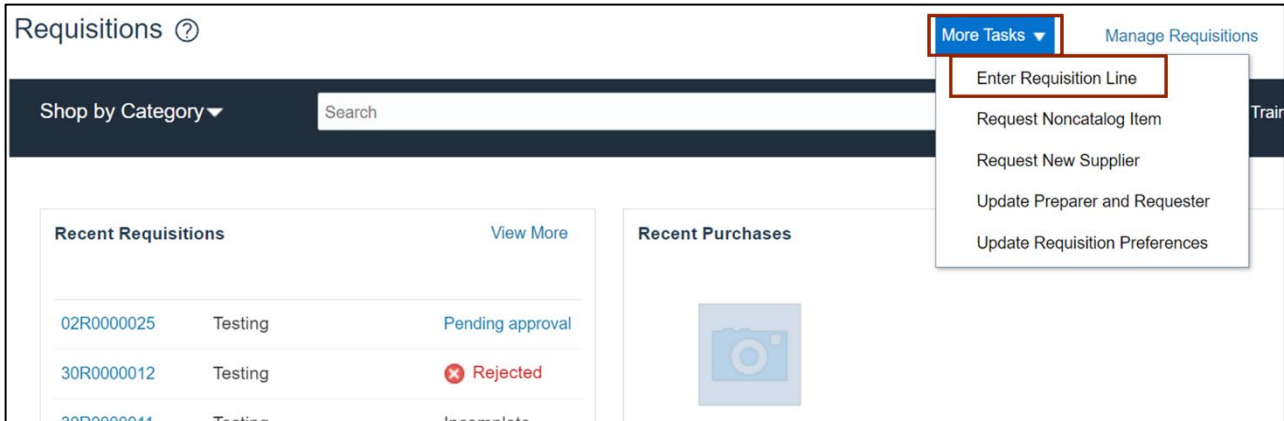
### Create Inventory Requisitions (DPI)

To create Inventory Requisitions (DPI) 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 Requisitions** app.



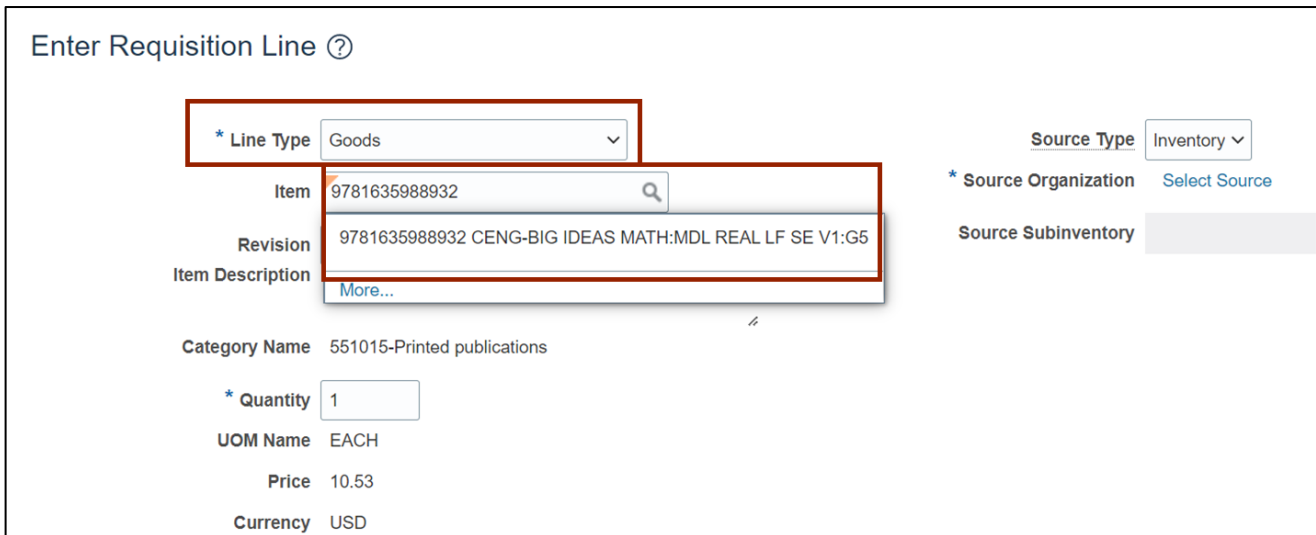
- Click the *More Tasks* drop-down choice list, on the top right corner, and select **Enter Requisition Line**.



- On the **Enter Requisition Line** page, select the *\*Line Type* and *Item*.

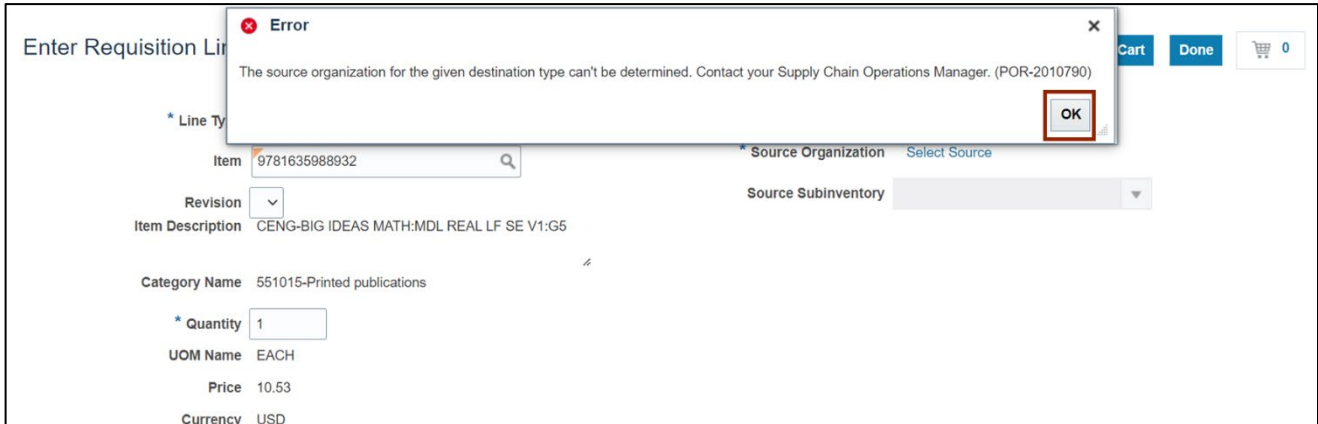
In this example, we choose *Line Type* as **Goods** and *Item* as **978163598892 CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5**.

Note: The above scenario is for DPI only.

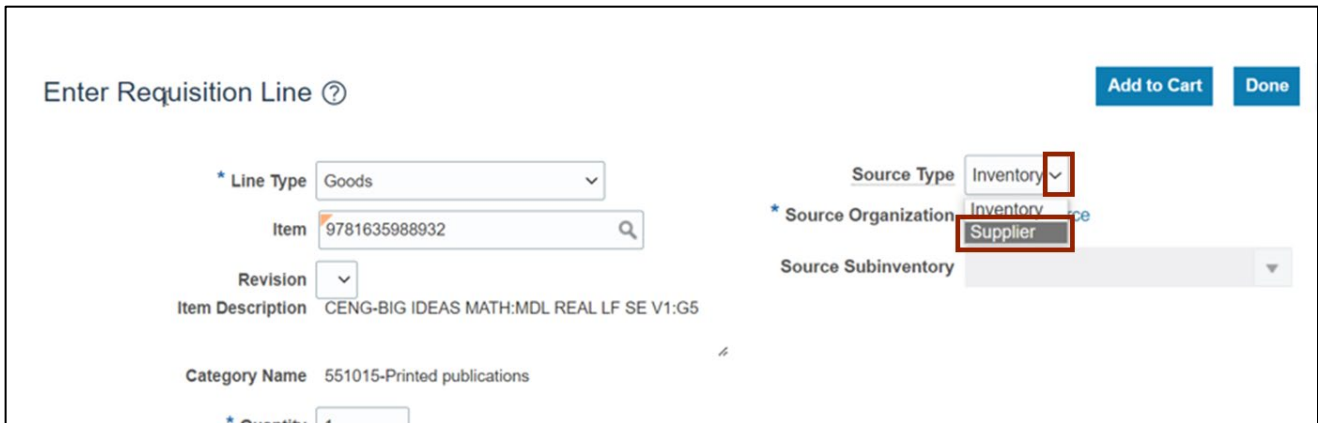


5. After selecting the Inventory Item an **Error** message will appear. Click the **OK** button.

Note: The error message is due to some items being used for both external supplier-sourced requisitions and internal Inventory-sourced consumption orders.




6. Click the **Source Type** drop-down choice list [  ], and select **Supplier**.



7. Enter the required Quantity in **\*Quantity** field.

In this example, we choose **30** for **\*Quantity**. **\*Item Description**, **Category Name**, **\*UOM Name**, and **\*Price** will be auto populated. Select the **Negotiated** checkbox.

Enter Requisition Line ? Add to Cart Done  0

\* Line Type: Goods

Item: 9781635988932

Revision: [dropdown]

\* Item Description: CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5

Category Name: 551015-Printed publications

\* Quantity: 30

\* UOM Name: EACH

\* Price: 10.53

\* Currency: USD

Negotiated

Source Type: Supplier

Agreement Type: Contract Purchase Agreement

Agreement: [search]

New supplier

Supplier: [search]

Supplier Site: [dropdown]

Supplier Contact: [dropdown]

Phone: [input]


Fax: [input]

Email: [input]

Supplier Item: [input]

8. Search for the **Supplier** name.

In this example, we choose **CENGAGE LEARNING**.

Enter Requisition Line ? Add to Cart Done  0

\* Line Type: Goods

Item: 9781635988932

Revision: [dropdown]

\* Item Description: CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5

Category Name: 551015-Printed publications

\* Quantity: CENGAGE LEARNING 115540 CENGAGE LEARNING:CENGAGE LEARNING INCORPORATED:THOMSON LEARNING:GALE

\* UOM Name: EACH

\* Price: 10.53

\* Currency: USD

Negotiated

Source Type: Supplier

Agreement Type: Contract Purchase Agreement

Agreement: [search]

New supplier

Supplier: CENGAGE LEARNING

Supplier Site: [dropdown]

Supplier Contact: [dropdown]


Phone: [input]

Fax: [input]

Email: [input]

Supplier Item: [input]

- Once the **Supplier** is selected, the **Supplier Site** and **Supplier Contact** will auto-populate if there is only one available. Otherwise, select the Site and Contact as appropriate.

Enter Requisition Line ? Add to Cart Done 

* Line Type: Goods	Source Type: Supplier
Item: 9781635988932	Agreement Type: Contract Purchase Agreement
Revision: [dropdown]	Agreement: [search]
* Item Description: CENG-BIG IDEAS MATH:MDL REAL LF SE V1.G5	<input type="checkbox"/> New supplier
Category Name: 551015-Printed publications	Supplier: CENGAGE LEARNING
* Quantity: 1	<b>Supplier Site: O.08PT.04</b>
* UOM Name: EACH	<b>Supplier Contact: aaaaaaoyd, aaaaqaosr</b>
* Price: 10.53	Phone:
* Currency: USD	Fax:
<input checked="" type="checkbox"/> Negotiated	Email:
	Supplier Item: [input]

- Scroll down to **Delivery** Section. Search for the appropriate **Suggested Buyer**.

In this example, we choose **BONDS, TRAYWICK**.

* Currency: USD	Fax:
<input checked="" type="checkbox"/> Negotiated	Email:
<b>Delivery</b>	Supplier Item: [input]
* Requester: PERRONE, ABRIGAIL	* Deliver-to Location: 08BOOKS-3905 REEDY CREEK ROA
Urgent: No	Deliver-to Address: STATION, ROAD, BLACK MOUNTAINNC, 287110000, US
Requested Delivery Date: 5/18/23	Destination Type: Inventory
Suggested Buyer: <b>BONDS</b>	Subinventory: [dropdown]
	<b>BONDS, TRAYWICK sendmail-test-discard@oracle.com</b>
	More...
<b>Billing</b>	
View Format Freeze Detach Wrap	

11. Review the **\*Deliver-to Location** field and the **Destination Type** field.

Note: The Destination Type field for Inventory should be equal to Inventory.

Delivery

\* Requester: PERRONE, ABRIGAIL

Urgent: No

Requested Delivery Date: 5/18/23

Suggested Buyer: BONDS, TRAYWICK

\* Deliver-to Location: 08BOOKS-3905 REEDY CREEK ROA

Deliver-to Address: STATION, ROAD, BLACK MOUNTAINNC, 287110000, US

Destination Type: Inventory

Subinventory: [dropdown]

12. Scroll down to the **Billing** section and review the **Charge Account**.

Note: The Charge Account is auto populated and cannot be edited or deleted.

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
0800-700100-54620000-0000000-0878111-0000-000000	5/10/23	100	30	315.90	Not reserved	X
<b>Total</b>				<b>315.90</b>		

13. Scroll down to the **Notes and Attachments** section, enter a **Note to Supplier**. Then, click the **Plus [ + ]** icon to attach a document.

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
0800-700100-54620000-0000000-0878111-0000-000000	5/10/23	100	30	315.90	Not reserved	X
<b>Total</b>				<b>315.90</b>		

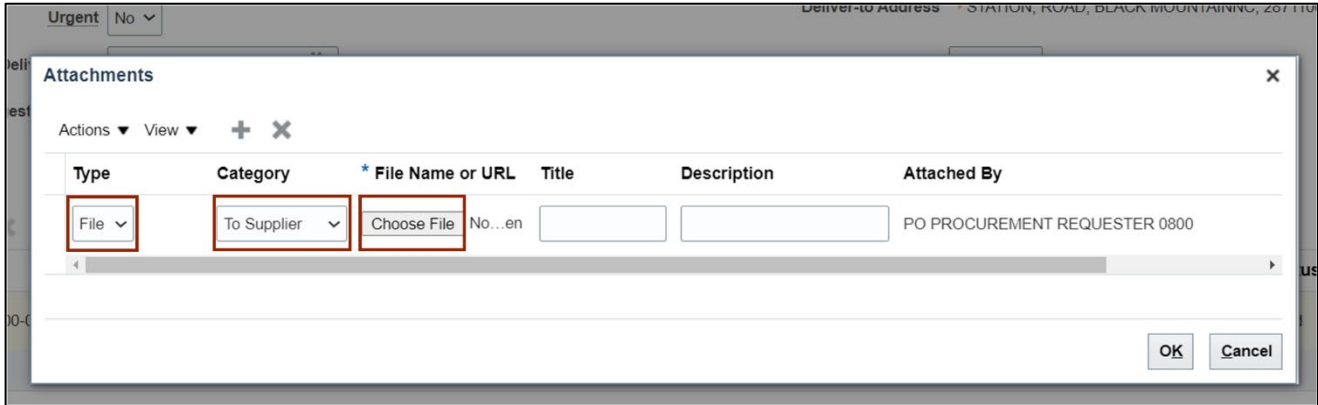
Notes and Attachments

Note to Supplier: Test Note to Supplier

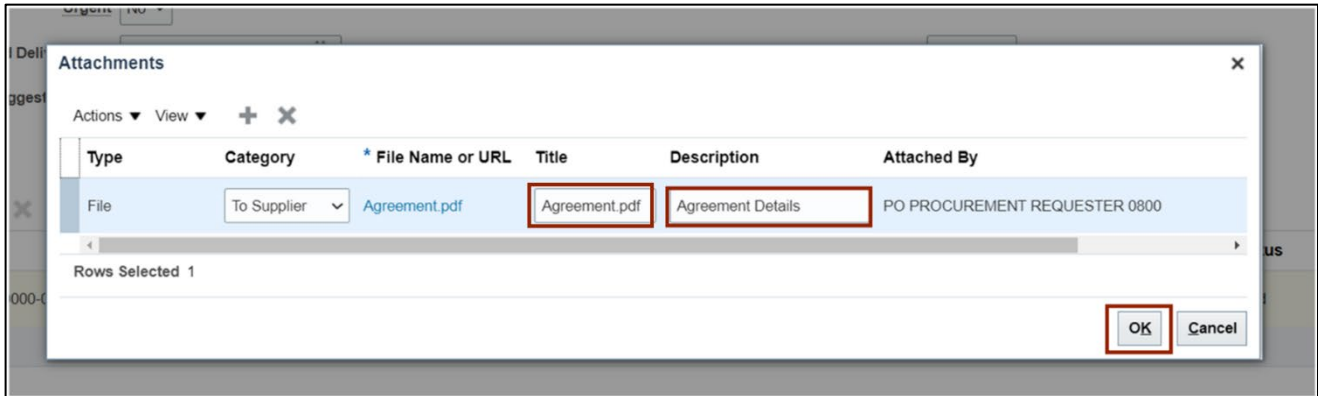
Attachments: None +

14. The *Attachments* pop-up appears. Select the **Type**, **Category** and **\*File Name or URL**.

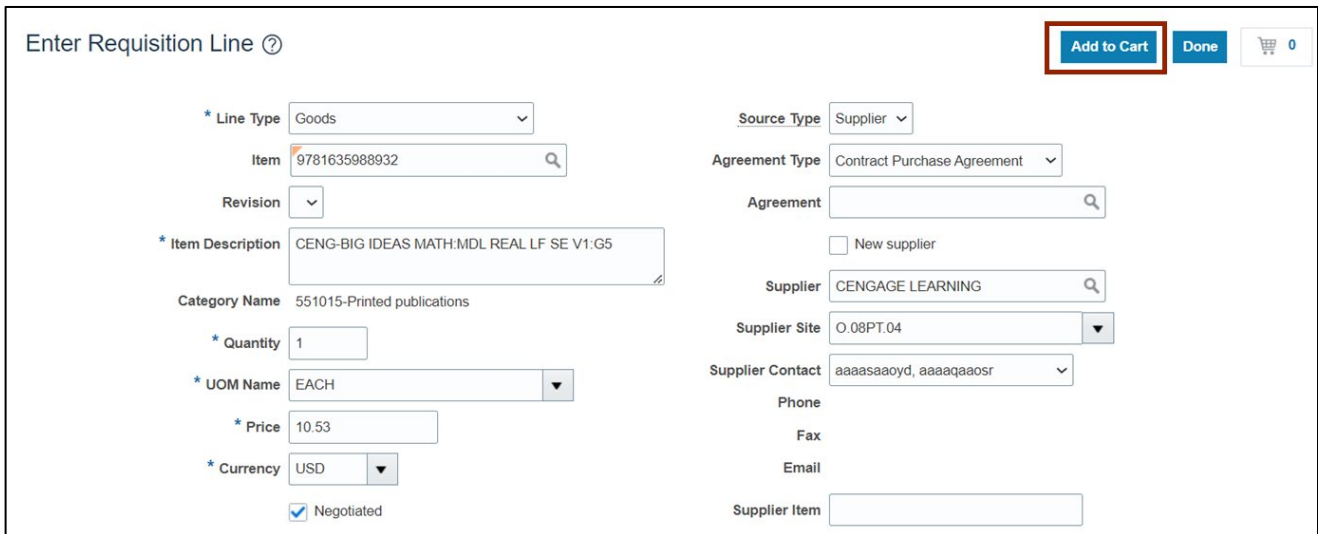
In this example, we choose **File** as **Type** and **To Supplier** as **Category**.



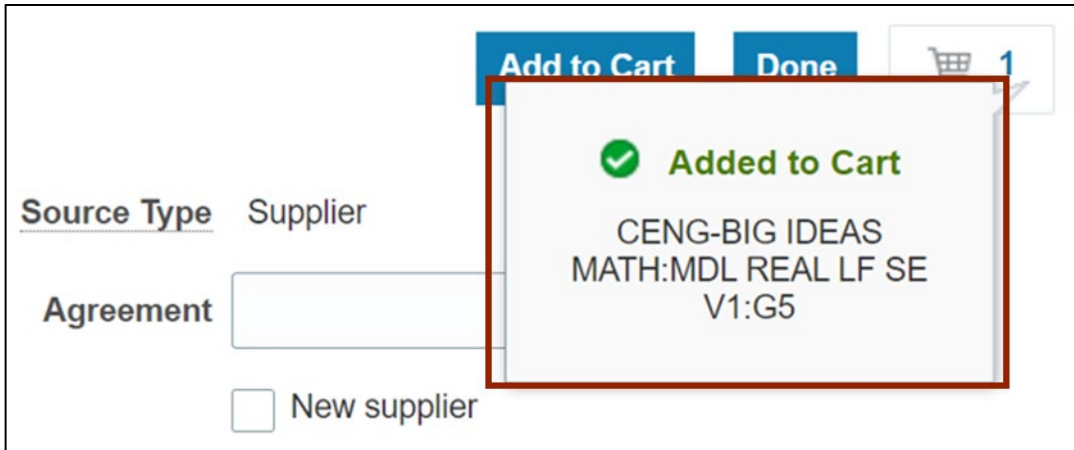
15. **Title** will get auto populated. Enter in the **Description** field, then click the **OK** button.



16. Scroll back up, and click the **Add to Cart** button.



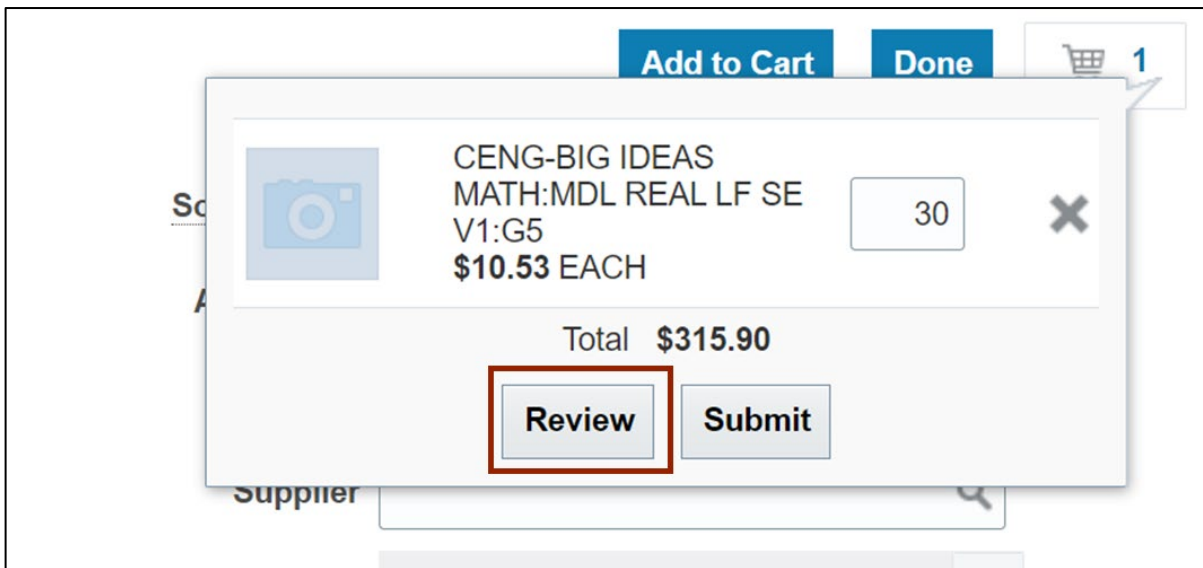
17. Added To Cart confirmation message appears.



18. Click the **Shopping Cart** [ 🛒 ] icon.



19. Click the **Review** button.





20. Review all the details filled in from the previous steps.

Edit Requisition: 08R0000081

Shop Check Funds Manage Approvals View PDF Save Submit

Requisitioning BU: 0800 DEPARTMENT OF PUBLIC INSTRUCTION

\* Description: CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5

Justification: [Empty]

Requisition Amount: 315.90 USD

Approval Amount: Calculate Amount with Tax

Funds Status: Not reserved

Attachments: None

Customer: [Empty]

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

Emergency purchase order number required:

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	Line Type	Item	Revision	Description	Category Name	* Quantity	UOM Name	* Price	Price (USD)	Amount	Amount (USD)	Conversion Rate Type
1	Goods	9781635988932		CENG-BIG IDEAS 1 551015-Printed publi...		30	EACH	10.53 USD	10.53	315.90 USD	315.90	
<b>Total</b>											<b>315.90</b>	

21. Scroll down to review the entire page and validate line-specific **Delivery** and **Billing** section.

Line 1: Details

Delivery

\* Requester: PERRONE, ABRIGAIL

\* Deliver-to Location: 08BOOKS-3905 REEDY CREEK ROAD

Urgent: No

Deliver-to Address: STATION, ROAD, BLACK MOUNTAINNC, 287110000, US

Requested Delivery Date: 5/18/23

Destination Type: Inventory

Suggested Buyer: [Empty]

Subinventory: [Empty]

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Delete
0800-700100-54620000-0000000-0878111-0000-00000000000-000000-0000-000000-00000	5/10/23	100	30	315.90	Not reserved	X
<b>Total</b>			<b>100</b>	<b>30</b>	<b>315.90</b>	

Notes and Attachments

Note to Supplier: Test Note to Supplier

Attachments: Agreement.pdf

Source

Agreement Type: Agreement

Supplier: CENGAGE LEARNING

22. Click the **Save** button.

Edit Requisition: 08R0000081 ?

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

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION

\* Description CENG-BIG IDEAS MATH:MDL REAL LF SE V1.G5

Justification

Emergency purchase order number required

Requisition Amount 315.90 USD  
Approval Amount Calculate Amount with Tax  
Funds Status Not reserved

Attachments None +

Customer

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

23. Click the **Check Funds** button.

Edit Requisition: 08R0000081 ?

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

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION

\* Description CENG-BIG IDEAS MATH:MDL REAL LF SE V1.G5

Justification

Emergency purchase order number required

Requisition Amount 315.90 USD  
Approval Amount Calculate Amount with Tax  
Funds Status Not reserved

Attachments None +

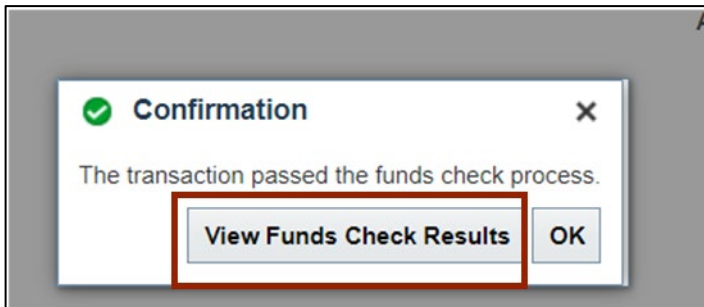
Customer

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

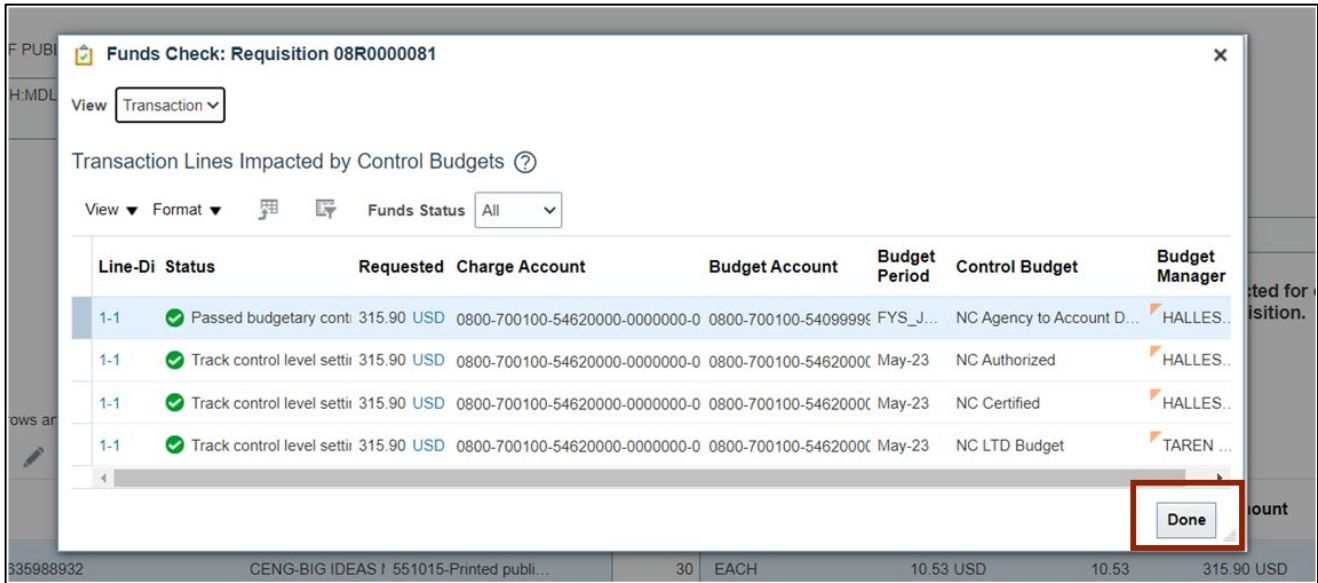
Requisition Lines

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

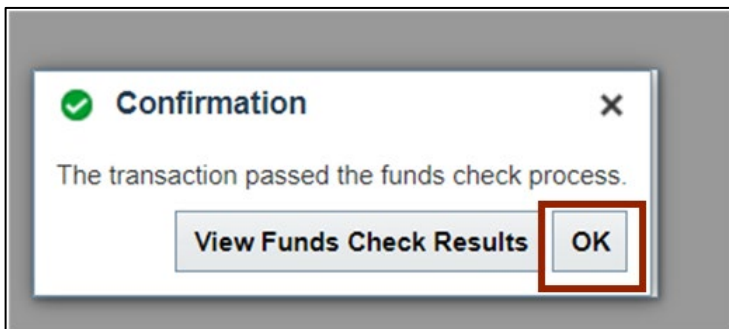
24. Click the **View Funds Check Results** button.



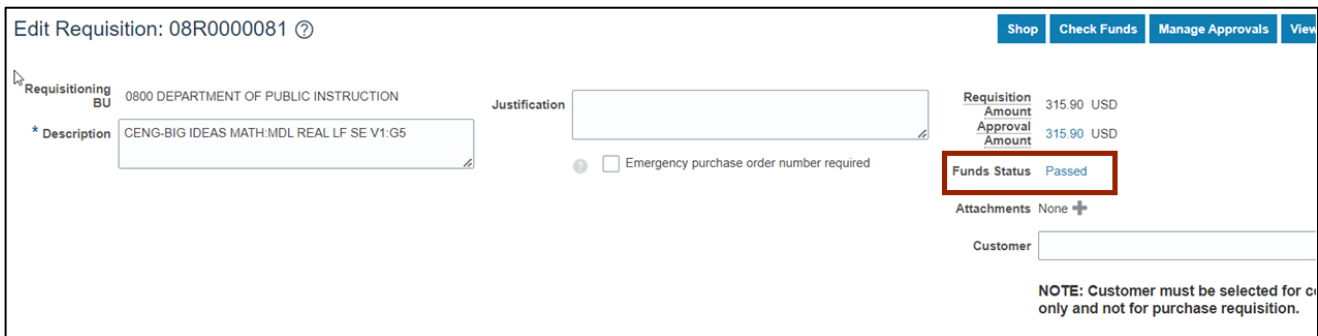
25. The *Funds Check* pop-up appears. View the funds check details and then click the **Done** button.



26. Click the **OK** button.



27. The *Funds status* reflects as **Passed**.



28. Optionally click the **View PDF** button.

Edit Requisition: 08R0000081 Shop Check Funds Manage Approvals **View PDF**

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION  
 \* Description CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5  
 Justification   
 Emergency purchase order number required

Requisition Amount 315.90 USD  
 Approval Amount 315.90 USD  
 Funds Status Passed  
 Attachments None +  
 Customer

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

29. Below is the purchase requisition PDF report output. Requisition **Header** and **Line details** can be viewed along with the **Supplier** and **Charge Account details**.

**ORACLE**

<b>Requisition 08R0000081 (315.9 USD)</b>		Report Date 5/15/23 5:54 PM GMT+00:00
		Page 1 of 1
<b>Requisitioning BU</b>	0800 DEPARTMENT OF PUBLIC INSTRUCTION	<b>Requisition Amount</b> 315.9 USD
<b>Entered By</b>	ABRIGAIL PERRONE	<b>Approval Amount</b> 315.9 USD
<b>Status</b>	Approved	<b>Procurement Card</b>
<b>Description</b>	CENG-BIG IDEAS MATH: MDL REAL LF SE V1:G5	<b>Justification</b>
<b>Emergency Requisition</b>	No	<b>Funds Status</b> Liquidated

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status
1	97816359 88932	CENG-BIG IDEAS MATH: MDL REAL LF SE V1:G5	551015- Printed publications	30	EACH	10.53 USD	315.9	Approved	Liquidated

<b>Requester</b>	ABRIGAIL PERRONE	<b>Supplier</b>	CENGAGE LEARNING
<b>Urgent</b>	No	<b>New Supplier</b>	No
<b>Requested Delivery Date</b>	5/18/23	<b>Supplier Site</b>	O.08PT.04
<b>Deliver-to Location Type</b>	Internal	<b>Supplier Contact</b>	aaaaaqaosr y aaaasaaoyd
<b>Deliver-to Location</b>	08BOOKS-3905 REEDY CREEK ROAD	<b>Contact Phone</b>	
<b>Deliver-to Address</b>	STATION, ROAD, BLACK MOUNTAINNC, 287110000, US	<b>Supplier Item</b>	
<b>Destination Type</b>	Inventory	<b>Note to Supplier</b>	Test Note to Supplier
<b>Subinventory</b>		<b>Note to Receiver</b>	
<b>Note to Buyer</b>			

Attachments		
Title	File Name or URL	Description
Agreement.pdf	Agreement.pdf	Agreement Details

Distributions						
Distribution	Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status
1	0800-700100-54620000-0000000-0878111-0000-00000000000-0000000-0000-0000000-00000	5/10/23	100	30	315.9	Liquidated

End of Report

30. On the **Edit Requisition** page, click the **Submit** button.

Edit Requisition: 08R0000081

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

Requisitioning BU: 0800 DEPARTMENT OF PUBLIC INSTRUCTION

\* Description: CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5

Justification:

Emergency purchase order number required

Requisition Amount: 315.90 USD  
Approval Amount: 315.90 USD

Funds Status: Passed

Attachments: None

Customer:

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

31. The *Confirmation* pop-up appears. Click the **OK** button.

View More

E V1:G5 Pending approval

E V1:G5  Approved

E V1:G5  Approved

E V1:G5  Approved

E V1:G5  Approved

E V1:G5  Approved

**Confirmation** X

Requisition 08R0000081 was submitted.

View PDF **OK**

Recent Purchases

<p>CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5</p> <p>Internally Orderable ⓘ</p> <p><b>\$10.53</b> EACH</p>	<p>W-STDYSYNC ELA READ&amp;WRIT CMP BND 1Y 4BKS:G10</p> <p>Internally Orderable ⓘ</p> <p><b>\$35.74</b> EACH</p>	<p>CENG-BIG IDEAS MATH:MDL REAL LF SE V2:G5</p> <p>Internally Orderable ⓘ</p> <p><b>\$10.53</b> EACH</p>
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32. On the **Requisitions** page, view the status of the requisition created as **Pending Approval**.

The screenshot shows the 'Requisitions' page with a search bar and a list of recent requisitions. The first requisition is highlighted with a red box.

Requisition ID	Description	Status
08R000081	CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5	Pending approval
08R0000076	CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5	Approved
08R0000071	CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5	Approved
08R0000067	CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5	Approved
08R0000066	CENG-BIG IDEAS MATH:MDL REAL LF SE V1:G5	Approved

## Wrap-Up

Create inventory requisitions (DPI) in NCFS using the steps above.

## Additional Resources

### Virtual Instructor Led Training (vILT)

- PO101-PO Procurement Requestor