PO-03 Manage Purchase Orders (Sourced from Oracle Requisitions)

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.

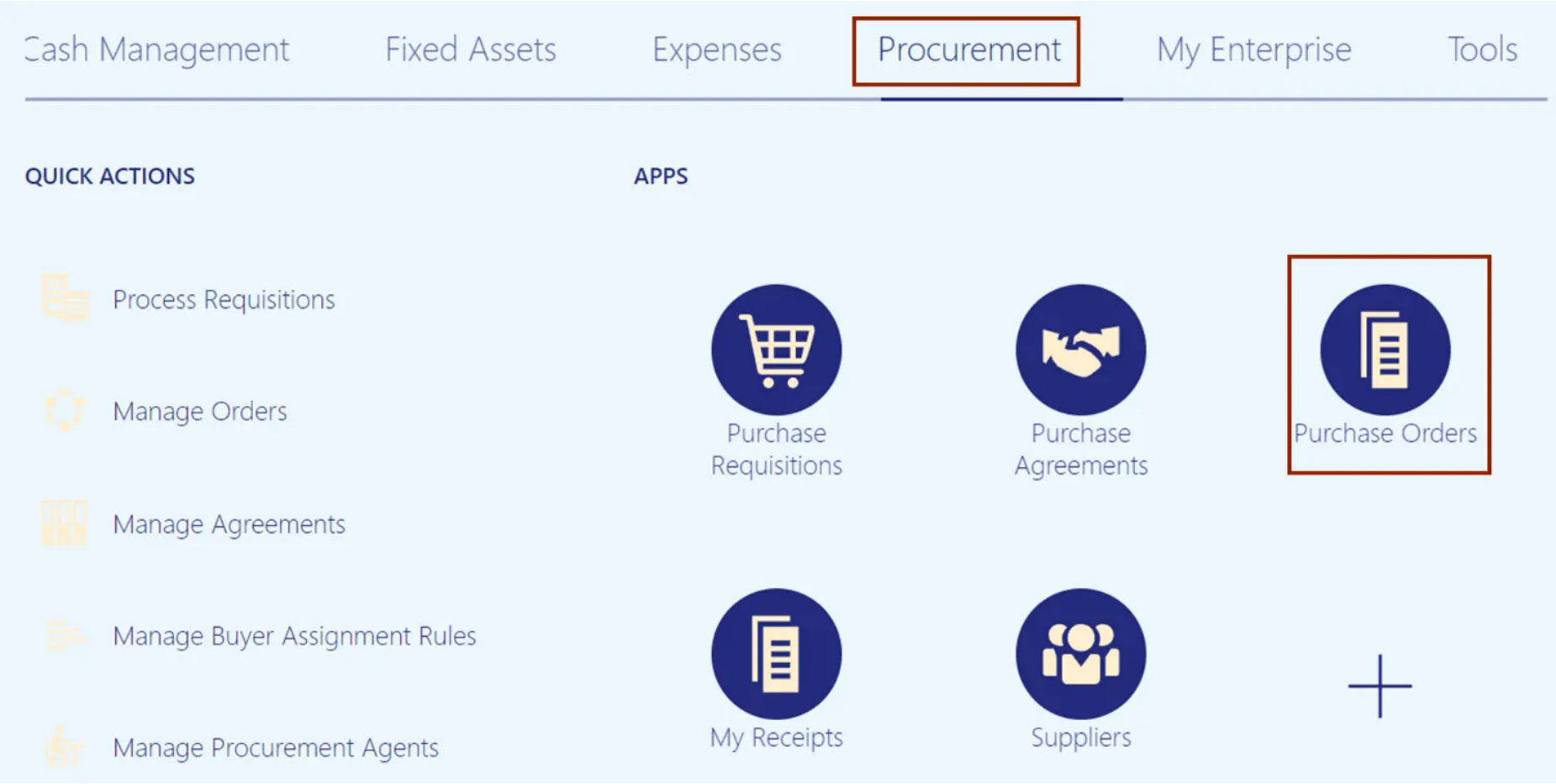
Manage Purchase Orders

To Manage Purchase Orders in NCFS, please follow the steps below. There are 18 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

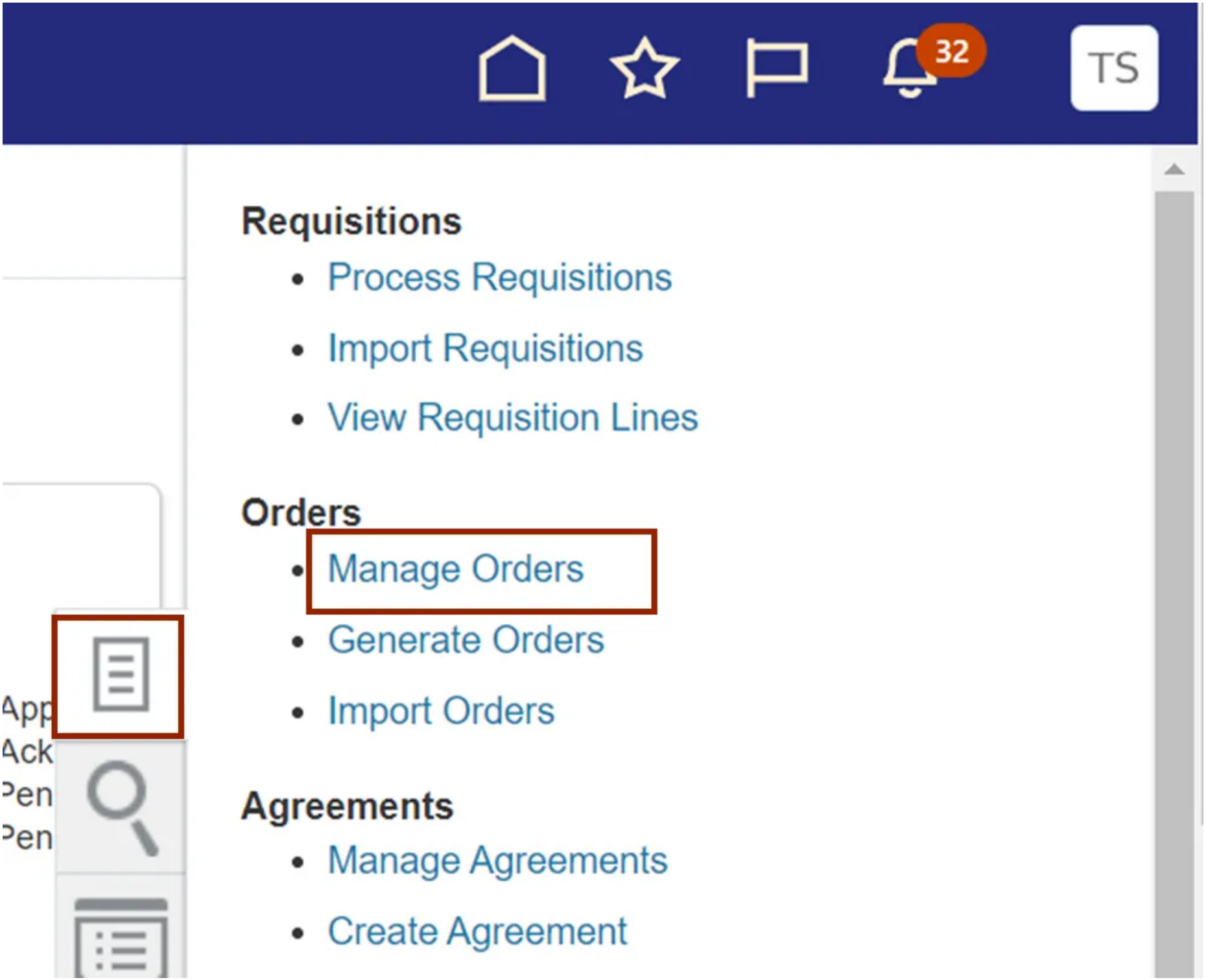
Step 2. On the **Home** page, click the **Procurement** tab. Click the **Purchase Orders** app.

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Step 3. Click the **Tasks** icon. Under Orders, click **Manage Orders**.

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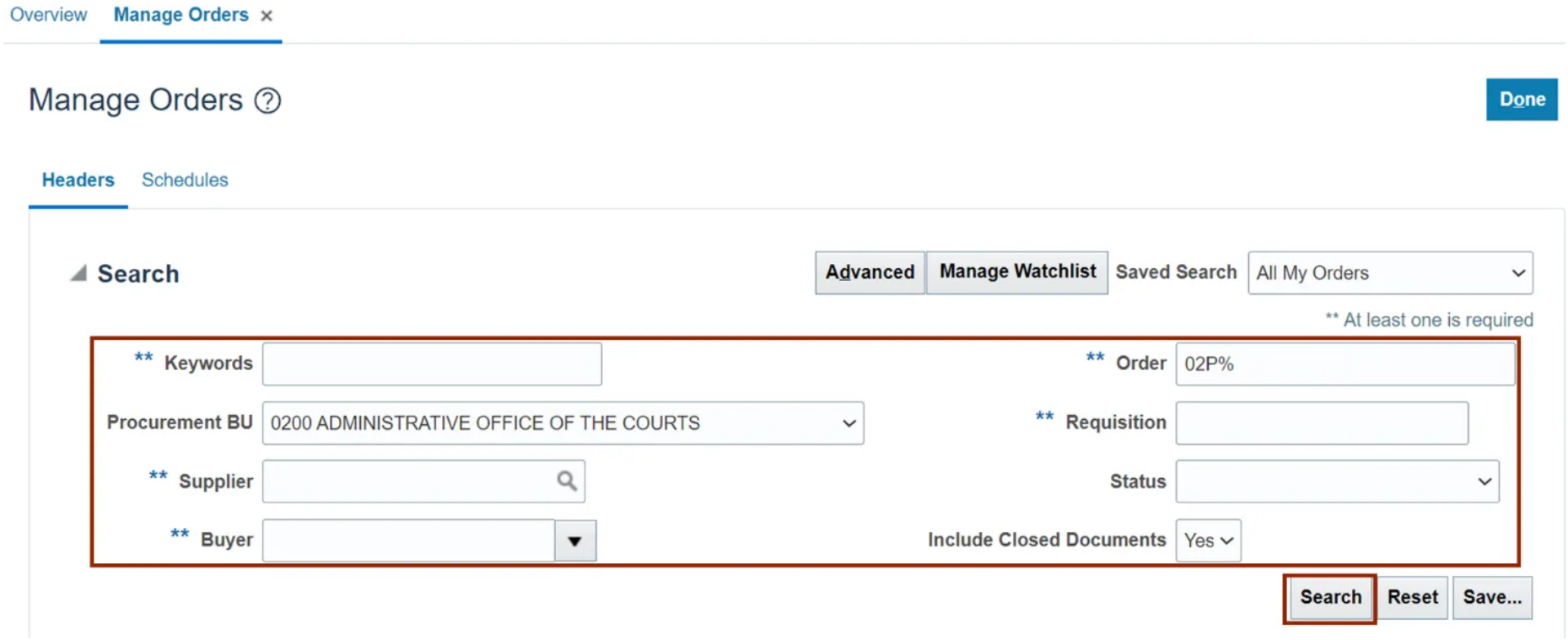

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TS
Requisitions
Process Requisitions
Import Requisitions
View Requisition Lines
Orders
Manage Orders
Generate Orders
Import Orders
Agreements
Manage Agreements
Create Agreement

Step 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.

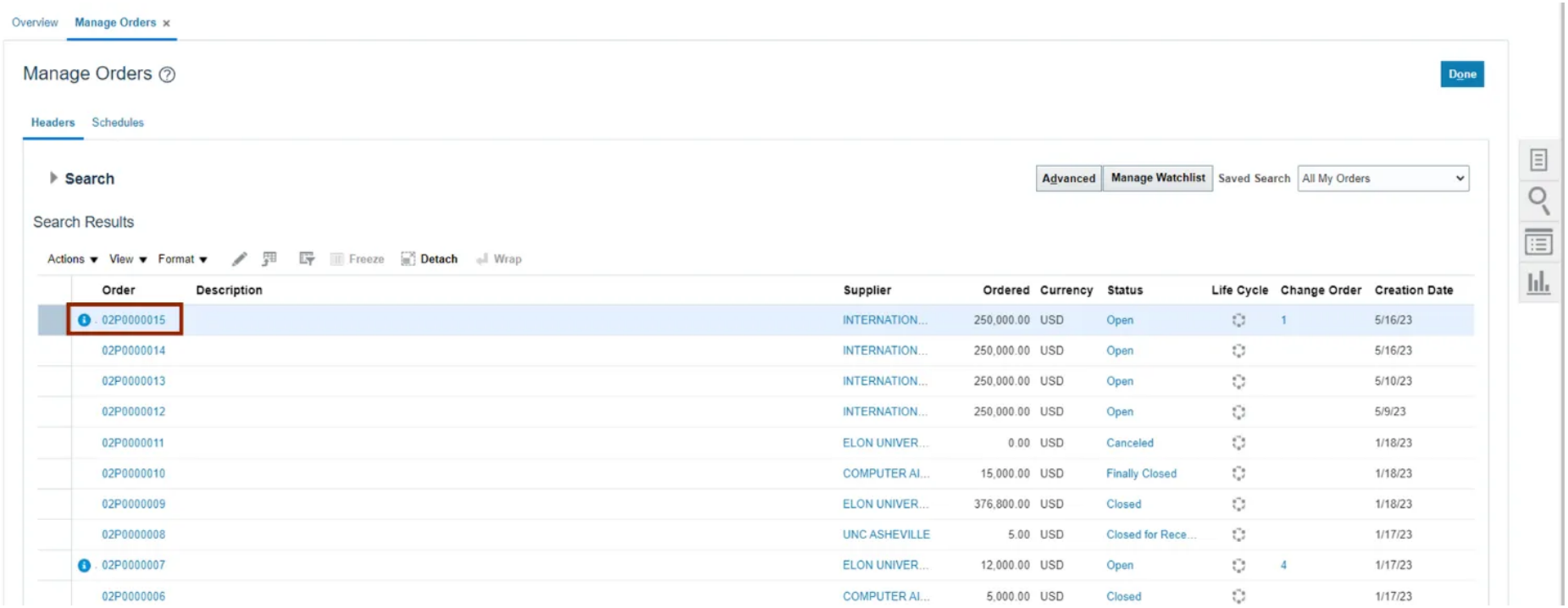
Note: Delete any auto-populated details in the ***Buyer*** field.

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

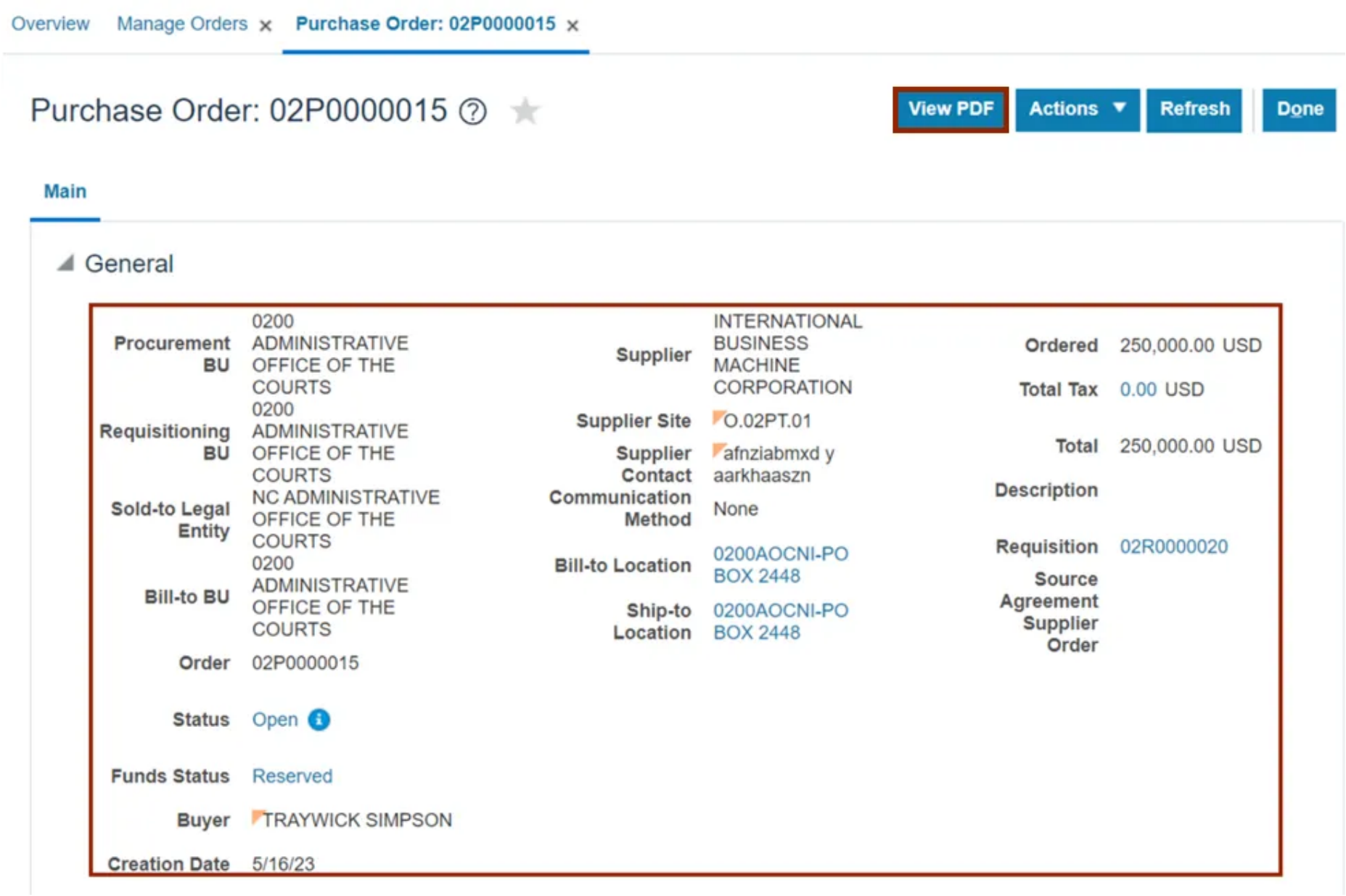
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Step 6. The **Purchase Orders** page opens. On the ***General*** section, check the ***PO Status, Funds Status, Buyer, Total Amount, Description, Requisition, Supplier Name***, and ***Supplier Site*** fields.

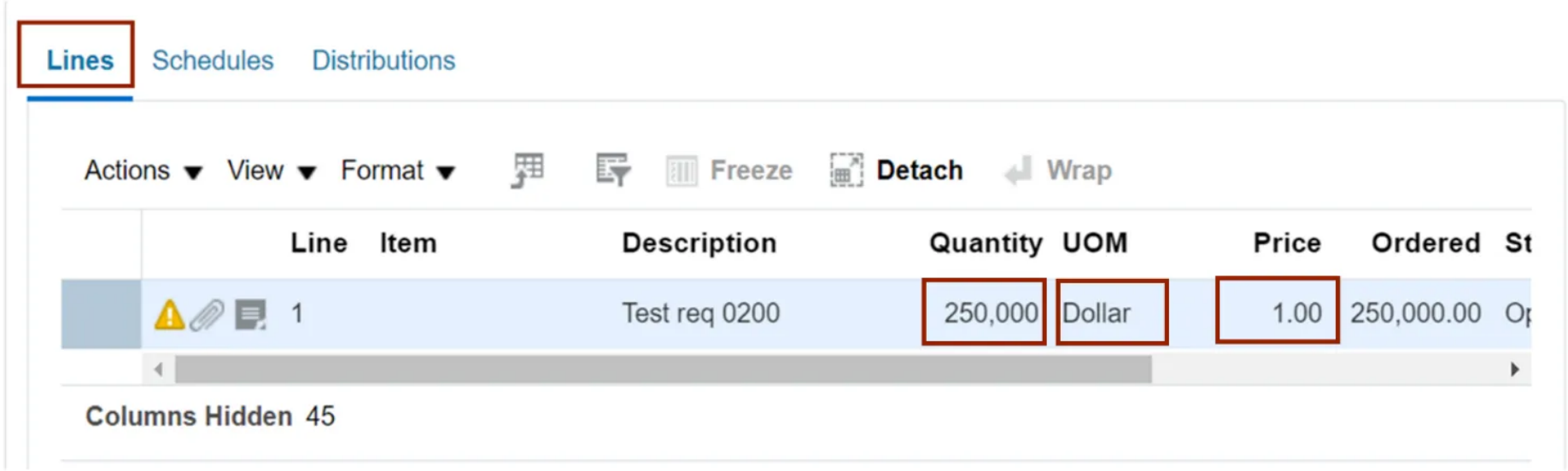
Note: To view the PO in PDF version, click the **View PDF** button.

Image



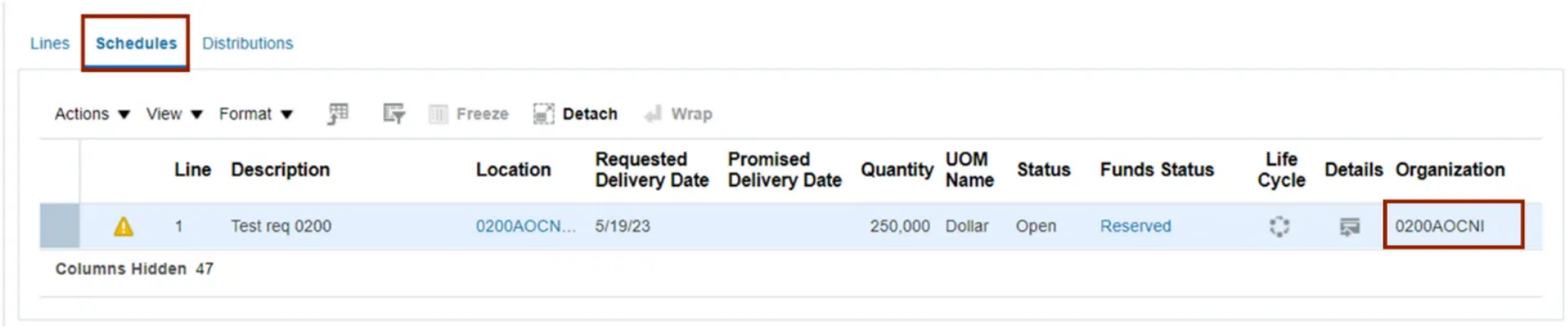
Step 7. Scroll down and validate the ***Lines*** section information. Check the ***Quantity, UOM***, and ***Price*** fields.

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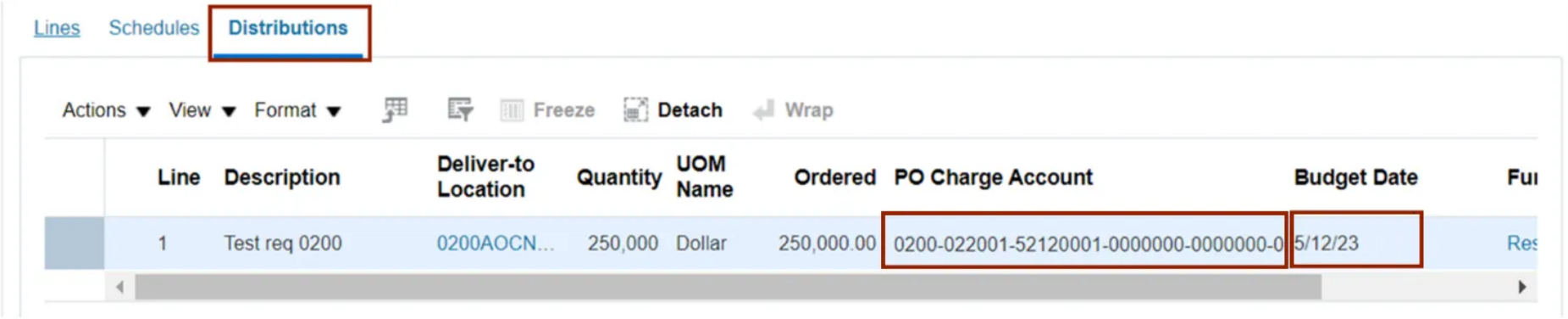
Step 8. Validate the ***Schedules*** section information. Check the ***Organization*** field.

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

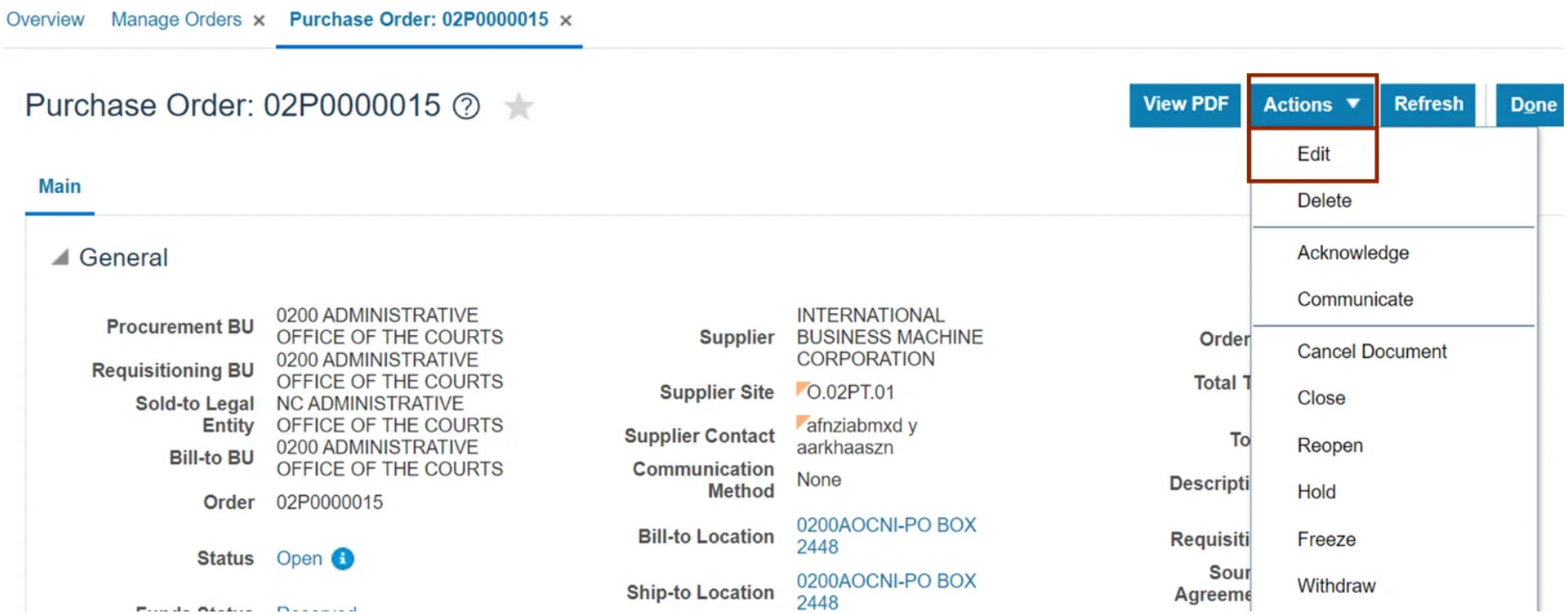
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Note: If there are changes identified and required after validation of the information on the Purchase order page, please follow the steps from step 10- 15. If there are no changes required in the PO, please skip to step 15.

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

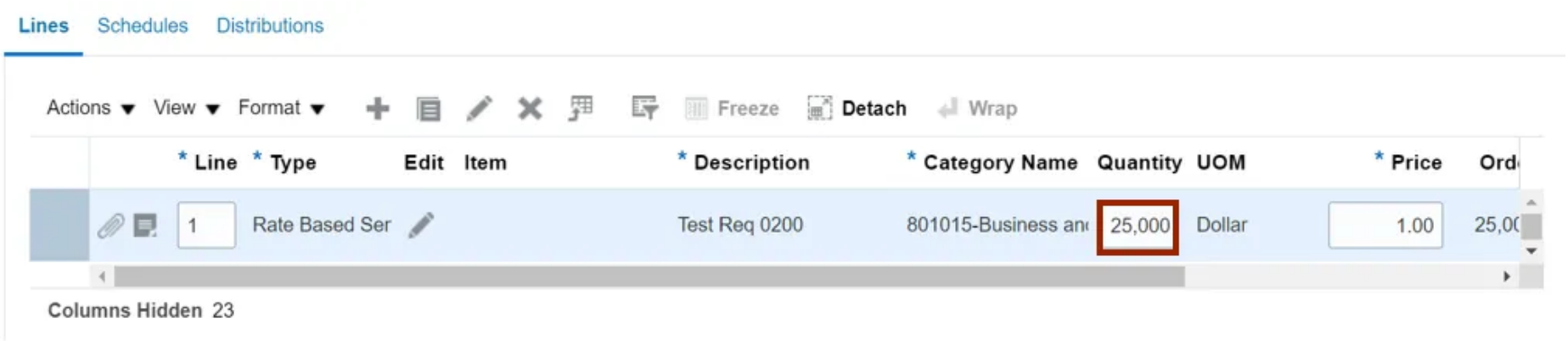
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Step 11. Make the required edit in the Purchase Order.

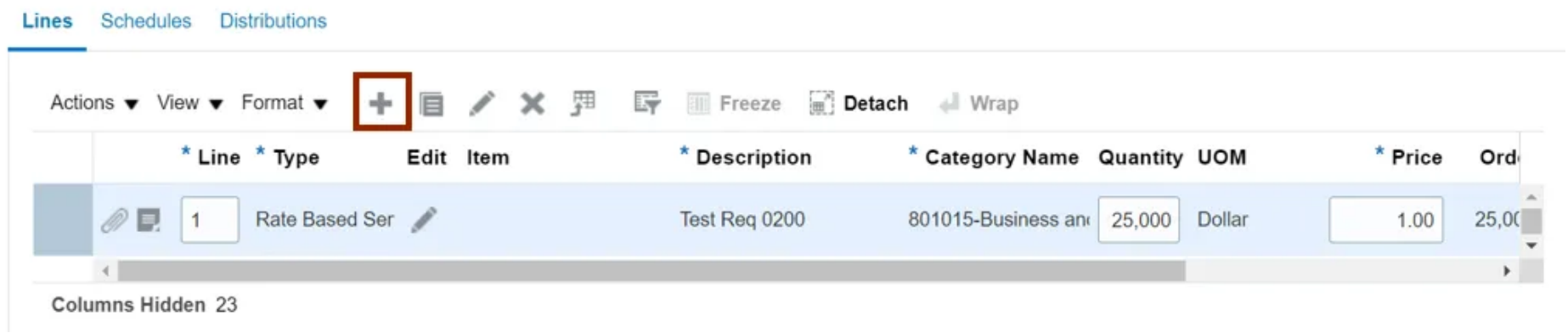
In this example we choose, to update ***Quantity - 25,000*** in the **Lines** section.

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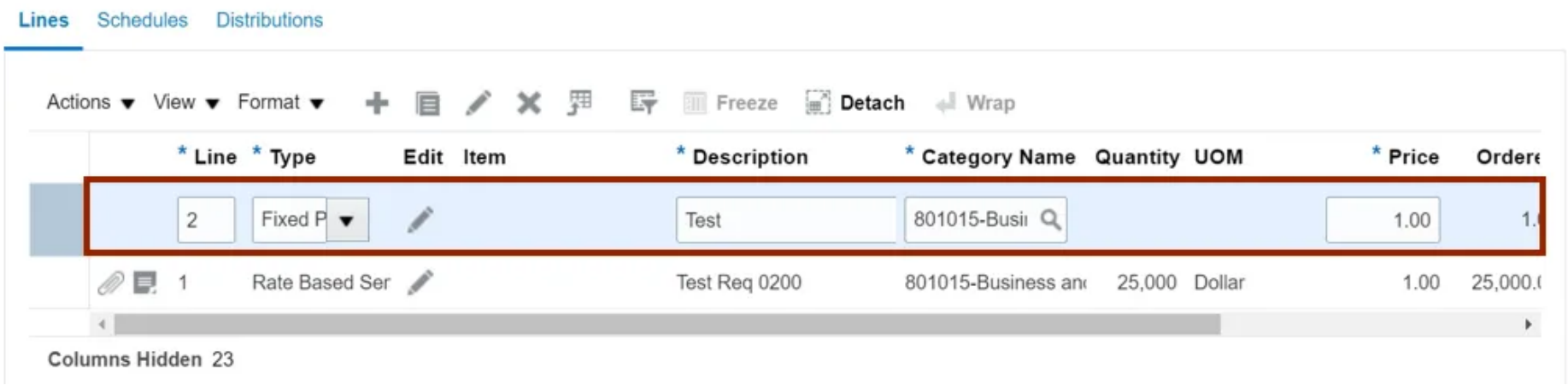
Step 12. Click the **Plus** icon to add a new line to the Purchase Order.

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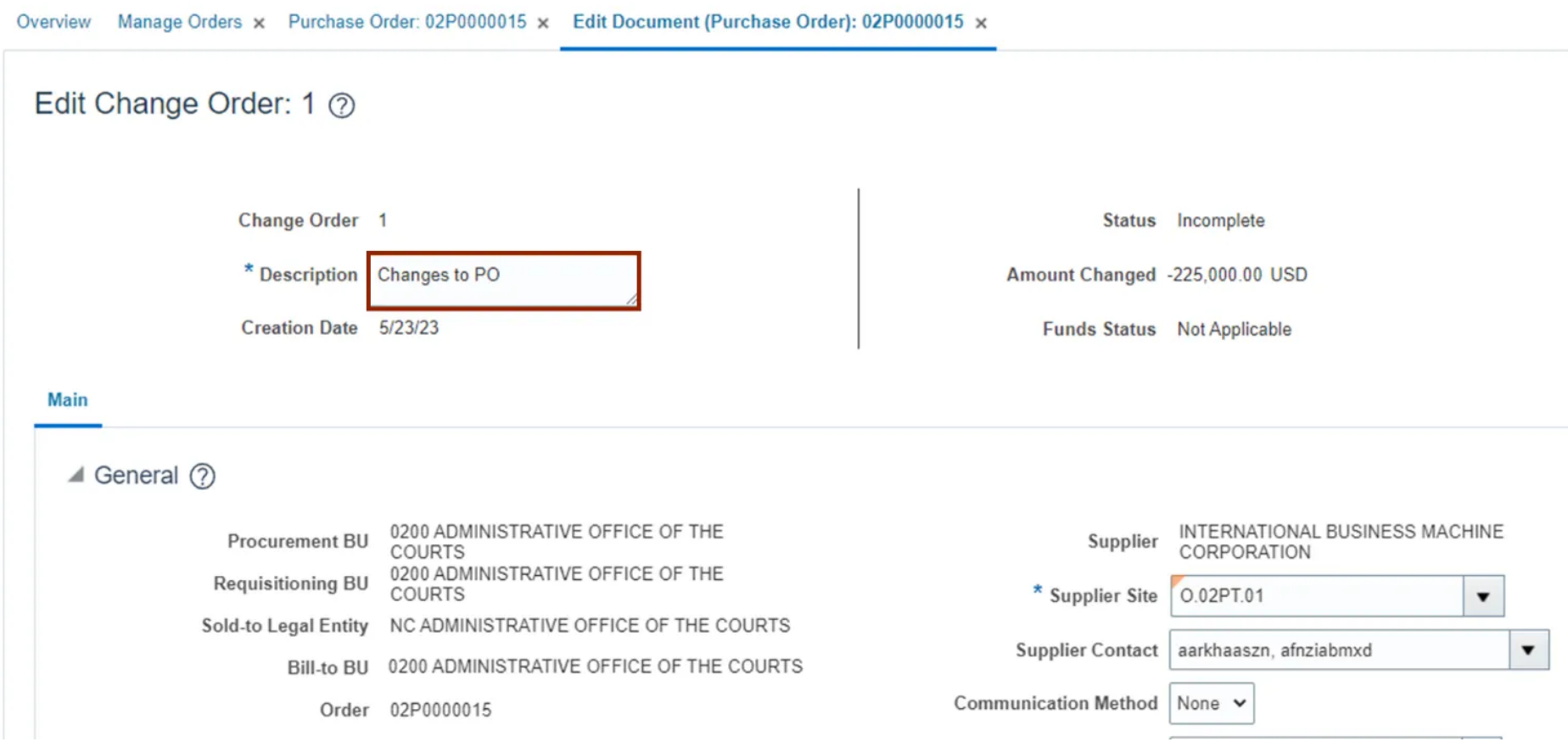
Step 13. Enter the applicable details in the new line of the Purchase Order.

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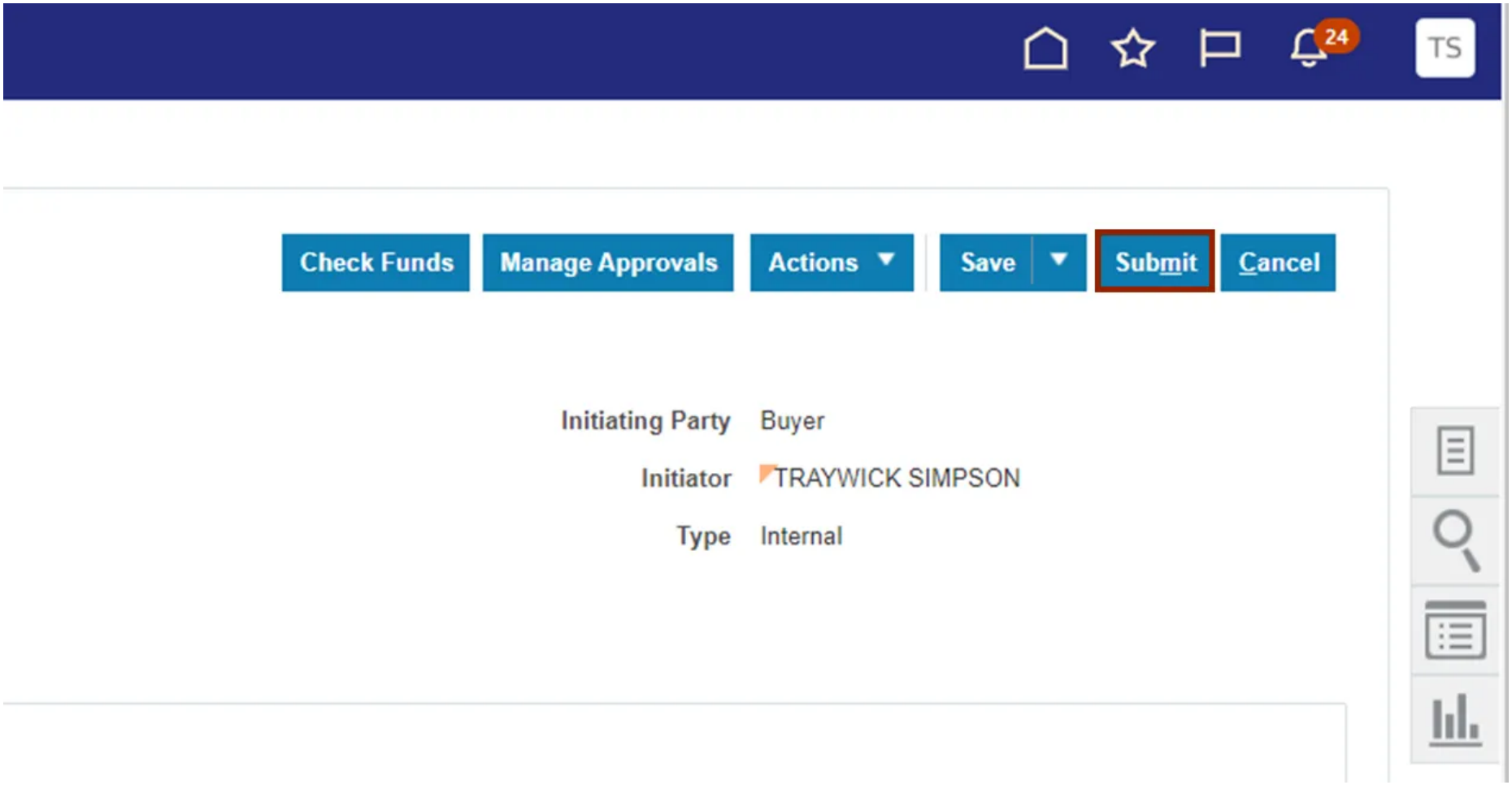
Step 14. Enter the value in ***Description** field.

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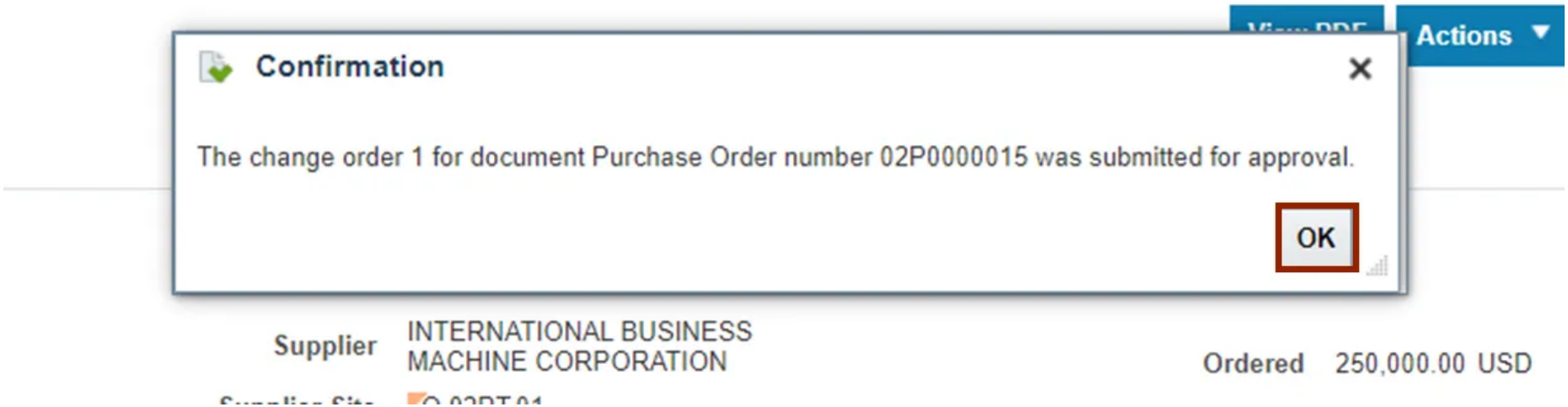
Step 15. Click the **Submit** button.

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

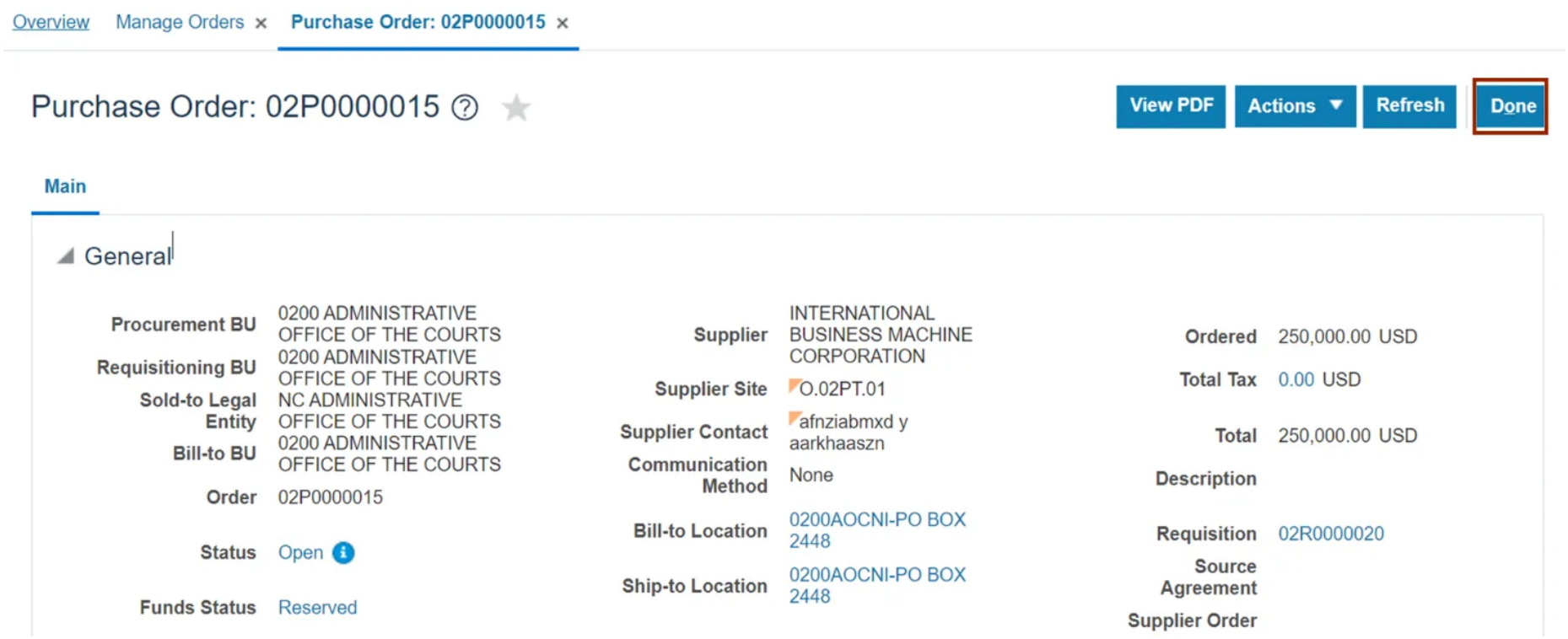
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Step 17. Click the **Done** button.

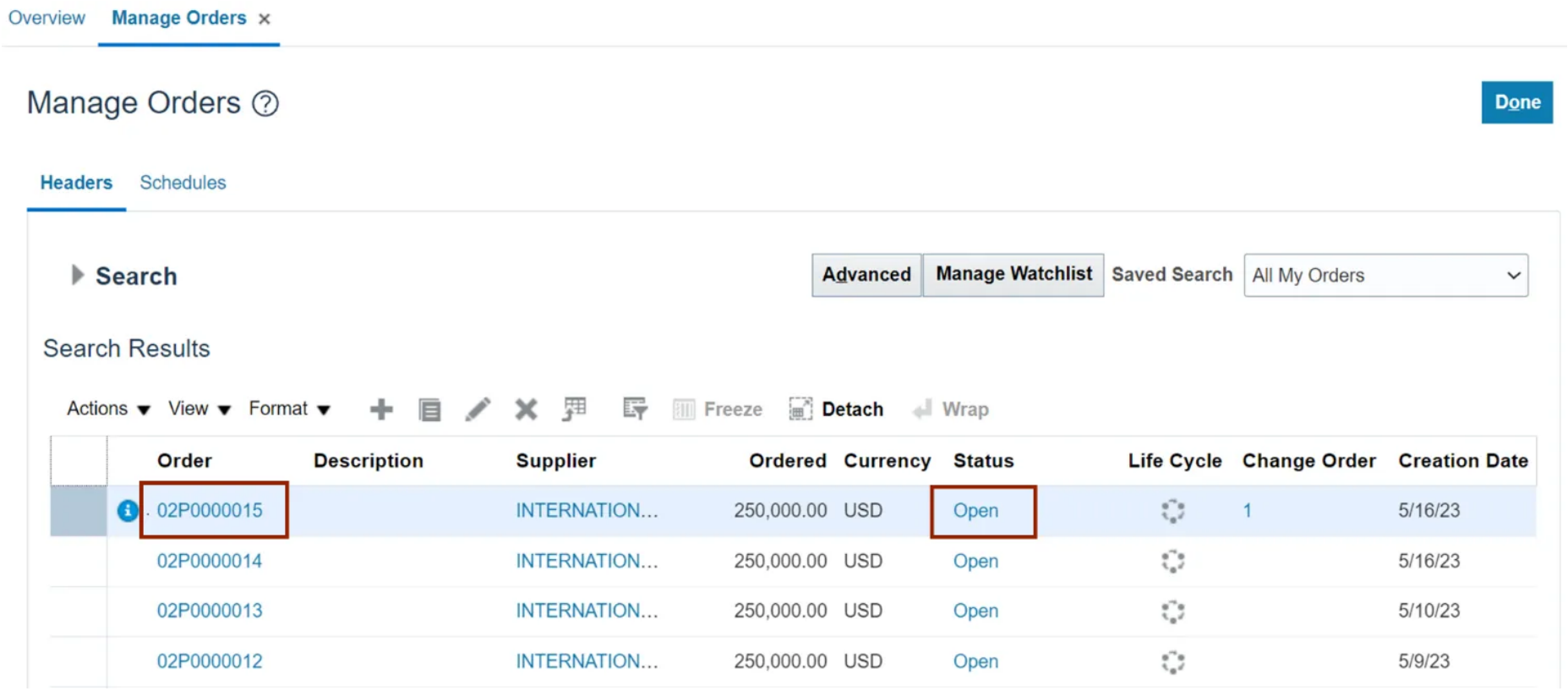
Note: Change Order has been submitted for approval, and once reviewed and approved, it will be completed and the PO will be updated as needed.

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Step 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.

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Wrap-Up

Manage Purchase Orders using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - PO102: PO Buyer

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