



# 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.ncosc.gov/training/NCFS-help-documents/inv-12-create-orders-behalf-others-self-service-procurement>

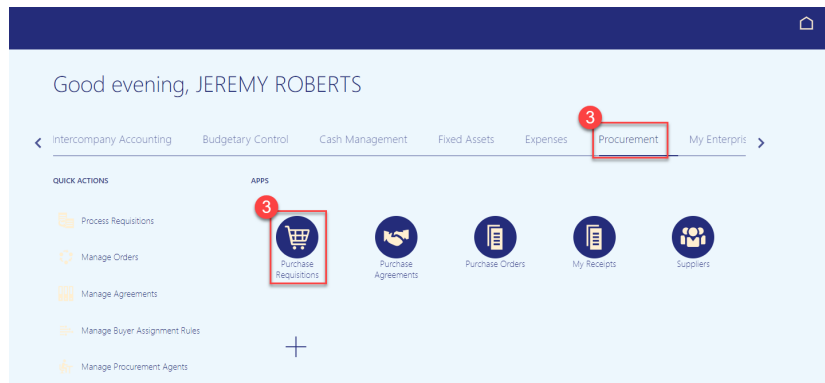
### Introduction and Overview

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.

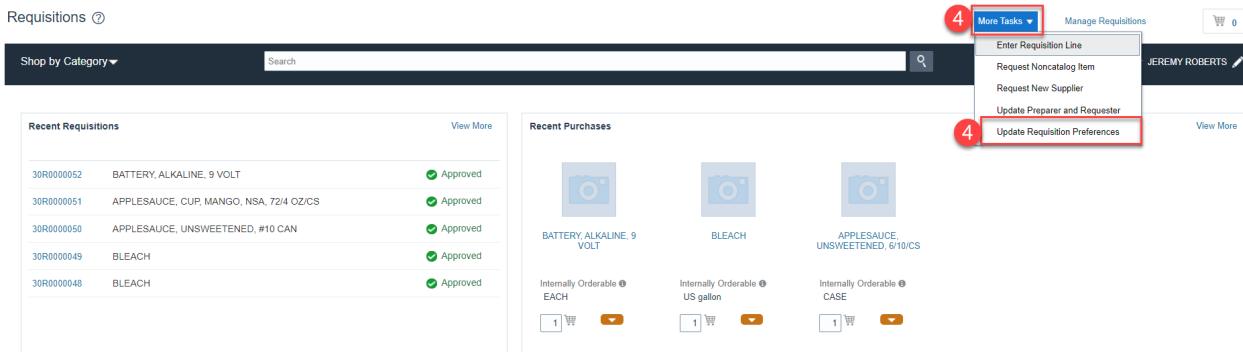
### Initiate Consumption Requisition

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

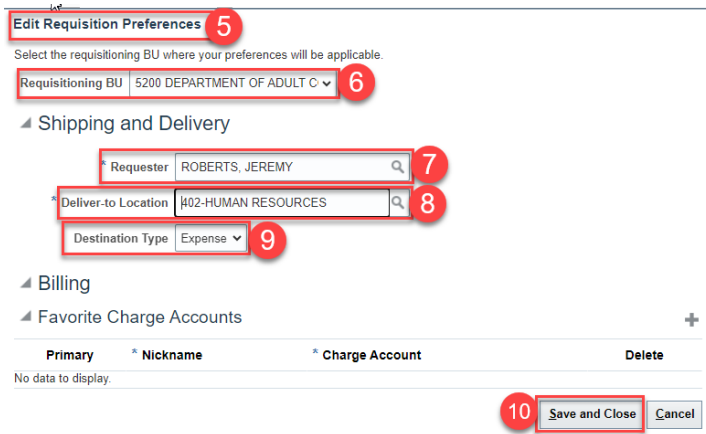
1. Navigate to the NCFS environment with this link: <https://osc.nc.gov/ncfslogin>.
2. Log in to the NCFS portal with your credentials to access the system.
3. On the **Home** page, under the **Procurement** tab, click the **Purchase Requisitions** app.



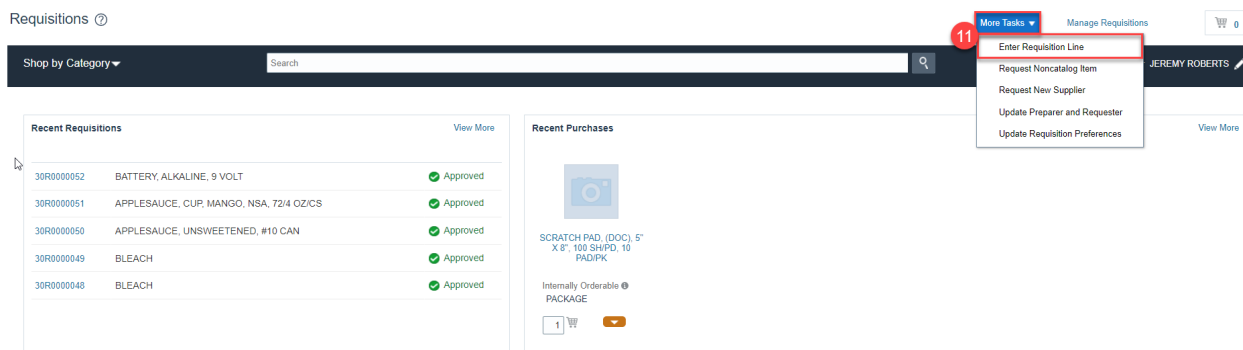
4. Select **Update Requisition Preferences** from the **More Tasks** drop-down.



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\*\*\***

Charge Account dialog box showing fields for Agency (5200), Budget Fund (108120), Account (53410007), Agency Mgmt Unit (5204580), Agency Program (0000000), Funding Source (0000), Project (0000000000), Inter Fund (0000000), Future 1 (0000), Future 2 (0000000), and Future 3 (0000000). Buttons for Search, Reset, OK, and Cancel are at the bottom.

- 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.

Add to Cart Done [Shopping Cart Icon] 0

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

Shopping Cart Review screen showing item: ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE \$32.59 CASE. Total \$32.59. Buttons for Review and Submit are visible.

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 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">34</span>                      Delete                      View Punchout Cart                 </div>	502023-Non alcohol...	1	CASE	32.5887 USD	32.59	Not reserved	✕
					<b>32.59</b>		

**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 1 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  
Requested Delivery Date 10/10/23

\* Deliver-to Location 402-HUMAN RESOURCES  
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	✕
<b>Total</b>				<b>32.59</b>		

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

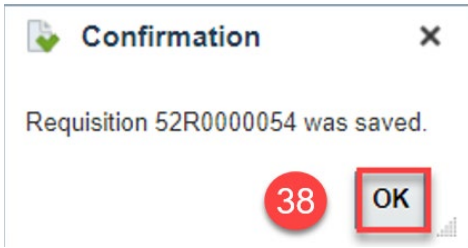
Requisition Amount 32.59 USD  
Approval Amount Calculate Amount with Tax  
Funds Status Not reserved  
Attachments None

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

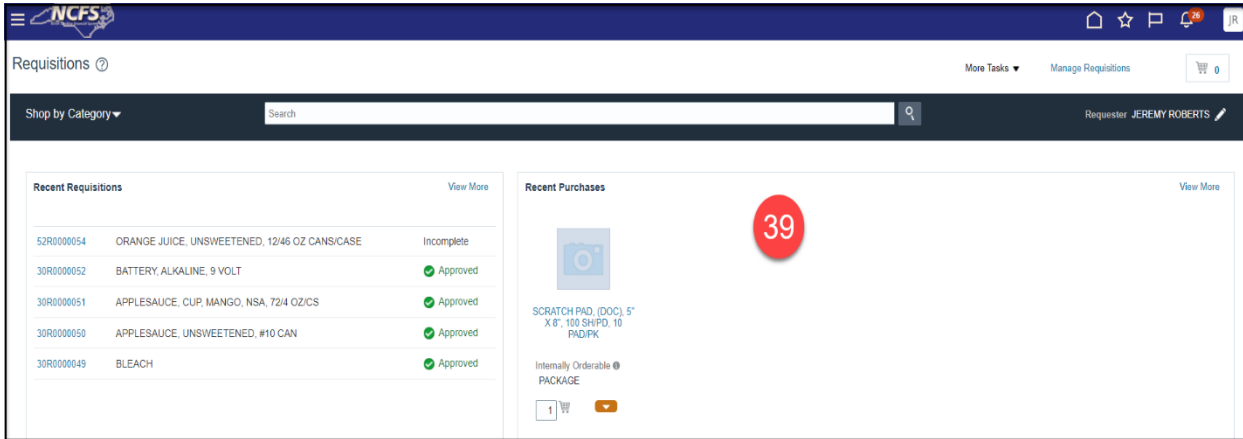
Requisition Lines



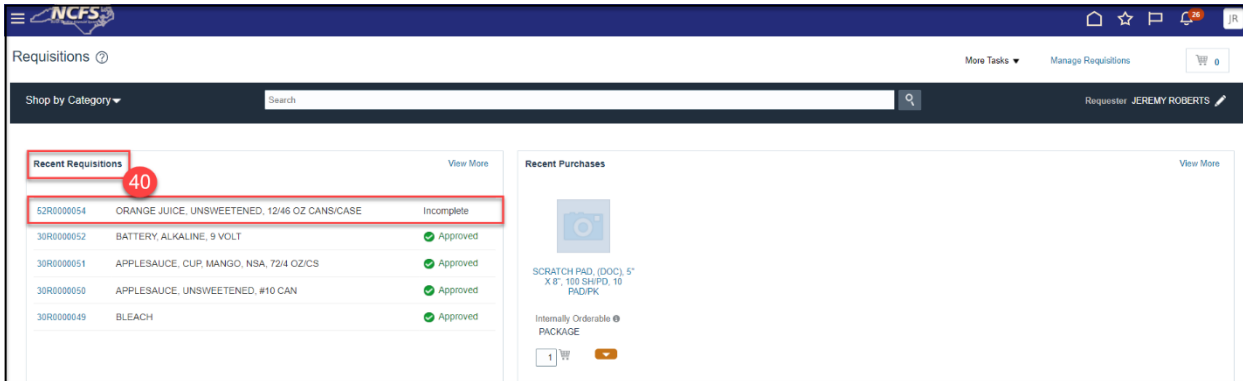
38. A **Confirmation** pop-up appears. Click the **Ok** button.



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



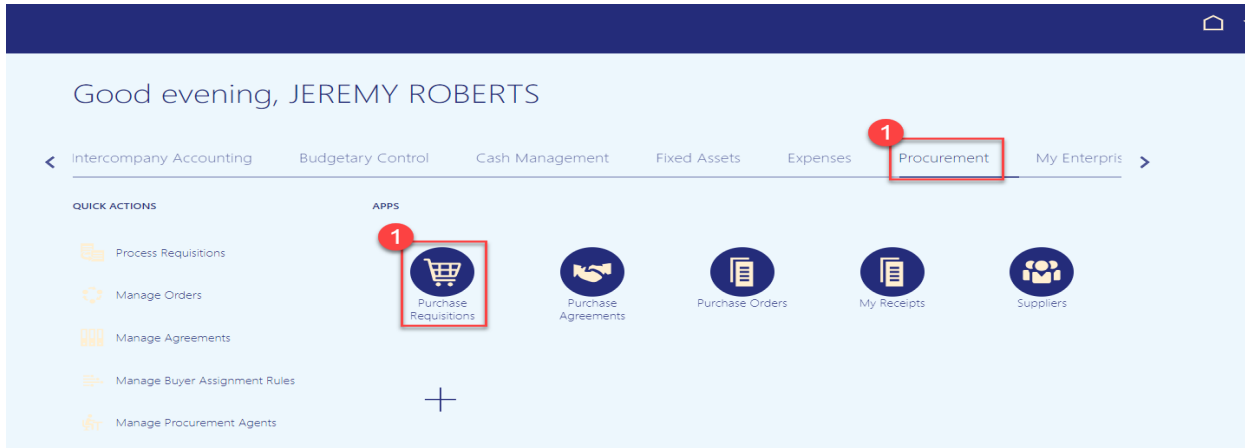
40. On the **Requisitions dashboard**, you can view the **Recent Requisitions**.



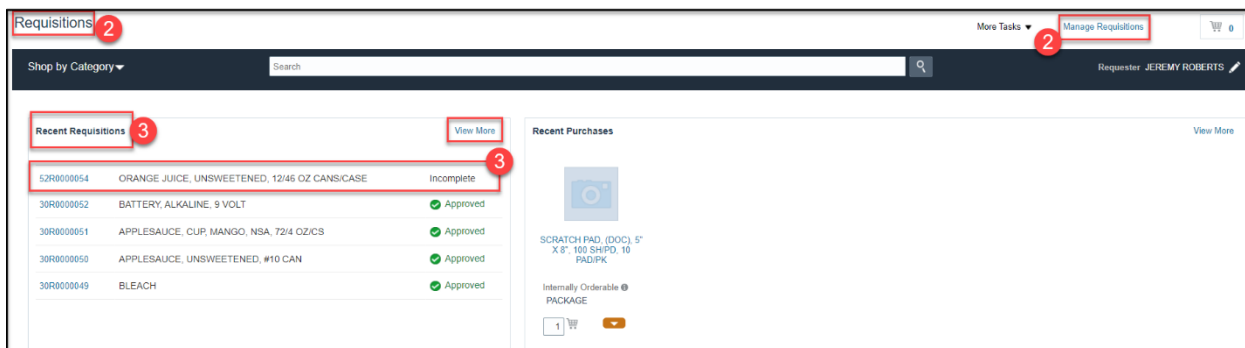
## Review and Submit DAC Consumption Requisitions

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.

Manage Requisitions

Requisitioning BU [5200 DEPARTMENT OF ADULT CORRECTION] 5

\*\* Entered By [ROBERTS, JEREMY] 6

\*\* Requisition [ ] 7

Description [ ] 8

Created [ ] 8

Status [All] 8

Requester [ ] 8

\*\* Supplier [ ] 7

Order [ ] 8

\*\* Item [ ] 7

Requisitions Requiring Attention [ ] 8

Search Reset Save... 9

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

Manage Requisitions

Requisitioning BU [5200 DEPARTMENT OF ADULT CORRECTION]

\*\* Entered By [ROBERTS, JEREMY]

\*\* Requisition [ ]

Description [ ]

Created [ ]

Status [All]

Requester [ ]

\*\* Supplier [ ]

Order [ ]

\*\* Item [ ]

Requisitions Requiring Attention [ ]

Search Results 10

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	

Rows Selected 1

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

Requisition: 52R0000054

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]

Check Funds View Life Cycle Actions Done

Duplicate

Cancel Requisition

Delete

Edit 11

Reassign

View Document History

View PDF

Requisition Lines

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		

Rows Selected 1 Columns Hidden 13





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

Requisition Amount 32.59 USD

Approval Amount 32.59 USD

Funds Status Not reserved

Attachments None

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

12

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	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE	502023-Non alcohol...	1	CASE	32.5887 USD	32.59	Not reserved	X
<b>Total</b>						<b>32.59</b>		

Rows Selected 1 Columns Hidden 8

Line 1: Details

Delivery

\* Requester ROBERTS, JEREMY

\* Deliver-to Location 402-HUMAN RESOURCES

Requested Delivery Date 10/10/23

Deliver-to Address 7020 YONKERS ROAD, RALEIGHNC, 276990000, WAKE, US

Billing

View Format Freeze Detach Wrap

Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
5200-108120-53410007-5204580-000	10/3/23	100	1	32.59	Not reserved	X
<b>Total</b>				<b>32.59</b>		

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

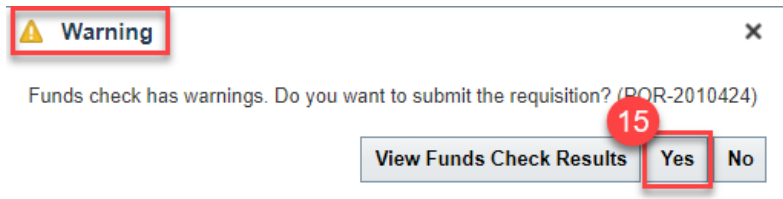
View Format Funds Status Warning

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	5200-108120-5309999	FYS_J...	NC Agency to Account D...	SHANNON

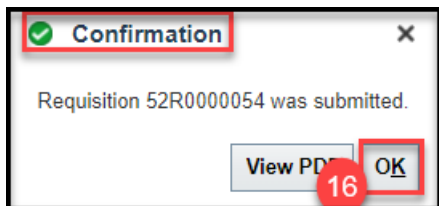
14 **Done**



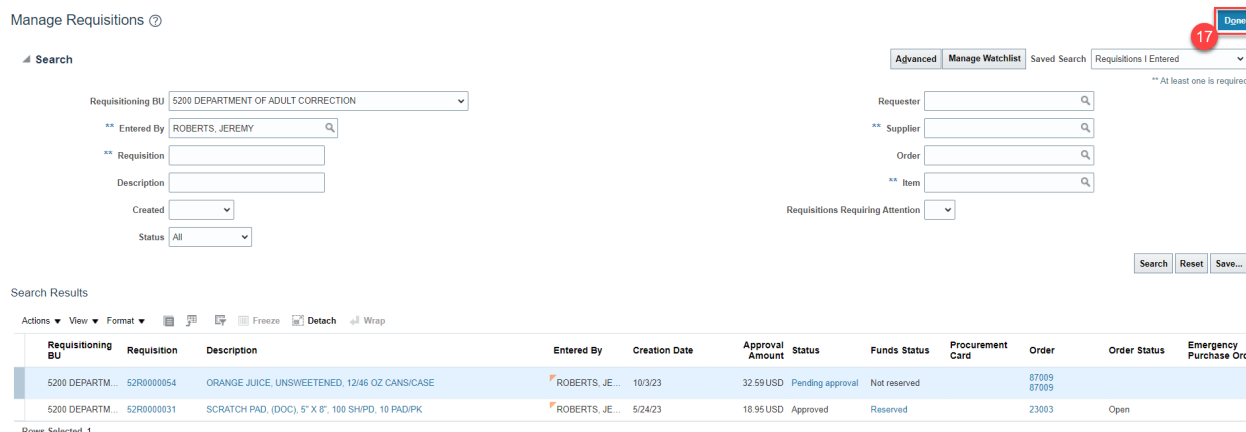
15. Click **YES**.



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

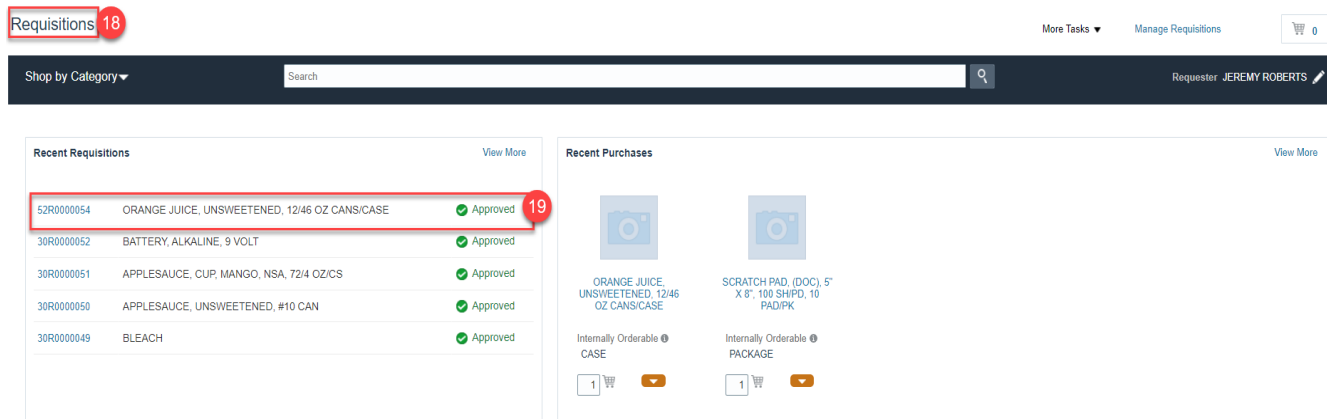


17. On the **Manage Requisitions** page, click the **Done** button. You are redirected to the **Requisitions** dashboard.




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

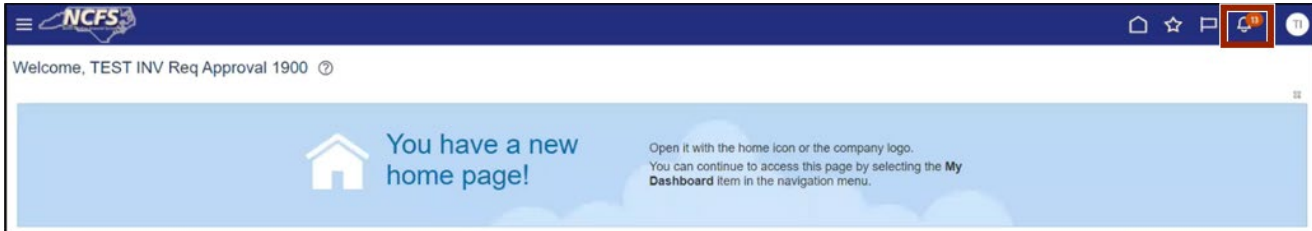
19. Status should now show **“Approved”**.



## Approve Customer Orders

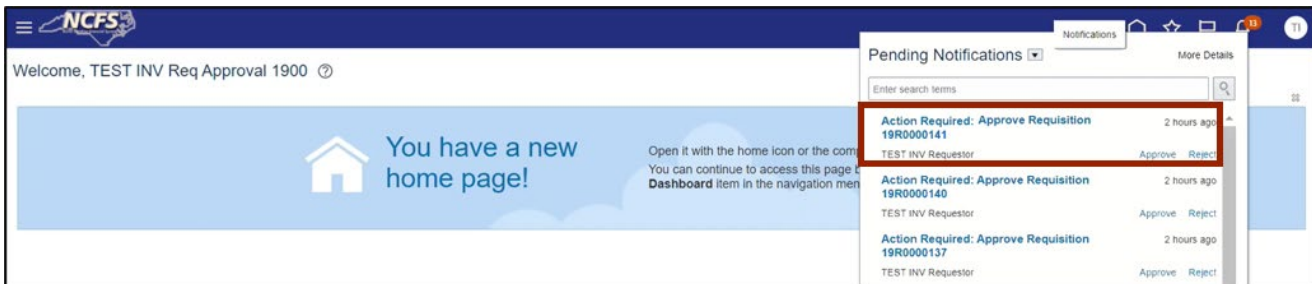
To Approve Customer Orders in NCFS, please follow the steps below:

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

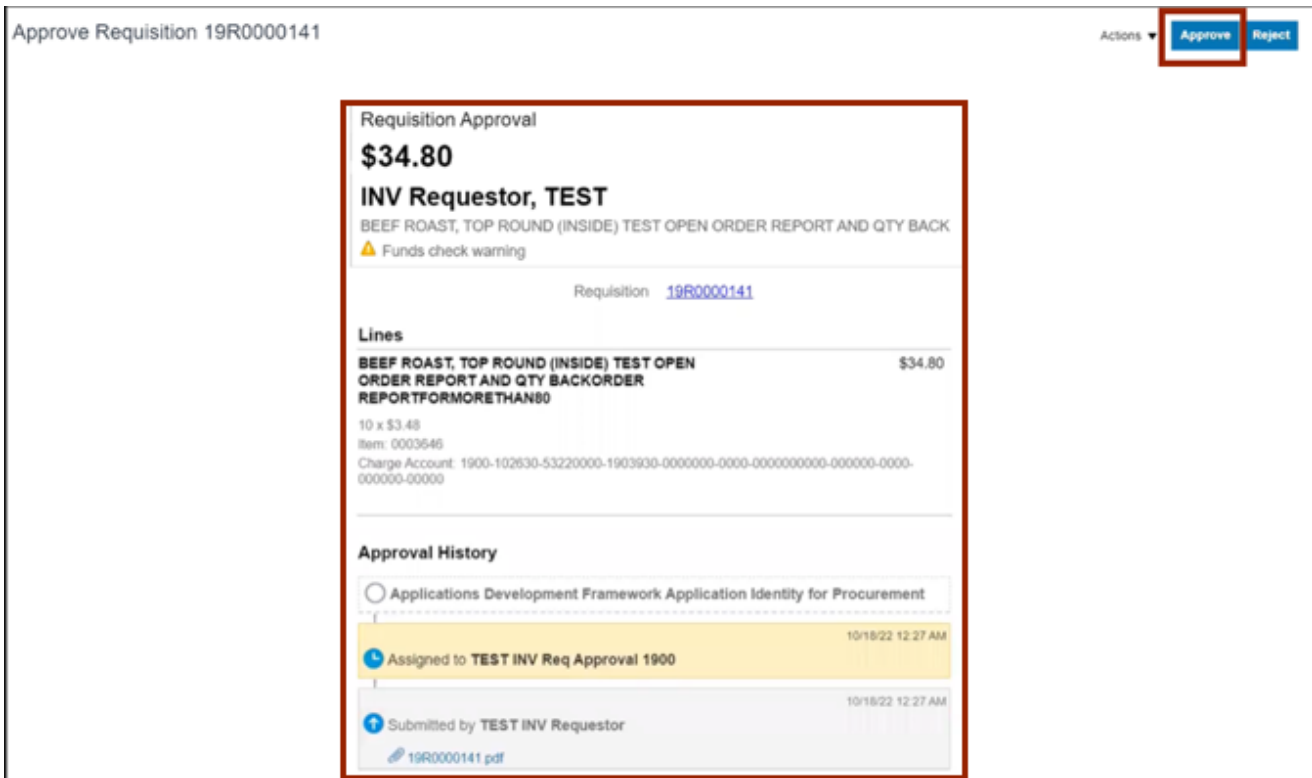


3. The *Pending Notifications* pop-up appears. On this pop-up, click the **Approve Requisition** notification.

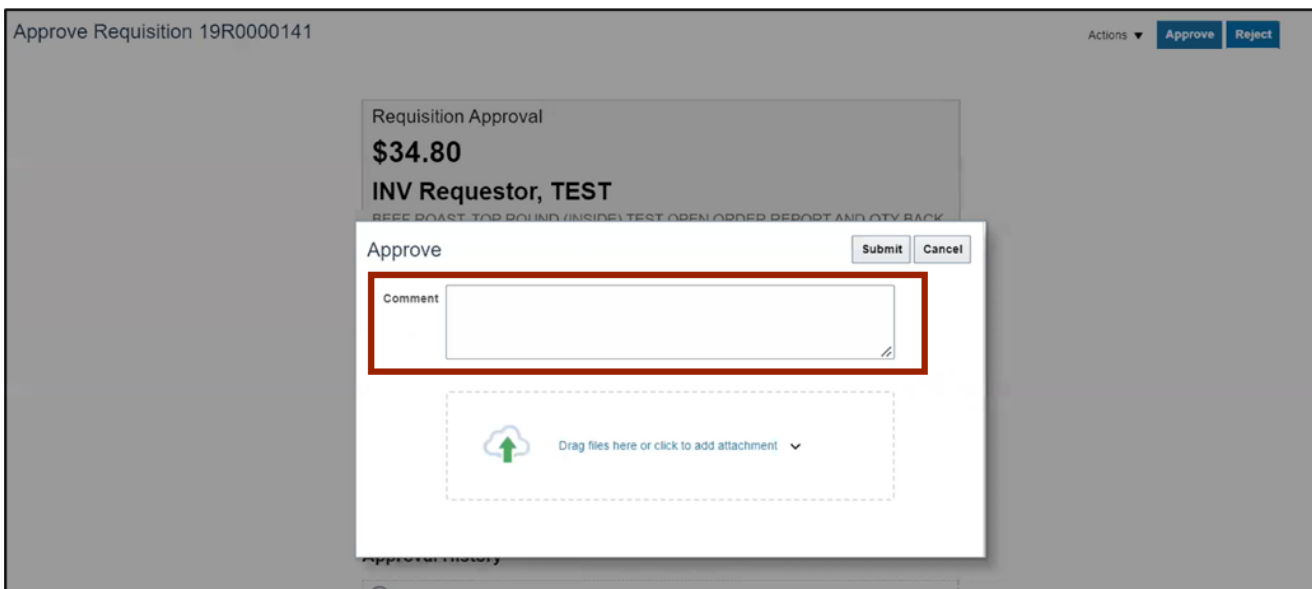
In this example, we choose the Action Required: Approve Requisition 19R0000141 notification link.



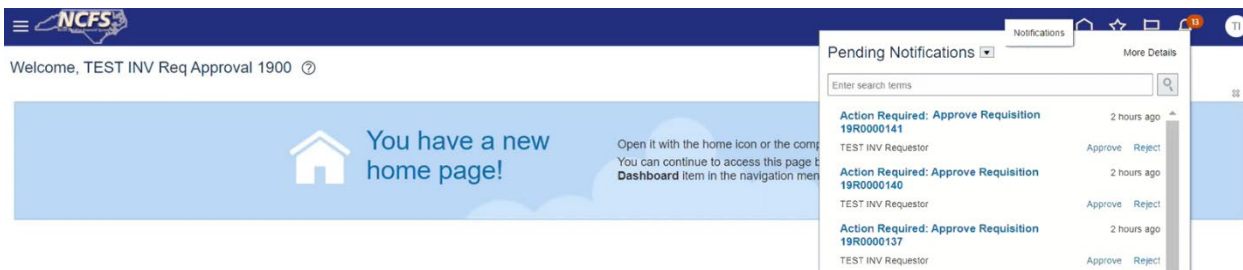
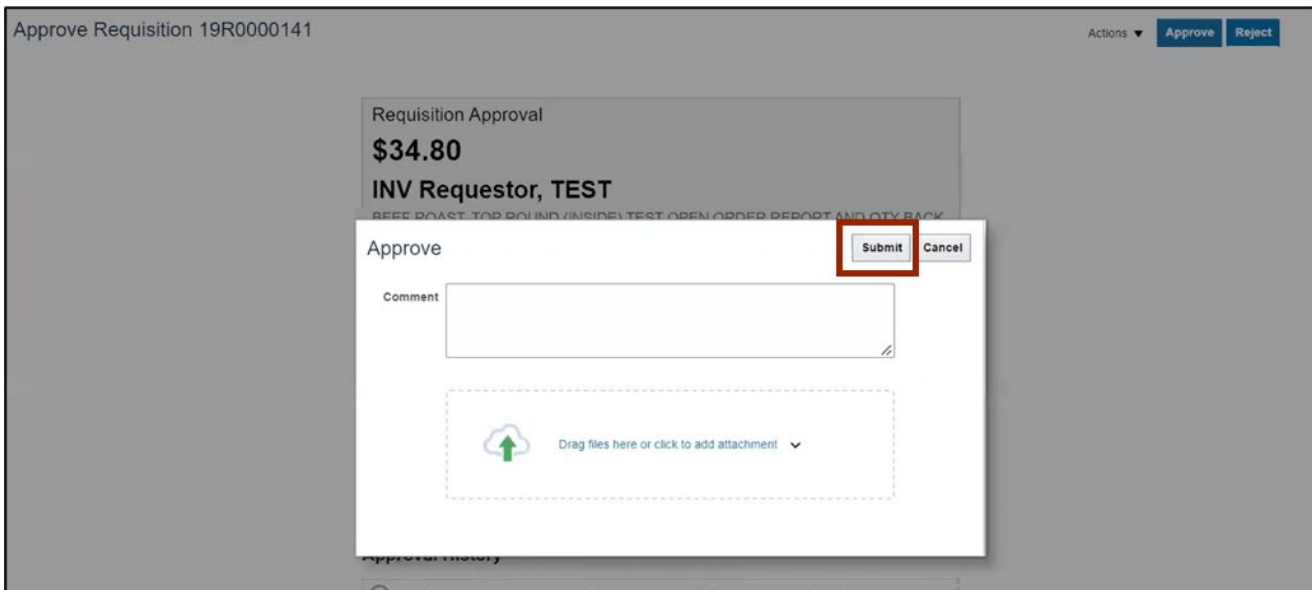
- The **Approve Requisition** page opens with all the requisition details to review for errors/accuracy. On the **Approve Requisition** page, click the **Approve** button.



- 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.ncosc.gov/training/NCFS-help-documents/inv-12-create-orders-behalf-others-self-service-procurement> (QRG)