LECTURE AGREEMENT PURCHASE REQUISITION

PURPOSE: TO RECORD AND ENCUMBER FUNDS FOR A LECTURE AGREEMENT CONTRACT

REQUIRED DOCUMENTATION & PREAPPROVALS:

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. REQUEST FOR CONTRACT FORM (RFC)
3. DETAILED SCOPE OF WORK AND PAYMENT PROVISIONS
4. COMPLETED AND SIGNED EVALUATION OF EMPLOYER-EMPLOYEE RELATIONSHIP FORM
5. BUDGET NUMBER AND AVAILABLE FUNDING

REQUIRED ATTACHMENT: REQUEST FOR CONTRACT FORM, SCOPE OF WORK AND PAYMENT PROVISIONS AND COMPLETED AND SIGNED EVALUATION OF EMPLOYER-EMPLOYEE RELATIONSHIP FORM.

CHECK "AMOUNT ONLY" BOX: YES

PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE - apinvoice@sdccd.edu. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER'S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

Note: The process for Lecture Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

LECTURE AGREEMENT REQUISITION

Log into PeopleSoft at myportal.sdccd.edu using your 10 digit Employee ID number as your Username and Password. Select the Finance Dashboard.
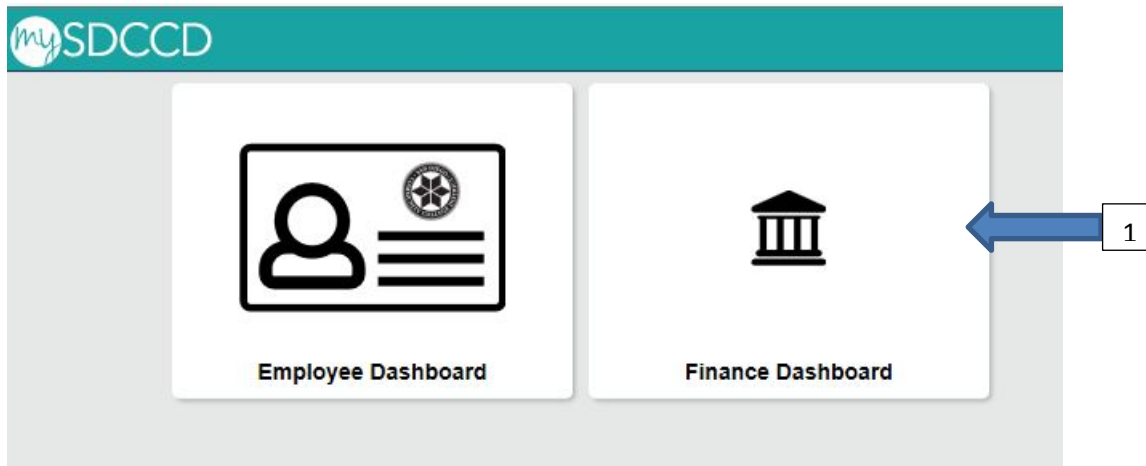
Next, navigate to *Procurement/Create a Requisition*.
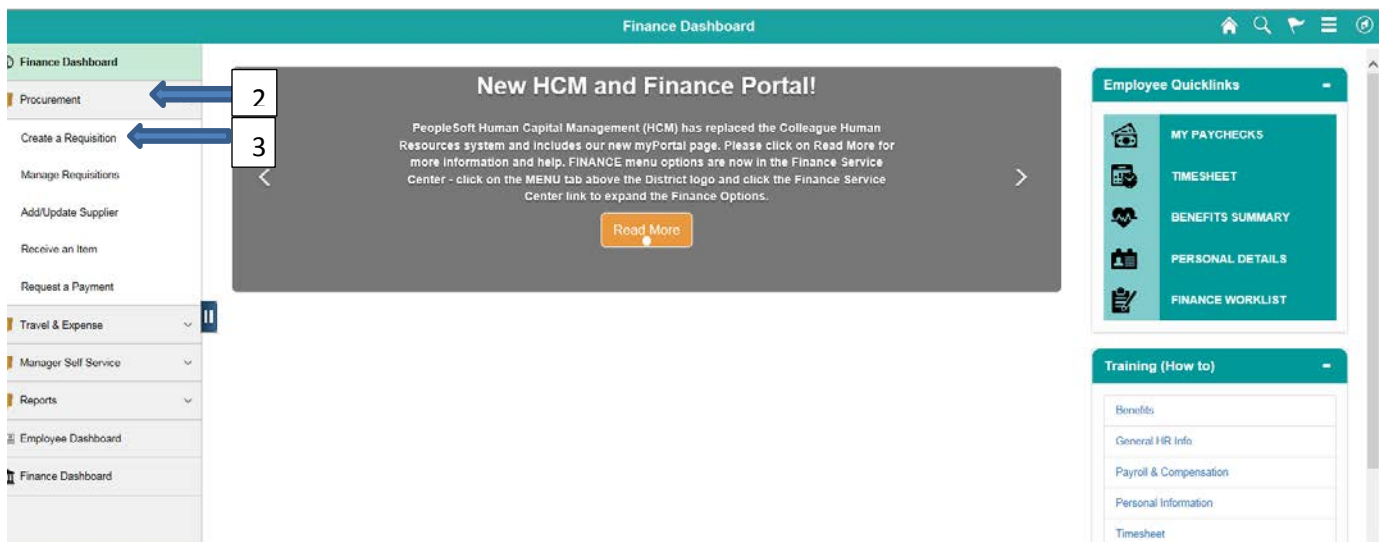
This is the *Requisition Settings* page. When creating a requisition, enter info on this page and it will auto populate into each line item of the requisition.

Requisition Settings

Business Unit MIR01   San Diego Miramar College   Bid No/Quote [   ]
*Requester CDEMOLL   Carrie De Moll   Priority Medium ▾
*Currency USD

Default Options ?
◉ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
○ Override   If you select this option, the defaults specified below will override any predefined values for these fields,only non-blank values are assigned.

Line Defaults ?

Supplier [   ]   Category [   ]
Supplier Location [   ]   Unit of Measure EA
Buyer [   ]

Shipping Defaults

Ship To MIR
Due Date [   ]   Attention [   ]

Distribution Defaults

SpeedChart [   ]

Accounting Defaults   Personalize | Find | 🔁 | 🖩   First ◁ 1 of 1 ▷ Last
Chartfields1

Dist	Percent▲	Location▲	GL Unit▲	Fund	Dept	Product	Account	
1		MIR	MIR01					−

OK   Cancel

The "Bid No/Quote" field should follow the naming convention "LECTURE AGRMT – VENDOR NAME". In the Default Options box, change the status from *Default* to *Override*.

Requisition Settings

Business Unit MIR01   San Diego Miramar College   Bid No/Quote LECTURE AGRMT - COLLINS, J.
*Requester CDEMOLL   Carrie De Moll   Priority Medium ▾
*Currency USD

Default Options ?
○ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
◉ Override   If you select this option, the defaults specified below will override any predefined values for these fields,only non-blank values are assigned.

Line Defaults ?

Supplier [   ]   Category [   ]
Supplier Location [   ]   Unit of Measure EA
Buyer [   ]

Click the Magnifying Glass Icon for Supplier Enter Supplier's Name. Click Find.

Help
Supplier ID [   ]   Find
Name JAMES C. COLLINS ✕   Reset
Short Supplier Name [   ]
Alternate Supp Name [   ]
City [   ]
Country [   ] State ▾
Postal Code [   ]
ⓘ Enter search criteria to find a supplier.

Select   Cancel

Supplier's ID # and related information will pop up. Click on the circle to select vendor and click "Select".

Supplier Search

Help

	Supplier ID		Find
	Name	JAMES C. COLLINS	Reset
	Short Supplier Name		
	Alternate Supp Name		
	City		
	Country	State	
	Postal Code		

Search Results — Personalize | Find | View All | 🔳 | 🔳 — First 1 of 1 Last

		Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
●	1	0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER PEAK RD	16203 SPANGLER PEAK RD	RAMONA	CA	🔳

Select   Cancel

Enter Category Code (918-38)

Buyer field should be blank

Attention field should be the Requester

Enter budget number (Fund, Dept, Product, Account). You should obtain this from your Dean or Manager. Click OK.

Requisition Settings

Business Unit	MIR01 🔍	San Diego Miramar College	Bid No/Quote	LECTURE AGRMT – COLLINS, JAMES
*Requester	CDEMOLL 🔍	Carrie De Moll	Priority	Medium ▾
*Currency	USD			

Default Options ⑦

○ Default — If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

◉ Override — If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ⑦

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier	0000590433 🔍	Category	918-38	918-38 is the Category Code for all Lecture Agreements
Supplier Location	MAIN 🔍	Unit of Measure	EA 🔍	
Buyer	KROSAS 🔍			

***Buyer* field should be blank**

Shipping Defaults

Ship To	MIR 🔍		
Due Date	📅	Attention	CARRIE DE MOLL

Distribution Defaults

SpeedChart [ ] 🔍

Accounting Defaults — Personalize | Find | 🔳 | 🔳 — First 1 of 1 Last

Chartfields1 🔳

Dist	Percent▲	Location▲	GL Unit▲	Fund	Dept	Product	Account	
1		MIR 🔍	MIR01 🔍	🔍	🔍	🔍	🔍	➕ ➖

OK   Cancel

The Requisition Settings page is complete. To begin creating the requisition, click the "Special Requests" link.

Enter Item Description starting with "LECTURE AGREEMENT – SUPPLIER'S NAME". Add the amount of the Lecture Agreement and enter the quantity as "1". In the Additional Information box, enter the Lecture Agreement Language shown below. Click all 3 boxes: Send to Supplier, Show at Receipt, and Shown at Voucher. Then click "Add to Cart".

Highlighted areas require you to provide specific information for each agreement.

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM
EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX
CONTACT PERSON: NAME/PHONE/AND/OR EMAIL
SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

On the next page, click "Checkout".

Create Requisition ⑦

Welcome   Carrie De Moll

🏠 Home   🔧 My Preferences   ⚙ Requisition Settings | 🛒 0 Lines   **Checkout**

Request Options ▼   Search All ▼   [_____]   Search   Advanced Search

On the Checkout page, attach the district-signed Lecture Agreement under Comments

Checkout - Review and Submit

Review the item information and submit the req for approval.

🔧 My Preferences   ⚙ Requisition Settings

Requisition Summary

Business Unit MIR01 🔍   San Diego Miramar College   Bid No/Quote LECTURE AGRMT - COLLINS, J.
*Requester CDEMOLL 🔍   Carrie De Moll   Priority Medium ▼
*Currency USD

Cart Summary: Total Amount 750.00 USD

Expand lines to review shipping and accounting details   ➕ Add More Items

Requisition Lines ⑦

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ ☐ 1	LECTURE AGREMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00	750.00	🖼	Add	🗑

☐ Select All / Deselect All   Select lines to: Add to Favorites   Add to Template(s)   Delete Selected   Mass Change

Total Amount   750.00 USD

> Click Icon under **Details** to select **Amount Only**

Shipping Summary

🖊 Edit for All Lines
Ship To Location   MIR
Address   10440 Black Mountain Road
San Diego, CA 92126-2999
Attention To   CARRIE DE MOLL
Comments

Requisition Comments and Attachments

Enter requisition comments

[_____]

☑ Send to Supplier   ☑ Show at Receipt   ☑ Shown at Voucher

Approval Justification

Enter approval justification for this requisition

[_____]

🖥 Check Budget   🖥 Pre-Check Budget

Save & submit   Save for Later   ➕ Add More Items   👓 Preview Approvals

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Line Details

Line Details ⑦

No Image   Line   1   CONSULTANT AGREEMENT - JAMES C   Line Status   Open

▼ Item Details ⑦

Merchandise Amount   5000.00 USD   ☐ RFQ Required
Item ID   ☐ Device Tracking
Category   315-35   ☐ Zero Price Indicator
Original Substituted Item Description   ☑ Amount Only
Physical Nature Goods ▼   ☐ Inspection Required
Buyer KROSAS 🔍
Buyer Information
Configuration Info

▼ Contract Information ⑦

☑ Use Contract if Available
Contract ID   🔍🖼
Contract Details
Version
Contract Line   🔍
Category Line   🔍

▼ Supplier Information ⑦

Supplier ID 0000090433 🔍 JAMES C. COLLINS
Supplier Location MAIN 🔍 16203 SPANGLER PEAK RD
Suggest New Supplier
Supplier Item ID
Supplier's Catalog

▼ Manufacturer Information ⑦

Manufacturer ID   🔍
Manufacturer
Manufacturer's Item ID   🔍
GTIN

▼ Sourcing Controls ⑦

☐ Consolidate with other Reqs
☐ Calculate Price
☑ Override Suggested Supplier

Click OK ➡ OK   Cancel

When the following message appears, click "Yes".

Message

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)

The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

Yes   No

Review all your information carefully. Click "Save for Later", which will create a Requisition ID number. If everything appears correctly, click "Check Budget".

When the "Budget Checking Status" changes from "Not Checked" to "Valid", proceed by clicking the "Save and Submit" button. This will start the approval process.

NOTE: If the check should be delivered to someone other than the supplier, refer to the *Process Guide for Special Handling Request Form*.