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 <u>myportal.sdccd.edu</u> using your 10 digit Employee ID number as your Username and Password. Select the Finance Dashboard.



Next, navigate to Procurement/Create a Requisition.

		Finance Dashboard	🎓 🤉 🏲 🗏 🎯
Finance Dashboard	-		_
Procurement		2 New HCM and Finance Portal!	Employee Quicklinks -
Create a Requisition		PeopleSoft Human Capital Management (HCM) has replaced the Colleague Human Resources system and includes our new myPortal page. Please click on Read More for	MY PAYCHECKS
Manage Requisitions		more information and help. FINANCE menu options are now in the Finance Service Center - click on the MENU tab above the District logo and click the Finance Service Center link to expand the Finance Service Center link to expand the Finance Service	> ТМЕЗНЕЕТ
Add/Update Supplier		Read More	BENEFITS SUMMARY
Receive an Item			PERSONAL DETAILS
Request a Payment			
Travel & Expense	~ 🛄		
Manager Self Service	~		Training (How to) -
Reports	~		Benefits
Employee Dashboard			General HR Info
Tinance Dashboard			Payroll & Compensation
			Personal Information
			Timesheet

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.

Business Unit MIRU1 C San Diego Miramar College Bid No/Quote	
*Requester CDEMOLL Q Carrie De Moll Priority Medium V	
*Currency USD	
Default Options (2) 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.	
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Supplier Location Unit of Measure EA Q	
BuyerQ	
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Due Date Attention	
Distribution Defaults	
SpeedChart	
Chartfields1	
Dist Percent Location GL Unit Fund Dept Product Account	
OK Cancel	
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The "Bid No/Quote" field should follow the naming convention "LECTURE AGRMT – VENDOR NAME"	•
In the Default Options box, change the status from <i>Default</i> to Override.	
Requisition Settings	
Requisition Settings	
Business Unit MIR01 San Diego Miramar College Bid No/Quote LECTURE AGRMT - COLLINS, J.	
Business Unit MIR01 San Diego Miramar College Bid No/Quote LECTURE AGRMT - COLLINS, J. *Requester CDEMOLL Carrie De Moll Priority Medium	
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Supplier's ID # and related information will pop up. Click on the circle to select vendor and click "Select".

	Su	pplier ID			Find			
		Name JAMES C. CO	LLINS		Reset			
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_	1 0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER	16203 SPANGLER	RAMONA	CA	P

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.

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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".

*Itom Description	LECTURE AGREMENT - O	OLLINS JAMES		
"item Description		OLEING, JAMES		
*Price	750.00		*Currency	USD
*Quantity			*Unit of Measure	EA Q
*Category	918-38	2	Due Date	31
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Supplier ID	0000590433	Q		
Supplier Name	JAMES C. COLLINS	JAMES C. COLLINS		Suggest New Supplier
Supplier Item ID				
Manufacturar				
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Manufacturer				
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CAMPUS/DEPT/PROG	RAM EFFECTIVE XX/XX/XXXX	TO XX/XX/XXXX		
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On the Checkout page, attach the Request for Contract, Scope of Work and Payment Provisions, and signed Evaluation of Employee Relationship form under Comments

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Checkoul - Review and Sub	mit								
Review the Item Information and submit the	req for approval.		1.	Uhu Droforo		aguicition Cottings		1	
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When the following message appears, click "Yes".



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

Review the Item	Information and submit f	the req for approval.			* My Dreft	Prences	ili Rec	uisition Settings				
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Check But	tget 🧔	Pre-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.

Check Budget	Pre-Check Budget	Budget Checking Status: Valid	
Save & submit	B Save for Later	Add More Items	රිට Preview Approvals

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