

PERFORMANCE AGREEMENT PURCHASE REQUISITION

PURPOSE: TO RECORD AND ENCUMBER FUNDS FOR A PERFORMANCE 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.

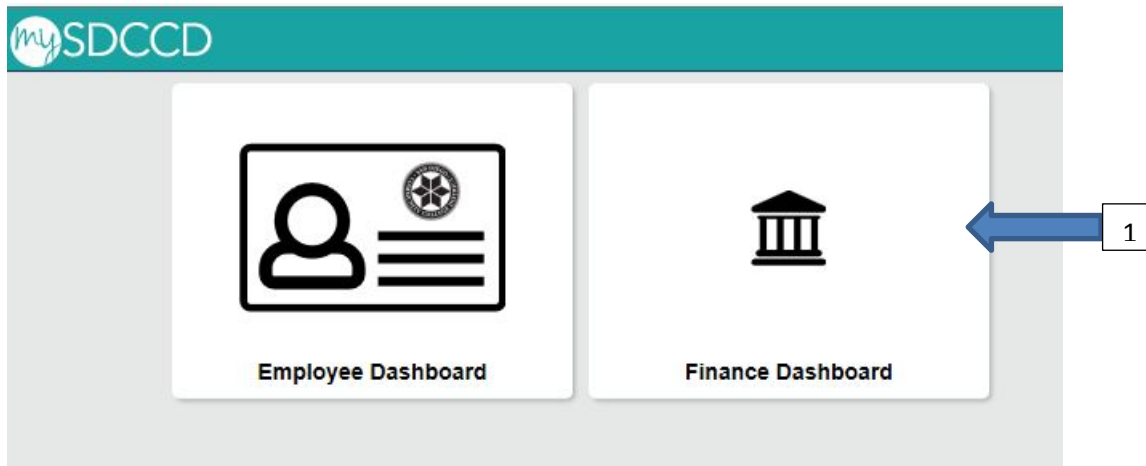
CHECK "AMOUNT ONLY" BOX: YES

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.

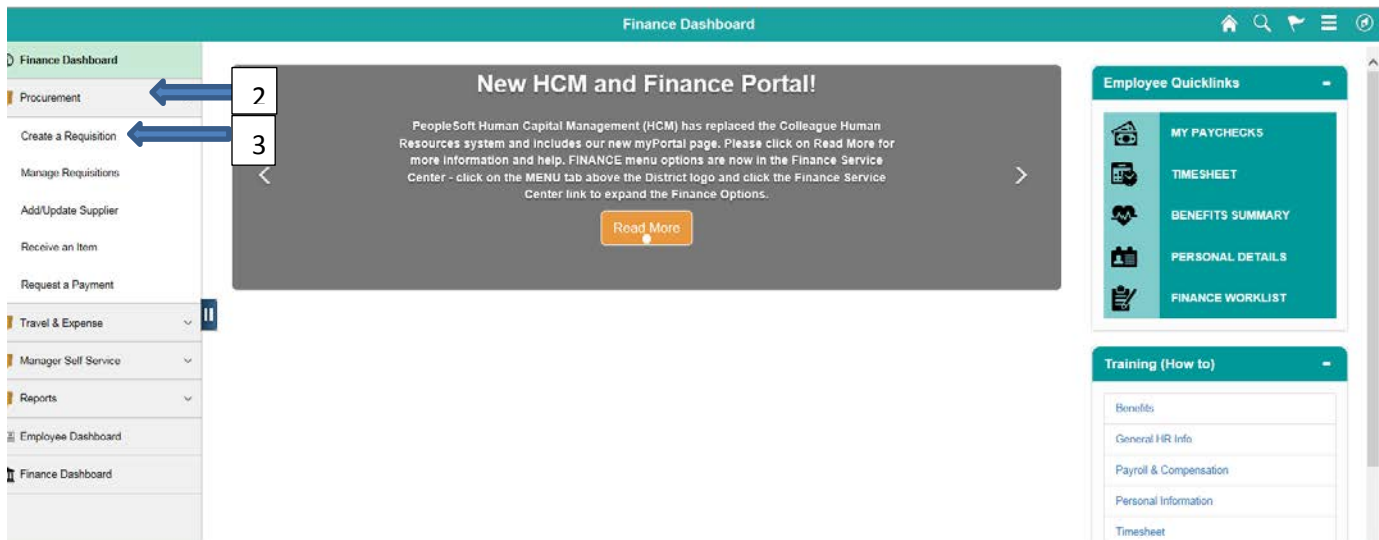
Note: The process for Performance Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

PERFORMANCE 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 San Diego Miramar College Bid No/Quote

*Requester Carrie De Moll Priority

*Currency

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

Buyer

Shipping Defaults

Ship To Due Date Attention

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | 1 of 1 Last

Chartfields1

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account
1		<input type="text" value="MIR"/>	<input type="text" value="MIR01"/>				

OK Cancel

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

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote Priority

*Requester Carrie De Moll

*Currency

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

Buyer

Supplier ID Find Reset

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Enter search criteria to find a supplier.

Select Cancel

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

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

Supplier Search

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 San Diego Miramar College Bid No/Quote PERFORMANCE AGRMT – COLLINS, JAMES

*Requester 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

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 Category 918-38

Supplier Location Unit of Measure EA

Buyer KROSAS

918-38 is the Category Code for all Lecture Agreements

Buyer field should be blank

Shipping Defaults

Ship To MIR

Due Date 31

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.

Create Requisition ?

Welcome Elizabeth Ann Whitsett

Home

My Preferences

Requisition Settings

0 Lines

Checkout

Request Options

Search All

Search

Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.



Catalog
Browse Catalogs
CATEGORY



Web
Browse Supplier Websites
Grainger Punch Out
Office Solutions Punch Out



Express Item Entry
Create an Express Requisition



Special Requests
Create a non-catalog request



Forms
Create and Submit Forms



Favorites
Browse Favorite Items and Services



Templates
Browse Company and Personal Templates



ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials



Recently Ordered
View recently ordered items and services
INSTALLATION MATERIALS
LABOR, PROJECT MANAGEMENT
LABOR, CABLE INSTALLATION, I...
PRINTER, LJ HP M610dn Printe...
BPO

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

Create Requisition ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description
*Price *Currency
*Quantity
*Category *Unit of Measure
Due Date

Supplier

Supplier ID
Supplier Name JAMES C. COLLINS Suggest New Supplier
Supplier Item ID

Manufacturer

Mfg ID
Manufacturer
Mfg Item ID

Additional Information

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR
CAMPUS/DEPT/PROGRAM EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX

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

Request New Item

☐ Request New Item A notification will be sent to a buyer regarding this new item request.

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 ?

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 Performance 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

San Diego Miramar College

Bld No/Quote

*Requester

Carrie De Moll

Priority

*Currency

Cart Summary: Total Amount 750.00 USD

Expand lines to review shipping and accounting details



Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00	750.00			

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

Total Amount 750.00 USD

Shipping Summary

Edit for All Lines

Ship To Location
Address

Attention To
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

Click Icon under
Details to select
Amount Only

Line Details

Line Details

No Image Line 1 Line Status: Open

Item Details

Merchandise Amount: 8000.00 USD

Item ID:

Category:

Original Substituted Item Description:

Physical Nature:

Buyer:

Buyer Information:

Contract Information

☒ Use Contract if Available

Contract ID:

Contract Details:

Version:

Contract Line:

Category Line:

Supplier Information

Supplier ID:

Supplier Location:

Supplier Name:

Supplier's Catalog:

Manufacturer Information

Manufacturer ID:

Manufacturer:

Manufacturer's Item ID:

Sourcing Controls

☐ Consolidate with other Req
☐ 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”.

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

Bld No/Quote

LECTURE AGRMT - COLLINS, J.

*Requester

CDEMOLL

Carle 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

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00000	750.00			

Select All / Deselect All

Select lines to:

Add to Favorites

Add to Template(s)

Delete Selected

Mass Change

Total Amount

750.00 USD

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

Edit more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

Check Budget

Pre-Check Budget

Save & submit

Save for Later

Add More Items

Preview Approvals

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

Save for Later

Add More Items

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*.