

LECTURE AGREEMENT PURCHASE REQUISITION

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

REQUIRED DOCUMENTATION & PREAPPROVALS:

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. SEE INSTRUCTIONS BELOW FOR REQUIRED DOCUMENTS
3. BUDGET NUMBER AND AVAILABLE FUNDING

PAID SPEAKERS UNDER \$1,000

- A SIGNED RELEASE OF LIABILITY FORM
- NO INSURANCE REQUIRED
- A PURCHASE REQUISITION ENTERED IN PEOPLESOFT; ATTACH THE COMPLETED RELEASE OF LIABILITY FORM TO THE REQUISITION. ONCE THE PURCHASE ORDER IS ISSUED, THE SPEAKER WILL SUBMIT AN INVOICE TO DISTRICT ACCOUNTS PAYABLE (APINVOICE@SDCCD.EDU) FOR PAYMENT PROCESSING UPON COMPLETION OF THE SPEAKING EVENT.

PAID SPEAKERS OVER \$1,000

- A COMPLETED REQUEST FOR CONTRACT FORM (RFC PROCESS FAQ SHEET)
- INSURANCE REQUIRED
- A PURCHASE REQUISITION ENTERED IN PEOPLESOFT; ATTACH THE RFC FORM TO THE REQUISITION. ONCE THE PURCHASE ORDER AND AGREEMENT IS ISSUED, THE SPEAKER WILL SUBMIT AN INVOICE TO DISTRICT ACCOUNTS PAYABLE APINVOICE@SDCCD.EDU FOR PAYMENT PROCESSING, UPON COMPLETION OF THE SPEAKING EVENT.

REQUIRED ATTACHMENT: REQUEST FOR CONTRACT FORM OR SIGNED RELEASE OF LIABILITY FORM

CHECK “AMOUNT ONLY” BOX: YES

CATEGORY CODE: 900-00

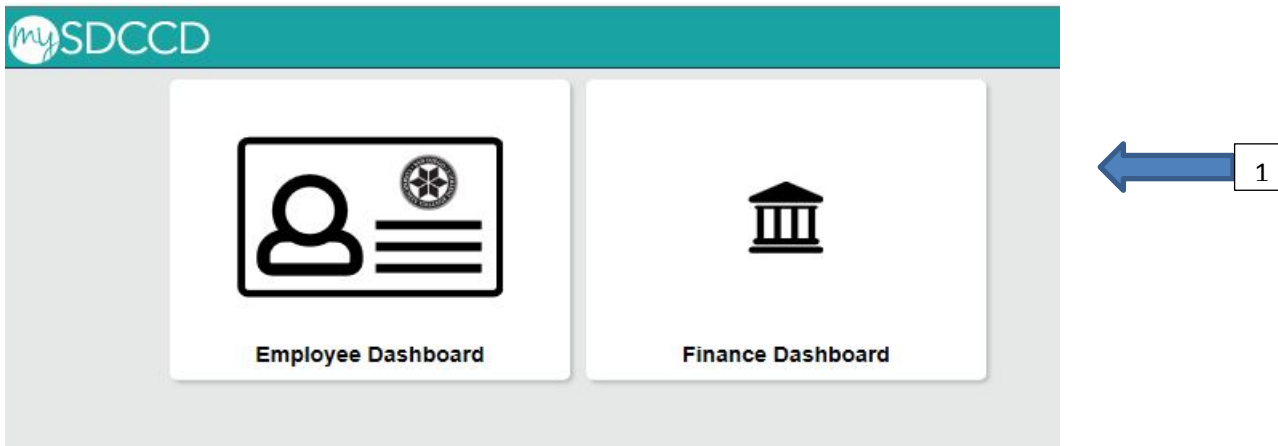
PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE SPEAKER OR REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE APINVOICE@SDCCD.EDU. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS 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.

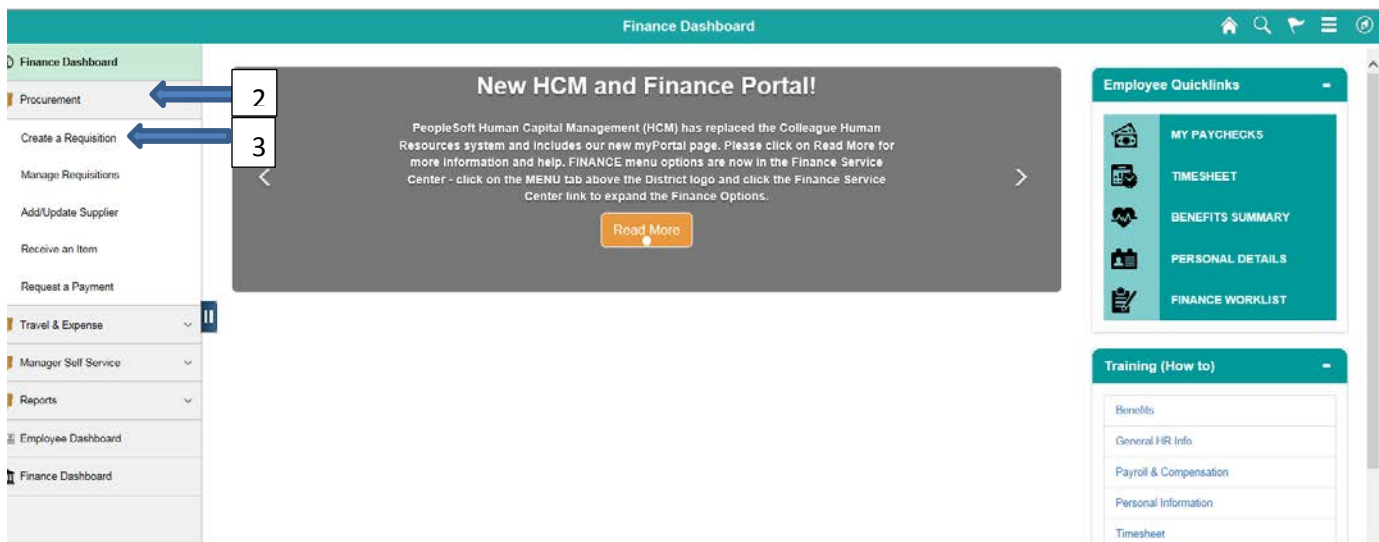
LECTURE AGREEMENT REQUISITION

Log into your SDCCD account and open PeopleSoft.

Navigate to Create a Requisition from the home page by selecting: Finance Dashboard/
Procurement/Create a Requisition.



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		MIR	MIR01				

OK Cancel

The “Bid No/Quote” field should follow the naming convention “LECTURE AGRMT–VENDOR NAME”.

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 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 (900-00)

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
*Requester Elizabeth Ann Whitsett Priority
*Currency Custom Fields

Default Options Custom Fields

☐ 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 900-00 is the Category Code
Supplier Location Unit of Measure
Buyer Buyer field should be blank

Shipping Defaults

Ship To
Due Date Attention ELIZABETH WHITSETT

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | First 1 of 1 Last

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus U
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 **"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"**.

Create Requisition ?

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

Item Details

*Item Description LECTURE AGREEMENT - COLLINS, JAMES
*Price 750.00
*Quantity
*Category 918-38
*Currency USD
*Unit of Measure EA
Due Date

Supplier

Supplier ID 0000590433
Supplier Name JAMES C. COLLINS
Supplier Item ID
Suggest New Supplier

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 INVOICE 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 Release of Liability form or Request for Contract, Scope of Work and Payment Provisions 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: MIR
Address: 10440 Black Mountain Road
San Diego, CA 92126-2999
Attention To: CARRIE DE MOLL

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

CONSULTANT AGREEMENT - JAMES C

Line Status: Open

Item Details

Merchandise Amount: \$000.00 USD

Item ID

Category: 910-25

Original Substituted Item Description

Physical Nature: Goods

Buyer: 100545

Buyer Information

Configuration Info

Contract Information

☒ Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information

Supplier ID: 000050433

Supplier Location: JAIN

Supplier Item ID

Supplier's Catalog

Manufacturer Information

Manufacturer ID

Manufacturer

Manufacturer's Item ID

GLIN

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

Comments

CARRIE DE MOLL

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*.