

Entering a Service Contract (O4) Directly
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NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

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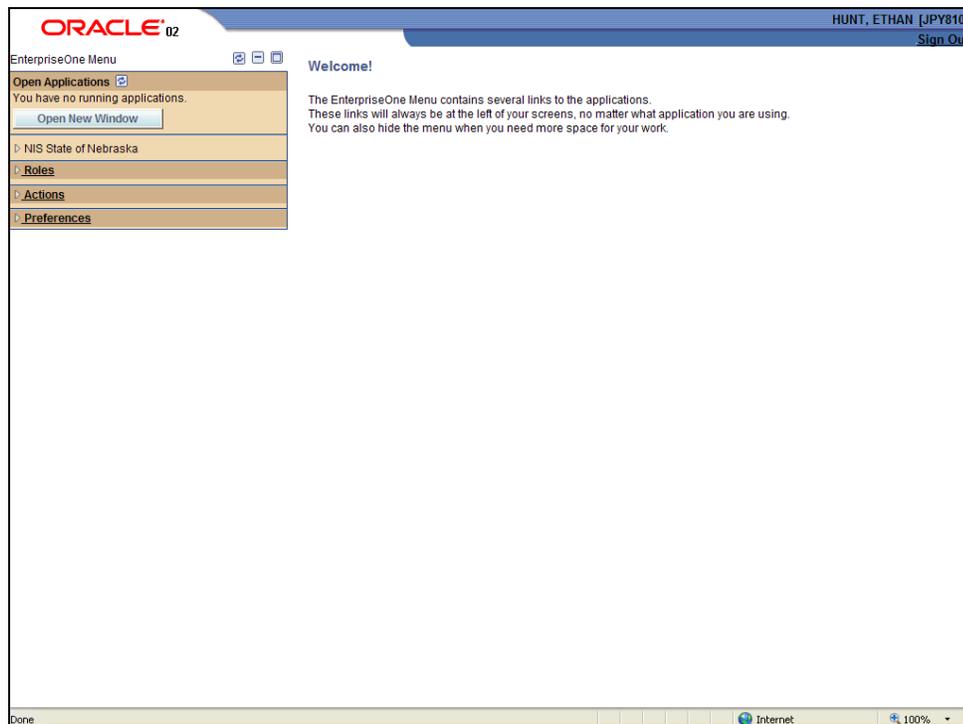
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Entering a Service Contract (O4) Directly

Entering a Service Contract (O4) Directly Lesson

Procedure

In this lesson you will learn how to enter a Service Contract (O4).

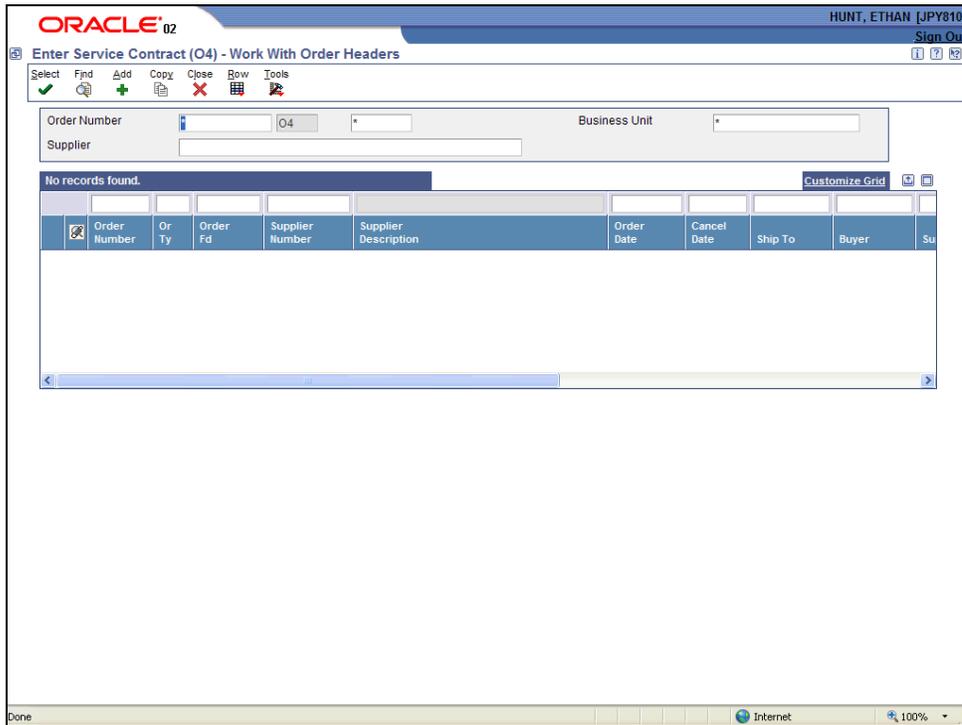


Step	Action
1.	Click the NIS State of Nebraska link. NIS State of Nebraska
2.	Click the Purchasing - Agencies link. Purchasing - Agencies
3.	Click the Contracts - Agency link. Contracts - Agency

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Step	Action
4.	Click the Enter Service Contract (O4) link.



Step	Action
5.	Click the Add button.

Step	Action
6.	In the Supplier field enter the address book number of the vendor from whom you will purchase the service.
7.	In the Ship to field enter the address book number of the location where services are to be performed. Note: The Ship to number will automatically populate the Send Invoice To field.
8.	In the Buyer field enter the address book number of the buyer who is responsible for the bidding of the contract.
9.	In the Business Unit field enter the Business Unit which is applicable to the contract.
10.	In the Requested field enter the date when the service contract will begin. If this field is not populated, the current date will default. Note: You can type the date in MM/DD/YY format or you can use the Visual Assist tool (calendar icon). 
11.	In the Promised Delivery field enter the date the vendor has promised to have the service provided.
12.	In the Cancel Date enter the date the contract is scheduled to end or work is to be completed. All contracts must have a cancel date per state statutes.

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Step	Action
13.	All Service Contracts must indicate an overall description of the contract in the Contract Description field. This is shown on the Treasurer's report that is posted on their website.
14.	Per state statute all Service Contracts must indicate where the documents may be found in the Contract Location field in the event someone needs to review them.
15.	<p>The New/Renew and Agency fields are used to indicate if the contract is new or a renewal, or if American Recovery & Reinvestment Act (ARRA) funds are being utilized to pay for this contract.</p> <p>If ARRA funds are being utilized, this will take precedence over the new or renew.</p>
16.	<p>If ARRA funds are being utilized for this contract you will enter an "A" in the New/Renew field.</p> <p>If the contract is new you will enter an "N" in the New/Renew field.</p> <p>If the contract is a renewal you will need to indicate if it is the 1st renewal, 2nd renewal, etc. in the New/Renew field. 1st renewal is "RA," 2nd renewal is "RB," etc. You can use the Visual Assist tool to ensure you select the correct renewal code.</p> <p>Remember if ARRA funds are being utilized, this take precedence over the new or renewal.</p>
17.	<p>If ARRA funds are being utilized for the contract "ARRA" must be entered into the Agency field.</p> <p>If ARRA funds are not being used then the word "Agency" must be entered into the Agency field.</p>
18.	In the AB / Contact field enter the address book number and name of the employee who has the most knowledge of the contract and could answer in depth questions regarding the contract. This may be different than the Agency contact or Buyer.
19.	<p>Click the OK button.</p> 

Step	Action
20.	<p>Enter the NIGP Code in the NIGP Number / Inventory Number field.</p> <p>If you need to find the applicable 5-digit code, note that all Services will be greater than 90000. You can use the Visual Assist tool if necessary. This field will not print on the purchasing documents.</p>
21.	Enter the quantity of the item you are ordering in the Quantity Ordered field.
22.	The Tr. UoM field stands for Transaction Unit of Measure. The system defaults to EA (each). You can override this with the appropriate unit of measure if necessary. Other options can be found using the Visual Assist tool.
23.	Enter the cost per unit in the Unit Cost field.
24.	Enter a description pertaining to the specific detail line in the Description 1 field. This field is limited to 30 characters. What is entered here will print on all purchasing documents.
25.	If necessary enter a description pertaining to the specific detail line in the Description 2 field. This field is limited to 30 characters. What is entered here will print on all purchasing documents.
26.	In the Account Number field enter an account number which references the agency's business unit and object account which will be funding the purchase. The format will be "Business Unit.Object Code". For example, 12345678.987654.

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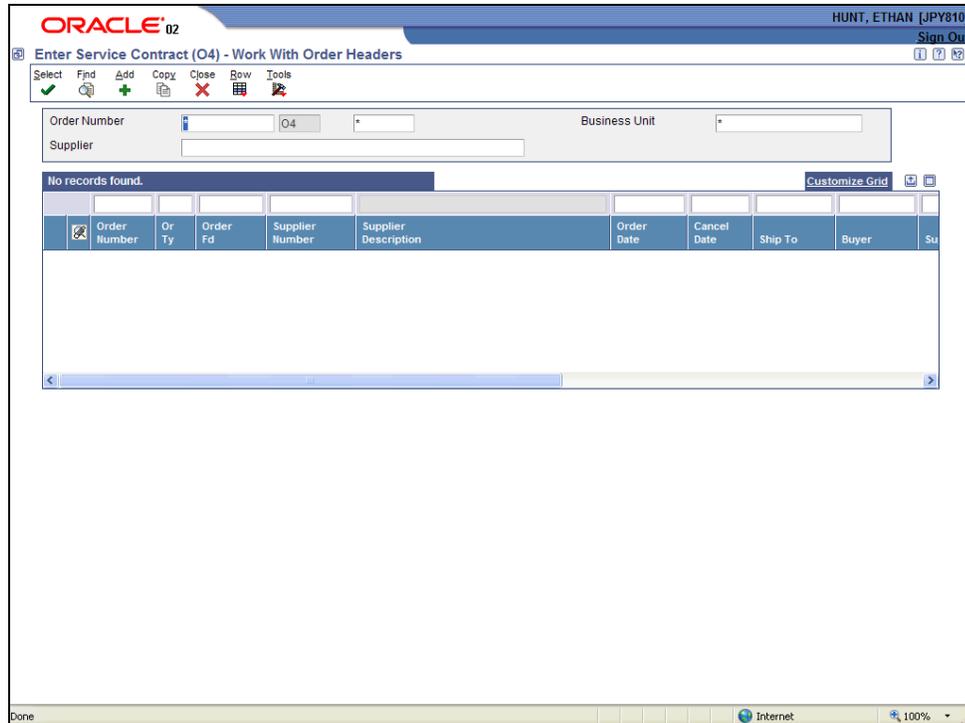
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Step	Action
27.	Add line attachments if desired. Refer to the Enter Attachments to Detail Lines work instructions for details about adding line attachments. Also you can add additional lines if needed.
28.	When you are finished click the OK button. 
29.	The O4 number will be displayed in the Previous Order field. You should make note of it in the event you wish to do more work with this Order Number at a later time.

The screenshot shows the Oracle O4 Order Header form. At the top, it says 'ORACLE 02' and 'HUNT, ETHAN [JPY810]'. The title bar reads 'Enter Service Contract (O4) - Order Header'. Below the title bar are buttons for 'OK', 'Cancel', 'Form', and 'Tools'. The form contains several sections:

- Order Number** and **Previous Order** fields, both with 'O4' in a dropdown menu.
- Address Numbers** section with fields for Supplier, Ship to, Buyer, Send Invoice To, Contract Description, Contract Location, and Print Message.
- Dates** section with fields for Order Date, Requested, Promised Delivery, and Cancel Date.
- Hold Code** field with the value 'BLANK - HOLD CODES 42HC'.
- Approval Code** field.
- Retainage %** field.
- Ordered By** field with the value 'UATTRAIN22'.
- Order Taken By** field.
- AIA Document** field with a 'Y' in a dropdown menu.
- Messages** section at the bottom.

Step	Action
30.	Click the Cancel button. 



Step	Action
31.	Click the Close button. 
32.	You have successfully completed this lesson. End of Procedure.