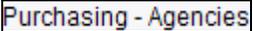
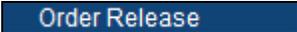
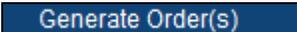
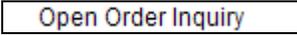


Generating a Service Contract (O4) from a Requisition (Z6 or O3) or Deviation Request (O8) Lesson

Step	Action
1.	<p>Warning: You can create a Service Contract (O4) from a Requisition (O8, O3, or Z6). The steps deatiled in this lesson are the same. The only difference is the menu path. Be sure to use the appropriate menu path.</p> <p>State of Nebraska > Purchasing - Agencies > Contracts - Agencies > Gen Service Contract (O4) from Agency Req (O3).</p> <p>State of Nebraska > Purchasing - Agencies > Contracts - Agencies > Gen Service Contract (O4) from Exempt Req (Z6).</p> <p>State of Nebraska > Purchasing - Agencies > Deviation Request > Gen Service Contract (O4) from Dev Request (O8).</p> <p>This lesson uses the memu path for creating a Service Contract (O4) from a Deviation Request (O8).</p> <p>Click the State of Nebraska link. </p>
2.	<p>Click the Purchasing - Agencies link. </p>
3.	<p>Click the Deviation Request link. </p>
4.	<p>Click the Gen Service Contract (O4) from Dev Request (O8) link. </p>
5.	<p>Enter the requisition number in the Order Number field.</p>
6.	<p>Click the Find button. </p>
7.	<p>Click the check box next to each line of the order to be generated to a contract. </p>
8.	<p>Click the Row button. </p>
9.	<p>Click the Order Release menu. </p>

Step	Action
10.	<p>ORDER HEADER</p> <p>Verify the following fields in the Header:</p> <p>Business Unit - A valid Business Unit for your agency. Supplier - Review this value and determine correct supplier number. Buyer - You can populate the address book record for the responsible buyer in your agency. Ship To - This reflects a delivery location for your agency.</p> <p>If you need to make any changes to these field you can do so at this time.</p>
11.	<p>Review the following fields on the Release Information tab:</p> <p>Release Qty - The quantity from the Requisition will populate - change this quantity only if it is determined to increase or decrease the field.</p> <p>Release Amt - Do not change this field. If you change the Release Qty field this field will populate automatically.</p>
12.	<p>Click the Detail Information tab.</p> 
13.	<p>Review the following fields on the Detail Information tab:</p> <p>Inventory Number - If the incorrect NIGP number was previously entered it can be changed here.</p> <p><i>Note:</i> If you change the number in the Inventory Number field here, you will also need to go through Revise to correct the 3 - Digit NIGP and NIGP Sub fields.</p> <p>Account Number - This must be a valid Account Number for your agency.</p>
14.	<p>Click the Dates tab.</p> 
15.	<p>On the Dates tab review the various date fields. Make sure there is a date is in the Cancel Date field and that it is correct. All contracts must have a cancel date per state statute #73-501 - 73-509.</p>
16.	<p>Click the OK button.</p> 
17.	<p>Click the Form button.</p> 
18.	<p>Click the Generate Order(s) menu.</p> 
19.	<p>The O4 document number generated will be displayed in the Order Number field. You will want to make note of this number for future reference.</p>

Step	Action
20.	<p>Next you will need to make some revisions to the O4 document.</p> <p>Click the Row button.</p> 
21.	<p>Click the Open Order Inquiry menu.</p> 
22.	<p>Choose the document by clicking the check box.</p> 
23.	<p>Click the Row button.</p> 
24.	<p>Click the Header Revision menu.</p> 
25.	<p>Review the Send Invoice To field. This is tied to the Ship to field, but you can override it if you need to.</p>
26.	<p>Verify there is a date in the Cancel Date field. All contracts must have a cancel date per state statutes 73-501-73-509.</p>
27.	<p>Click the Additional Properties tab.</p> 
28.	<p>Document Description</p> <ul style="list-style-type: none"> o Highly Recommend o Populate for a commodity or service requisition, this field can be used for free form text. It is helpful to fill this field in at the requisition level. Populate with data that describes the goods/services being procured. This information will print on reports. o This field can hold up to 30 alpha/numeric characters
29.	<p>Document Location</p> <ul style="list-style-type: none"> o Mandatory o Per state statute all Service Contracts must indicate where the documents may be found in the Document Location field o This field can be pulled from the address book. o This must be a Address Book Search Type of "F" - facility

Step	Action
30.	<p>Document Contact</p> <ul style="list-style-type: none"> o Mandatory o Identifies the primary person responsible for the commodity or service requisition. This field can be pulled from the address book. o This must be an Address Book Search Type of “B, E, N, or X”.
31.	<p>Click the Category Codes tab.</p> 
32.	<p>The New/Renew field is used to indicate if the anticipated contract is new or a renewal.</p> <p>The Funding field may be used to indicate if American Recovery & Reinvestment Act (ARRA) funds are being utilized.</p>
33.	<p>Changes to the Header requires population to the Detail Lines.</p> <p>To do this, click the Form button.</p> 
34.	<p>Click the Header To Detail menu.</p> 
35.	<p>POPULATE HEADER TO DETAIL will appear in the Header box. If you forgot to populate the header to detail you will manually need to make the changes in the detail lines.</p> <p>Click the Populate menu.</p> 
36.	<p>Click the OK button.</p> 
37.	<p>Review the detail lines and make changes as needed.</p>
38.	<p>When you are finished click the OK button.</p> 
39.	<p>Warning Error "Event Still in Process" appears. This is okay.</p> <p>Click the OK button.</p> 
40.	<p>Click the Close button.</p> 
41.	<p>Click the Close button.</p> 
42.	<p>Click the Close button.</p> 

Step	Action
43.	You have successfully completed this lesson. End of Procedure.