

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

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SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. 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.



**Training Guide
Generating a Service Contract (O4) from a
Requisition (Z6 or O3) or Deviation Request
(O8)**

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

Once a Purchase Requisition is created, or a Deviation Request is created and approved by AS Materiel, a Service Contract can be generated. All bids must be documented as a Header attachment on the Requisition or Deviation Request document.

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

Procedure

This lesson details how to create a Service Contract (O4) from a Deviation Request (O8).

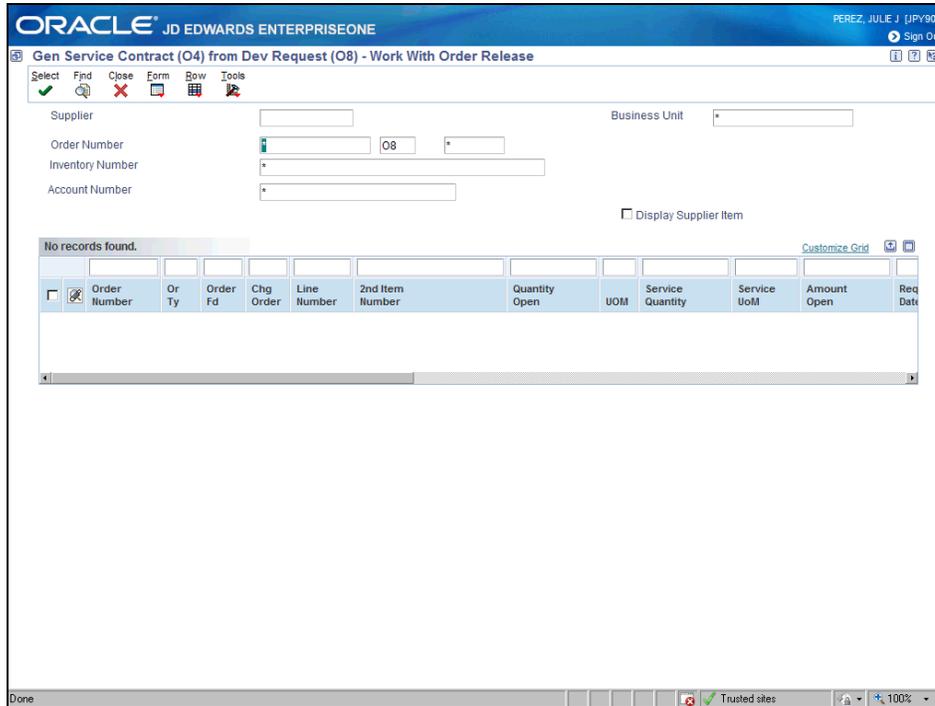
Step	Action
1.	<p>Warning: You can create a Service Contract (O4) from a Requisition (O8, O3, or Z6). The steps detailed in this lesson are the same. The only difference is the menu path. Be sure to use the appropriate menu path.</p> <p>State of Nebraska > Purchasing - Agencies > Contracts - Agencies > 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 menu path for creating a Service Contract (O4) from a Deviation Request (O8).</p> <p>Click the State of Nebraska link.</p> <p>State of Nebraska</p>
2.	<p>Click the Purchasing - Agencies link.</p> <p>Purchasing - Agencies</p>
3.	<p>Click the Deviation Request link.</p> <p>Deviation Request</p>

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Step	Action
4.	Click the Gen Service Contract (O4) from Dev Request (O8) link. <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Gen Service Contract (O4) from Dev Request (O8) </div>



Step	Action
5.	Enter the requisition number in the Order Number field.
6.	Click the Find button. 
7.	Click the check box next to each line of the order to be generated to a contract. 
8.	Click the Row button. 
9.	Click the Order Release menu. <div style="border: 1px solid black; padding: 2px; width: fit-content; background-color: #0056b3; color: white; text-align: center;"> Order Release </div>

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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.</p> <p>Supplier - Review this value and determine correct supplier number.</p> <p>Buyer - You can populate the address book record for the responsible buyer in your agency.</p> <p>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>

Step	Action
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> <p><u>Detail Information</u></p>

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Step	Action
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>Note: 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> <p>Dates</p>

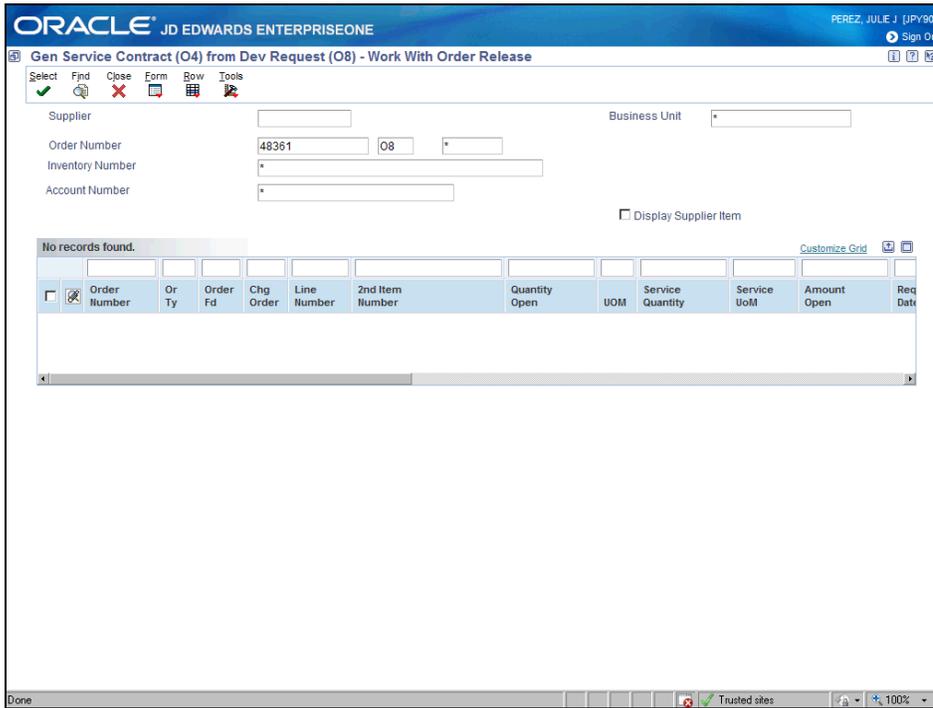
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Step	Action
15.	On the Dates tab review the various date fields. Make sure there is a date is in the Cancel Date field and that it is correct. All contracts must have a cancel date per state statute #73-501 - 73-509.
16.	Click the OK button. 

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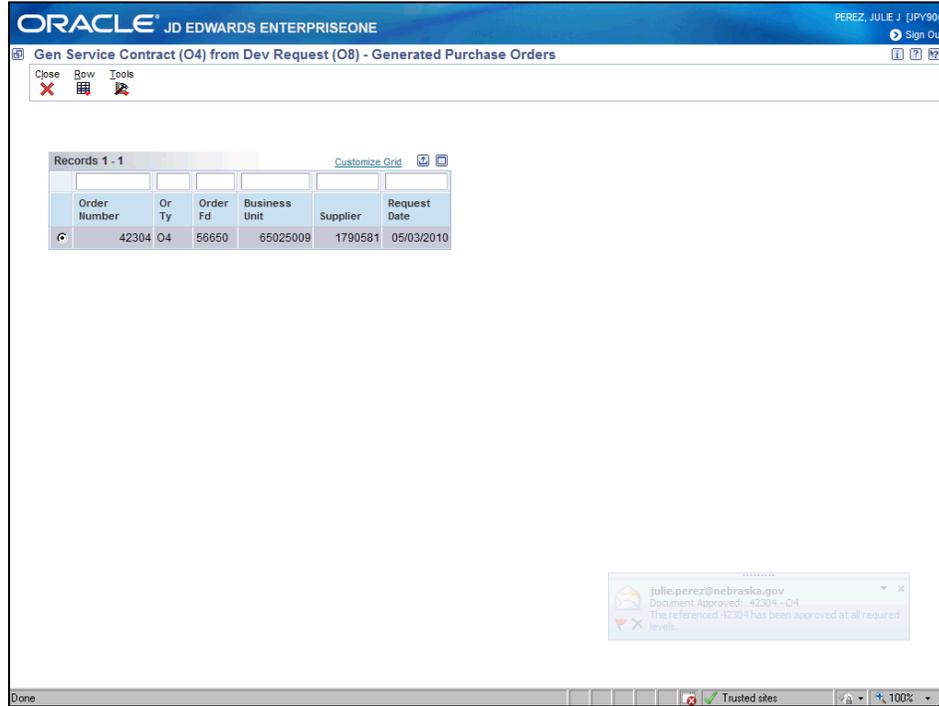
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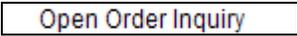


Step	Action
17.	Click the Form button. 
18.	Click the Generate Order(s) menu. 
19.	The O4 document number generated will be displayed in the Order Number field. You will want to make note of this number for future reference.

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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> 

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



ORACLE JD EDWARDS ENTERPRISEONE PEREZ, JULIE J [JPY900] Sign Out

Gen Service Contract (O4) from Dev Request (O8) - Work With Order Details

Select Find Add Copy Close Form Row Tools

Order Number 42304 O4 * Business Unit 65025009

Related Order * * *

Original Order * * * N/A

NIGP Num/Inventory * *

Account Number * *

SBL Type/Subledger * * Display Supplier Item

Commodity Code * *

Records 1 - 1 Customize Grid

<input type="checkbox"/>	Order Number	Quantity To Receive	UM	Amount To Receive	Ship To	Or Ty	Order Fd	Change Order	Supplier Number	Supplier Name
<input checked="" type="checkbox"/>	42304	5.0000	EA	50,000.00	557767	O4	56650	000	1790581	BELL MED

Done Trusted sites 100%

Step	Action
22.	Choose the document by clicking the check box. <input checked="" type="checkbox"/>
23.	Click the Row button.
24.	Click the Header Revision menu.

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The screenshot displays the 'Order Header' section of the Oracle JD Edwards EnterpriseOne interface. Key fields include:

- Order Number:** 42304 (with O4 and 56650 sub-identifiers)
- Business Unit:** 65025009
- Supplier:** 1790581 (BELL MEDICAL INC)
- Ship To:** 557767 (AS MATERIEL, STATE PURCHASING)
- Buyer:** 4455871 (HUNT, ETHAN)
- Send Invoice To:** 557767 (AS MATERIEL, STATE PURCHASING)
- Dates:** Entered Date (03/15/2010), Requested (05/03/2010), Prom Del Date (05/03/2010), Cancel Date (05/03/2015)
- Hold Code:** BLANK - HOLD CODES 42/HC
- Approval Code:** 100378
- Ordered By:** NISJPerez
- Payment Terms:** Net 30 Days from Invoice Date

Step	Action
25.	Review the Send Invoice To field. This is tied to the Ship to field, but you can override it if you need to.
26.	Verify there is a date in the Cancel Date field. All contracts must have a cancel date per state statutes 73-501-73-509.
27.	Click the Additional Properties tab. 

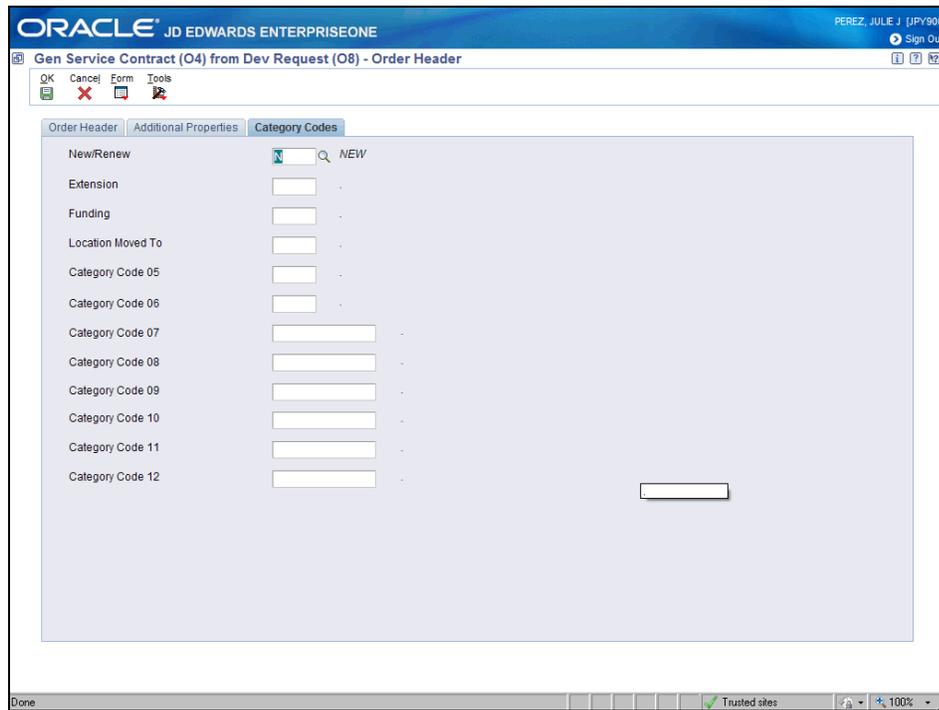
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Step	Action
28.	<p>Document Description</p> <ul style="list-style-type: none"> o Highly Recommend o Populate for a commodity or service requisition, this field can be used for free form text. It is helpful to fill this field in at the requisition level. 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> 



Step	Action
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> 

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Step	Action
34.	Click the Header To Detail menu. 
35.	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. Click the Populate menu. 
36.	Click the OK button. 
37.	Review the detail lines and make changes as needed.

Step	Action
38.	When you are finished click the OK button. 
39.	Warning Error "Event Still in Process" appears. This is okay. Click the OK button. 

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Step	Action
40.	Click the Close button. 
41.	Click the Close button. 
42.	Click the Close button. 
43.	You have successfully completed this lesson. End of Procedure.