

**Generating a Service Contract (O4) from a Quotation Request
(Z1)**

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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 Quotation Request (Z1)

Table of Contents

Generating a Service Contract (O4) from a Quotation Request (Z1).....	1
Generating a Service Contract (O4) from a Quotation Request (Z1) Overview.....	1
Generating a Service Contract (O4) from a Quotation Request (Z1) Lesson	1

Generating a Service Contract (O4) from a Quotation Request (Z1)

Generating a Service Contract (O4) from a Quotation Request (Z1) Overview

Once the Service has been bid and bid responses have been received and entered into the system, the Service Contract can be generated. The Service Contract is non-encumbering and not budget checked. Purchase Orders will be generated from the Service Contract.

Generating a Service Contract (O4) from a Quotation Request (Z1) Lesson

Procedure

In this lesson you will learn how to generate a Service Contract (O4) from a Quotation Request (Z1).

Step	Action
1.	Click the State of Nebraska link. State of Nebraska
2.	Click the Purchasing - Agencies link. Purchasing - Agencies
3.	Click the Contracts - Agency link. Contracts - Agency
4.	Click the Gen Service Contract (O4) from Quote (Z1) link. Gen Service Contract (O4) from Quote (Z1)

Training Guide

Generating a Service Contract (O4) from a Quotation Request (Z1)

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

Gen Service Contract (O4) from Quote (Z1) - Quote Order Release

Business Unit *

Order Number Z1 *

NIGP/Inv Number

Account

Supplier

Buyer

Records 1 - 1 [Customize Grid](#)

Release Quantity	Responded Price/Amount	UM	Release Amount	Service Quantity	Service UoM	Supplier	Name	NIGP Number/ Inventory Num
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Done Trusted sites 100%

Step	Action
5.	<p>Enter any of the following search criteria in the appropriate field(s):</p> <ul style="list-style-type: none"> ~ Order Number ~ Document Type ~ Account Number ~ Item Number ~ Business Unit (Branch/Plant) ~ Supplier
6.	<p>Click the Find button.</p> 

Training Guide Generating a Service Contract (O4) from a Quotation Request (Z1)

Business Unit

Order Number

NIGP/Inv Number

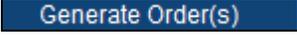
Account

Supplier

Buyer

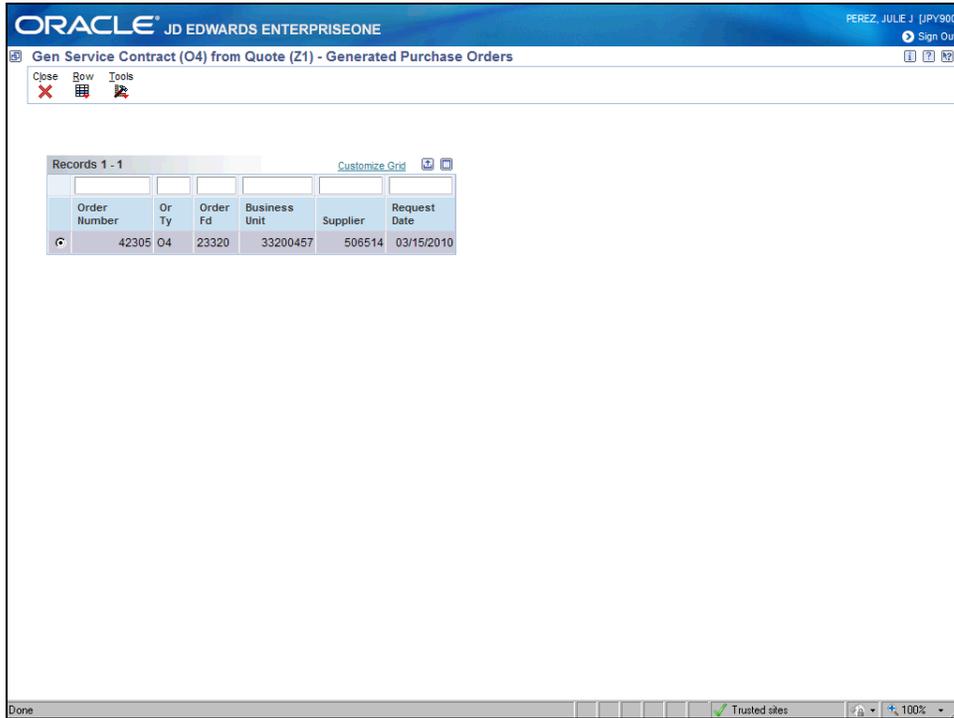
Records 1 - 5 Customize Grid

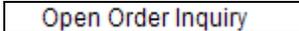
	Release Quantity	Responded Price/Amount	UM	Release Amount	Service Quantity	Service UoM	Supplier	Name	NIGP Number/Inventory Num
C	.5000	7,686.0800					999999	BEST SOURCE	
C		.0000	EA		.0000	MI	500020	MARTIN MARIETTA AGGREG...	98815
C		.0000	EA		.0000	MI	504252	DUKE & CO INC	98815
C		.0000	EA		.0000	MI	506514	CLEAN MANAGEMENT SERV...	98815

Step	Action
7.	Enter the quantity to be released to the vendor in the Release Quantity field for each line that you will release to the Service Contract.
8.	Click the Form button. 
9.	Click the Generate Order(s) menu. 
10.	The new Order Number and Or Ty (Order Type) will appear and should be noted if you wish to do more work with them or facilitate searches later.

Training Guide

Generating a Service Contract (O4) from a Quotation Request (Z1)



Step	Action
11.	Revisions will need to be made to the Header of the contract. Click the Row button. 
12.	Click the Open Order Inquiry menu. 

Training Guide Generating a Service Contract (O4) from a Quotation Request (Z1)

The screenshot shows the Oracle JD Edwards EnterpriseOne interface for generating a service contract. The window title is "Gen Service Contract (O4) from Quote (Z1) - Work With Order Details". The user is logged in as PEREZ, JULIE J. [JPY900]. The interface includes a menu bar with options: Select, Find, Add, Copy, Close, Form, Row, Tools. Below the menu bar, there are several input fields for order details:

- Order Number: 42305 (with a dropdown menu set to O4)
- Business Unit: 33200457
- Related Order: *
- Original Order: *
- NIGP Num/Inventory: *
- Account Number: *
- SBL Type/Subledger: *
- Commodity Code: *

There is also a checkbox for "Display Supplier Item". Below the input fields is a table with the following data:

Order Number	Quantity To Receive	UM	Amount To Receive	Ship To	Or Ty	Order Fd	Change Order	Supplier Number	Supplier Name
42305	.5000	EA		558083	O4	23320	000	506514	CLEAN MA

The table has a "Records 1 - 1" indicator and a "Customize Grid" button. The status bar at the bottom shows "Done" and "Trusted sites".

Step	Action
13.	Click the check box of the document. <input type="checkbox"/>
14.	Click the Row button.
15.	Click the Header Revision menu.

Training Guide

Generating a Service Contract (O4) from a Quotation Request (Z1)



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Gen Service Contract (O4) from Quote (Z1) - Order Header

Order Header Additional Properties Category Codes

Order Number 42305 O4 23320 Business Unit 33200457

Address Numbers Dates

Supplier 508514 CLEAN MANAGEMENT SERVICES Entered Date 03/15/2010

Ship To 558083 GAME & PARKS - WILDLIFE DIV Requested 03/15/2010

Buyer 100378 PEREZ, JULIE J Prom Del Date 05/30/2010

Send Invoice To 678943 AS - N/S Cancel Date

Pmt Remark Wildlife-Leslie Hershberger

Description Wildlife Req # 09-13S

Print Message

Tax Expl Code Hold Code BLANK - HOLD CODES 42/HC

Tax Rate/Area Approval Code 100378

Certificate Retainage %

Tax ID 470827320 Ordered By NISJPerez

Person/Corp. ID C Order Taken By

Payment Terms Net 30 Days from Invoice Date

Messages Attachments

Done Trusted sites 100%

Step	Action
16.	Review the Send Invoice To field. This is tied to the Ship to field, but you can override it if you need to.

Training Guide Generating a Service Contract (O4) from a Quotation Request (Z1)

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

Gen Service Contract (O4) from Quote (Z1) - Order Header

Order Number: 42305 O4 23320 Business Unit: 33200457

Address Numbers

Supplier: 506514 CLEAN MANAGEMENT SERVICES
 Ship To: 558083 GAME & PARKS - WILDLIFE DIV
 Buyer: 100378 PEREZ, JULIE J
 Send Invoice To: 678943 AS - N/S

Dates

Entered Date: 03/15/2010
 Requested: 03/15/2010
 Prom Del Date: 05/30/2010
 Cancel Date: []

Pmt Remark: Wildlife-Leslie Hershberger
 Description: Wildlife Req # 09-13S
 Print Message: []

Tax Expt Code: [] Hold Code: [] BLANK - HOLD CODES 42/HC
 Tax Rate/Area: [] Approval Code: 100378
 Certificate: [] Retainage %: []
 Tax ID: 470827320 Ordered By: NISJPEREZ
 Person/Corp. ID: C Order Taken By: []
 Payment Terms: [] Net 30 Days from Invoice Date

Messages

Attachments

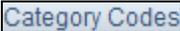
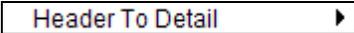
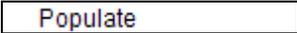
Step	Action
17.	In the Cancel Date enter the date the contract is scheduled to end or work is to be completed. All contracts must have a cancel date per state statutes 73-501-73-509.
18.	Click the Additional Properties tab. Additional Properties

Training Guide

Generating a Service Contract (O4) from a Quotation Request (Z1)



Step	Action
19.	<p>Document Description</p> <ul style="list-style-type: none"> o All Service Contracts must indicate an overall description of the contract in the Document Description field o Populate for a 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
20.	<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 information is required by State Statute for contracts. o This must be a Address Book Search Type of "F" - facility

Step	Action
21.	<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”.
22.	<p>Click the Category Codes tab.</p> 
23.	<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>
24.	<p>Enter the desired information into the Funding field. Enter "AR".</p>
25.	<p>Changes to the Header requires population to the Detail Line.</p> <p>To do this click the Form button.</p> 
26.	<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 Header To Detail menu.</p> 
27.	<p>Click the Populate menu.</p> 
28.	<p>Click the OK button.</p> 
29.	<p>Review the detail lines and make changes as needed.</p>
30.	<p>Click the OK button.</p> 
31.	<p>Click the Close button.</p> 
32.	<p>Click the Close button.</p> 
33.	<p>Click the Cancel button.</p> 

Training Guide

Generating a Service Contract (O4) from a Quotation Request (Z1)



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