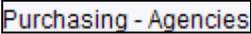
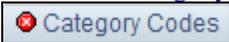


Entering/Revising a Service Contract (O4) Direct Lesson

Step	Action
1.	Click the State of Nebraska link. 
2.	Click the Purchasing - Agencies link. 
3.	Click the Contracts - Agency link. 
4.	Click the Work with Contract link. 
5.	For New Service Contract, click the Add button. 
6.	For Revision to Existing Service Contract renewal or extension, search for existing contract. 
7.	Click the Find button. 
8.	Enter Header Information for this Service Contract
9.	<p>Order Header - if this is a Revision to the Contract</p> <p>Modify information on the Order Header as needed.</p> <p><i>Note:</i> Changes to the Order Header do not automatically update on the Detail Lines. To populate ALL information from the Order Header to the Order Detail Lines, click Form, Header to Detail, Populate.</p> <p>Review the Detail lines to ensure the information is correct.</p> <p><i>Note::</i> Information from the Order Header will NOT populate to Detail lines that are cancelled or closed (Status = 999).</p>
10.	<p>An Order Number has three components:</p> <ul style="list-style-type: none"> o Order Number - system assigned o Order Type - All Service Contracts are O4 Order (Document) Type. o Order Fund - automatically assigned based on Business Unit

Step	Action
11.	<p>Supplier</p> <p>The Address Book number of the vendor from whom you will purchase the goods</p> <ul style="list-style-type: none"> o Primarily "V" search type Address Book records. <p>NOTE: This should NEVER be an "E" search type Address Book record.</p>
12.	<p>Ship To - Address to which the goods are to be delivered or the location where services are to be performed</p> <ul style="list-style-type: none"> o If multiple locations, A/B # 559783 (FACILITY, MULTIPLE ADDRESSES) can be used if the service is to be completed at several locations. o The Ship To number will automatically populate the Send Invoice To field. o Primarily "F" search type Address Book records.
13.	<p>Invoice To - the address the Vendor will send their invoice to</p> <ul style="list-style-type: none"> o Automatically populates but can be overridden o Primarily "S" search type Address Book records if the invoice will not be sent to the "Ship To" address.
14.	<p>Buyer Number - The Buyer who is primarily responsible for bidding process for this Contract at the AGENCY</p>
15.	<p>Business Unit - BU accountable for the Contract.</p>
16.	<p>Contract Entered (Date) - Current date will automatically populate.</p>
17.	<p>Contract Start (Date) - Enter the date on which the service contract will begin.</p> <p>If the Contract Start Date field is not populated, the current date will default.</p>
18.	<p>Contract Renewal (Date) –</p> <p>If the contract is New, enter the Contract Start Date.</p> <p>If the contract is Renewed, enter the date the service contract was renewed.</p> <p>If the Contract Renewal Date field is not populated, the Contract Start date will default.</p>
19.	<p>Contract End (Date) – Enter the date that the service contract will end.</p> <p>If the contract is renewed or extended, Contract End Date must be updated to reflect the new end date.</p>

Step	Action
20.	<p>Order Header</p> <p>Modify information on the Order Header as needed.</p> <p><i>Note:</i> Changes to the Order Header do not automatically update on the Detail Lines. To populate ALL information from the Order Header to the Order Detail Lines, click Form, Header to Detail, Populate.</p> <p>Review the Detail lines to ensure the information is correct.</p> <p><i>Note::</i> Information from the Order Header will NOT populate to Detail lines that are cancelled or closed (Status = 999).</p>
21.	<p>Click the Additional Properties tab.</p> <p>Additional Properties</p>
22.	<p>Data on the Additional Properties tab provides information about the document: Document Description, Document Location, and Document Contact</p>
23.	<p>Document Description</p> <ul style="list-style-type: none"> o Mandatory; this field is an overall description of the service contract. o The information will not be printed on the contract; however, it will print on Contract Reports. o This field can be used for free form text. o This field can hold up to 30 alpha/numeric characters and will automatically capitalize.
24.	<p>Document Location</p> <ul style="list-style-type: none"> o Mandatory o Identifies the facility where a service contract was established, this field can be pulled from the address book. o This must be a Address Book Search Type of “F” - facility
25.	<p>WARNING</p> <p>For contracts, the system is designed to require data on the Category Codes tab. Due to this requirement, an edit error will appear at the top of the screen to highlight this requirement.</p> <p>Complete adding data to Additional Properties tab, then update the Category Code information prior to working with the Detail Line information.</p>

Step	Action
26.	<p>Document Contact</p> <ul style="list-style-type: none"> o Mandatory o Identifies the primary person responsible for the service contract. This field can be pulled from the address book. o This must be an Address Book Search Type of “B, E, N, or X”.
27.	<p>Click the Category Codes tab.</p> 
28.	<p>Data on the Category Codes tab provides Renewal information about the service contract.</p>
29.	<p>New/Renew</p> <ul style="list-style-type: none"> o Mandatory o This field indicates if the contract is a new contract or the number of times that it has been renewed. Use the visual assist for Category Code lookup. o This field MUST be changed during the revise process when the contract is renewed.
30.	<p>Extension</p> <ul style="list-style-type: none"> o Populate this field during the revision process if the contract is extended.
31.	<p>Funding</p> <ul style="list-style-type: none"> o Optional o This field is used to indicate special funding sources such as ARRA (American Recovery and Reinvestment Act)
32.	<p>Location Moved To</p> <ul style="list-style-type: none"> o Populate this field with "RM" when the document is moved to Records Management. o Verify Cancel Date is changed to reflect the contract has expired
33.	<p>Enter Detail Lines for this Purchase Order</p> <p>Detail Lines can be entered regardless of the Tab that is displayed.</p>

Step	Action
34.	<p>NIGP Number/Inventory Number</p> <ul style="list-style-type: none"> o NIGP Number/Inventory Number – represents the NIGP commodity code for items to be purchased. If you need to find the applicable 5-digit code, note that all Services are > 90000. This field will not print on the purchasing documents. o 3-Digit NIGP – Will populate from the NIGP Number/Inventory Number; this is the three-digit prefix to a commodity code o NIGP Sub – Will populate from the NIGP Number/Inventory Number; this is the two-digit commodity code suffix <p>3-Digit NIGP and NIGP Sub automatically populate from the data entered in the NIGP Number/Inventory Number field but can be overridden.</p>
35.	<p>Quantity Ordered - Enter the quantity of the item that you require.</p> <p>In some cases, a service contract is for a specific dollar amount with unit & unit cost defined as \$1.00. In this situation, Quantity Ordered is equal to the total value of the contract.</p>
36.	<p>Tr. UoM - Transaction Unit of Measure. System defaults to EA; override this with the appropriate unit of measure if necessary. Other options can be found using the visual assist.</p>
37.	<p>Unit Cost – the estimated cost per unit.</p>
38.	<p>Extended Cost – The system will automatically populate this field based on the Quantity Ordered and Unit Cost fields.</p>
39.	<p>Pu. UoM - Purchase Unit of Measure. Defaults to the same Unit of Measure in the Tr. UoM field.</p> <p>Pu. UoM must equal Tr. UoM or an error will occur.</p>
40.	<p>Description 1 – This is free text – will print on all purchasing documents; enter descriptive data pertaining to the specific detail line. System will capitalize the text.</p>
41.	<p>Description 2 – This is free text – will print on purchasing documents; enter descriptive data that you want to appear in in system. System will capitalize the text.</p>
42.	<p>Account Number – valid business unit and object account from the Chart of Accounts. If this field was populated on Line Defaults tab, this does not need to be filled in at the detail level.</p>
43.	<p>The following fields populate based on the Account Number:</p> <ul style="list-style-type: none"> Cost Center Obj Acct Sub SBL Type Subledger

Step	Action
44.	Business Unit - Automatically populates from the Business Unit on the Order Header. This can be revised on the detail line for purposes of split coding.
45.	Line Number - Automatically populates in sequence
46.	<p>Ln Ty – Line Type</p> <p>Enter the appropriate Line Type for your order.</p> <ul style="list-style-type: none"> o J - Non-Stock Items, defaults for services o T - Text Line; indicates that text will be included on this line, but there will not be any funds/accounts associated with this line.
47.	<p>Dev Request - Deviation Request for Commodities and Services:</p> <ul style="list-style-type: none"> o Exception Orders o Emergency Purchases o Direct Purchase Authority, DPA o Statewide Contract Use o Deviation Process
48.	Other fields on a detail line may be required by your Agency. Fill these required.
49.	<p>Line Attachments -</p> <p>Line Attachments: Text (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)</p> <p>Line Attachments: OLE (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)</p>
50.	<p>Add as many detail lines as necessary to the service contract.</p> <ul style="list-style-type: none"> o Use the down arrow on the keyboard to move the cursor to the next line if required. o Additional fields will be defaulted in, such as Extended Cost and Line Type. o If you have additional items to order, repeat step 6 until the order is complete. o The new Order Number and Order Type (O4) will appear and should be noted if you wish to do more work with them or facilitate searches later.
51.	<p>Click the OK button.</p> 
52.	<p>You can enter a new contract or click the Cancel button.</p> 
53.	<p>Click the Close button.</p> 

Step	Action
54.	End of Procedure.