

Entering a Service Contract (O4) Direct

Overview

Use this work instruction to create a Service Contract.

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 Administrative Services website:

<http://www.das.state.ne.us/>.

Navigation

Click Roles, Procurement.

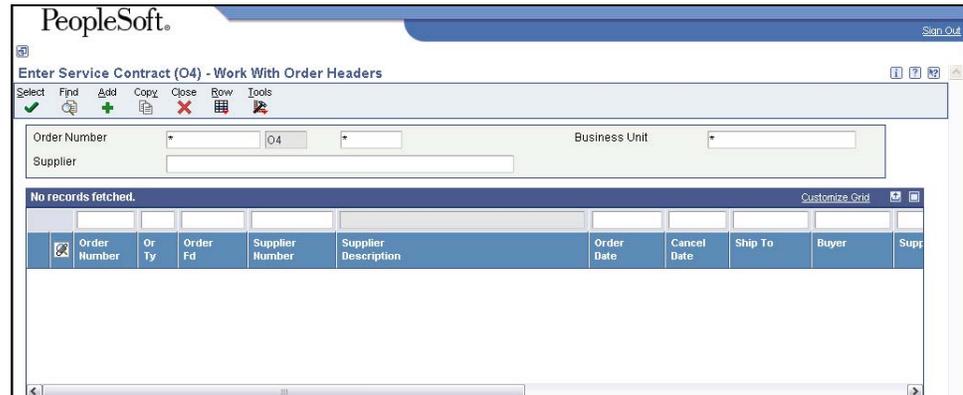
(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

Purchasing – Agencies > Contracts - Agency > Enter Service Contract (O4)

Steps

Enter a Service Contract Directly

Start this instruction from the Work with Order Header window.



1. Click **Add**. The Enter a Service Contract (O4) - Order Header window appears.

The screenshot shows the 'Enter Service Contract (O4) - Order Header' form in PeopleSoft. The form is divided into several sections:

- Order Header:** Order Number (04), Business Unit.
- Address Numbers:** Supplier, Ship to, Buyer, Invoice To, Print Remark, Description, Print Message.
- Dates:** Order Date, Requested, Promised Delivery, Cancel Date.
- Tax/Approval:** Tax Expt Code, Tax Rate/Area, Certificate, Tax ID, Person/Corp. ID, Payment Terms, Hold Code (BLANK - HOLD CODES 42/HC), Approval Code, Retainage %, Ordered By (NISLMILLER), Order Taken By, AIA Document (Y).
- Messages:** A section for entering messages.

2. Complete the following fields:

- **Business Unit** - BU accountable for the order
- **Supplier Number** - enter the Address Book number of the vendor from whom you will purchase the goods.
- **Ship To** - address to which the goods are to be delivered or the location where services are to be performed.
 - The Ship To number will automatically populate the Send Invoice To field.
 - Your login ID will default to the Ordered By field.
- **Order Date** - automatically defaults to the current date.
- **Requested Date** - Enter the date on which the service contract will begin.
 - If the Requested Date field is not populated, the current date will default.
- **Promised Delivery** – enter the Cancel Date as it will carry to the Purchase order. The system uses this date in conjunction with the receipt date.
- **Cancel Date** – Enter the date that the service contract will end.
- **Payment Remark** - Optional - This field can be used for free form ext.
- **Contract Location/Desc** - Must be populated as it is used to identify where the contract will be physically located.
 - The information will not be printed on the contract however it will print on the Contracts with Originating Doc Type report.
 - This field can hold up to 30 Alpha/numeric characters.

PeopleSoft

Enter Service Contract (O4) - Order Header

Order Number: 04 22710 Business Unit: 27227150

Address Numbers

Supplier: 500261 ABELCONN LLC
 Ship to: 558552 ROADS LINCOLN CENTRAL...
 Buyer: 1117504 MILLER, LINDSEY
 Invoice To: 250227 ROADS LINCOLN CENTRAL CO...

Dates

Order Date: 03/03/2006
 Requested: 06/03/2006
 Promised Delivery: 06/03/2006
 Cancel Date: 03/03/2007

Tax

Tax Expt Code: []
 Tax Rate/Area: []
 Certificate: []
 Tax ID: 410840023
 Person/Corp. ID: []
 Payment Terms: []

Hold Code

Hold Code: [] BLANK - HOLD CODES 42/HC
 Approval Code: []
 Retainage %: []
 Ordered By: NISLMILLER
 Order Taken By: []
 AIA Document: Y

Messages

3. Click **OK**. The Order Detail window will appear.



The Order Number will display in the upper Order Detail tab.

PeopleSoft

Enter Service Contract (O4) - Order Detail

Order Number: 11673 O4 22710 Business Unit: 27227150

Supplier: 500261 ABELCONN LLC Order Revision: []
 Ship To: 558552 ROADS LINCOLN CENTRAL COMPLEX Order Date: 03/03/2006
 Hold Code: [] BLANK - HOLD CODES 42/HC
 Retainage %: []

Records 1 - 1

	NIGP Number/ Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1

4. Complete the following information in the grid:

- **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 will be > 90000. This field will not print on the purchasing documents.
- **3-Digit NIGP** –three-digit prefix to a commodity code
- **NIGP Sub** – two-digit commodity code suffix



3-Digit NIGP and NIGP Sub automatically populates from the data entered in the NIGP Number/Inventory Number field but can be overridden.

- **Quantity Ordered** - Enter the quantity of the item that you require
- **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.

- **Unit Cost** - the estimated cost per unit
 - **Description 1** - This is free text – will print on all purchasing documents; enter descriptive data pertaining to the specific detail line.
 - **Description 2** – This is free text – will print on purchase order only; enter descriptive data pertaining to the specific detail line.
 - **Account Number** - valid business unit and object account from the Chart of Accounts.
 - **Report Code 3** – Commodities and Services use to identify:
 - Exception Orders
 - Emergency Purchases
 - DPA
 - Statewide Contract Use
 - Deviation Process
 - **Report Code 4** – Used ONLY for Purchasing for Inventory
 - Identifies Master Planning Family.
 - **Ln Ty** – Defaults **J** for Non-Stock items; end-user can add a **T** Line type that indicates the Line is text information.
 - Other fields as required by your agency
 - Line Attachments: Text (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)
 - Line Attachments: OLE (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)
5. Use the down arrow on the keyboard to move the cursor to the next line if required
-  Additional fields will be defaulted in, such as Extended Cost and Line Type.
 -  If you have additional items to order, repeat steps 4 and 5 until the order is complete.
 -  The new Order Number and Or Ty (O4) will appear and should be noted if you wish to do more work with them or facilitate searches later.

PeopleSoft® Sign Out

Enter Service Contract (O4) - Order Detail F1 F2 F3

OK Cancel Form Row Tools

Order Detail | Line Defaults

Order Number	11673	O4	22710	Business Unit	27227150
Supplier	500261	ABELCONN LLC		Order Revision	
Ship To	558552	ROADS LINCOLN CENTRAL COMPLEX		Order Date	03/03/2006
Hold Code		BLANK - HOLD CODES 42/HC			
Retainage %					

Records 1 - 2 Customize Grid

	NIGP Number/ Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1
<input type="checkbox"/>	91820	918	20	40.0000	HR	65.0000			consulting
<input type="checkbox"/>									

6. Click **OK** to return to the Order Header window.
7. Click **Cancel** to return to the Work with Header window.
8. Click **Close**.