

## **LECTURE AGREEMENT PURCHASE REQUISITION**

**PURPOSE:** TO RECORD AND ENCUMBER FUNDS FOR A LECTURE AGREEMENT CONTRACT

**REQUIRED DOCUMENTATION & PREAPPROVALS:**

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. APPROVED LECTURE AGREEMENT CONTRACT
3. COMPLETED AND SIGNED EVALUATION OF EMPLOYER-EMPLOYEE RELATIONS FORM
4. BUDGET NUMBER AND AVAILABLE FUNDING

**REQUIRED ATTACHMENT:** LECTURE AGREEMENT CONTRACT SIGNED BY SPEAKER AND DISTRICT PURCHASING AND CONTRACT SERVICES

**CHECK “AMOUNT ONLY” BOX:** YES

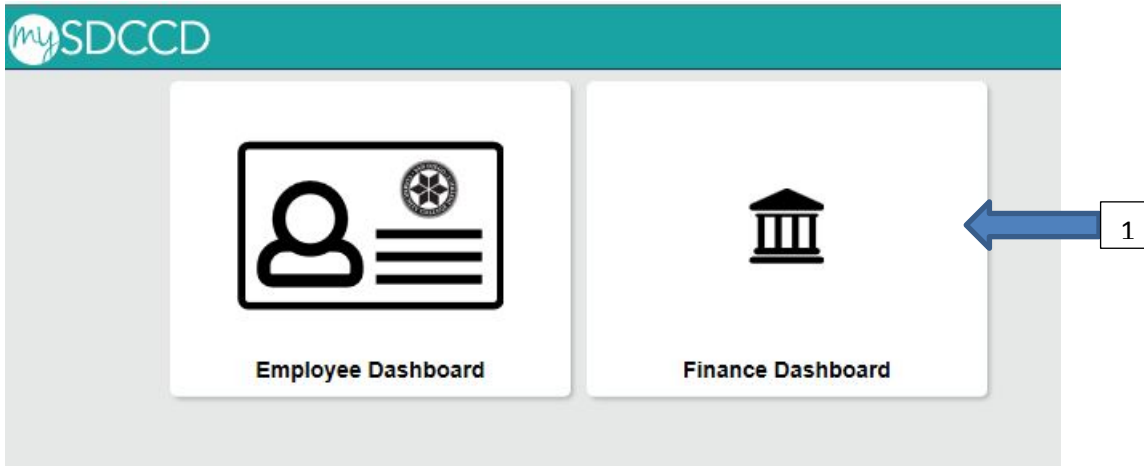
**PAYMENT PROCESS TO SUPPLIER:** SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE - [apinvoice@sdccd.edu](mailto:apinvoice@sdccd.edu). BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

*Note: The process for Lecture Agreements and Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.*

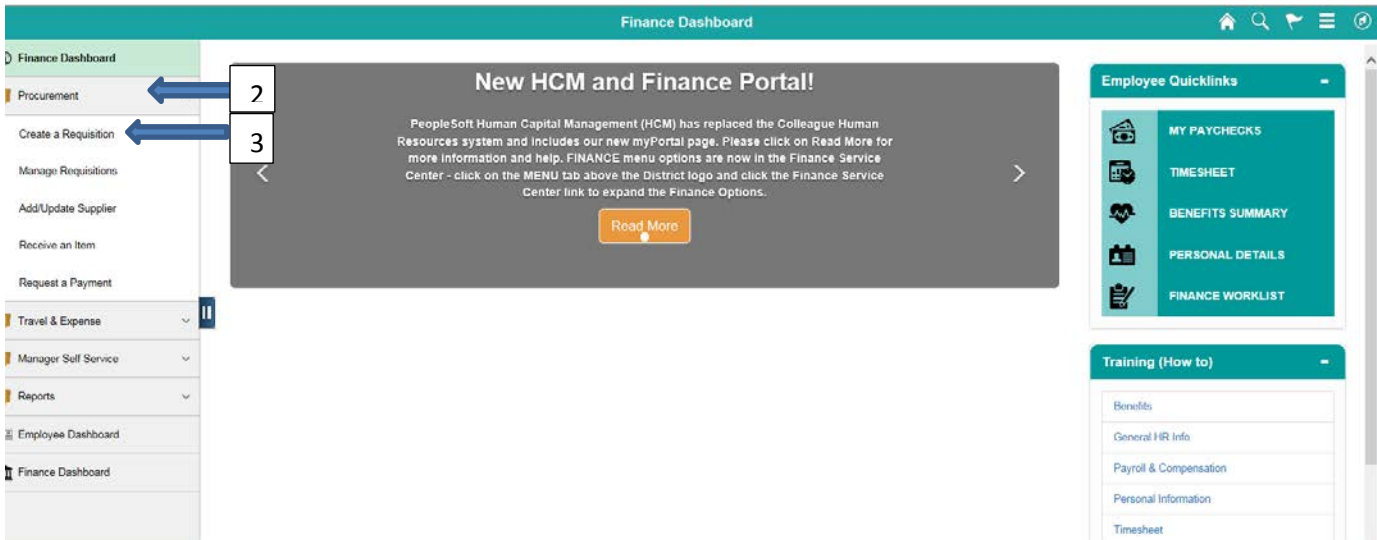
# LECTURE AGREEMENT REQUISITION

Log into PeopleSoft at [myportal.sdccd.edu](http://myportal.sdccd.edu) using your User ID and Password.

Select the Finance Dashboard.



Next, navigate to *Procurement/Create a Requisition*.



This is the *Requisition Settings* page. When creating a requisition, enter info on this page and it will auto populate into each line item of the requisition.

**Requisition Settings**

Business Unit  San Diego Miramar College Bid No/Quote

\*Requester  Carrie De Moll Priority

\*Currency

**Default Options** ?

**Default** If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

**Override** If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults** ?

Supplier  Category

Supplier Location  Unit of Measure

Buyer

**Shipping Defaults**

Ship To  Attention

Due Date  Attention

**Distribution Defaults**

SpeedChart

**Accounting Defaults** Personalize | Find |  First 1 of 1 Last

Chartfields1	Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account
	1		MIR	MIR01				

OK Cancel

The “Bid No/Quote” field should follow the naming convention “LECTURE AGRMT – VENDOR NAME”. In the Default Options box, change the status from *Default* to *Override*.

**Requisition Settings**

Business Unit  San Diego Miramar College Bid No/Quote

\*Requester  Carrie De Moll Priority

\*Currency

**Default Options** ?

**Default** If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

**Override** If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults** ?

Supplier  Category

Supplier Location  Unit of Measure

Buyer

Supplier ID

Short Supplier Name

Alternate Supp Name

City

Country  State

Postal Code

Enter search criteria to find a supplier.

Select Cancel



Click the Magnifying Glass Icon for Supplier Enter Supplier’s Name. Click Find.

Supplier's ID # and related information will pop up. Click on the circle to select vendor and click "Select".

Supplier Search

Supplier ID  Find  
Name JAMES C. COLLINS Reset  
Short Supplier Name   
Alternate Supp Name   
City   
Country  State   
Postal Code

**Search Results** Personalize | Find | View All | First 1 of 1 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
	1 0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER PEAK RD	16203 SPANGLER PEAK RD	RAMONA	CA	

Select Cancel

Enter Category Code (918-38)

Buyer field should be blank

Attention field should be the Requester

Enter budget number (Fund, Dept, Product, Account). You should obtain this from your Dean or Manager.

Click OK.

### Requisition Settings

Business Unit  San Diego Miramar College Bid No/Quote LECTURE AGRMT – COLLINS, JAMES  
\*Requester  Carrie De Moll Priority   
\*Currency

**Default Options**

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.  
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults**

**Note:** The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier  Category   
Supplier Location  Unit of Measure   
Buyer

918-38 is the Category Code for all Lecture Agreements

Buyer field should be blank

### Shipping Defaults

Ship To  Attention   
Due Date

### Distribution Defaults

SpeedChart

**Accounting Defaults** Personalize | Find | First 1 of 1 Last

Chartfields1

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account
1		<input type="text" value="MIR"/>	<input type="text" value="MIR01"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

The Requisition Settings page is complete. To begin creating the requisition, click the "Special Requests" link.

Create Requisition ?

Welcome Elizabeth Ann Whitsett

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**  
Browse Catalogs  
CATEGORY
- Web**  
Browse Supplier Websites  
Grainger Punch Out  
Office Solutions Punch Out
- Express Item Entry**  
Create an Express Requisition
- Special Requests**  
Create a non-catalog request
- Forms**  
Create and Submit Forms
- Favorites**  
Browse Favorite Items and Services
- Templates**  
Browse Company and Personal Templates
- ePro Services**  
Request Services  
Fixed Cost Service  
Variable Cost Service  
Time and Materials
- Recently Ordered**  
View recently ordered items and services  
INSTALLATION MATERIALS  
LABOR, PROJECT MANAGEMENT  
LABOR, CABLE INSTALLATION, I...  
PRINTER, LJ HP M610dn Printe...  
BPO

Enter Item Description starting with "LECTURE AGREEMENT – SUPPLIER'S NAME". Add the amount of the Lecture Agreement and enter the quantity as "1". In the Additional Information box, enter the Lecture Agreement Language shown below. Click all 3 boxes: Send to Supplier, Show at Receipt, and Shown at Voucher. Then click "Add to Cart".

Create Requisition ?

Enter information about the non-catalog item you would like to order:

Item Details

\*Item Description LECTURE AGREEMENT - COLLINS, JAMES

\*Price 750.00 \*Currency USD

\*Quantity \*Unit of Measure EA

\*Category 918-38 Due Date

Supplier

Supplier ID 0000590433

Supplier Name JAMES C. COLLINS JAMES C. COLLINS Suggest New Supplier

Supplier Item ID

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX

Send to Supplier  Show at Receipt  Shown at Voucher

Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

Add to Cart

Highlighted areas require you to provide specific information for each agreement.

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX  
CONTACT PERSON: NAME/PHONE/AND/OR EMAIL  
SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

On the next page, click "Checkout".

## Create Requisition ?

Welcome Carrie De Moll

[Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#)

[Checkout](#)

Request Options Search  Search Advanced Search

On the Checkout page, attach the district-signed Lecture Agreement under Comments

### Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

#### Requisition Summary

Business Unit  San Diego Miramar College Bld No/Quote   
\*Requester  Carrie De Moll Priority   
\*Currency

Cart Summary: Total Amount 750.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00	750.00			

Select All / Deselect All    Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 750.00 USD

Click Icon under Details to select Amount Only

#### Shipping Summary

[Edit for All Lines](#)

Ship To Location   
Address   
  
Attention To   
Comments

#### Requisition Comments and Attachments

Enter requisition comments

Send to supplier     Show at Receipt     Shown at Voucher

#### Approval Justification

Enter approval justification for this requisition

[Check Budget](#)

[Pre-Check Budget](#)

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)

#### Line Details

Line 1  CONSULTANT AGREEMENT - JAMES C    Line Status: Open

Merchandise Amount: 8000.00 USD  
Item ID:   
Category: 915-25  
Original Substituted Item Description:   
Physical Nature:   
Buyer: 102545  
Buyer Information:   
Configuration Info:

HP-D Required     Device Tracking  
 Zero Price Item     Amount Only  
 Inventory Required

Use Contract if Available  
Contract ID:   
Contract Details:   
Version:   
Contract Line:   
Category Line:

Supplier Information:  
Supplier ID: 000050433    JAMES C. COLLINS  
Supplier Location: 0001    16200 SPANGLER PEAK RD  
Supplier Item ID:   
Supplier's Catalog:

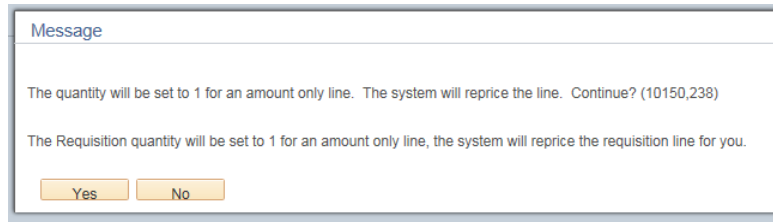
Manufacturer Information:  
Manufacturer ID:   
Manufacturer's Item ID:   
GLIN:

Sourcing Controls:  
 Consolidate with other Req  
 Calculate Price  
 Override Suggested Supplier

[OK](#) [Cancel](#)

Click OK

When the following message appears, click “Yes”.



Review all your information carefully. Click “Save for Later”, which will create a Requisition ID number. If everything appears correctly, click “Check Budget”.

### Checkout - Review and Submit

Review the Item Information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

#### Requisition Summary

Business Unit:  San Diego Miramar College Bid No/Quote:   
\*Requester:  Carrie De Moll Priority:   
\*Currency:

Cart Summary: Total Amount 750.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00000	750.00		Edit	

Select All / Deselect All      Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 750.00 USD

#### Shipping Summary

[Edit for All Lines](#)

Ship To Location: MIR  
Address: 10440 Black Mountain Road  
San Diego, CA 92126-2999  
Attention To: CARRIE DE MOLL  
Comments:

#### Requisition Comments and Attachments

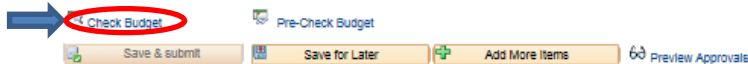
Enter requisition comments

Send to Supplier     Show at Receipt     Shown at Voucher

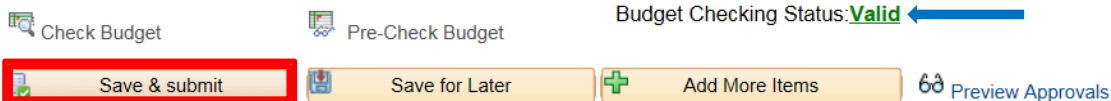
[Edit more Comments and Attachments](#)

#### Approval Justification

Enter approval justification for this requisition



When the “Budget Checking Status” changes from “Not Checked” to “Valid”, proceed by clicking the “Save and Submit” button. This will start the approval process.



**NOTE: If the check should be delivered to someone other than the supplier, complete a Special Handling Form and email it to [APspecialhandling@sdccd.edu](mailto:APspecialhandling@sdccd.edu).**