

LECTURE AGREEMENT

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

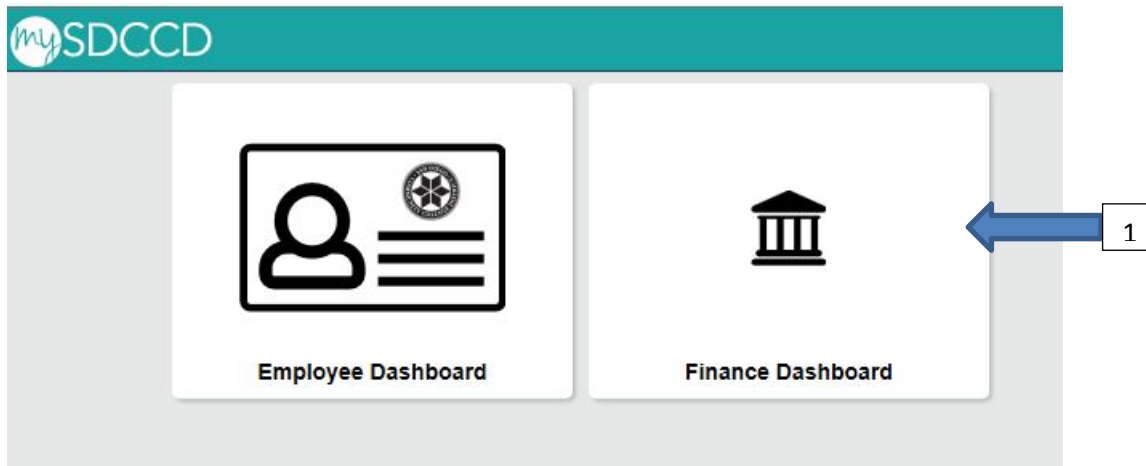
PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. INVOICE IS ELECTRONICALLY ROUTED WITHIN PEOPLESOFT FOR APPROVAL. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER'S CONSENT.

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.

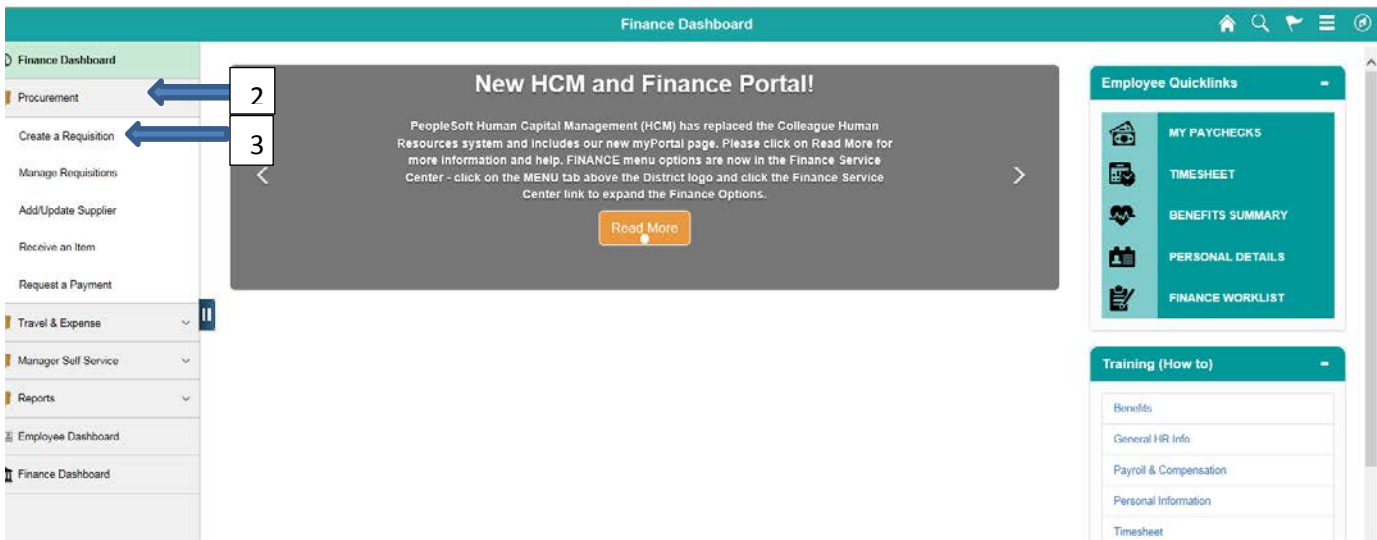
LECTURE AGREEMENT REQUISITION

Log into PeopleSoft at myportal.sdccd.edu 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 ?

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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.

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 Help

Supplier ID
 Name JAMES C. COLLINS
 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	
<input type="radio"/>	1 0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER PEAK RD	16203 SPANGLER PEAK RD	RAMONA	CA	

Enter Category Code (918-38), Buyer (KROSAS) and to whose attention this should go (typically 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

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		MIR	MIR01				

On the next page click on "Create Requisition".

Create Requisition ?

Welcome Carrie De Moll

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.

- Web**
Browse Supplier Websites
Office Solutions Punch Out
- Templates**
Browse Company and Personal Templates
- Create Requisition**
Create a non-catalog request
- ePro Services**
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials
- Favorites**
Browse Favorite Items and Services
- Recently Ordered**
View recently ordered items and services
SHIPPING AND HANDLING
SIGN, BULLETIN BOARD, OUTDOO...
Insertable Big Tab Dividers,...
Lightweight Hand Letter Open...
Magic Tape Value Pack, 3/4" ...
More...

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

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

Supplier

Supplier ID

Supplier Name 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

On the next page, click "Checkout".

Create Requisition ?

Welcome Carrie De Moll

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

Request Options

Search All

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: 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

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

Merchandise Amount: 8000.00 USD
Item ID: 915-25
Original Substituted Item Description: Goods
Physical Nature: Goods
Buyer: 102545

Contract Information: Use Contract if Available
Contract ID: 102545

Supplier Information: Supplier ID: 000050433, Supplier Location: 0001, Supplier's Catalog: 118203 SPANGLER PEAK RD

Manufacturer Information: Manufacturer ID: , Manufacturer's Item ID: , G13N

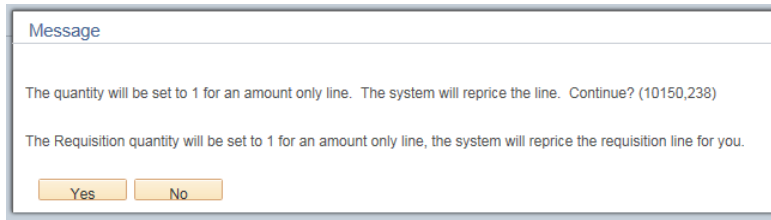
Sourcing Controls: Consolidate with other Req, Calculate Price, Override Suggested Supplier

HPO Required, Device Tracking, Zero Price Item, Amount Only, Inventory Required

[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
*Requester: Carrie De Moll
*Currency:
Bid No/Quote:
Priority:

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 Comments: CARRIE DE MOLL

Requisition Comments and Attachments

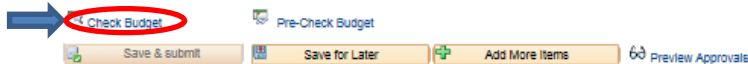
Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

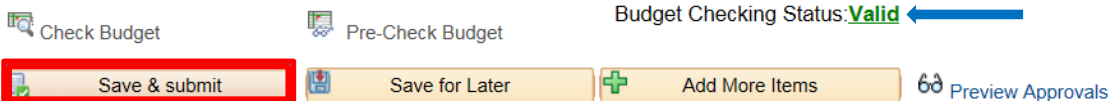
[Edit more Comments and Attachments](#)

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.