How to Enter a Task Order for Lewan Contract 201416395

Login to PeopleSoft

- From the Main Menu:
  - Purchasing
  - Requisitions
    - Add/Update Requisitions
      - Add a New Value:
        - Business Unit: enter your 5 letter business unit (i.e. EAPPS)
        - Requisition ID=NEXT

- Header
  - Requester: enter your employee ID
  - Origin = TSK
  - Click Add Comments and Upload Applicable Documents as Attachments

- Line
  - Details Tab:
    - Description: Enter a short description specific to this task order
    - Quantity= 1
    - UOM= LOT
    - Category Code=
      - 98527 for copy machines
      - 20477 for printers
- Dollar Amount: enter the specific amount you wish to encumber for this task order only

  - **Ship To/Due Date Tab:**
    - Ship To: Generally the Business Unit followed by 0’s (i.e. EAPPS000000)

  - **Vendor Information Tab:**
    - Vendor: enter **000007031**
    - (LEWAN & ASSOCIATES will appear under Vendor Name)

  - **Attributes Tab:** Check **Amount Only** Box

  - **Contract Tab:**
    - Contract ID: enter **201416395**

  - Click the **Details Tab** again:
    - Click on the Schedule button

  - Click on the Distribution button

  - Enter the following **Account Code:**
    - **640400** for copy machine lease
    - **910900** for copy machine/print charges
• Enter the Fund, Org, Program, and Class chartfields specific to your business unit.

  ❖ Finalize

  ➢ Add any ad hoc approvers by clicking View Approvals *(if applicable)*

  ➢ *Save* the Requisition

  ➢ Move to Pending Status by clicking on the Open check box

  ➢ Approve the Requisition yourself

  ➢ The requisition will move on to be approved by the next person in the approval chain

  ➢ An Expending Authority must approve the requisition (the final approver) at which point an Alfresco Workflow will begin (see below).
(Multiple actors, At least 1 is Mandatory)

Agency Contract Admin (Mandatory)

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Agency Approvess?

No

Yes

Agency Approvess as assigned by the contract admin (Optional)

Agency Approvals Task

Approve

Initiating Authority Approval Task

• OC Contract owning agency approver, signs last
  • Determined by user in Agency Assignment task

Signature Draft Build Task

Generate

Signature Draft Validation Task

Done

Get Vendor Signature Task

Done

Signature Page Validation Task

Done

Agency Approver Assignment Task

Done

Request Revision

Request Revision

Redo

Redo

Redo