

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

Maintain Requisitions

Requisition

Business Unit: EAPPS Status: Open
Requisition ID: 12345 Budget Status: Not Chk'd
Requisition Name: 12345 [Copy From](#) Hold From Further Processing

Header

*Requester: 110757 [Requester Info](#) [Add Comments](#) (highlighted)
*Requisition Date: 10/17/2014 [Requisition Defaults](#)
*Origin: TSK [Task Order- 1 time use project](#) [Requisition Activities](#)
*Currency Code: USD [Dollar](#) [PW Assignment](#)
Accounting Date: 10/17/2014 [Amount Summary](#)
Total Amount:

❖ 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. EAPPS00000)

➤ Vendor Information Tab:

- Vendor: enter **0000007031**
- (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

Merchandise Amount	Status				
0.000	Open				

- Click on the Distribution button

Attention To	Status	
 110757	Active	

- Enter the following Account Code:
 - **640400** for copy machine lease
 - **910900** for copy machine/print charges

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: [Task Order #1](#)
 Line: 1 Status: Active
 Schedule: 1

Ship To: EAPPS00000 Enterprise Quantity:
 *Distribute By: Quantity
 Liquidate by: Quantity
 SpeedChart: [Multi-SpeedCharts](#)

Distributions

Chartfields Details Asset Information Budget Information

Distrib	Open	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Org
1	<input checked="" type="checkbox"/>	100.0000	1.0000	500.000	DENV	640400		

OK Cancel Refresh

- Enter the Fund, Org, Program, and Class chartfields specific to your business unit.

❖ Finalize

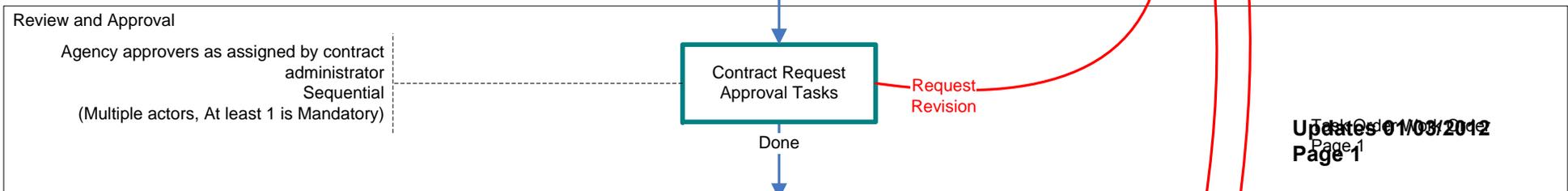
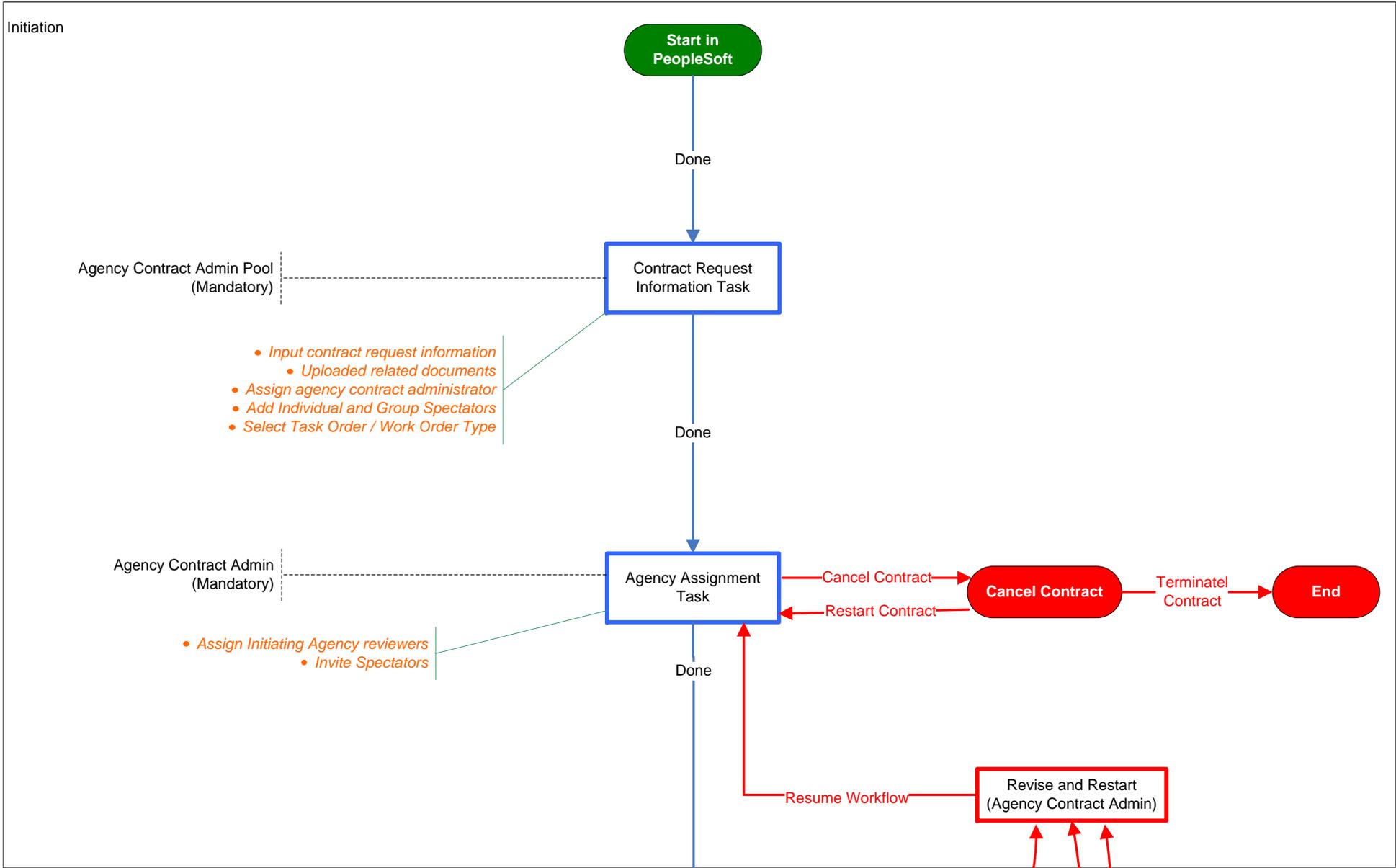
- Add any ad hoc approvers by clicking View Approvals (if applicable)
- **Save** the Requisition
- Move to Pending Status by clicking on the Open check box

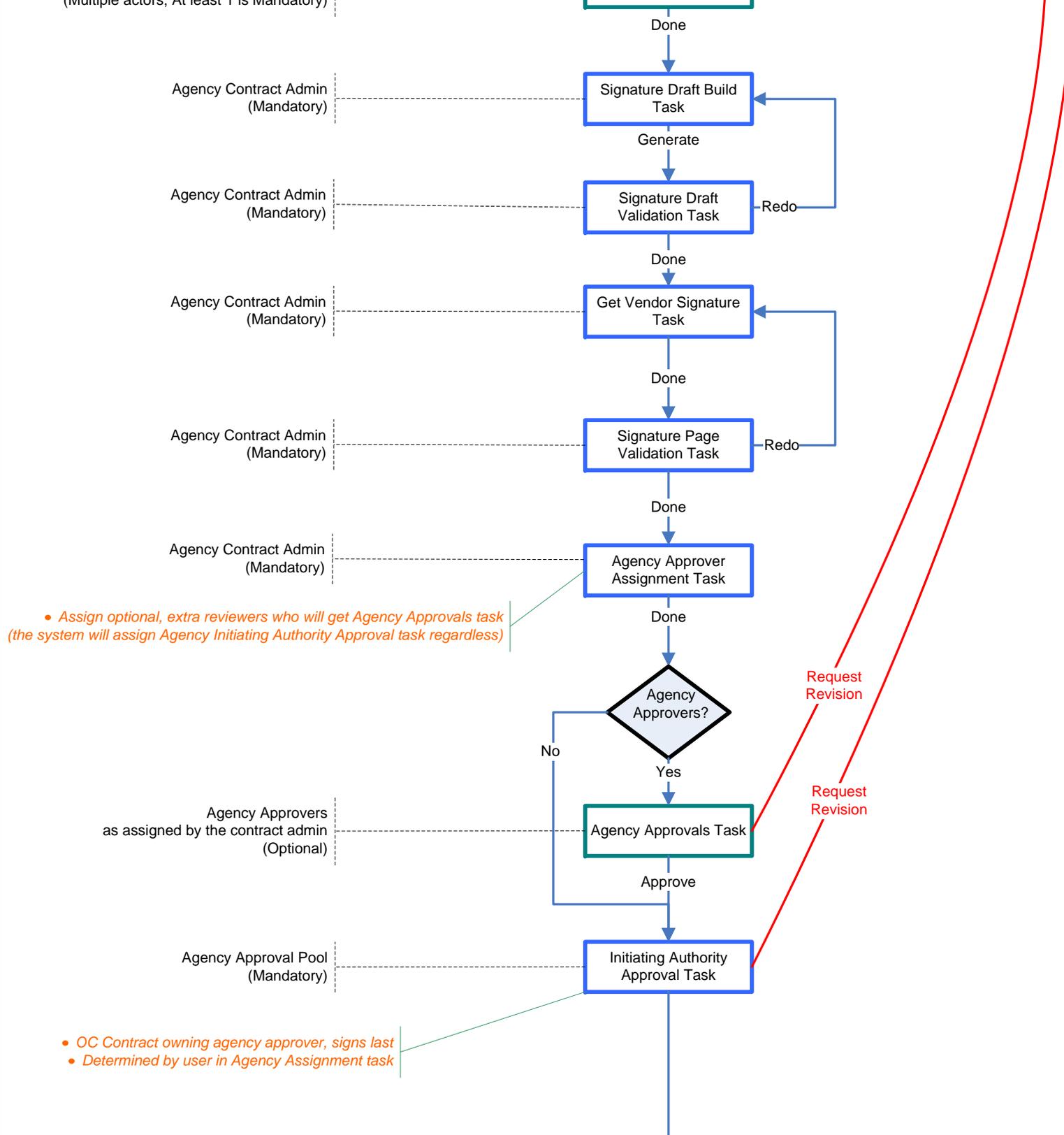
Status: Open 

Budget Status: Not Chk'd 

Hold From Further Processing Prevailing Wage

- 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).





Approve

End

