This feature will show you how to complete a requisition for services, rather than goods, using PeopleSoft. Examples of services include utilities, subcontracts, and independent contractors. This instructional guide includes information about “fixed” and “variable cost” service requisitions as well as service requisitions involving “time and materials.” To learn more about the requisition process, attend “Introduction to Purchasing and Payables” as well as “Purchasing and Payables: Paying Your Vendors.” Revised 7/27/04

- Log into the system via the myUFL portal, using your GatorLink user id and password (http://my.ufl.edu)

The first 3 steps to creating a service requisition are just like creating a requisition for goods. Your basic navigation for the "procurement to pay" cycle is:

- e-Procurement
  - e-Procurement Home Page
  - Create Requisition

- At the New Requisition screen, the Business Unit will default to UFLOR
  - Change the Business Unit to the first four digits of the Dept ID making the request
  - Press “OK”

- Next, title your requisition—remember: the more descriptive, the better!
  - When done, click “Special Request”
  - Choose “Service” for Type of Item and click “Next”

**Service Examples:**
- Utilities (electric, gas)
- Independent contractors
- Temporary services
- Repairs
- Construction
- Copying
- Postage
- Freight
- Leases/rent
- Subcontracts
- Moving
- Printing

- Specify service type. Your choices are:
  - **Fixed Cost:** A one-time event for a flat rate against which partial payment may be made. This choice can support monthly payments against a total encumbrance (e.g., for utilities).
  - **Variable Cost:** The service is a contractual agreement based on the number of hours of work. Example of variable cost: Dollars per hour.
  - **Time and Materials:** A two-line requisition where line 1 is Variable Cost ($/hr) and line 2 is Fixed Cost (cost of materials).

**NOTE:** After following the steps described on pages 2-6 of this guide, proceed as you have been trained, entering ChartField string (under the truck!), comments, etc. Don’t forget to associate a project, if applicable, on the appropriate ChartField string(s). Click the Ledger icon within Shipping Information to go to ChartFields.

- For Services, change the Distribution to “AMT” (for Amount)—this does not default!
A Closer Look at Fixed Cost Service Requisitions:
Examples: Utilities, Electricity

- After selecting Fixed Cost, enter the description
- Then select a category by clicking on the magnifying glass, and then using the Advanced Lookup feature

![Special Request - Fixed Cost Service](image)

**Vendor Lookup**

At the Lookup Category screen:
- Change “Description” from “begins” to “contains” and type in a word. In the example below, we typed in “util”
- After typing in your word of choice, press the Look Up button and you will get Search Results
- To select the appropriate category, click on the link, and the system will automatically return to the previous page and fill in your selection

![Look Up Category](image)

**Search Results**

<table>
<thead>
<tr>
<th>Category Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>83101600 Electric Utilities</td>
</tr>
<tr>
<td>83101600 Oil and Gas Utilities</td>
</tr>
<tr>
<td>83101500 Water and Sewer Utilities</td>
</tr>
</tbody>
</table>
Then, at the Special Request—Fixed Cost Service screen (as shown below):

- Define the Value of the Service (Example: $4000 for three months)
- Currency will default to USD (for U.S. Dollars)

Next, look up the Vendor ID, by clicking on “Vendor Lookup”

- Then, enter the date range the services will be provided using the calendar “drop downs”
  - Start Date: The day services commence
  - Due Date: The end date for the order
- Quotes are not appropriate for this type of service
- Use the Comments Text field as appropriate
- Then, “Add Item”
A Closer Look at Variable Cost Service Requisitions:
Examples: Temporary Services, Independent Contractors, Professional Services

- After selecting Variable Cost, enter the description
- Then select a category by clicking on the magnifying glass, and then using the Advanced Lookup feature

![Image of Service Requisitions form]

At the Lookup Category screen:
- Change “Description” from “begins” to “contains” and type in a word. In the example below, we typed in “temp”
- After typing in your word of choice, press the Look Up button and you will get Search Results
  - To select the appropriate category, click on the link, and the system will automatically return to the previous page and fill in your selection

![Image of Lookup Category form]
Then, at the Special Request—Variable Cost screen (as shown below):

- Enter Units of Work (Example: Number of hours or days)
- Enter the Unit of Measure (Example: Hours)
- Enter the Rate (Example: Dollars per hour or dollars per day)

Next, look up the Vendor ID, by clicking on “Vendor Lookup”

- Enter the date range the services will be provided using the calendar “drop downs”
  - Example: Beginning date of service: 7/1/04
  - Date of completion: 1/31/05
- If the vendor has supplied a Quote Number and Quote Date, enter them here
- In “Scope of work,” provide a complete description of what is required in order for the vendor to be paid
- Then, “Add Item”
A Closer Look at Time and Materials Service Requisitions:
Examples: Repairs and Some Kinds of Subcontracts

The first line of a Time and Materials requisition looks like a Variable Cost Service Requisition

▸ Enter the required information (Example: Repair work is billed by the hour)

![Special Request - Time and Materials (Service Information)](image)

▸ Click “Next” to proceed to line 2 of the requisition

The second line of a Time and Materials requisition looks like a Fixed Cost Service Requisition

▸ Enter the cost (Example: The cost of the materials needed for the repair work)
▸ Then, “Add Item”

![Special Request - Time and Materials (Materials Information)](image)