PURCHASING 101
&
BASIC REQUISITION ENTRY

THE UNIVERSITY OF
SOUTHERN MISSISSIPPI

Updated August 29, 2013

Procurement & Contract Services
procurement@usm.edu

The University of Southern Mississippi
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Hattiesburg, MS 39406-0001
601.266.5174
# Purchasing 101 & Basic Requisition Entry

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What is Procurement & Contract Services?

Procurement & Contract Services provides service and support of the procurement needs of the educational, research and administrative mission of the university while adhering to state and federal statutes and university policy. We manage the procurement process from the purchase request through the receiving of goods, processing of vendor payments and cataloging of inventory. In addition to the procurement process, we also manage university travel and contracted services (i.e. university contracts for Eagle Dining and Barnes and Noble).

Who do I contact if I have questions about Purchasing?

Audra Williams  Buyer/Pcard Administrator  audra.williams@usm.edu
Procurement Cards; Resolve Training; Equipment Rental Contracts (Copiers, etc.); Consultant Payments and Reimbursements; Furniture, Insurance; Maintenance Contracts; Personal Services Agreements; Printing and Related Items (Advertisements, Awards and Trophies, Binding, Novelty Items, Printing and Clothing); State Contract Office Supplies

Heather Hendrix  Buyer  heather.hendrix@usm.edu
Books and Instructional Supplies; Contract Services, Physical Plant, and Residence Life Purchases (Appliances, Carpet, Hardware, Food Service Equipment, Janitorial and Laundry Supplies, Tools, etc.); Dues; Food; Paper and Paper Products; Printer Ink, Toner and Maintenance Kits; Subscriptions

Jennifer Henry  Buyer  jennifer.k.henry@usm.edu
Workflow Requisition Entry and Approval Training; Athletic Equipment and Supplies; Drugs and Pharmaceuticals; Marine Equipment and Supplies; Medical Equipment and Supplies; Music and Musical Instruments; Scientific Equipment and Supplies; Sole Source Purchases Audio/Visual Equipment; Computer Hardware; Computer Software; Fax Machines; Standing Orders; Telecommunications Equipment; Vehicles and Related Supplies (Batteries, Fuelman, Tires, etc.)

Jo Berry  Vendor Maint/Pcard Specialist  sandra.berry@usm.edu
Maintain Vendor Database; Purchase Order Inquiry; Procurement Card Review

Procurement Liaison
Bid Processing and Advertising; Purchase Order Processing

Heather Rivers  Purchasing Clerk  heather.l.rivers@usm.edu
General Procurement Questions; Incoming Mail Processing

Who do I contact if I have questions about Accounts Payable?

Shelia Sims  Manager, A/P & Travel  shelia.sims@usm.edu
1099 Misc, Petty Cash, Accounts Payable and Travel Problem Resolution

Angela Thomson  Accounts Payable Specialist  angela.thomson@usm.edu
Remittance Vouchers, Employee Reimbursement Vouchers

Sandra Howard  Accounts Payable Clerk  sandra.howard@usm.edu
USMPO Vendors A-L Invoice Entry; GCRL Invoice Entry

Gwen Hill  Accounts Payable Clerk  gwen.hill@usm.edu
USMPO Vendors M-Z Invoice Entry; USMGC Invoice Entry
PROCUREMENT CYCLES

Payment Issued

Decision to Purchase

Enter a Requisition

Purchase Order Created

Invoice Received in A/P

Enter a Receipt

Goods Rec'd or Services Rendered

Decision to Purchase

Reconcile Pcard

Use Pcard

Goods Rec'd or Services Rendered

PCARDS
When preparing to make a purchase remember it is your duty to spend the university’s funds responsibly by following purchasing laws, university policies and by obtaining competitive pricing and value.

**What would you do if you were buying the item with your own money?**

Purchases from external vendors using university funds can be made with three different purchasing processes: procurement card, purchase order or remittance voucher.

When preparing to make a purchase, first determine which process is appropriate:

1. Can I use a procurement card? Is the purchase allowable and will vendor accept it?
2. If cannot use the procurement card then a purchase order must be obtained BEFORE making the purchase.
3. Remittance vouchers should be used only when other payment methods are not more appropriate. Please contact Accounts Payable or visit the Accounts Payable website for more information about remittance vouchers.

**PROCUREMENT CARDS**

Procurement cards (pcards) have replaced purchase orders for almost all small dollar purchases. They provide a more rapid turn around on small dollar purchases. Pcards also reduce the number of forms, invoices and checks to be processed, so the cost and processing time of each purchase is greatly reduced.

Procurement cards can be used for the following:

- office supplies (items on the mandatory state contract must be purchased from the state contract vendor)
- subscriptions to scholarly journals and publications
- memberships in professional organizations that promote advancement of the university’s mission
- instructional supplies (i.e. books, music, classroom materials)
- laboratory and classroom supplies
- software (excluding multi-user licenses)
- services (i.e. equipment repair, uniform mending)

Procurement cards CANNOT be used for the following:

- Purchases totaling more than $5,000 (NO splitting to avoid the transaction limit)
- Equipment or inventory items (see listing on next page)
- Fuel
- Printing or novelty items with custom logos
- Back ordered items (items must be readily available at the time of order)
- Travel related expenses, including conference registration fees — the only exception is vehicle rental through the state contract agency (please see Travel website)

Please see the Procurement Card Policies and Procedures Manual for more information on pcards.
EQUIPMENT ITEMS AND EXCEPTIONS

ALL donated and purchased equipment is property of The University of Southern Mississippi.

Equipment that must be tagged and inventoried:

A. Equipment with a cost of $1,000 or more

B. Exceptions to the $1,000 rule (All considered inventory and must be tagged)

1. Weapons
2. Cameras and camera equipment with a cost of $250 or more
3. Two-way radio equipment
4. Televisions with a cost of $250 or more
5. Lawn maintenance equipment
6. Cellular telephones
7. Major computer components:
   • Printers and multi-purpose machines with a cost of $250 or more
   • Hard drives
   • CPUs
8. Chainsaws
9. Air compressors
10. Welding machines
11. Generators
12. Motorized vehicles

C. Former exceptions items now only subject to the $1,000 rule

1. Recorders
2. iPods
3. MP3 players
4. Typewriters
5. Appliances
6. VCRs
7. Sterling Silver
8. Scanners
9. Dictating Equipment
10. Antiques
11. Modems
REQUISITIONS AND PURCHASE ORDERS

If a procurement card cannot be used, then a purchase order must be obtained BEFORE making the purchase. The purchase order process begins with a requisition.

A requisition is simply an authorized request for the purchase of goods or services. This request is submitted to Procurement & Contract Services to be processed into a purchase order. A purchase order is the official university document that represents an obligation to the vendor for the purchase of the specific goods or services detailed in the purchase order.

A purchase order must be obtained before the purchase is made. Requisitions submitted after the purchase has been made will require VP approval.

GETTING STARTED WITH REQUISITIONS

To enter requisitions, faculty and staff must attend a training session in order to gain access to Workflow in SOARFIN. Training sessions are offered once a month and are available for registration through SOAR. Administrators and faculty who do not enter requisitions but need access to approve requisitions can gain access by watching on-line tutorial instead of attending a requisition entry class.

Requisition entry and approval instructions, as well as the approver tutorial, can be found at the LEC website: www.usm.edu/lec/training/soardocs/scarfindocs.php.

Because requisitions and approval are entered online, it is not necessary to send a paper copy of the requisition to Procurement & Contract Services. Any attachments required by Procurement & Contract Services can be attached to a Requisition Attachments form (see page 42 for sample) and sent to Box 5003. The Requisition Attachment Form can be found on the Procurement & Contract Services website. The only instance where a paper copy of the requisition would be required is if two or more signature authorities are required to approve the requisition.

QUOTE AND BID REQUIREMENTS

Purchases of commodities and/or equipment totaling between $5,000.01 and $50,000.00 require two written quotes. These quotes must be submitted to Purchasing when the requisition is entered in SOARFIN.

Purchases of commodities and/or equipment totaling $50,000.01 or more must be sent out for bid. Bids are advertised for at least two consecutive weeks and a bid opening is scheduled for no less than 7 working days after the last advertisement.

In general, one–time services, such as equipment repair, do not require two quotes or bids. This only applies when we are strictly paying only for a service and no goods are exchanged (for example, labor only contracts). However, Procurement & Contract Services reserves the right to require the bid process for services performed over a period of time or for high dollar amounts. Some specific services, such as waste management and technology related services, are not exempt from the quote and bid requirements. If there are questions about requirements for a particular service, please contact Procurement & Contract Services.

Other than services, the only exceptions to the quote and bid requirements are state contract purchases and state approved sole source purchases.
STATE CONTRACT PURCHASES

State contracts are competitively bid or negotiated with the goal of taking maximum advantage of the state’s buying power.

If a commodity is on a competitive bid state contract, that commodity must be purchased from the contract vendor unless we have received prior approval from the state Office of Purchasing, Travel and Fleet Management (OPTFM). Purchases of state contract items totaling less than $100 can be purchased from a non-contract vendor without prior approval.

If a commodity is on a negotiated state contract, the commodity may be purchased from any of the contract vendors. Negotiated state contract items may also be purchased from non-contract vendors provided all purchasing laws and procedures are followed and the price paid does not exceed the negotiated contract price.

Purchases of state contract items that total over $5,000.00 are exempt from the quote and bid requirements as long as no single item has a net cost of over $25,000.00.

A list of state contracts can be found on the OPTFM website. A link to the OPTFM state contract site is provided on the Procurement & Contract Services website.

SOLE SOURCE PURCHASES

Purchases of commodities and equipment totaling over $5,000.00 when only one vendor can provide the needed items can be processed as a sole source purchase. These purchases require approval from OPTFM. In order to submit a sole source request, the department must compose a justification memo explaining why the product is unique and only available from a single vendor. The memo must answer the following questions:

- Do other companies make similar commodities that will do the same job or meet the same goals?
- How is this item unique from all others?
- What can this item do that the others can’t?
- Is there a copyright or patent on the commodity?
- Is this item available from other distributors? **IMPORTANT**

If the item is used for research, consider the additional questions:

- What does the item do?
- How will this purchase or failure to make this purchase have an impact on the research?

The potential vendor is required to register with the state before the request can be submitted. Please contact Procurement & Contract Services for instructions for the vendor registration process or if you have any questions about making a sole source purchase.

TAX EXEMPTION

The university is exempt from paying sales tax in the State of Mississippi and has been waived from paying sales tax in several other states. Sales Tax Exemption certificates are located on the Office of the Controller’s website under Tax Compliance. If you have any questions about tax exemption, please contact the Tax Compliance Officer at 601.266.4102.
STANDING ORDERS

Standing orders are zero dollar purchase orders that can be used to make multiple similar purchases throughout the fiscal year; for example, Fuelman services or the rental and refills of cylinders for scientific gases. Most repetitive, small dollar purchases can now be made on the procurement card, so standing orders should be reserved for vendors who do not accept Visa payments and/or purchases such as fuel that require a purchase order.

Standing orders can only be issued for one fiscal year at a time. All standing orders will be canceled on June 30 each year and will have to be renewed for the next fiscal year. Procurement & Contract Services will notify the campus community each spring when it is time to begin requisition entry for renewing standing orders for the next fiscal year.

COMPUTER PURCHASES

iTech has standardized computer purchases for the campus. Requisitions are no longer required to make computer purchases. A standard computer can be purchased directly from iTech through SOAR. The purchase will be processed similar to an Interdepartmental Invoice. If you require a computer different from the standard configuration, you can submit a quote and an explanation for the variation from the standard configuration to computer.orders@usm.edu.

Please visit the iTech website for more information on departmental computer purchases.

CONTRACT SIGNATURE AUTHORITY

Budget signature authority is NOT equivalent to contract signature authority.

Typically it is Procurement & Contract Services' role to execute both purchase orders and contracts. Only senior administrators who have been formally and explicitly delegated "Contract Signature Authority" by the University President may sign contracts on behalf of the university. Proposed contracts should be forwarded to Procurement & Contract Services in conjunction with a requisition.
AFTER THE PURCHASE ORDER

After the PO is created, Procurement & Contract Services will send the PO to the vendor unless other instructions are noted on the requisition. After the goods have been received or services rendered, the department is required to enter a receipt in SOARFIN. This receipt lets Accounts Payable know that the items have been received or the services are complete and the invoice is approved for payment. The invoice cannot be paid until a receipt is entered in the system. The only exception to this rule would be for payments sent with the order, for example dues and subscriptions.

All invoices should be made out to The University of Southern Mississippi and be mailed directly to Accounts Payable by the vendor. If the department does receive an invoice, it should be forwarded to Accounts Payable at box 5104. Please make sure the PO number is noted on the invoice before forwarding it to Accounts Payable.

SOARFIN CHARTFIELDS

Chartfield is a SOARFIN term used to define the data elements that will constitute the university’s chart of accounts. The combination of the Fund, DeptID, Program and Project/Grant (if applicable) chartfields comprise the “Budget String.” The account chartfield is also required for transactions in order to classify the expenditure, so the minimum requirements for every transaction are Account—Fund—DeptID—Program—Project/Grant (if applicable). Below is a sample budget string:

PeopleSoft Fund ............: 10H10
PeopleSoft Department ...: 130001
PeopleSoft Program ......: 06000
PeopleSoft Project/Grant :
HR Department ............: H130001001
Department Name ............: PROCUREMENT AND CONTRACT SERVICES
Signature Authority ......: R WILLIS/M HERNDON

The account chartfield is a required part of the chartfield string entered on your requisition. The lists on the following pages are the most common account chartfields for expenditures. The full list can be found on the Office of the Controller’s website, www.usm.edu/controllersoffice/forms.html.
# ACCOUNT CHARTFIELDS — CONTRACTUAL SERVICES

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<th>Description</th>
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<td>Professional Development Fees</td>
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<td>Postage And Post Office Charge</td>
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<td>605240</td>
<td>Telephone Installation And Mail</td>
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<td>Telephone Cellular</td>
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<td>605246</td>
<td>Pagers</td>
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<tr>
<td>605250</td>
<td>Cable TV</td>
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<td>605260</td>
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<td>Utilities - Water</td>
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<td>Utilities - Garbage Disposal</td>
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<td>Publicity And Public Informations</td>
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<td>Rental Of Building And Floor S</td>
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### ACCOUNT CHARTFIELDS — COMMODITIES

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<td>Building Construction Supplies</td>
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<td>Paints And Preservatives</td>
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<tr>
<td>606290</td>
<td>Other Equip Repair Parts And S</td>
</tr>
<tr>
<td>606310</td>
<td>Laboratory And Testing Suppl</td>
</tr>
</tbody>
</table>

### ACCOUNT CHARTFIELDS — EQUIPMENT

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>608211</td>
<td>Off Mach Furn Fix Over $5000</td>
</tr>
<tr>
<td>608221</td>
<td>Vehicles Over $5000</td>
</tr>
<tr>
<td>608231</td>
<td>Farm Equip Over $5000</td>
</tr>
<tr>
<td>608241</td>
<td>Medical Equip Over $5000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>608251</td>
<td>Data Proc Equip Over $5000</td>
</tr>
<tr>
<td>608261</td>
<td>Radio &amp; Tele Equip Over $5000</td>
</tr>
<tr>
<td>608271</td>
<td>Scientific Equip Over $5000</td>
</tr>
<tr>
<td>608291</td>
<td>Other Equipment Over $5000</td>
</tr>
</tbody>
</table>
USEFUL WEBSITES

Procurement & Contract Services  www.usm.edu/procurement

- Purchasing Policies
- Procurement Card Guidelines
- Link to State Contracts Website
- Requisition Attachments Form
- Sole Source Justification Questions
- Vendor Registration Forms

Office of the Controller  www.usm.edu/controllersoffice

- Account Chartfields List
- Personal Services Agreement
- Property Accounting Procedures
- PeopleSoft Cross-Reference (Eagle Vision Search)

Eagle Vision Search  www.usm.edu/controllersoffice/eagleVision/ppscre/dept_cr/index.php

- Search for complete chartfield strings (see screen shot below)
PURCHASING PROCESS

Department makes decision to purchase goods or services

Purchase totals $5,000.00 or less
- Read allowable purchases
- Use card to make purchases
- Process transaction in Resolve by assigning budget and uploading receipt
- Obtain at least one quote for purchase
- Enter a requisition, submit quote
- Signature authority approves requisition
- SPA approves requisition
- Procurement approves transaction in Resolve
- Transaction posts to General Ledger

Purchase totals $5,000.01 - $50,000.00
- Obtain two competitive, written quotes for entire purchase
- Accept lowest quote
- Enter a requisition, submit quote
- Signature authority approves requisition
- SPA approves requisition
- Purchasing verifies all required documents and approves requisitions
- Purchasing creates purchase order and sends to vendor to place order

Purchase totals $50,000.01 or more
- If sole source, obtain quote and write justification memo
- Enter a requisition, submit quote and memo
- Signature authority approves requisition
- SPA approves requisition
- If over $500,000, submit request to CFO for purchase to be added to IHL agenda
- OPT approves purchase and issues P.I. number
- IHL approves purchase
- SPA approves requisition
- SPA approves requisition
- Bid advertised in newspaper for two consecutive weeks
- Sealed bids are opened publicly on designated date

Write bid specifications and compile list of potential vendors
- Enter a requisition, submit specs and vendor list
- Signature authority approves requisition
- SPA approves requisition
- If lowest bid, write justification memo
- Accept lowest bid
ACCOUNTS PAYABLE, RECEIVING & PROPERTY ACCOUNTING PROCESS

Purchasing creates purchase order (PO) and sends to vendor to place order

Goods are delivered to Receiving

Non-equipment

Receiving delivers goods to department

Equipment

Property Accounting runs daily PO report to check for equipment items

Equipment items are tagged by Property Accounting

Department receives goods and enters receipt in SOARFIN

Accounts Payable receives invoice from vendor, verifies receipt in SOARFIN and enters voucher

All vouchers that pass budget check and PO matching are rolled to payments

PAVA payment is issued for payment

Payment notification sent to vendor

All other vendors

Check is issued for payment

Check sent to vendor

Property Accounting runs report for items paid on equipment codes

Equipment items are added to InCircuit system after payment is issued
SOARFIN QUICK REFERENCE NAVIGATION

ENTERING A REQUISITION

Home → Purchasing → Requisitions → Add/Update Requisitions
Add a New Value Tab, Click Add

UPDATING A REQUISITION

Home → Purchasing → Requisitions → Add/Update Requisitions
Find an Existing Value Tab, Enter Requisition #, Click Search

CHARTFIELD APPROVAL

Home → Purchasing → Requisitions → Approve Chartfields
Enter Requisition #, Click Search

PRINTING A REQUISITION

**Must first click View Printable Req in Requisition or Approve Chartfield screen.

Home → Reporting Tools → Report Manager
Administration Tab

ENTERING A RECEIPT

Part 1: Home → Purchasing → Receipts → Add/Update Receipts
Add a New Value Tab, Click Add

Part 2: Home → Purchasing → Receipts → Maintain Delivery Information

VIEW REQUISITION INFORMATION

Home → Purchasing → Requisitions → Review Requisition Information → Document Status

VIEW PURCHASE ORDER INFORMATION

Home → Purchasing → Purchase Orders → Review PO Information → Document Status
Getting Started in PeopleSoft

The PeopleSoft sign-on panel will prompt you to enter information in two fields. Use the tab key to move to the next field. <Click on> Sign In] after entering the data into the specified fields.

User ID: The PeopleSoft identification name assigned to you.
Password: The PeopleSoft password associated with the operator ID.
Entering a Requisition

Home → Purchasing → Requisitions → Add/Update Requisitions

Business Unit: Enter appropriate business unit or <click on> and choose appropriate business unit.

USMPO- most often used for Hattiesburg chartfield strings.
USMGC- for Gulf Park.
GCLAB- for Gulf Coast Research Lab.

Requisition ID: Accept default of NEXT.

<Click on> the Add button.

Maintain Requisitions

Requisition

Business Unit: USMPO
Requisition ID: NEXT

Status: Open
Budget Status: Not Charged

Requester: TRAIN1
Requester Info: Train1

Request Date: 10/11/2008

Currency Code: US
Accounting Date: 10/11/2008

Purchasing: Catalog
Catalog Search
Requester Items

Details
Line DescriptionSony UMCategoryPriceAmount Status
1 0.0000 0.00000 Open

<Click on> the Requisition Defaults link Requisition Defaults.
Maintain Requisitions

Requisition Defaults

Business Unit: USMPO
Requisition ID: NEXT
Requisition Date: 10/1/2006
Status: Open

Default
If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Buyer: Vendor:
Category: Location:

Ship To: *Distribute by:
Due Date: Quantity
Ultimate Use Code:

Product Summary
SpeedChart:

<Click on> the Vendor Lookup link Vendor Lookup.

NOTE: DO NOT click on the \( \) beside “Vendor.” The information contained within that selection is very large and puts excess processing time on the system.

Vendor Search

| Name: | ShortName: BETTERMA |
| City: | State: |
| Country: | Post: |
| Class: | Type: |
| Max Rows: 10 |

Search

ShortName: Enter a short name (no spaces).

Frequently used abbreviations:
Intl = International
Natl = National
Univ = University
Assn = Association
MS = Mississippi

<Click on> the Search button Search.
<Click in> the corresponding box of the appropriate selection.

<Click on> the Address link **Address**.

Address
Set ID: USM01  Vendor ID: 0000001752
Country: USA  United States
Address 1: P O BOX 7537
Address 2:
Address 3:
City: JACKSON
County: MS  Mississippi
State: 39284

Verify the address and <click on> the OK button **OK**. This will take you back to the previous screen.

If the vendor or address was incorrect, select another Vendor ID and verify the vendor and address as done previously until correct Vendor ID is chosen.
Once correct Vendor ID is located, <click on> the OK button.[OK].

Ship To: Defaults to 900. Accept default unless order is being shipped to another location.
**Distributions:**

**Account:** Enter the account code 60xxxx or <click on> Q and choose appropriate account code.

**Fund Code:** Enter the fund code.

**Dept:** May default in. If not, enter department or <click on> Q and choose appropriate department.

**Program:** Enter the program code or <click on> Q and choose appropriate program.

**Project:**

*If a grant or project only:*

<Click on> the Project link Project.

<table>
<thead>
<tr>
<th><strong>GRANTS:</strong></th>
<th><strong>OR</strong></th>
<th><strong>DE Accounts:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects Information</td>
<td>OR</td>
<td>Projects Information</td>
</tr>
<tr>
<td>Project Business Unit:</td>
<td>USM01</td>
<td>Project Business Unit:</td>
</tr>
<tr>
<td>Project:</td>
<td>GR####</td>
<td>Project:</td>
</tr>
<tr>
<td>Activity:</td>
<td>00000 (five 0s)</td>
<td>Activity:</td>
</tr>
<tr>
<td>Source Type:</td>
<td></td>
<td>Source Type:</td>
</tr>
<tr>
<td>Category:</td>
<td></td>
<td>Category:</td>
</tr>
<tr>
<td>Subcategory:</td>
<td></td>
<td>Subcategory:</td>
</tr>
</tbody>
</table>

---

**FOR GRANTS AND DE ACCOUNTS:**

**Project Business Unit:** Enter most appropriate value.

- USM01 - Grants
- USMPC - DE Accounts

**Project:** Enter Grant or Project number (GR#### or DE#####).

**Activity:** Enter 00000 (five 0s).

<Click on> the OK button OK.

This will take you back to the requisition form.
Line:

Description: Enter description of purchase. DO NOT click on the .

Quantity: Enter quantity.

UOM: Enter unit of measure or <click on> and choose appropriate UOM.

Category: Enter category or <click on> and choose appropriate category.

Price: Enter price per item.

*Note: Use the icon to add a row for additional items you wish to order on this requisition. Use the icon to delete a row.

Icons:

● <Click on> ● to add a line item comment. Use same comment process as described in the Header Comments section (see page 22).

●● DO NOT use the line details icon-- ●●.

●● This icon is used if you wish to distribute the cost of this item between multiple chartfield strings. See Page 29.
Maintain Requisitions

Requisition

Business Unit: USMPO
Requisition ID: NEXT
Status: Open

Requisition Date: 10/11/2008
Requestor: Train
Requestor Info: Train

Origin: Online
Currency Code: Dollar
Total Amount: 0.00 USD

Accounting Date: 10/11/2008

Add Notes From:
Purchasing Kit
Item Search
Requester Items

Line Details CMOD Vendor Information Item Information Attributes Contract
1 Description Quantity UOM Category Price Amount Status

<Click on> the Add Comments link.

Header Comments

Business Unit: USMPO
Requisition ID: NEXT
Status: Open

Sort Method: Comment Time Stamp
Sort Sequence: Ascending

Comments

Copy Standard Comments

Comment Status: Active

Send to Vendor

Shown at Receipt

Shown at Voucher

Attached Document

Attachment

[Image of document page]

You may independently type in your header comment in the blank space or you may <click on> the Copy Standard Comments link Copy Standard Comments.

(For commonly used comments see page 31)
Comment Type: Enter appropriate comment type or <click on> and Lookup button to choose appropriate type.

Commonly used comment types:
CAN = Canned comments
CSC = Competitively bid contracts
NSC = Negotiated state contracts

Comment ID: <Click on> and choose appropriate comment.

<Click on> the OK button .

If you need to add further comments, <click on> the Add button .

If you need to inactivate a comment, <click on> the Inactivate box.
Send to Vendor: <Click in> box if you need to send comment to vendor.
This comment will print on the final purchase order.

Shown at Receipt: <Click in> box if comment needs to be shown on receipt.
You will see these comments when you receive the items in Peoplesoft.

Shown at Voucher: <Click in> box if comment needs to be shown on voucher.
Accounts Payable will see these comments when paying the invoice.

NOTE: Associated Document Attachment function does not operate in Requisition Entry.

<Click on> the OK button.
This will take you back to the requisition form.
**<Click on> the ✅ next to “Status.” This will change the status to “Pending.”

<Click on> the 📄 Save button.

Once the requisition is saved:

RECORD YOUR REQUISITION NUMBER!!!
Verify that status is set to approve. If it is not, <click on> the dropdown and choose approve.

You may also add comments if desired. **These comments will not print on the purchase order or requisition.**

<Click on> the <Save> button.
Printing the Requisition

You can print the requisition from this page by choosing the View Printable Req button and proceed with the instructions below.

When you choose this option you will get two pop up windows.

**FIRST** <click on> the **OK** button in this window.

Expand the second window.

<Click on> the Refresh button until the process shows a Posted Status.

Once the process is “Posted,” <click on> the Details link.
<Click on> the View Log/Trace Link.

View Log/Trace

Report ID: 987654  Process Instance: 1372110
Name: POR00010  Process Type: SQR Report
Run Status: Success
Requisition Print SQR

Distribution Node: PSREPORTS  Exp. Date:

Name  Version  Description  Time  Exp. Date
POR00010  2.02S  PS  REPORTS  11:37:04AM CDT  06/29/2013
POR00010  2.01S  PS  REPORTS  11:37:01AM CDT  06/29/2013
POR00010  2.00S  PS  REPORTS  11:37:01AM CDT  06/29/2013
POR00010  1.99S  PS  REPORTS  11:37:01AM CDT  06/29/2013

Return

<Click on> the .PDF link.

A new window will appear that will contain a PDF copy of your requisition. You may print this for your records.
Distributing the cost of an item between two or more chartfield strings

<Click on> the button on the Maintain Requisitions page.

Maintain Requisitions

Schedule

Business Unit: USMPO
Requisition Date: 10/11/2000
Requisition ID: NEXT
Status: Open

Return to Main Page

Schedule

<table>
<thead>
<tr>
<th>Line</th>
<th>Item</th>
<th>Requisition</th>
<th>Quantity</th>
<th>Price</th>
<th>Amount</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>4.0000</td>
<td></td>
<td>2,000.00 USD</td>
<td>Active</td>
</tr>
</tbody>
</table>

<Click on> the button.

Maintain Requisitions

Distribution

Requisition ID: NEXT
List: 1
Scheduler: 1
Ship To: 920
Mailing Address: Open Quantity: 4.0000 EA
Amount: 2,000.00 USD

If you want to distribute the cost of the item by QUANTITY, accept the default in the “Distribute by” field.

If you want to distribute by AMOUNT, <click on> the dropdown by “Distribute by” and choose “Amount.”

<Scroll right> and <click on> the button. This will add a row in order to enter other chartfield strings.

Enter number of rows you wish to add, and click .
ROW 1:

**Quantity:** Change quantity to desired quantity to be taken from the chartfield indicated in row 1.

**OR**

**Amount:** Change number to the amount to be taken from the chartfield indicated in row 1.

ROW 2:

**Quantity:** Enter desired quantity to be taken from the second chartfield you will use.

**OR**

**Amount:** Enter desired amount to be taken from the second chartfield you will use.

**Account:** Defaults to original account. Accept this value or change if necessary.

**Fund:** Enter the second fund you wish to use.

**Department:** Enter the second department you wish to use.

**Program:** Enter the second program you wish to use.

*Note:* If you are using a project/grant for your second chartfield string, **click on** the Project link and follow instructions for entering a project grant number (see page 20).

<Click on> the OK button **OK**.

---

Maintain Requisitions

Schedule

Business Unit: USMPO  
Department: GGT  
Status: Open

Return to Main Page

1. **Note:**

   **Line Item Price:** 4,000  
   **Amount:** 2,690.00 USD

   **Quantity:** 200  
   **Price:** 4,000.00  
   **Amount:** 2,690.00 USD
   
   **Status:** Active

   <Click on> the **Save** button.
Common Comments

- If you would like to pick up the original, signed purchase order and deliver to the vendor, please add this comment:
  WALK THRU: [Contact Name] @ [Contact Phone Number]

- If ordering from a state contract, please include the following comment (this is Canned Comment 005):
  P.O. Issued Pursuant To Provisions Of Mississippi State Contract #[State Contract #]

- If the vendor sent a quote, please include the following comment:
  Per Quote [quote reference number]
  if there is no quote number, enter this:
  Per quote dated [date listed on quote] from [contact listed on quote]
  ❖ If the vendor did give a quote, please send a requisition attachments form with a copy of the quote to Box 5003.

- If the vendor requires payment up front, please include this comment (usually reserved for membership dues and subscription services):
  Please send check with order

- To help expedite the receiving process, it is a good habit to include a “Ship to Attention” comment:
  PLEASE SHIP ATTN [name], [building, room]
Releasing a PO

Getting Started in PeopleSoft

The PeopleSoft sign-on panel will prompt you to enter information in two fields. Use the tab key to move to the next field. <Click on> Sign in after entering the data into the specified fields.

User ID: The PeopleSoft identification name assigned to you.
Password: The PeopleSoft password associated with the operator ID.
Releasing a Purchase Order

Home → Purchasing → Receipts → Add/Update Receipts

**Business Unit:** Enter the appropriate business unit.

**PO Unit:** Enter the appropriate unit.

**ID:** Enter the purchase order number of the item you have received.

**Do not put in any other criteria as it will hinder results.**

<Click on> the Search button.
<Click on> the View All link to view all of the lines of purchase orders that are to be received.

<Check on> the box of the purchase order from which you received the product or <click on> the Select All link to view all lines of purchase order.

Receiving

Receipt Unit: USMPO
Receipt ID: 0001038421

Select Purchase Order

<table>
<thead>
<tr>
<th>Line</th>
<th>Item</th>
<th>Description</th>
<th>Price</th>
<th>Qty</th>
<th>Unit</th>
<th>QTY</th>
<th>Unit</th>
<th>Status</th>
<th>Device</th>
<th>Track</th>
<th>Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Item #615-09-17040-6 Binders.</td>
<td>1.51000</td>
<td>10,000</td>
<td>EA</td>
<td>CL</td>
<td>10,000</td>
<td>Received</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Item #615-09-17041-3 Binders.</td>
<td>1.20000</td>
<td>24,000</td>
<td>EA</td>
<td>CL</td>
<td>24,000</td>
<td>Received</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Item #615-09-17042-2 Binders.</td>
<td>1.96000</td>
<td>10,000</td>
<td>EA</td>
<td>CL</td>
<td>10,000</td>
<td>Received</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Item #615-09-17043-0 Binders.</td>
<td>2.63000</td>
<td>12,000</td>
<td>EA</td>
<td>CL</td>
<td>12,000</td>
<td>Received</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Verify the quantity**.

<Click on> the Save button.

**Receipt ID is at the top of the document.**

35
Proceed to Maintain Delivery Information on the main menu to enter delivery location.

Delivered: <Check> the box for delivered.

Date: Enter date the product was received.

Deliv To: Enter the location product was delivered to.

**REMEMBER to do this process for each line of the purchase order.**

<Click on> the Save button.
Viewing Requisition Information

Introduction
This documentation will guide you through the process of viewing requisition information in the SOARFIN system. You will be able to view purchase order, receipt, voucher, and payment information.

Getting Started in PeopleSoft

The PeopleSoft sign-on panel will prompt you to enter information in two fields. Use the tab key to move to the next field. <Click on> Sign In after entering the data into the specified fields.

User ID: The PeopleSoft identification name assigned to you.
Password: The PeopleSoft password associated with the operator ID.
Viewing Requisition Information

Navigation:
Home → Purchasing → Requisitions → Review Requisition Information → Document Status

Requisition Document Status
Enter any information you have and click Search. Leave fields blank for a list of all values.

Business Unit: Enter USMPO or choose USMPO from selection by <clicking on> the magnifying glass 

Requisition ID: Enter the Requisition Number

<Click on> Search.

Business Unit: USMPO
Requisition ID: 000012345
Status: Complete
Document Date: 05/09/2005
Document Type: Requisition
Budget Status: Valid
Currency: USD
Amount: 0.00
Requester: Kittrell, Virginia

Associated Document

<table>
<thead>
<tr>
<th>BID</th>
<th>Business Unit</th>
<th>DOC ID</th>
<th>Document Type</th>
<th>Status</th>
<th>Document Date</th>
<th>Vendor ID</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>USMPO</td>
<td>0001033333</td>
<td>PO</td>
<td>Complete</td>
<td></td>
<td>05/16/2005</td>
<td>0000011760</td>
<td>01</td>
</tr>
<tr>
<td>USMPO</td>
<td>0000017092</td>
<td>Receipt</td>
<td>Received</td>
<td></td>
<td>05/31/2005</td>
<td>0000011760</td>
<td>01</td>
</tr>
<tr>
<td>USMPO</td>
<td>00014973</td>
<td>Voucher</td>
<td>Posted</td>
<td></td>
<td>05/16/2005</td>
<td>0000011760</td>
<td>01</td>
</tr>
<tr>
<td>USM01</td>
<td>0000150920</td>
<td>Payment</td>
<td>Posted</td>
<td></td>
<td>06/03/2005</td>
<td>0000011760</td>
<td>01</td>
</tr>
</tbody>
</table>

You can view information about the Requisition by clicking on any of the hyperlinks under the “DOCID” column.

- To view information about the purchase order, <click on> the hyperlink to the left of the “PO.” A new window will appear.
Purchase Order Inquiry

Purchase Order

Unit: USMPO
PO ID: 00001033317
PO Date: 05/16/2005
Vendor: HWRDPEST-001
Vendor ID: 0000011790
Buyer: Oglesby, David
PO Reference: 

Backorder Status: None
Receipt: Received
Hold From Further Processing:
Merchandise: 698.00
Freight/Tax/ Misc: 0.00
Total: 698.00 USD

<i>Click on</i> any of the hyperlinks to view details of the purchase order.

Req DOC Status

Business Unit: USMPO
Req Id: 0000012316
Status: Complete

Document Date: 05/09/2005
Document Type: Requisition
Budget Status: Valid

Currency: USD
Amount: 698.00

Requester: Kittrell, Virginia

Associated Document

- To view the receipt, <click on> the hyperlink to the left of “Receipt.” A new window will appear.
To view the voucher, <click on> the hyperlink to the left of the “Voucher.” A new window will appear.

Scroll to the bottom of the page to find the details of the voucher.

<Click on> [4] to view payment information. This will show you the check number, date of payment, and payment amounts.