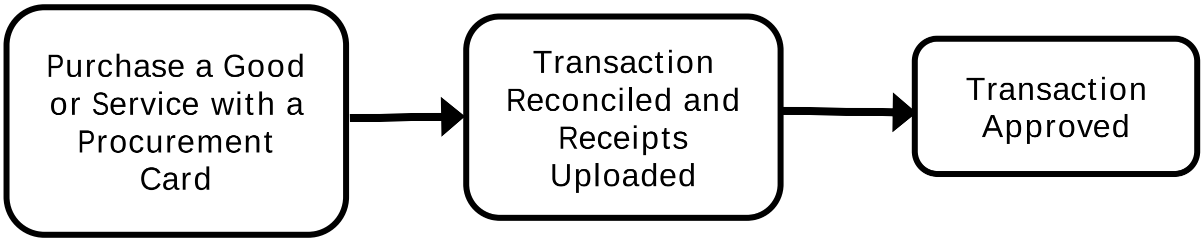
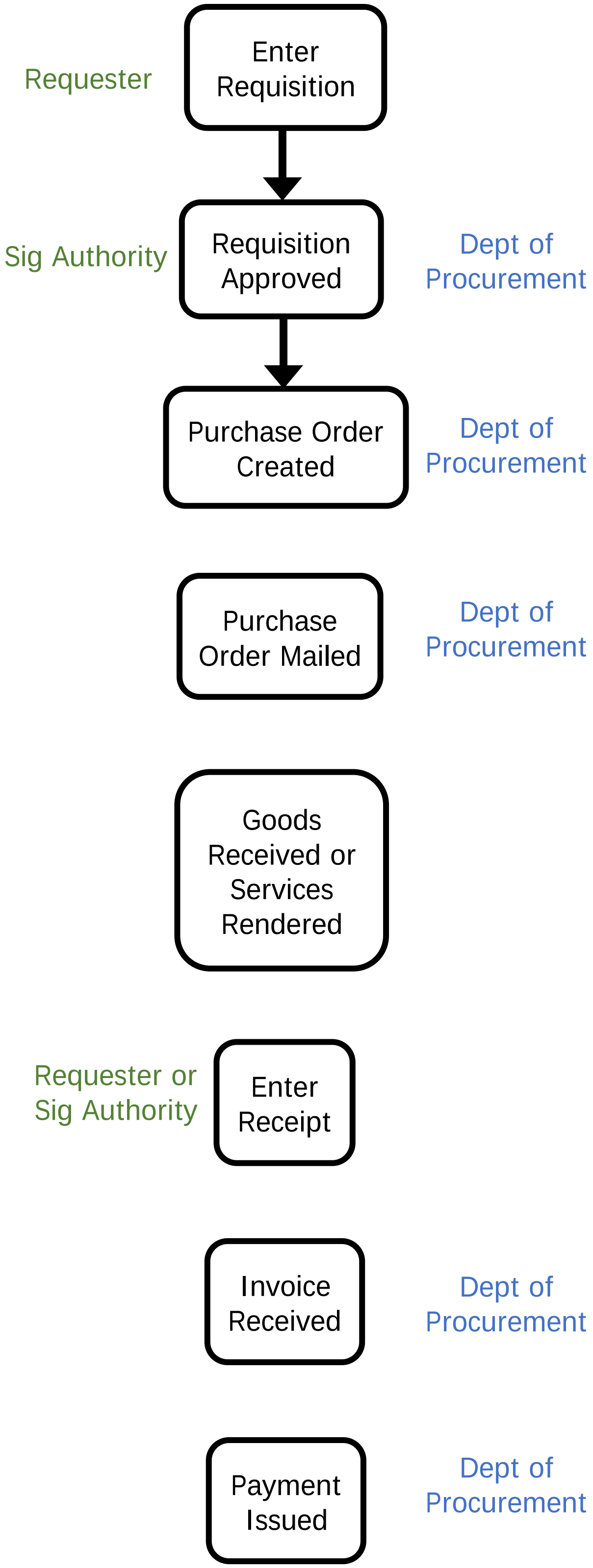
	Department of Procurement & Contract Services
	Purchasing 101 and Requisition Training Manual.docx
	2.5
	7/05/2022

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.


Purchase a Good or Service with a Procurement Card
Transaction Reconciled and Receipts Uploaded
Transaction Approved


Requester
Enter Requisition
Sig Authority
Requisition Approved
Dept of Procurement
Purchase Order Created
Dept of Procurement
Purchase Order Mailed
Dept of Procurement
Goods Received or Services Rendered
Requester or Sig Authority
Enter Receipt
Invoice Received
Dept of Procurement
Payment Issued
Dept of Procurement

1

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

Equipment that must be tagged and inventoried:

- Equipment with a cost of $1,000 or more
- Equipment with of cost $250 or more
    - Cameras and camera equipment
    - Televisions
    - Printers and multi-purpose machines
- Regardless of cost
    - Weapons
    - Two-way radio equipment
    - Lawn maintenance equipment
    - Cellular telephones
    - Major computer components:
    - Hard drives
    - CPUs
    - Chain saws
    - Air compressors
    - Welding machines
    - Generators
    - Motorized vehicles

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 Proc waste management and technology related services, are not

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 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

For a listing of the chartfields, visit this page on the Office of Controller’s website:

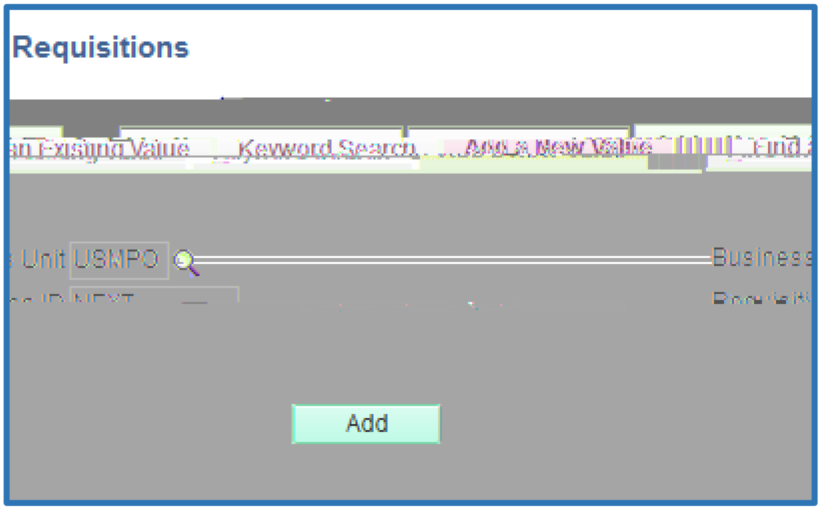
The requisition is only the formal request.
The requisition must be approved by a signature authority and the Department of Procurement and Contract Services.
The purchase order must be obtained before the purchase is made.

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

The approver tutorial, can be found at the LEC website - www.usm.edu/lec/training/soardocs/soarfindocs.php.

Because requisitions and approval are entered online, it is not necessary to send a paper copy of the requisition to Procurement & Contract Services. 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.

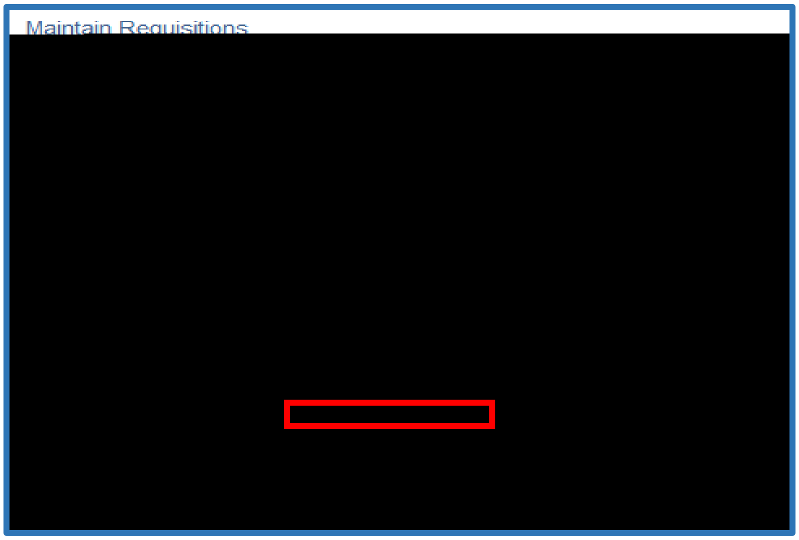
1. Go to soarfin.usm.edu in your web browser.
2. Type in . It will be your empli l ɞ ʌ



Unit USMPO
ID NEXT

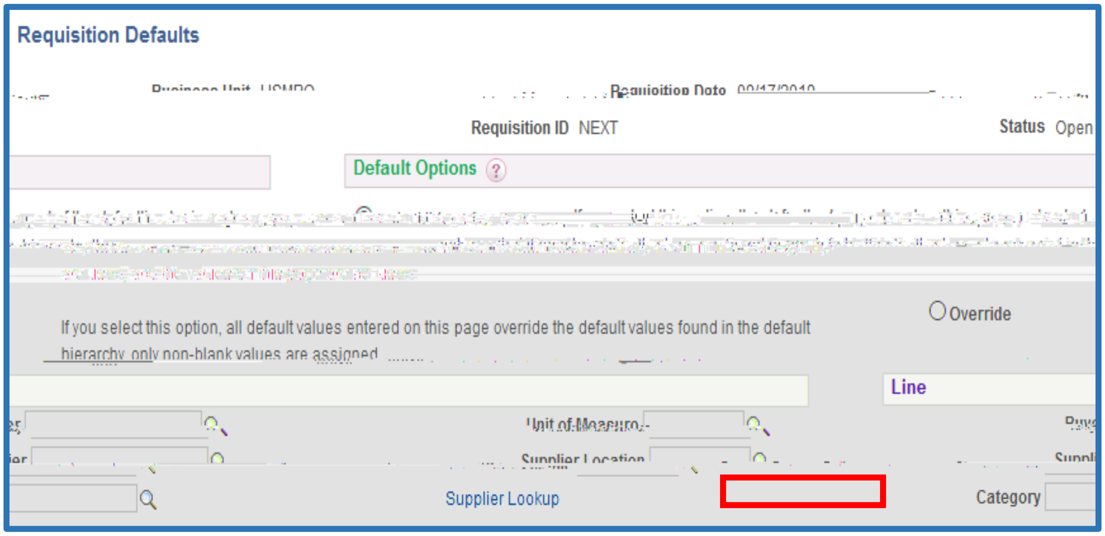
5. Click the Add button.

6. Click .



Maintain Requisitions

7. Click . Note: Don't click the next to Supplier. It will take a long time to load.



Requisition Defaults

Business Unit UCMRO

Requisition Date 09/17/2010

Requisition ID NEXT

Status Open

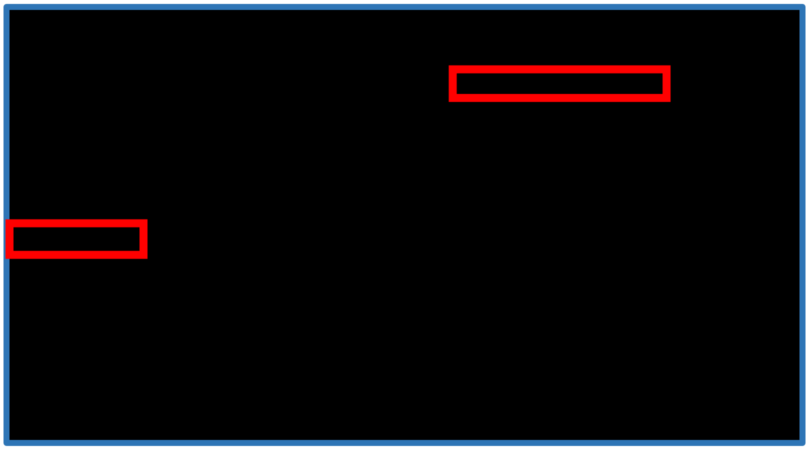
Default Options

○ Override

If you select this option, all default values entered on this page override the default values found in the default hierarchy only non-blank values are assigned.

8. Enter of the vendor. If the vendor you need is not listed, then contact the Department of Procurement. You cannot enter a requisition if the vendor is not in the system.

9. Click the button.



14. defaults to 900. Change it if it going to different campus location.

15. Enter the directly or click the 🔍 button to see the choices.

16. Enter the .

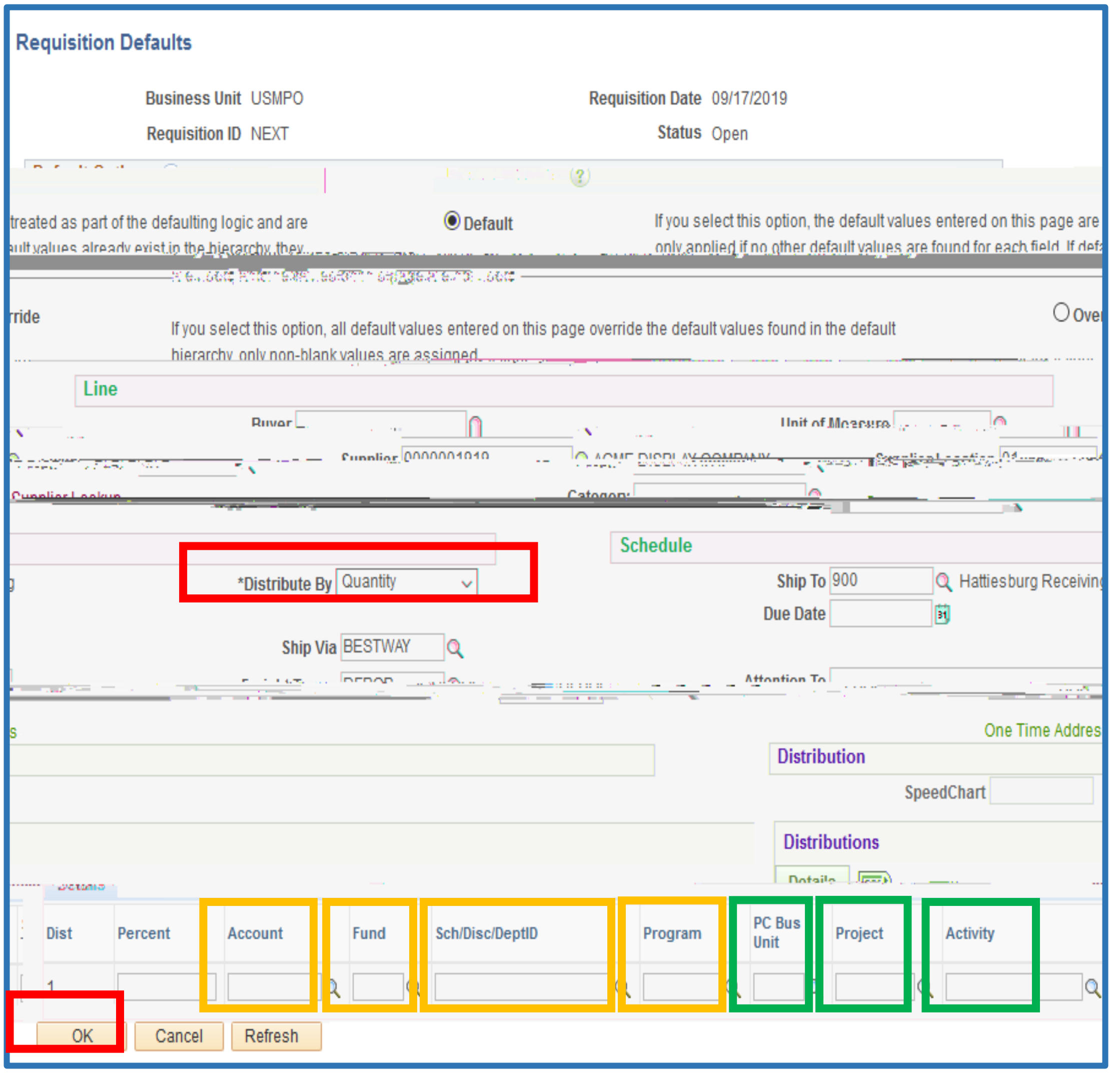
17. Enter the .

18. Enter the .

19. For PC Bus Unit:
    a. If it not a Grant, WP, DE, then leave blank.
    b. If it is a Grant, then enter USM01.
    c. If it is a WP or DE, then enter USMPC.

20. Enter the , only if it is a grant or project (GR, WP, DE).

21. Enter 00000 (five zeroes) for , only if it is grant or project (GR, WP, DE).



Requisition Defaults

Business Unit USMPO
Requisition ID NEXT
Requisition Date 09/17/2019
Status Open

treated as part of the defaulting logic and are
● Default
If you select this option, the default values entered on this page are only applied if no other default values are found for each field.

If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.
○ Ove

Line
Supplier 0000001010 ACME DISPLAY COMPANY
Supplier Lookup

Schedule
*Distribute By Quantity
Ship To 900 Hattiesburg Receiving
Due Date
Ship Via BESTWAY
Attention To
One Time Address

Distribution
SpeedChart
Distributions

Dist	Percent	Account	Fund	Sch/Disc/DeptID	Program	PC Bus Unit	Project	Activity
1								

OK Cancel Refresh

22. Click OK to return to the main requisition page.

23. Enter the of the first item on Line 1.

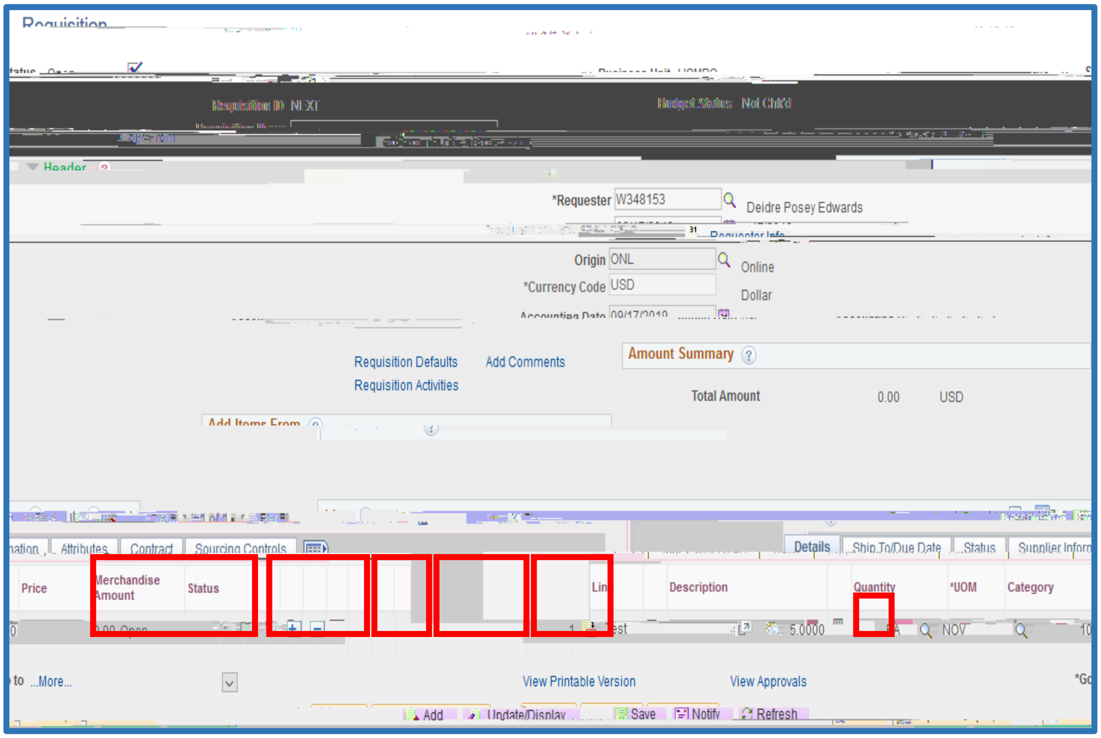
24. Enter the .

25. Enter the . Click the 🔍 button to see the choices.

26. For , click on the 🔍 button and select the appropriate category.

27. Enter the .

28. If you need additional lines (items), click the ⊞ button on the far right of the row.



Requisition ID NEXT

Budget Status Not Chk'd

*Requester W348153 Deidre Posey Edwards

Origin ONL Online

*Currency Code USD Dollar

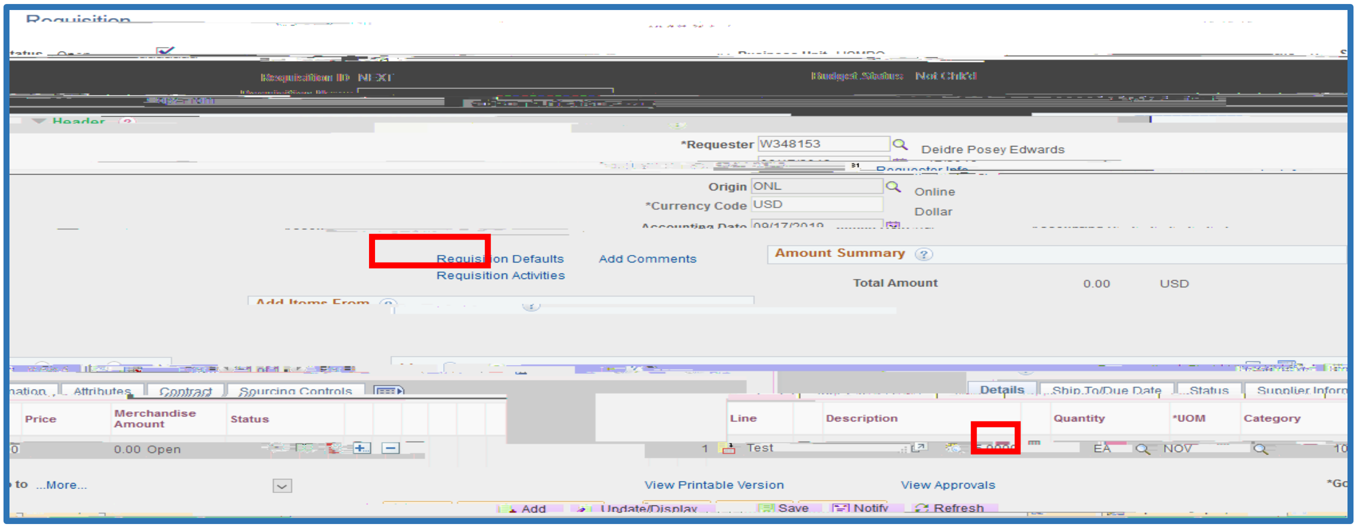
Total Amount 0.00 USD

Price	Merchandise Amount	Status	Line	Description	Quantity	*UOM	Category
0	0.00	Open	1	Test	5.0000	EA	NOV

Requisition
Header
Requisition Defaults
Add Comments
Requisition Activities
Amount Summary
Add Items From
Attributes
Contract
Sourcing Controls
Details
Ship To/Due Date
Status
Supplier Inform
to ...More...
View Printable Version
View Approvals
Add
Update/Display
Save
Notify
Refresh

29. Click to enter any information about the request (quote/invoice number, confirmation of goods received/services rendered, email address to send Purchase Order, etc.)

30. If you want to add a comment for a specific line, then click the 💬 icon on the appropriate line.



Requisition ID NEXT

Budget Status Not Chk'd

*Requester W348153 Deidre Posey Edwards

Origin ONL Online

*Currency Code USD Dollar

Total Amount 0.00 USD

Price	Merchandise Amount	Status	Line	Description	Quantity	*UOM	Category
0	0.00	Open	1	Test		EA	NOV

Requisition
Header
Requisition Defaults
Add Comments
Requisition Activities
Amount Summary
Add Items From
Attributes
Contract
Sourcing Controls
Details
Ship To/Due Date
Status
Supplier Inform
to ...More...
View Printable Version
View Approvals
Add
Update/Display
Save
Notify
Refresh

31. Enter desired comments. Check the and

38. Click on the link.

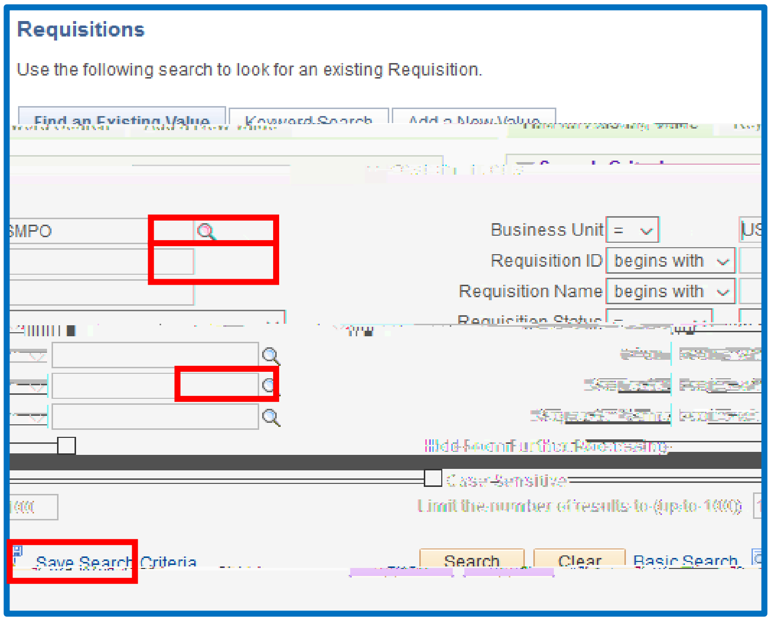
39. Click on the window that pops up

40. Click the PDF option on the View Log/Trace screen. This will bring up a PDF version of your requisition that you can now print or save for your records. (pop-ups must be enabled)

41. Once you have saved your requisition and recorded the requisition number, the requisition must be budget checked. Click beside Budget Status. This will check the validity of the budget string being used.
    a. If you receive an error, double check the budget string being used and correct if needed.
    b. You may have to refresh the screen a few times if the budget check does not run the first time. Do not click the button to run the check a second time!

42.

4. Enter your . Click . If you don’t know your , then enter your emplid for and click . Then select your requisition.



Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value
Keyword Search
Add a New Value

SMPO

Business Unit =

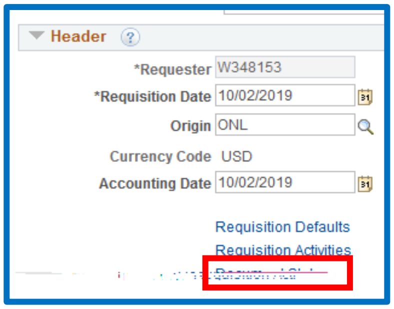
Requisition ID begins with

Requisition Name begins with

Requisition Status =

Case Sensitive
Limit the number of results to (up to 1000)
Save Search Criteria
Search
Clear
Basic Search

5. Click on . (If you searched by requester, you will need to choose the desired requisition before moving forward with this step.)



Header

*Requester W348153

*Requisition Date 10/02/2019

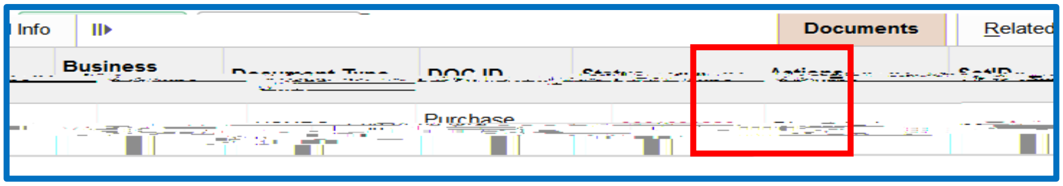
Origin ONL

Currency Code USD

Accounting Date 10/02/2019

Requisition Defaults
Requisition Activities

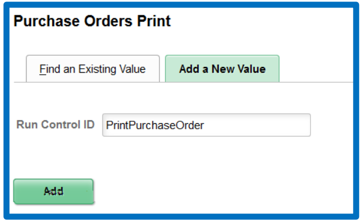
6. Copy or note your Purchase Order ID (DOC ID). Don’t click on the number.



Info
Documents
Related
Business
Document Type
DOC ID
Status
Actions
SetID
Purchase

7. Click on .

8. If it the first time you are printing a purchase order then follow the instructions in Step 8, if not skip to step 9.
   a. Click on the tab.
   b. Enter “PrintPurchaseOrder” without the quotes for
      Click You may now proceed to Step 10.



Purchase Orders Print

Find an Existing Value
Add a New Value

Run Control ID PrintPurchaseOrder

Add

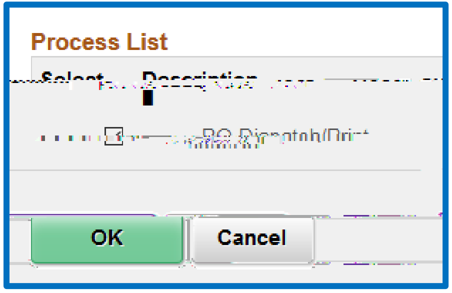
9. If you have printed a purchase order before click the tab and and click . (Choose the run control you established the first time you printed a PO.)

10. Enter your . The same Business Unit will go in both blanks.

11. Enter your .

12. Click .

13. Make sure PO Dispatch/Print is checked and Click

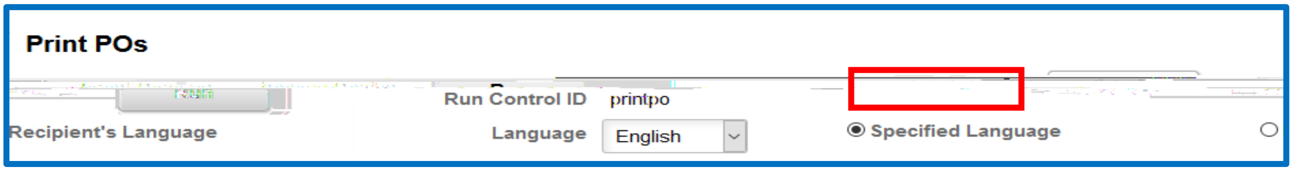


Process List

Select Description

☒ PO Dispatch/Print

14. Click



Print POs

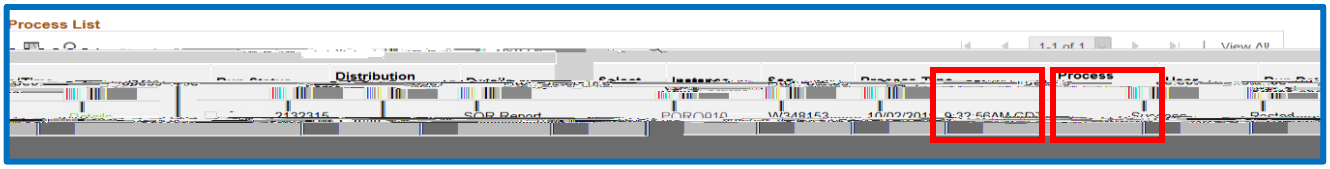
Run Control ID printpo

Recipient's Language

Language English

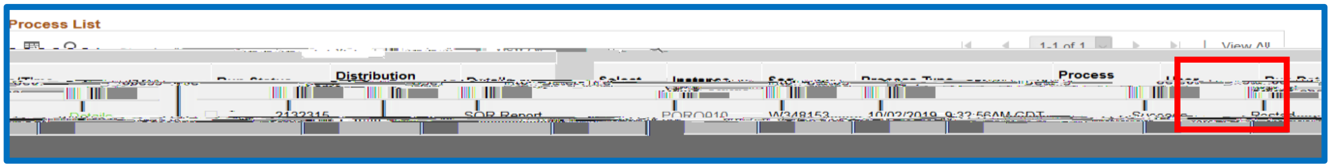
● Specified Language ○

15. Click Refresh until you see Run Status of Success and Distribution Status of Posted



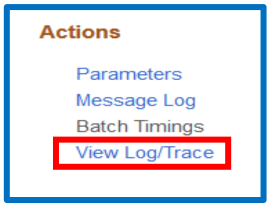
Process List
Distribution
Process

16. Click on



Process List
Distribution
Process

17. Click



Actions

Parameters
Message Log
Batch Timings
View Log/Trace

4. Check the boxes of the purchase order you want to receive or click Select All to view all lines of the purchase order. Click Ok.

5. Verify the quantities received are correct and click . The receipt ID will then populate at the top of the documel16 9