

REQUISITION TIPS

Here are a few tips/reminders to help your requisition proceed to a purchase order:

*Please do not create multiple requisitions for the same purchase.

*Please be careful when copying a previous requisition. Information that would be inaccurate for your new requisition may be copied from your previous requisition; e.g. pricing, certain notes, etc.

BACKUP DOCUMENTATION:

*Please provide all backup documentation as attachments to one email sent to Procurement (send to purchase@olemiss.edu) that references your requisition number in the subject line of that email. Please make sure the requisition number you mention is eight digits long starting with 10, does not include spaces, and does not have letters like "PR" attached directly to it.

*Please make sure the correct requisition number is written on your backup documentation.

QUOTES – For purchases from \$5,000.01 to \$75,000, please provide at least two (2) signed quotes. If a quote was not signed by the vendor, you must also send us the vendor's email when the quote was sent to you to serve as the vendor's signature. Please review the expiration date of your quotes and request new ones from the vendors if your quotes will expire in less than 30 days from the date you are sending them to Procurement. Taxes should not be on the quotes, so please ask the vendor to remove them and provide a revised quote.

CONTRACTS – If your purchase is based on a contract, you must provide a copy of the fully executed (both parties have signed) contract. If you have uploaded the fully executed contract to the UM Contract Database, you may reference the contract number assigned by the Database in the Header Note of your requisition instead of providing a copy of the contract. Please note that all pages of the contract must be provided. Please provide confirmation (email, etc.) indicating that our Office of General Counsel has reviewed the contract prior to UM signature unless utilizing a previously approved template such as the Consulting Agreement template found at the ORSP page: <https://research.olemiss.edu/award-management/consultants> .

PREPAYMENTS – All prepayments require completion of the prepayment request paragraph (<https://procurement.olemiss.edu/wp-content/uploads/sites/55/2018/10/IHL-Prepayment-Policy-Revision-Announcement-including-707.03-policy-page-10.30.18.pdf>) and supporting documentation that shows the vendor's requirement to prepay. Any prepayments that exceed \$5,000 require IHL approval; please allow time for this process.

REQUISITION DETAILS:

HEADER NOTE – This is the area utilized to communicate with Procurement. If your current purchase is related to a purchase in the past, please include your previous purchase order and requisition numbers. Also, it is critical that you include information related to the legality of your purchase. For example, you might mention two quotes, a Bid File/RFP number, an IT sole source number, a contract, etc. You should also mention the shipping charges in this area since shipping should not be listed as a line item. For all copier lease requisitions, you must state the current meter reading in the Header Note.

SHORT TEXT – Please provide an accurate short description of the item you wish to purchase. Each line item on your quote should be a line item on your requisition.

DESIRED VENDOR – Vendor records must be created in SAP by Procurement personnel before the requisition is started. Please see the following link that may be sent to potential vendors for setup instructions: <https://procurement.olemiss.edu/new-vendor-application/>. Requisitions should be processed with vendor numbers that start with 65 only. Please be sure the vendor number you insert is accurate. (Hint: Check the “Source of Supply” tab at the bottom of the requisition to make sure the right vendor name appeared after you entered the number. Also, there are times when you will see directions to insert a different number for that vendor when you check this tab.)

VALUATION PRICE – Please make sure the pricing entered matches your backup documentation. If a line item is valued at \$0, please enter \$.01 in the Valuation Price field and mention in your Header Note that line item should actually be \$0.

G/L ACCOUNT – Please be sure to enter the appropriate G/L code for the items or services you wish to purchase.

ITEM TEXT: Please include the details of the item/service in the Item Text field for each line item. Details could be something like size, color, time period, included components, quote number and date, etc. (Your quote number and quote date should be mentioned in the Item Text of your final line item on your requisition.) Descriptions on your requisition should match the descriptions on the quote.

TECHNOLOGY PURCHASE – For any IT-related purchase, please be sure to answer Technology Purchase? as “Yes” and check all appropriate boxes below that question on the Customer Data Tab. Please be sure to answer all questions on the Customer Data Tab on Line Item #1 only.

SOLE SOURCE PURCHASE – For any sole source purchase, please check the Sole Source Purchase box on the Customer Data Tab and follow the instructions in the email that is automatically sent to the creator of the requisition once saved. Please be sure to answer all questions on the Customer Data Tab on Line Item #1 only.

FEDERAL EQUIPMENT PURCHASE GREATER THAN OR EQUAL TO \$5,000. If your G/L account starts with 582 and you are charging a grant account for the purchase, you will need ORSP approval. Please upload your completed Non-Availability of Equipment form to the requisition Customer Data Tab and answer yes to the Federal Equipment question.