




Purpose:	This manual outlines how to use the Requisition Form to create a requisition for NON-Punch Out items or services
Navigation:	Shop > Shopping > Shopping Home
Notes:	<p>University users with the roles of Requestor, Approver, Buyer, or Receiver will initiate a purchasing requisition by utilizing the Requisition Form. Expenses will be paid against an invoice submitted to AP by the supplier after matching occurs.</p> <p>Requisitions approved by individuals with departmental authority for approving purchases and expenditures move along for review by a Procurement Agent (Buyer role). Final approval will result in the creation of a Purchase Order.</p>

Contents

General Information	1
The Requisition Form	2
Completing the Requisition (for a non-catalog order).....	8
The Purchase Order (non-catalog PO)	19

General Information

- 1.1 The Requisition Form is a guided template for submitting requisitions for suppliers NOT listed as Punch Out suppliers. The Requisition Form should only be used with a Punch Out supplier if an asset or non-catalog item is being purchased. In such a case the user must select a non-Catalog fulfillment address in the requisition form request.
- 1.2 Users with a Shopper role are the only roles that cannot access a Requisition Form.
- 1.3 Help text is either directly displayed, or click the  icon. Links to helpful web pages may be included in help text.
- 1.4 Mandatory question fields are marked with a  icon.
- 1.5 The Line Information section requires all fields on each line to be filled out, despite not having a  icon.

The Requisition Form

2.1 Navigate to the “Shopping Home” page.

2.2 Scroll down the screen to the “Forms” section. Click the “Requisition Form” link to open the form.

Number	Requisition	Requisitioner	Date	Total
3435932	2022-01-05 U4273...	Shannon Ward	1/5/2022	35.49 USD
3389340	2021-11-04 U4273...	Shannon Ward	11/4/2021	30.89 USD
3389291	21.3 multi-line PO...	Shannon Ward	11/4/2021	30.89 USD
3389328	1 line order for AP	Shannon Ward	11/4/2021	45.00 USD
3389085	21.3 AP Multi-line L...	Shannon Ward	11/4/2021	48.00 USD

2.3 All sections in the grey bar at the left need to have a green check mark before the requisition form can be added to a cart and submitted as a requisition.

2.4 After reading the instructions, click “Next.”

Requisition Form

Form Number: 640221
Purpose: Procurement Request
Status: Incomplete

Instructions

Suppliers ✓
Form Fields ✓
Requisition Information ✓
Line Information ✓
Review and Submit

Instructions

The use of diverse suppliers is strongly encouraged and required for competition. You will be asked to provide documentation on the good faith effort to engage diverse suppliers.

For additional assistance in locating potential diverse-owned suppliers, please visit the Office of Supplier Diversity's website or by searching the Supplier database in the Bull Marketplace by running an Advanced Search for Company Classification.

This electronic form provides a guided format for entering requisitions for goods or services not available through our enabled suppliers. Please fill out each section completely, and attach any and all appropriate backup material. If you have questions, contact a Senior Procurement Agent for assistance.

Next >

2.5 Search for and select a supplier. The supplier search will look for any supplier records that contain the words typed in the bar; using partial names or terms will broaden results.

Suppliers

Supplier: Please select a fulfillment center below.

Search Registered Suppliers

Supplier: Fisher
Relationship: All
Zip Code: [] Within 5 Miles

Clear Search

- 2.6 Select the supplier and the most appropriate Fulfillment Center address by clicking the “Select” button from the results list.
- a. Only one Fulfillment Center can be chosen per requisition form. If another is selected after, it will replace the first choice.
 - b. If the user is using a Punch Out supplier (like in this example), **be sure to choose the Fulfillment Center that does NOT say “Catalog.”**

Supplier Name	Doing Business As	Fulfillment Centers	Action
FISHER SCIENTIFIC COMPANY LLC		3970 JOHNS CREEK CT STE 500 3970 JOHNS CREEK CT STE 500, SUWANEE, Georgia 30024-0000 United States	Select
		4500 TURNBERRY DR 4500 TURNBERRY DR, HANOVER PARK, Illinois 60133-0000 United States	Select
		Catalog: (preferred) 3970 JOHNS CREEK CT STE 500, SUWANEE, Georgia 30024-0000 United States	Select
		DEPT CH 10119 DEPT CH 10119, PALATINE, Illinois 60055-0000 United States	Select
FISHER BIOSERVICES INC		14665 ROTHGEB DRIVE: (preferred) 14665 ROTHGEB DRIVE, ROCKVILLE, Maryland 20850-0000 United States	Select

- 2.7 Click the “Next” button at the bottom of the screen after selecting the appropriate Fulfillment Center.
- 2.8 In Form Fields, select the Requisition Information link (or click “Next”).

- 2.9 In the Requisition Information section, review and answer all prompted questions:
- a. **IS THIS PURCHASE ASSOCIATED WITH A USF CONTRACT:** If a USF contract is associated with this order, the user will be prompted to add the contract number and is given the option to upload a fully executed copy of the contract

Is this purchase associated with a USF Contract? ★ ⓘ

Yes No

b. **DOES THIS REQUISITION INVOLVE ANY OF THE FOLLOWING:** Select all relevant items related to your order. Depending on your selection you may be prompted for additional information and/or attachments.

NOTE: Pay close attention to the instructions for ‘**Subagreements**’ and ‘**Blanket Purchase Order**’ options. Lines must be set up in a specific format for these kinds of orders, and will be returned to the requisitioner if not done properly.

Does this requisition involve any of the following?

- | | | | |
|--|--|--|---|
| <input type="checkbox"/> Construction or renovation of Tampa buildings/grounds | <input type="checkbox"/> Perquisites for employees | <input type="checkbox"/> Cell phone/cell data/computer air cards | <input type="checkbox"/> Subagreements |
| <input type="checkbox"/> Use of a USF logo | <input type="checkbox"/> Departmental copier leases | <input type="checkbox"/> Blanket Purchase Order | <input type="checkbox"/> Purchase of Assets |
| <input type="checkbox"/> Services provided by an Independent Contractor | <input type="checkbox"/> Non-standard technology requiring UTSB approval | <input type="checkbox"/> Purchase of Vehicles | <input type="checkbox"/> Direct Owner Purchase Order (DOPO) |

c. **QUOTE INFORMATION:** Every order requires at least one quote, which must be attached as a PDF document (even if it was a verbal quote)

▼ **Quote Information**


Please attach the quote from your selected supplier. For orders under \$25,000 total, quotes may be from the supplier directly (a "written quote") or they can be written by the department, provided all required information is supplied (a "verbal quote"). Either way, please attach the quote in PDF format for review.

Primary quote upload *

No File Attached

d. **SOURCING INFORMATION:** You must provide information on how the quote related to this purchase was gathered.

▼ **Sourcing Information**

How was this purchase sourced? * 

- USF Public Solicitation (ITN/ITB)
- Competitive Quotations
- Emergency Purchase
- Single Source
- Non-USF public and open competitive solicitation
- Policy Exemption
- Order under \$10,000, competition not required
- Other (explanation required)

- i. **USF Public Solicitation:** Orders >\$150,000, which are not otherwise exempt must be publicly solicited. If your purchase falls under a contract that was awarded through public solicitation you must provide the solicitation number.
- ii. **Competitive Quotations:** Orders over \$10,000 require competitive quotes from alternate suppliers. At least 1 quote must be from a Certified Business Entity.

- iii. **Emergency Purchase:** Only allowable under true emergent circumstances and must be approved by a Procurement Director or other delegee.
- iv. **Single/Sole Source:** Must provide a clear description of the purchase, how the purchase is to be used and why there is no other supplier which can provide the same service/good. See our website for more detailed information on using Single/Sole Source.
- v. **Non-USF Public and Open Competitive Solicitation:** As a public agency, USF may use contracts awarded by other agencies so long as the competition was public. You must provide details on the contract. The quote should also indicate contract pricing was applied.
- vi. **Policy Exemption:** Will require selection of the specific regulation being used, and may require a justification attachment.
- vii. **Renewal of existing contract per terms of original contract:** Only allowable when a USF contract specifically states the terms of the agreement and allows for renewals. In which case a renewal agreement was likely signed and should be included as a part of the requisition. See section 2.9(a).
- viii. **Order under \$10,000, competition not required:** USF is exempt from competition under \$10,000, however you should always perform due diligence to ensure you are getting the best value. You will be asked to provide information on diverse suppliers.
- ix. **Other:** After the Fact orders should be documented under this option

e. **PAYMENT AND SHIPPING TERMS:** If there is need according to the terms of the quote or contract to alter the payment or shipping terms, you may do so. Check the Help text bubble to see lists of allowable terms.

▼ **Payment and Shipping Terms**

Do you need to change our Payment Terms (default: Net30) or Shipping Terms (default: F.O.B Destination)? ★ ⓘ

Yes No

Please describe the new Payment or Shipping Terms ★

f. Additional comments or backup documentation may be added at the bottom of the section. Please inform the Procurement Agent if any special instructions or documents must be included with the order. These can alternatively be placed in the “External Notes and Attachments” section of the requisition itself if they should be sent to the supplier with the PO.

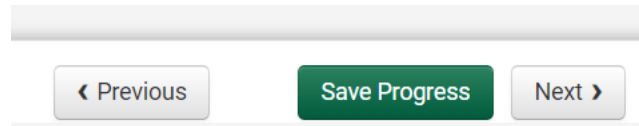
Do you have additional comments or attachments to add?

Comments Attachments

Do you require space for more attachments?

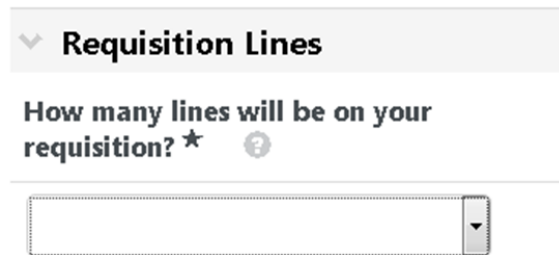
Yes No

2.10 After all questions are answered, click the “Next” button. You can also save your progress if you wish to return to your requisition form request later.



2.11 In the Line Information section, read the instructions carefully before selecting the number of lines to be included on the order.

2.12 From the drop-down menu, select the number of lines. Up to 20 are allowed on each Requisition Form.



2.13 Each line will populate with five fields which must be filled in:

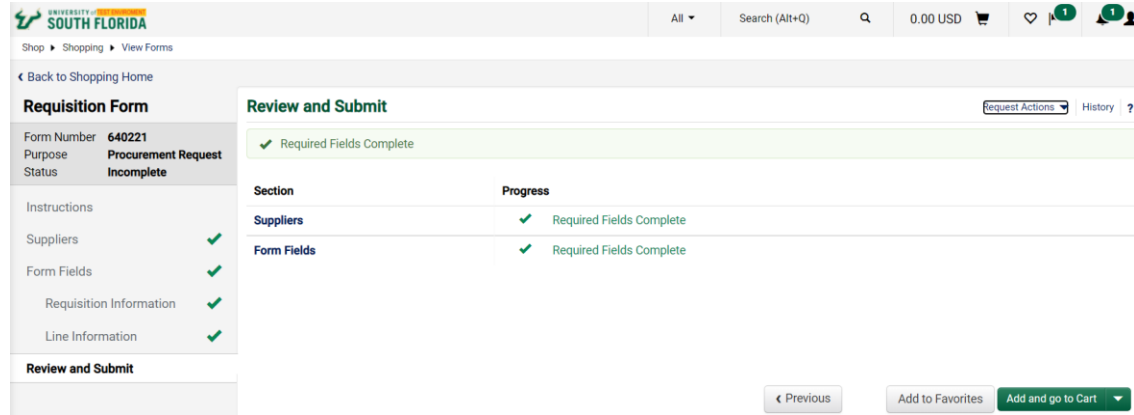
Line 1

Unit Price	<input type="text"/>	USD	Quantity	<input type="text"/>	Total	0.00 USD
Unit of Measure	<input type="text"/>					
Product Description	<input type="text"/>					
	1000 characters remaining					
Commodity Code	-			<input type="button" value="Edit"/>		

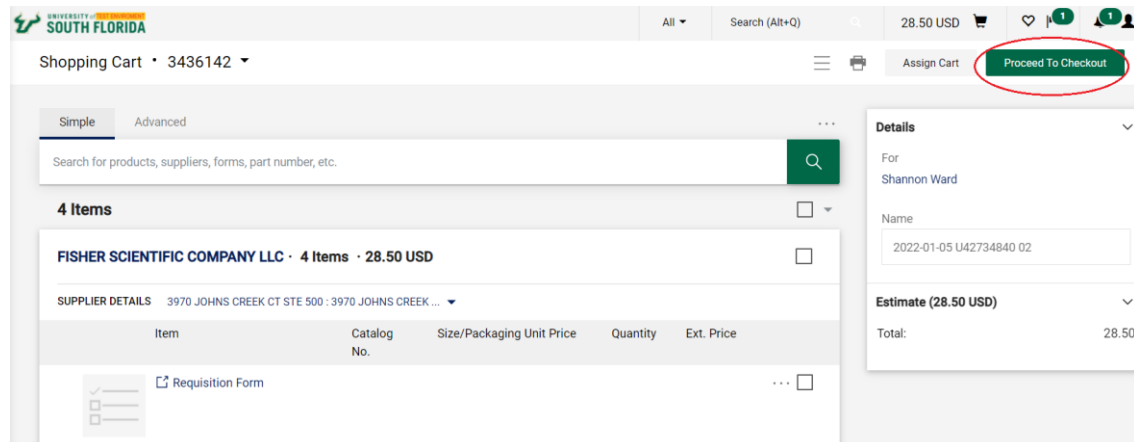
- a. **Unit price:** The price per item or service being ordered.
- b. **Quantity:** The number of items or services being ordered. Note that for an amount-only order, the quantity MUST be “1.”
- c. **Unit of Measure:** The measurement of the items being ordered. Note that for an amount-only order, the UOM MUST be “LOT.”
- d. **Product Description:** A clear description of the item or service. Do NOT only use an item or part number. A Procurement Agent should be able to tell at a glance what you are buying.
- e. **Commodity Code:** The type of item or service being purchased. BE AS SPECIFIC AS POSSIBLE BY SEARCHING FOR KEY WORDS RELATED TO YOUR PURCHASE! AVOID THE USE OF “OTHER” CATEGORIES UNLESS ABSOLUTELY NECESSARY. Note that commodity codes will restrict which expense account codes may be selected for that requisition line’s chartfield. A full list of all commodity codes and their expense account codes is available on Procurement Services website.

2.14 When all line fields have been filled out, click “Next” to go to the final review page of the form.

2.15 Click the “Add and go to Cart” button on the next page.



2.16 Once your form has been added to your cart, you can select “Proceed to Checkout” to create your requisition. You are also able to assign your cart to another user to create the requisition.



Completing the Requisition (for a non-catalog order)

3.1 After Proceeding to Checkout, a draft requisition page is created. This page is effectively only visible by the user and its document number cannot be searched as a requisition until it has been entered into workflow.

Requisition • 3436142

Summary PO Preview Comments Attachments History

General	Shipping	Billing
Description: <i>no value</i>	Ship To	Bill To
Cart Name: 2022-01-05 U42734840 02	UNIVERSITY OF SOUTH FLORIDA CENTRAL RECEIVING TAMPA CAMPUS Attn: Shannon Ward 4202 E FOWLER AVE CRS100 TAMPA, FL 33620-5050 United States	UNIVERSITY OF SOUTH FLORIDA ACCOUNTS PAYABLE 4202 E. Fowler Ave. SVC1039 Tampa, FL 33620 United States
Requested: <i>no value</i>		
Delivery Date:		
Prepared by: Shannon Ward		
Prepared for: Shannon Ward		
PO Business Unit: TAMPA Tampa Campus	Delivery Options	Billing Options
Do not send PO to Supplier: <input checked="" type="checkbox"/>	Location: MDC2305 HEALTH SCIENCE MAIN BUILDING	Accounting: <i>no value</i> Date:

Draft

Correct these issues.
You are unable to proceed until addressed.

- Required: Oper Unit
- Required: Fund
- Required: Dept
- Required: Product
- Required: Initiative

Be aware of these issues.
You may review and proceed.

Total (28.50 USD)

Subtotal: 28.50

28.50

- 3.2 On the right side of the draft requisition, a symbol will alert users of errors and a of warnings. All errors must be fixed before the “Place Order” button will become usable.
- Note that only a Requestor and Approver will see the Place Order button. All other users will need to assign their cart to a user with one of these roles to place the order into workflow.
- 3.3 The various sections in the Summary tab have fields which can be edited by the user by clicking the symbol. Clicking the symbol will bring up a new window to edit the information.


3.4 Let's start with the **General** section:

Edit General ✕


General


Description

Cart Name

Requested Delivery Date 

Prepared by Shannon Ward

Prepared for 

PO Business Unit [★] 

Do not send PO to Supplier

[★] Required fields Save Close

- a. **Description:** A custom name for the requisition order.
- b. **Cart Name:** A default name based on the date the requisition was created, the user's ID number, and the sequential order number for the day. This can be edited and will show as the Requisition Name in FAST.
- c. **Requested Delivery Date:** An optional field used when an order is needed by a specific date.
- d. **Prepared by:** The name of the user creating the requisition.
- e. **Prepared for:** The name of the user the order is being placed on behalf of. Any user in the Bull Marketplace can be chosen. The user will be shown as the document's owner, and any default values they have will be automatically placed on the requisition.
- f. **PO Business Unit:** The campus code pertaining to this order.
- g. **Do not send PO to Supplier:** Switching this on will stop the eventual PO from automatically sending a PO to the supplier. **This should only be chosen in rare cases**, such as for an After the Fact order to prevent a double order.

3.5 The **Shipping** section allows a user to select a Ship To Address from a set list of addresses which can accept deliveries. If the user has a default or favorited Ship To Addresses, they will appear in the Edit Shipping section. Otherwise, the user will need to search and select from the list of Ship To addresses.

CURRENT ADDRESS	
Contact Line 1	UNIVERSITY OF SOUTH FLO RIDA
Contact Line 2	CENTRAL RECEIVING TAMP A CAMPUS
Attn: ★	Shannon Ward
Address Line 1	4202 E FOWLER AVE
Address Line 2	CRS100
City	TAMPA
State	FL
Zip Code	33620-5050
Country	United States

- TAMPA CENTRAL RECEIVING - UNIVERSITY OF SOUTH FLORIDA , CENTRAL RECEIVING TAMPA CAMPUS , Shannon Ward, 4202 E FOWLER AVE, CRS100, TAMPA, FL ... ★
- 1 Direct (Office Depot Only) - UNIVERSITY OF SOUTH FLORIDA , TAMPA CAMPUS , Shannon Ward, 4202 E FOWLER AVE, TAMPA, FL 33620-9000, United States
- USF ACCOUNTS PAYABLE - UNIVERSITY OF SOUTH FLORIDA , ACCOUNTS PAYABLE , Paul Cleveland, 4202 E FOWLER AVE, SVC1039, TAMPA, FL 33620-0001, United States

Search additional Results Per Page 10 ▼

Delivery Options



Location *

★ Required fields

- a. The **“Attn:”** field can be edited to indicate who will receive an order. Most other fields cannot be edited.
- b. A One-Time Address option exists with free-form fields for custom addresses. Not all suppliers accept these kinds of addresses!
- c. Office Depot has an address for Tampa campus orders called **“1 Direct (Office Depot Only)”**. This address ensures the delivery ends up at the final destination, indicated by the Location field.
- d. The Location field is also in this section. This is a mandatory field made up of USF building code and room numbers. Even if an order is to an off-campus address, a Location code is still required; it is recommended to use the submitter’s Location, or to use a generic code such as TAMPA.

3.6 The **Billing** section will always default to our Accounts Payable office. All invoices sent by mail should go to this address.

a. The **Accounting Date** should remain blank.

Billing  ... 

Bill To

UNIVERSITY OF SOUTH FLORIDA
 ACCOUNTS PAYABLE
 4202 E. Fowler Ave.
 SVC1039
 Tampa, FL 33620
 United States

Billing Options


Accounting *no value*
 Date

3.7 The **Accounting Codes** section is where the user will select the chartfield string for each line of their requisition.


- a. If there are default header values, they will appear at the top of the page. However, default codes will not populate on the line if they are not allowable.
- b. If there are lines with different codes in use, Users will need to put their chartfield strings into the Accounting Codes at the line level rather than the header level. The Account Codes section will show this:

Accounting Codes




 Values vary by line.

c. The chartfield string for each line can modified by using the  button.


1	Specialized beaker unavailable from catalog	EA	3.50	1	3.50	...
---	---	----	------	---	------	-----

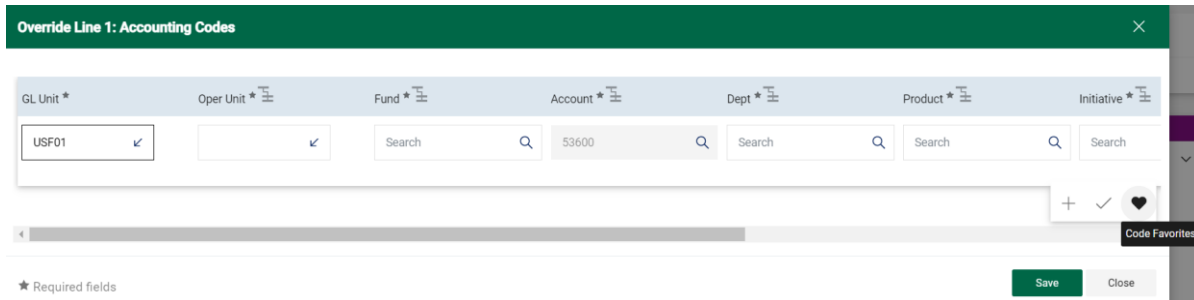
^ ITEM DETAILS 


Commodity Code	2111151218 / Other Lab Supplies	Tag Number	<i>no value</i>
External Note	<i>no value</i>	Internal Note	<i>no value</i>
		Internal Attachments	Add
		PO Clauses	<i>no clause</i>

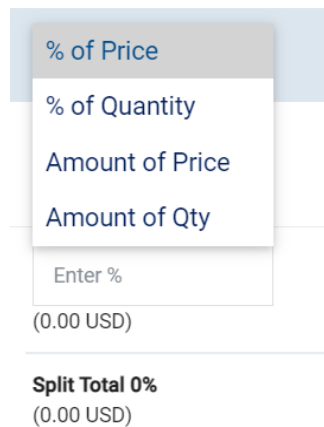
^ ACCOUNTING CODES Values have been overridden for this line   


GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
USF01 USF	<i>no value</i>	<i>no value</i>	53600 SUPPLY/EQUIP LAB & RESEARCH	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>	<i>no value</i>




- d. Please review the “Commodity to Account Code Mapping” spreadsheet on the Procurement Services website to find a list of commodity codes and their allowable account codes.
- e. In the individual line, favorited chartfields can be selected from “code favorites” icon, . This can save a user time and is highly recommended.



- f. The distribution for each line can be split by selecting the “add split” icon, . Scrolling to the right after adding a split will show the options for how to split the line’s chartfields.



- g. There is also the option to copy the chartfield string from one line to all other lines, using the “copy to other lines”  option:

ACCOUNTING CODES Values have been overridden for this line    Required: Initiat

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Copy line 1 Accounting Codes to other lines ⁱ Reference	you may review :
USF01	TPA	10000	53600	025100	000000	0000000	no value	no value	no value	Total (28.50 USD)
USF	USF TAMPA	GENERAL REVENUE	SUPPLY/EQUIP LAB & RESEARCH	UTILITIES	DEFAULT PRODUCT	DEFAULT INITIATIVE				Subtotal


Selecting this icon will open up a new pop-up allowing you to copy the current line to all lines on the requisition form request. Simply check the box for the form request, and choose “Copy” in the green button at the bottom.



Copy To Other Lines: Accounting Codes						
FISHER SCIENTIFIC COMPANY LLC						
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
<input type="checkbox"/> Requisition Form						
1	Specialized beaker unavailable from catalog Procurement Request: Requisition Form	EA	3.50	1	3.50	
2	Box of specialized beaker caps Procurement Request: Requisition Form	BX	5.00	1	5.00	
3	Custom USF-Logo vial Procurement Request: Requisition Form	EA	10.00	2	20.00	


h. As with FAST, if a Project is being used, a PC Business Unit and Activity ID must also be included. In the Bull Marketplace, Project and Activity ID are concatenated into a single value. Budget Reference may or may not be needed.


PC Bus Unit	Project / Activity	Budget Reference
<i>no value</i>	<i>no value</i>	<i>no value</i>

i. For any chartfield value, if an invalid choice is manually entered, the entry will not be saved and must be corrected before the error can clear.

3.8 **The Internal Notes and Attachments** section allows users to place information relevant to the order which may only be viewed by internal USF users with the appropriate roles. This section is only edited by Users in Specific Situations outlined below. Click the edit  button to make changes.


Internal Notes and Attachments  

Close/Cancel the PO 

PR Validation Override 

Internal Note *no value*

Internal Attachments **Add**

- a. **Close/Cancel the PO:** This is a flag only used for Change Requests, when the user is requesting to either Close or Cancel a PO. This should be kept as an  in all other cases.
- b. **PR Validation Override:** This will allow the requisition to skip the PR Validation process in workflow. **It is VERY closely monitored**, as this is only allowed in cases where RFM has approved the use of a recently expired grant to be used for a PO to pay the final expenses of a project, or if a change request to close a PO with an expired grant project is submitted. All other uses of this will result in the requisition being returned to the submitter.

3.8 **The External Notes and Attachments** section can be used to attach comments which will print out on the body of the PO, or documents which will be electronically distributed along with the PO to the supplier.

External Notes and Attachments   

Note to all Suppliers *no value*

Attachments for all suppliers [Add](#)

PO Clauses 1 [View details](#)

- a. SUPPLIERS CAN SEE THIS SECTION!! Do NOT include things such as competitive quotes or internal email discussions.
- b. Not all suppliers will review or accept external attachments. If something is necessary for an order, please be sure to verify with your supplier that they have received the required information after the PO has been distributed.
- c. Editing the PO Clauses is RESTRICTED

3.9 At the page bottom is the **Form Request information and line items**. Here you can see the supplier name and details and a link to the Requisition Form Request.

FISHER SCIENTIFIC COMPANY LLC · 4 Items · 28.50 USD

^ SUPPLIER DETAILS 3970 JOHNS CREEK CT STE 500 : 3970 JOHNS CREEK ... ▼

Contract *no value* PO Number To Be Assigned

PO Clauses *no clause*

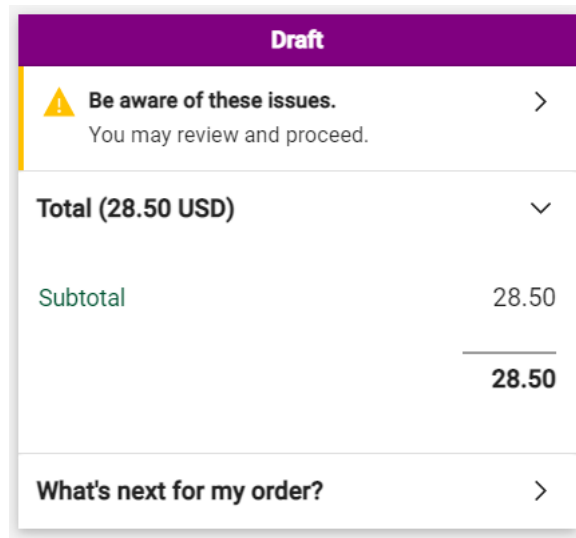
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
------	-------------	----------------	------------	----------	------------



[Requisition Form](#)

...

Contract: *no value*

3.10 On the right-hand side of the screen is the **Requisition Status** area.

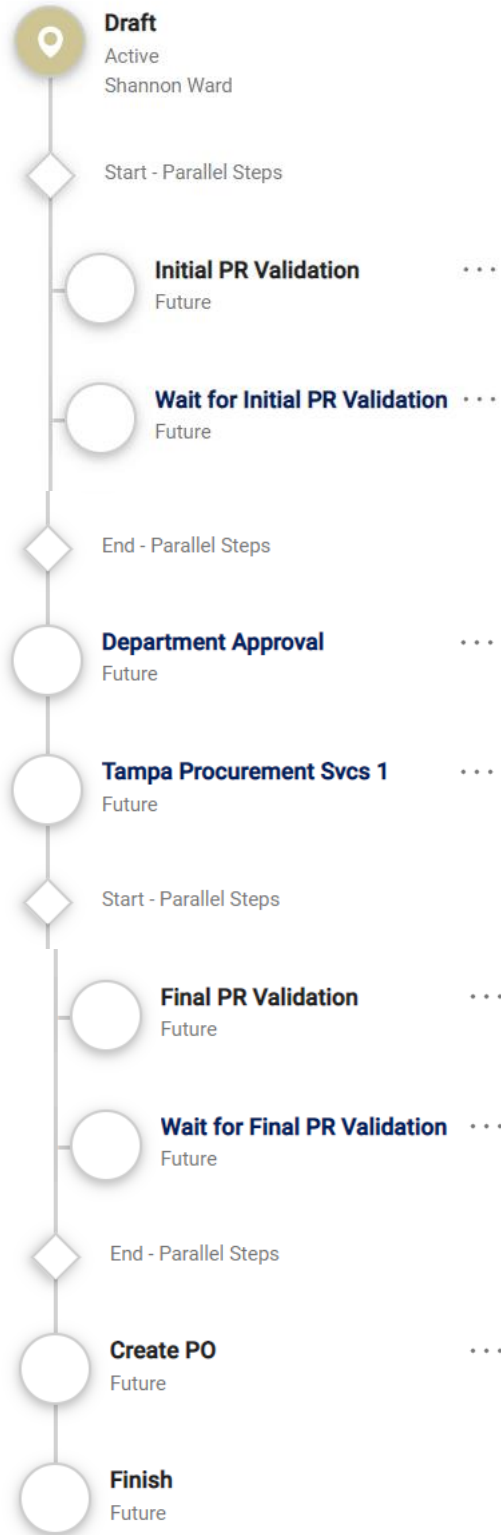


- a. The top bar tells you the workflow status of your requisition. It could say **Draft**, **Pending**, **Completed**, **Withdrawn**, or **Rejected**. Draft requisitions cannot be searched for in the Bull Marketplace and are only accessible by the person who owns the draft requisition.
- b. Errors  and warnings  are displayed next. Errors must be cleared before the requisition can be submitted. Warnings do not need to be cleared.
- c. "What's next for my order?" can be expanded to show the workflow route the requisition will need to go through before creating a PO. Steps with approvals can be expanded to show the Approvers or Buyers who can approve that step.

3.11 Once all errors are fixed, the Place Order button at the top of the draft requisition page becomes available. Selecting **Place Order** to initiate workflow approval.



3.12 Workflow is the approval route for your requisition after you select 'Place Order.' Workflow is found under the "What's next for my order" section. An example of workflow is shown below:



- a. **PR Validation** is an automated step that sends a validation request to FAST.
 - a. This is similar to a Budget Check in FAST, but it does NOT create an encumbrance.
 - b. If your order fails the PR Validation, your requisition will be removed from workflow and placed back in a Draft status.
 - c. Determine the error using the History section in the upper-right hand corner of the requisition page.
 - d. Fixing these errors sometimes needs to happen outside the system through budget transfer.
 - e. Once the error has been fixed, the user should resubmit their requisition by again selecting "Place Order."
 - f. Reasons for PR Validation to fail can include:
 - i. No budget exists on the chartfield being used
 - ii. There is insufficient budget remaining on the chartfield being used
 - iii. The budget date for a grant is expired (out of bounds)
 - iv. The supplier selected in the Bull Marketplace is not active in FAST (contact suppliersetup@usf.edu if this happens)
 - v. The Fulfillment Center selected in the Bull Marketplace is not active in FAST (contact suppliersetup@usf.edu if this happens)
 - vi. The PR Validation request has timed out while waiting for a response (contact Procurement Services if this happens)

- b. **Chartfield approval.** The specific Approvers will be based on the chartfield(s) used.
 - a. Click the icon next to the workflow step to see Approvers and their contact info.

Click this button to expand the workflow step and review Approvers



Department Approval ...

Future

Requisition Approvals for Operating Unit TPA and Department 025100

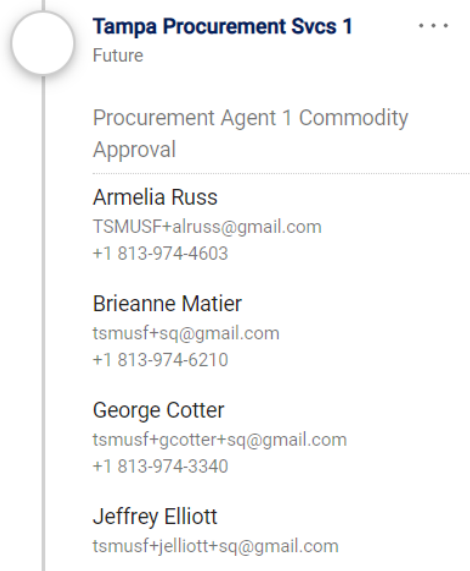
Corey Kelly
tsmusf+ckelly+sq@gmail.com

John McCall
tsmusf+sq@gmail.com
+1 813-974-8269

Shawna Neckar
tsmusf+sq@gmail.com
+1 813-974-0620

- b. If multiple chartfield strings are used, parallel approvals may be initiated. An Approver from each chartfield string will need to approve the requisition before it can move to the next approval step.
- c. **The system does not allow a requisition's owner to also be an Approver.** If an Approver submits a requisition using a chartfield string they are responsible for, another Approver must be the one who approves this step.

c. Approval by Procurement Services



Tampa Procurement Svcs 1 ...
Future

Procurement Agent 1 Commodity
Approval

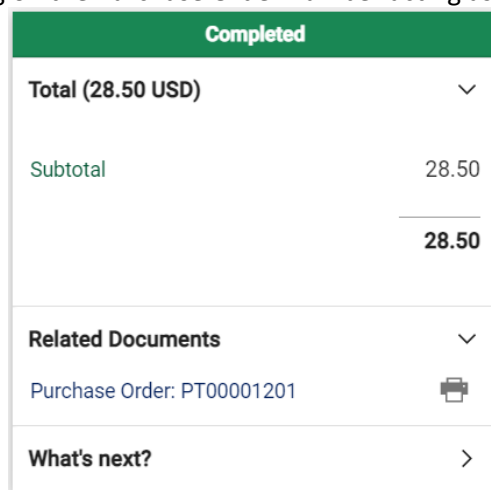
Armelia Russ
TSMUSF+alruss@gmail.com
+1 813-974-4603


Brienne Matier
tsmusf+sq@gmail.com
+1 813-974-6210

George Cotter
tsmusf+gcotter+sq@gmail.com
+1 813-974-3340

Jeffrey Elliott
tsmusf+jelliott+sq@gmail.com

- a. The Procurement Agent group assigned to this step will be based on the Business Unit and/or commodity code selected.
- b. Questions should be directed to the Procurement Agent indicated in the step. However, all Procurement Agents (and managers) should be able to approve requisitions that reach this step in case the assigned Agent is unavailable.
- d. If there are any additional approvals, they will also need to be approved before proceeding to the next step.
- e. After all approvals are granted, a final PR Validation check is run, mirroring the first. This is to ensure that the chartfield(s) used would still pass a Budget Check before the PO is created.
- f. If the final PR Validation passes, then a PO is created and PO workflow is initiated. You can access the PO by clicking on the Purchase Order number acting as a hyperlink.



Completed	
Total (28.50 USD)	∨
Subtotal	28.50
	28.50
Related Documents	∨
Purchase Order: PT00001201	
What's next?	>

At this point the requisition is complete, so any changes must be made to the PO using a Change Request.

The Purchase Order (non-catalog PO)

4.1 After the requisition has been approved, a Purchase Order document will be created with a unique PO number beginning with the letter “P”. and PO workflow will be initiated.

Purchase Order • PT00001201 Revision 0

Status Summary Revisions (1) Confirmations Shipments Change Requests Receipts Invoices Comments Attachments History

General Information	Shipping Information	Billing/Payment
PO/Reference No. PT00001201 Revision No. 0 Supplier Name FISHER SCIENTIFIC COMPANY LLC Address 3970 JOHNS CREEK CT STE 500 SUWANEE, Georgia 30024-0000 United States	Ship To UNIVERSITY OF SOUTH FLORIDA CENTRAL RECEIVING TAMPA CAMPUS Attn: Shannon Ward 4202 E FOWLER AVE CRS100 TAMPA, FL 33620-5050 United States ShipTo Address Code T_CTRL_REC	Bill To UNIVERSITY OF SOUTH FLORIDA ACCOUNTS PAYABLE 4202 E. Fowler Ave. SVC1039 Tampa, FL 33620 United States BillTo Address Code T_AP

Completed

Details

Supplier Status Sent To Supplier

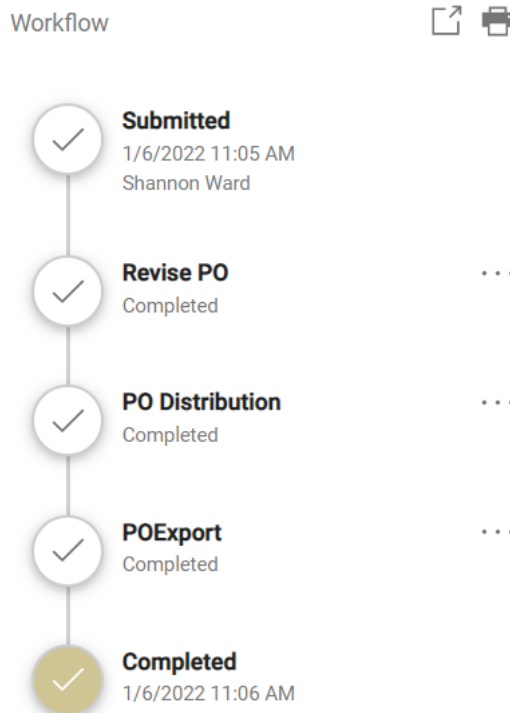
Supplier FISHER SCIENTIFIC COMPANY LLC

Total (28.50 USD)

Subtotal 28.50

28.50

4.2 PO workflow has no approval steps; it is a series of automated steps and can be found under the “What’s Next?” section on the side. These steps check for **Revisions to the PO, Distributes the PO to the supplier, and Exports the PO to the FAST system.**



4.3 The Summary section gives a view of all parts of the PO document on one page. Most of these sections will mirror the information from the requisition.

4.4 One difference is in the Billing/Payment section, where the Billing Options includes Payment and Freight terms. These can be adjusted by a Procurement Agent based on the Payment Terms section of the Requisition Form Request.

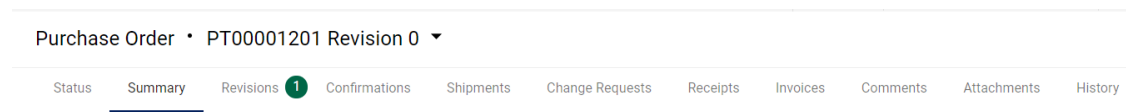
Billing Options

Payment Terms 0% 0, Net 30

F.O.B. Destination

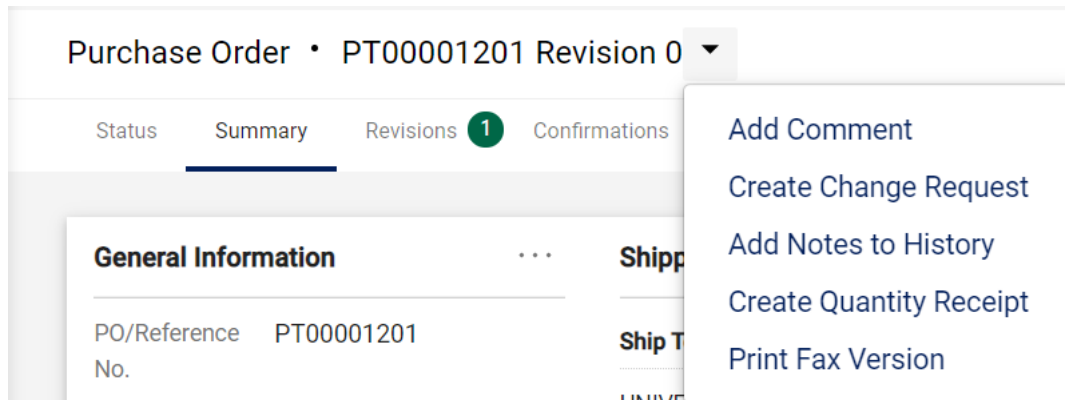
Accounting Date 1/6/2022

4.6 At the top of the page are the tabs for related documents and information:



- a. **Revisions:** Shows all revisions done to the PO either through a Change Request or a PO Revision.
- b. **Confirmations:** Some suppliers provide a confirmation they have received an order.
- c. **Shipments:** If a supplier sends a shipment confirmation order, it will appear in this section to document when the items were shipped.
- d. **Change Requests:** Shows all Change Request documents.
- e. **Receipts:** Shows all receipts against the PO.
- f. **Invoices:** Shows all invoices submitted against the PO.
- g. **Comments:** Shows all comments from the requisition, PO, and Change Requests.
- h. **Attachments:** Shows all internal and external attachments from the requisition or PO. This does NOT show attachments on the requisition form.
- i. **History:** A record of all actions on the PO.

4.7 Users can perform specific tasks relating to the PO by using the Document Actions drop-down menu next to the Purchase Order number at the top of the screen:



- a. **Add Comment:** Allows the user to create a comment on the PO and email it to relevant USF users for review (if desired).
- b. **Create Change Request:** Allows the user to make changes to their PO via a Change Request form. The form mirrors the PO but allows the user to modify certain sections. Please see the Change Request job aid for more information.
- c. **Add Notes to History:** Creates a text entry in the History link. DO NOT USE.
- d. **Create Quantity Receipt:** If the user has receiving permissions, they are able to create receipts against the PO lines here. Please see the Receiving job aid manual for more information. Note: If the requisition form request indicated a Blanket Purchase Order or Subagreements, the option to Create Price Receipt is displayed here.
- f. **Print Fax Version:** Allows the user to print out a copy of the full electronic Purchase Order.