

PROCUREMENT PROCEDURES

DESCRIPTION GUIDELINES AND DATA STANDARDS

The following guidelines should be followed when entering descriptions on requisitions:

- * Descriptions should begin with a noun followed by additional information. (*Example: Toner, Black, HP LaserJet 3550, Item No. Q2670A*)
- * It is VERY important to use mixed-case letters.
- * Do NOT use symbols such as @, #, %, &, /, _.
- * If you have a quote from the vendor, enter the description from the quote on the requisition. You must itemize the requisition using the quote if it is non-confirming. If the description on the quote is not clear, it is your responsibility to provide the full specifications (the one exception is Dell e-quote descriptions, please call Lisa (3449) or Rebecca (2229) in regards to Dell descriptions). Confirming requisitions do not have to be itemized, but must have a description. Each invoice must have a separate line description (ex. one invoice = one line item, two invoices = two line items, etc.)
- * The commodity code will generate a generic description. Delete the generic description and type the vendor's description of the item instead. **Do not use the generic commodity description for the item's description.**
- * For non-confirming requisitions, include the item number, color, make/model, and a full specification of the item. Confirming requisitions should include a description of what was ordered and the invoice number (*Ex. Phone Service, Invoice No. 1234*).
- *Your non-confirming order will be faxed to the vendor, so think of what information the vendor will need to identify the exact item(s) you are ordering. That is the information that should be in your description. Confirming orders will be processed and sent to Accounts Payable for the processing of payment.
- *If you need more space to type the description on the requisition, go to Item Text under Options in Banner to complete the description.

Note: Document Text should be used when the information refers to the entire requisition (ex, quote number, state contract number, notes to Procurement, new vendor Info). Item Text should be used to refer to a particular line item (make/model, product/item numbers, information that did not fit on description line).