**Course Description:**
Need to understand the ins-and-outs of purchasing, receiving and accounts payable? If so, **Procurement Basics** training is for you! You'll learn how to find Colleague information regarding requisitions, purchase orders, receiving and vouchers. An overview of Procurement policies and procedures is also included to keep you current and in the know. Samples of required forms are included in the materials and instructions for completing these forms will be discussed.

**Audience:**
- CSM employees with a need for Procurement information
- Anyone with Colleague Financials [CF] access
- Cost center managers

**Course Length:**
- 2 hours

**Prerequisites:**
- Required – IMT-1005 Introduction to Colleague
- Recommended – HRD-1012 FERPA Training

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**Course Outline:**
- **Procurement Department**
  - Staff
  - Policies
- **Contracts Overview**
  - Contract Process
  - Signatory levels
  - Routing form
  - Contractor checklist
  - W-9 form
  - Certificate of Insurance
- **Purchasing**
  - Instructions on how to complete a requisition
  - Technology purchases
  - Tax exemption form
  - Prepayment
  - Stockless Office Supplies
- **Purchase Orders**
  - Difference between a PO and a BPO
  - Prepaid PO’s
  - Shipping charges
  - On line orders
- **Shipping & Receiving**
  - Incoming deliveries
  - Outgoing packages
    - UPS, FedEx
  - Fixed Assets
    - Inventory
    - Asset Transfer
    - Asset Disposal

**Course Outline (cont’d):**
- **Accounts Payable**
  - Check run schedule
  - Payment against PO
  - Petty cash
  - Contracted services
  - PCards BOA (Bank of America transactions)
  - Expense reimbursements
- **Colleague Overview**
  - Budget Inquiry: ACBL
  - Vendor: VEND, VENI
  - Purchase Order: PINQ
  - Blanket Purchase Order: BINQ

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For more Technical Training information, visit:
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