



PURCHASING PROCESS

Revised August 17, 2013

The following steps apply to **any expense** for which the department may provide funding. **Approval must be received BEFORE any departmental purchase is initiated (including grants).**

1. Identify what needs to be purchased, the appropriate vendor, estimated merchandise cost, and estimated shipping cost.
2. Go to the university's purchase request system (eRequest) at <http://erequest.osu.edu/>
3. Login using your OSU Name.# (e.g. fulton.82) and university password (aka email password).
4. Click "New"

Purchasing/Payment Option

5. Indicate Purchasing/Payment Option (see spreadsheet for details)

Vendor/Payee and Item Details

6. To purchase office supplies click the eStores logo and follow these steps, otherwise skip to step 7
 - Click the Supplier Websites tab
 - Click the appropriate vendor link
 - Add items to the cart
 - Click Checkout
 - Click Checkout (again)
 - Click Confirm Checkout
 - Continue to step #10
7. Add details for the first item that you wish to purchase (description and item #), quantity of items, and estimated amount.
8. Add the Vendor information – if you are using a purchasing card you only need to indicate the vendor name (e.g. Target). All other purchases require the full vendor address.
9. To add additional items click the "Add Another Item" button.

General Request Information

10. **Ship To:** This will default to the address you enter on the preferences screen. If you are using a purchasing card for an in-person purchase type N/A to indicate that the item will not be shipped.
11. **Additional Info:** Provide any additional information that will assist us in understanding your request (e.g. website, special instructions, etc.).
12. **Business Purpose:** Indicate a very **specific reason** as to why this purchase needs to be made. E.g. Costumes for Othello, paper for office copier, textbooks for Theatre 210, etc.
13. **Attachments:** Use this area to attach quotes from the vendor.

Funding Source

14. **Org Number:** 02800
15. **Special Funding Instructions:** Use this area to indicate where you would like the funding to come from. E.g. Seasonal Scenery, Othello Costumes, Classroom Supplies.
16. **Chartfield Information:** Do not make changes to this section.

Actions

17. **Save For Later:** If you need to gather additional information, click Save For Later. Your request will be saved and you can come back to it later.
18. **Continue:** If you are ready to submit your request click “Continue” to preview and double check your request.

eRequest Preview

19. **Go Back and Edit:** If you made a mistake, use this button to correct your entry.
20. **Submit For Approval:** Clicking this button will submit your request for approval. You will receive an email copy of the request indicating that it has been submitted for approval. Once the request has been approved you will receive a second email indicating that the request has been approved.

Purchase Request Approved

See spreadsheet for specific details on what happens – or what you should do after the eRequest is approved.

Purchase is Complete

21. If applicable, return Purchasing Card to Savenda.
22. Scan receipt(s) and/or packing slip(s) using the office copier (instructions posted to the left of the display panel) or using the multifunction printer/scanner in your office. The file should be saved as a PDF with the file named the same as your purchase request number (e.g. PR12345) and saved to Z:\Purchasing\.
23. Staple receipt(s) and/or packing slip(s) to a copy of the PR Request form that was emailed to you or provided by Savenda or Rachel when you picked up the Purchasing Card.

DONE!

NOTES ABOUT ONLINE SHOPPING

After completing steps 1-20:

- **Amazon** – Send a wishlist to fulton.82@osu.edu (click Share With Friends). Approved requests will be ordered within 24 hours. Shipping for products marked Amazon Prime will be received within 2 business days with no shipping cost.
- **eBay & PayPal** – Share the item with fulton.82@osu.edu (look for the envelope under the “Other item info” box).
- **Grizzly Industrial** – Place the item in your Gift Cabana, click “Tell others about your Cabana” and add fulton.82@osu.edu
- **McMaster-Carr** – “Forward” (top right corner of CURRENT ORDER screen) to fulton.82@osu.edu

You will be notified when the order is received. No other action on your part is required. Paperwork will be completed by Savenda.

| OPTION | PURPOSE | AFTER eREQUEST IS APPROVED | AFTER PURCHASE IS MADE AND PRODUCT IS RECEIVED | TURN AROUND TIME |
|-------------------------------|---|---|---|----------------------|
| Standard Purchasing Request | <ul style="list-style-type: none"> Total invoice exceeds \$1,000 Product through eStores (e.g. office supplies) Guest Artist Honorarium (2 days - 31 days) | The request is forwarded to the Arts & Sciences Business Services Center (BSC) for entry into the real purchasing system. You will receive a third email indicating the Requisition or Purchase Order number and the vendor will receive the Requisition or Purchase Order via fax. | Scan packing slip(s) if the item was shipped. Invoices should be forwarded by the vendor directly to Accounts Payable. If you receive a copy of the invoice scan it with the packing slip. After scanning everything, staple the originals to the eRequest form and put in Savenda's mailbox. | 2 to 5 business days |
| Purchasing Card Preferred | Purchase of small dollar goods and services | See Savenda for a Purchasing Card and make your purchase. Card must be returned within 48 hrs. Make sure when purchasing the product that you are not charged tax and that tips do not exceed 20% of the bill. Alcohol and spousal meals may not be charged to departmental funds. | Return Purchasing Card. After scanning everything, staple the originals to the eRequest form and put in Savenda's mailbox. | 1 business day |
| Internal Order | OSU Vendor (e.g. Blackwell, Continuing Ed, UniPrint, University Catering, etc.) | You will receive an email from the BSC indicating that payment information has been dispatched to the internal vendor. Take a copy of the email attachment with you if you are picking up a product or attending a training session. | Scan packing slip(s) or any type of documentation you receive. After scanning everything, staple the originals to the eRequest form and put in Savenda's mailbox. | 1 business day |
| Blanket Order Release | For purchases made against an <u>existing</u> blanket purchase order (e.g. 5 th Avenue Lumber) | Contact the vendor to place your order. | Scan packing slip(s). Staple the originals to the eRequest form and put it in Savenda's mailbox. | 1 business day |
| Reimbursement to Employee | Reimbursement to yourself for the purchase of goods that were preapproved by the chair but you were unable to get a Purchasing Card. | You will receive an email when the payment request has been entered and another email when the reimbursement has been deposited into your account. No other action is needed. | Scan original itemized receipts. If being reimbursed for a meal include the Business Meal Form. Tip cannot exceed 20% of the bill. Alcohol and spousal meals will not be reimbursed. Staple the originals to the eRequest form and put it in Savenda's mailbox. | 7 business days |
| Payment | Honorarium (1 day) and Membership Dues | You will receive a third email when payment has been processed by the BSC. Accounts Payable will mail a check within 7 business days. No other action is needed. | Scan invoice or Letter of Offer signed by the chair. Staple originals to the eRequest form and put it in Savenda's mailbox. | 7 business days |
| Refund | BOX OFFICE USE ONLY | | | |
| Reimbursement to Non-Employee | DO NOT USE | | | |

First time users (not Production related):

The first time you log into eRequest you need to set a few preferences:

- 1) Click on Preferences (top left corner of the page)
- 2) Make sure that "Email Enabled" is checked
- 3) In the Ship To box put:
Department of Theatre
ATTN: [Your Name]
1849 Cannon Drive
1089 Drake Center
Columbus, OH 43210
- 4) In the Chartfield section select UNIV from the dropdown list under "BU GL"
- 5) In the box under "Org" type 02800
- 6) In the box under Fund type 011000
- 7) Click Save

First time users (Production related):

The first time you log into eRequest you need to set a few preferences:

- 1) Click on Preferences (top left corner of the page)
- 2) Make sure that "Email Enabled" is checked
- 3) In the Ship To box put:
Department of Theatre
ATTN: [Your Name]
1849 Cannon Drive
1089 Drake Center
Columbus, OH 43210
- 4) In the Chartfield section select UNIV from the dropdown list under "BU GL"
- 5) In the box under "Org" type 02800
- 6) In the box under Fund type 110132
- 7) In the box under Account enter the appropriate number for your area:

| | | | | | |
|----------|----------|-------|-------|---------|-------|
| Costumes | Lighting | Media | Props | Scenery | Sound |
| 61493 | 61496 | 61236 | 61495 | 61494 | 61497 |

- 8) Click Save