

PURCHASING PROCESS

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. smith.22) and university email password.
4. First time eRequest users: Set *Preferences* if you haven't done so already. Click on *Preferences* in the menu above the *eRequest Home* text, and check the box *Email Enabled*, put in the *Ship To, Org Number*, and *Chartfield* starting numbers.
 - *OSU Dept of Dance*
1800 Cannon Drive, 517 Lincoln Tower
Columbus, OH 43210
** Renovation Space Summer 2011-Summer 2013 **
*** Deliver between 8AM-5PM. Please call ahead so Reception Office knows of arrivals. 614-292-7977. ***
 - OSU dept organization #, *Org Number: 02410*
 - Chartfield, set at *UNIV* in the *BU GL* drop-down list, then *02410* for the *Org #*.
 - Click *Save*.
 - Click *Home* to return to the eRequest home page.

Purchasing/Payment Option

5. Click the *New* button. Indicate *Purchasing/Payment Option*. See spreadsheet on page xxxx 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 in *Description* and *Item #1, Quantity of items, and Estimated Amount*.

8. Add the *Vendor/Payee Information* – put vendor’s entire address, unless you are requesting to use a dept Purchasing Card / Procurement Card, for which you only need to indicate the vendor name; e.g. Target.

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. Type *N/A* for not applicable, if you are requesting to use a Procurement Card for an in-person purchase to indicate that the item will not be shipped.

11. **Additional Info:** Provide any more details that will assist approvers and auditors in understanding your request; e.g. website, special instructions, etc.

12. **Business Purpose for the Item(s) Above:** Type a very detailed, specific reason as to why this purchase needs to be made. Best practice is to write as if explaining to an auditor who doesn’t know anything about the field or dept; e.g. costume items for dept annual performance run Dance Uptown: Bebe Miller’s dance, paper for office copier, production materials to support Spring Dance Festival, and the like.

13. **Attachments:** Use this area to attach quotes from the vendor, website carts lists with item specifics and totals, any related grant or funding docs or related email chains.

Funding Source

14. **Org Number:** 02410

15. **Special Funding Instructions:** Use this area to indicate where you would like the funding to come from, if you have a specific grant or funding source.

16. **Chartfield Information:** Do not make changes to this section. To be handled by dept accounting.

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; first for accounting approval to administrative manager Jane Ledford-Adkins, then final approval to Chair Susan Petry. 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 Eric.

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 Eric or Rachel when you picked up the Purchasing Card.

DONE !

NOTES ABOUT ONLINE SHOPPING

After completing steps 1-20:

- **Amazon** – Send a *Wishlist* to ledford-adkins.1@osu.edu, click *Share With Friends*. Once your eRequest is approved, you may come to Jane to check out a dept credit card.
- **eBay & PayPal** –Share the item with ledford-adkins.1@osu.edu. Look for the envelope under the *Other item info* box.
- If the website doesn't take the dept credit card wording, Dance General # or Dance Earnings #, put in your name as the cardholder.

You will be notified when the order is received. No other action on your part is required. Reconciling the eRequest with the post-purchase paperwork will be completed by Jane. Please make sure to give her all packing slips and papers that come in the delivery boxes / packaging.