



# cSOP101- General Purchasing Guidelines

Process Workflow, Procurement Request (Want Sheet) Form Submission, and Support Resources

## Overview

The purpose of this SOP is to not only explain in detail how to fill out and submit a Procurement Request, but to help provide guidance to those utilizing the online procurement request form.

Purchasing representatives are responsible for fulfilling requests by end users within the Chemistry Department which includes students, professors, and staff. Currently, most requests for goods & services are made by way of a Procurement Request, often referred to as a “Want Sheet.” You may access the Procurement Request form by using the following link:

[Procurement Request Form](#)

**Please note that those who are currently submitting their requests directly through Buy.IU can continue to do so!**

## Procurement Request Workflow

The flow chart on the proceeding page shows the various stages of a requisition. Note that this workflow process may vary slightly depending on the supplier and/or method used most notably P-Card purchases as they require additional approvals.

## P-Card Purchases

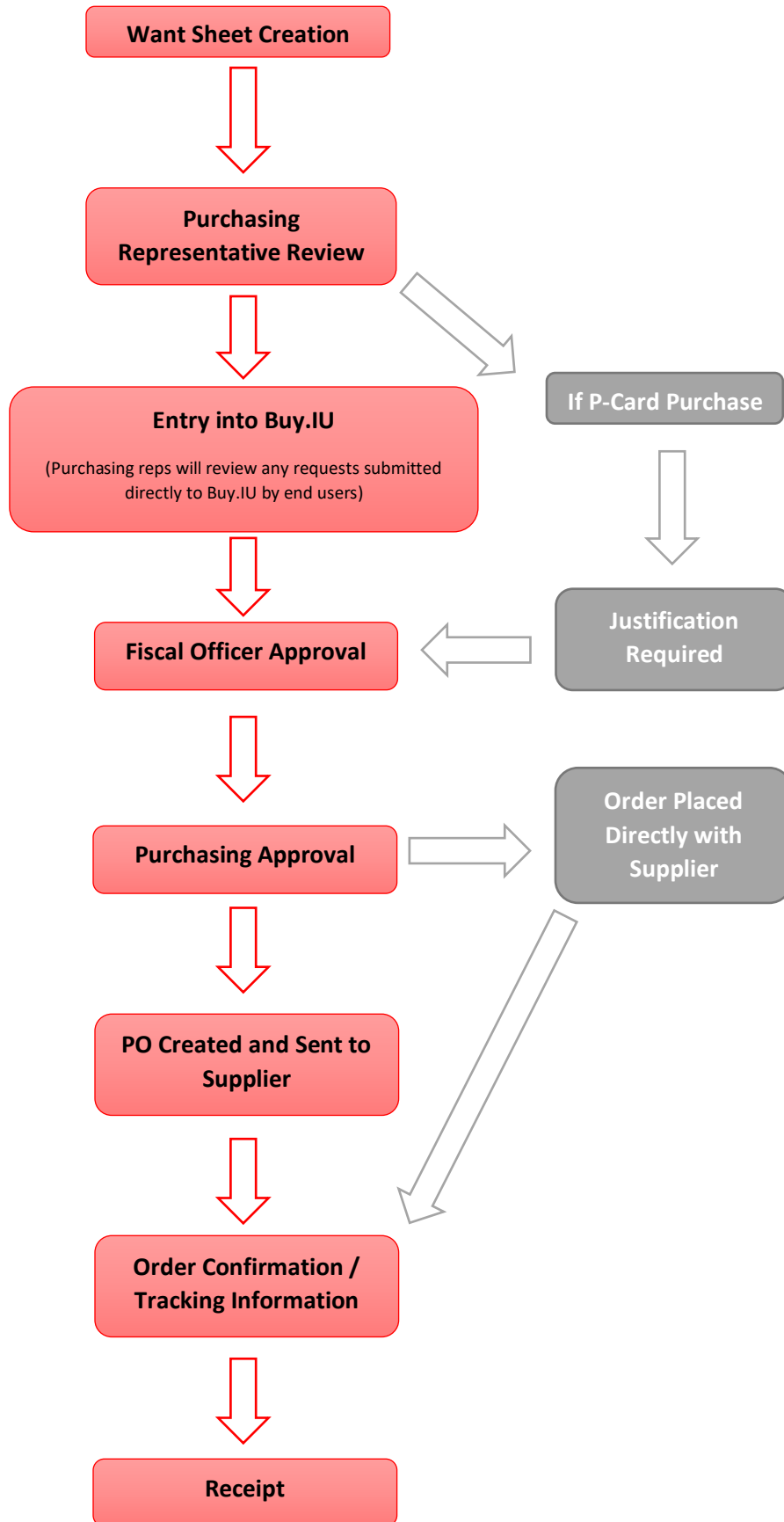
When a purchase requires the use of a P-card, there are certain things that need to be kept in mind. Please refer to the link below for more information on what items can be purchased using a P-Card.

[Office of Procurement Services SOP-PCARD-04](#)

All P-card purchases must be approved by the appropriate fiscal officer within the department and any P-Card purchase over \$1,000 must also be approved by the Office of Financial Operations & Budget for The College of Arts and Science.



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## Want Sheet Creation

### Requestor Information

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Name

Phone Number

Email

Email CC

Affiliation   
Office/Group, not just department.

Account(s)   
  
  
Identify account distribution here, if applicable. Please use either dollar amounts or percentages.

Account Notes

These fields should automatically fill in with your information. If they do not, enter any missing info.

Please make sure that the email entered here is a valid IU email!

Additional email addresses can be entered here. They are not required to be IU email addresses.

Choose your affiliation from the drop-down menu. If you do not see your affiliation, please enter which group you are with. Please do not simply list "Chemistry."

Enter the account number associated with your group, or project. If there is a sub-account involved, please list it as well. You may add up to three different accounts and sub accounts.

**Please enter numbers only, no dashes or spaces.**

If you are entering more than one account, please note the distribution here. The preferable method would be a percentage; however, dollar amounts would also be acceptable to use.



### Vendor Information

Name	<input type="text" value="Oakwood Chemical"/>
Address	<input type="text" value="730 Columbia Hwy N"/>
City	<input type="text" value="Estill"/>
State	<input type="text" value="Sc"/>
Zip	<input type="text" value="29918"/>
Phone	<input type="text" value="800-467-3386"/>
Fax	<input type="text"/>
Contact	<input type="text" value="sales@oakwoodchemical."/>

\*One preferred vendor per request, please

When supplying vendor information, please provide as much information as possible!

At a minimum, please provide the name and contact information of the desired vendor. This could be simply an email, website, or phone number.



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## Purpose

Will items be used to construct equipment?\*

Yes  No

Fabrication  
Number:\*

Are item(s) in this request a new equipment purchase?\*

Yes  No

Will items be used to repair existing equipment?\*

Yes  No

IU Tag  
Number:\*

Will items be used to upgrade existing equipment?\*

Yes  No

IU Tag  
Number:\*

In the Purpose section, answer the questions shown.

All questions do require an answer.

If answering 'yes' to certain questions, you will be prompted for additional required information such as a fabrication number or IU tag number. Please be sure to provide this information when required.



Order Details

Quantity	Catalogue or Item Number	Description/Specs	Unit Price	Unit Total Price
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
<b>ORDER TOTAL</b>				<input type="text" value="0.00"/>

When entering item(s) to be ordered, it is acceptable to copy/paste directly from supplier websites when inputting information in these spaces, however, be aware that certain websites may include extraneous characters which can obscure actual item numbers and/or descriptions. When ordering items such as chemicals, please be as specific as possible. Providing a link to the actual catalog or supplier website is extremely helpful and can be done by pasting a link in the comments/instructions section as outlined below:

Comments/Instructions

This section is used for all notes or special instructions. Enter anything that you think will help Chemistry purchasing reps in locating the correct items you are requesting. It is often helpful to paste a link to the website or catalog order information was obtained from. There is no character limit in this field. Justification statements for P-Card purchases or suppliers known to not be listed in Buy.IU should go here.

This section is also where you may request expedited shipping, however, shipping methods are often determined by contract provisions with suppliers and can often not be changed.

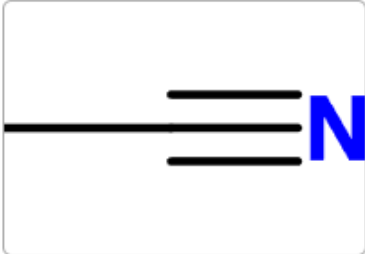


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Sample excerpt from vendor website ([Oakwood Chemical](#)) as linked in the comments section above:

099891

Acetonitrile HPLC grade

<b>CAS Number:</b>	75-05-8	
<b>Molecular Formula:</b>	C <sub>2</sub> H <sub>3</sub> N	
<b>Molecular Weight:</b>	41.05	
<b>MDL Number:</b>	MFCD00001878	

Item #	Price	Quantity	Add to Cart
099891-1L	Regular Price: \$22.00	<input type="text" value="1"/>	<input type="button" value="Add to Cart"/> <b>In Stock USA</b>
099891-4L	Regular Price: \$80.00	<input type="text" value="1"/>	<input type="button" value="Add to Cart"/> <b>In Stock USA</b>
099891-4x4L	Regular Price: \$315.00	<input type="text" value="1"/>	<input type="button" value="Add to Cart"/> <b>In Stock USA</b>

### Attachments

No file chosen

 Hold Ctrl (Windows) or Cmd (Mac) to select multiple files.

The final section is where you attach any additional files such as quotes, spec sheets, or other pertinent documents. While quotes are not required for most purchases, if one was obtained, please include it with the request. If additional documentation is required, it should be attached in this section. Details on additional required information is detailed in the next section.

### Important Required Information

There are certain situations that require additional information and/or additional forms to be submitted with your request to avoid delays in processing.

If you are purchasing new equipment valued over \$4,999, please include the following additional information as required:

- Location where equipment will primarily be used/stored
  - Building and room number is adequate
- Indicate whether equipment will be placed into service within 30 days of receipt



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- Please note that this is the date of receipt (if known), not the date of the request!
- In the case of non-standard computer equipment and ALL software purchases, a UITs approval is required to be submitted with the request.
  - For a list of standardized computer configurations that can be purchased directly through Buy.IU, see [this link](#).
  - For a non-standard configurations, please see [this policy](#).
  - For software purchases, please see [this policy](#).

### Submitting the Request

Once you have entered all information, click the "Submit Order" button at the bottom of the page. A box will appear (as shown below) asking for you to confirm the form submission. This is the last opportunity to add information to the request.

If you have more information to supply, please select "Continue Editing" to return to your request form.

If your purchasing request is complete and correct, select "Submit Now" to email this form to the Chemistry Requisitioning Office for processing.

Continue Editing

Submit Now

You should then see a green message box appear with a confirmation number near the top of the page containing a confirmation number. Please keep this number handy as it will be needed if there are any issues with your submission.

Your Submission Was Successful

Your confirmation number is 220216-23268.

You should receive an email response shortly.

If you do not receive a confirmation email, contact ITG at 6-4124.

You should also receive a confirmation email shortly after submitting your request, although this can take several minutes. A sample image of this message is shown below. Please note that this is the exact request that is seen by Chemistry Purchasing reps and is what is used to enter your order in Buy.IU.

If you do not receive a confirmation email, please contact [Chemistry Purchasing](#) before resubmitting your request.





# INDIANA UNIVERSITY DEPARTMENT OF CHEMISTRY

Procurement Request from Kendra Carter/Sample Supplier/1234567



Carter, Kendra C  
To  chemreq  Carter, Kendra C

If there are problems with how this message is displayed, click here to view it in a web browser.



## PROCUREMENT REQUEST

**Confirmation Number:** 220323-11042

<b>Requested by:</b> Kendra Carter	<b>PREFERRED VENDOR INFORMATION:</b>
<b>Requestor Phone #:</b> (812) 855-0821	<b>Name:</b> Sample Supplier
<b>Email Address:</b> <a href="mailto:kcpascha@iu.edu">kcpascha@iu.edu</a>	<b>Address:</b>
<b>Affiliation:</b> Business Office (OBUS)	<b>Phone #:</b>
<b>Account #:</b> 1234567	<b>Fax #:</b>
<b>Account Notes:</b> Sample text	<b>Vendor Contact:</b> <a href="mailto:sample@sample.com">sample@sample.com</a>

**Instructions:** Enter comments, web links, or any other pertinent info here!

**Will items be used to construct equipment?** Yes  
**Fabrication number:** 111-222  
**Will items be new equipment?** Yes  
**IU tag number:** IU123456  
**Will items be used to repair existing equipment?** Yes  
**IU tag number:** IU123456  
**Will items be used to upgrade existing equipment?** Yes  
**IU tag number:** IU123467

Qty	Catalog or Item #	Description and Necessary Specifications	Unit Price	Unit Total Price
1	000000	Item 1	\$100.00	\$100.00
2	111111	Item 2	\$100,000.00	\$200,000.00
<b>Order Total:</b>				\$200,100.00



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Where to go for Help

**If you require any assistance filling out this form, please contact:**

[chemreq@indiana.edu](mailto:chemreq@indiana.edu)

**For technical issues, contact ITG at:**

<https://itg.indiana.edu/job-request/>