

How To:  
Create a Purchase Request

## HOW TO PLACE AN ORDER

Enter your username and password

Click on the “requester” dropdown box on the top banner

Select “New Request” and it will direct you to the Online Purchasing System (OPS) Purchase Request form.

### Basic Information

- **Order Nickname:** Please use the following format [last name COMPANY NAME mm/dd/yy]  
example: Smith DELL 7/25/22
- **Order Placed By:** auto-fills by default
- **Order Placed on Someone Else's Behalf:** Click the checkbox if you're creating this request on behalf of someone else. *Note: Click 'Notify on Submission' to notify this person that you've submitted their order.*
- **Order Type:** Choose *Research*, *Instructional*, or *Other*
- **Your Phone:** Please enter your phone number in case we need to contact you
- **Course Number:** Optional
- **Purpose:** Optional
- **Account Code:** Optional. Please note: you can type in a brief summary, like 'lab' for lab supplies or 'electronic' for electronic supplies and it will populate with the account code.



## Online Purchasing System (OPS)

Purchase Request Form [New](#)

[Change Department](#)

**Basic Information** ^

Order Nickname  
last name COMPANY NAME date

Order placed by: Porter, Sarah (sarahpor)

☐ Order placed on someone else's behalf

Order Type \*  
Research X ▾

Your Phone \*  
7346476147

Course Number

Purpose

### Shipping

- **Recipient:** Please add the Recipient name for this order
- **Shipping address:** Select pre-approved address from drop-down menu, or select 'other'
- **Expedited Shipping:** If you require expedited shipping, checkmark this selection. You will need to provide a reason in the comment section down the page.

### Shipping



Recipient: \_\_\_\_\_

Pat Smith

Shipping Address \* \_\_\_\_\_

Cooley Bldg - Main Office



Room # \_\_\_\_\_



Expedited shipping

If you need expedited shipping please provide a reason in the comments section.

## Supplier Information

- **Search for a Supplier:** You'll find a list of pre-approved suppliers as you type in your Supplier.
- **Use Unlisted Supplier:** Select this option if your supplier is not listed. Please note that this may increase processing time for your order.
- **Please do NOT select** Create New Supplier

### Supplier Information

You must specify a supplier.

Search for a Supplier

mcmaster

MCMaster Carr Supply Company - 0000004689

☐ Use unlisted supplier

CREATE NEW SUPPLIER

## Shortcodes

- **Shortcode:** A shortcode is required to place an order. If you are unsure of how to obtain a shortcode, please talk to your advisor or professor.
- **Shortcode Owner:** auto-fills by default
- You may also add more than one shortcode. The percentage must add up to 100% altogether in order to proceed, and you must calculate the amount that will be on each shortcode.

## Shortcodes



Shortcode *	Shortcode Owner *	Percentage *	Amount *	
007207	agrt (Thomas, Alexander)	50 %	\$ 50.00	
099441	mcbrider (McBride, Ryan)	50 %	\$ 50.00	

ADD SHORTCODE

☐ Waive shortcode owner approval

### Order Items

You **MUST** attach a Supplier Quote or Invoice. Please keep in mind that .pdf is preferable.  
Please include:

- **Quantity**
- **Unit**
- **Item**
- **Item Description**
- **Price/Unit**

**Sole Source Form (only needed for orders > \$10,000)**

**Comments and Other attachments can be uploaded at this time.**  
**Submit your Request!**