PURCHASING SERVICES SUMMARY

- Purchasing Services is a division under Business and Auxiliary Services.
- Purchasing Services offers several services to the campus community and are listed below.
  - Moving and Excess
  - Recycling
  - Inventory Control
  - Public Auctions and GovDeals Online Auction
  - Central Mail
  - Central Receiving
  - Central Stores
  - Excess Catalog and Back-to-Campus Items
  - Long Term Storage
PURCHASING SERVICES FREE SERVICES

FREE SERVICES TO YOUR DEPARTMENT

- MOVING AND STORAGE
- RECYCLING
- INVENTORY CONTROL
- CENTRAL MAIL
- CENTRAL RECEIVING
- EXCESS CATALOG AND BACK-TO-CAMPUS ITEMS
- LONG TERM STORAGE
PURCHASING SERVICES- B450 MOVE REQUEST

- This presentation will explain what a B450 move request and the purpose of a B450 Move Request.
- The different types of B450 move request.
- How to fill out your request correctly.
  - What the required information we need to complete your request.
  - What information you need before starting the B450 Move Request.
  - It will explain the process of the B450 Move Request.
WHAT IS A B450 MOVE REQUEST

• A B450 move request is a document that Purchasing Services requires and has several different purposes.
  • This form is found on SciQuest Home page.
  • It will listed under Moving, Storage and Inventory forms.

• Purpose of a B450 Move Request.
  1. To Schedule the Material Handlers job task daily.
  2. To track item(s) purchased by the university.
     1. Includes Capital Assets, non-capital assets and electronics.
     1. The University Controller’s Office uses this form to track Capital Assets.
     1. Capital Assets are item(s) purchased with BSU funds that cost $5,000 or more.
  3. To keep track of item(s) purchased with the University funds and make sure that they are disposed of properly.
  4. A B450 has several different Types.
     1. These types will be explain in the next slide.
     2. You cannot submit two types of B450’s on the same requisition.
        1. Example: You can not list recycled and excess items together on the same B450 Move request.
B450 MOVE REQUEST - TYPE CATEGORIES

• **Recycled Items** - Request for us to pick up recycled items such as batteries, lamps, toner, etc.

• **Excess** - To remove item(s) from the departmentally permanently

• **Inter-Department Move** - Move item(s) from room-to-room in same department

• **Dept. Move** – Department moving from one location to another on campus. Needs to be schedule with Assistant Director of Purchasing Services.

• **Loaned** - Temporary use between departments

• **Long Term Storage Item** - Storage for items for departments. All long-term storage request must go through the Assistant Director of Purchasing Services for approval.

• **Stolen/Lost** - If equipment is lost or stolen. (Include the BSU tag number, Serial Number, and Police report if stolen.

• **Traded** - Purchased item and trading in old item (Include the BSU tag number, Serial Number, and PO number for new item(s).

• **Transferred** - Item(s) moved from one department to another or one location to another location (Building and Room.)
B450 MOVE REQUEST- REQUEST TYPES EXPLANATIONS

**EXCESS**
- **Excess** is the item(s) that your department no longer needs.
  - Item(s) can be reused by campus.
  - Item(s) departments no longer need and/or want.
- Item(s) purchased with BSU funds, must go on a B450 request form.
- Items purchased with BSU fund cannot be taken home and/or given to an employee for personal use.

**RECYCLING**
- **What is recycling?**
  - Recycling means that the item(s) can no longer be used.
  - Such as broken equipment, electronics, and furniture.
- Recycling can also be used for bad batteries, bad and/or broken lamps, and plastics.
- All items must be listed on a B450 move request.
- Departments are not allowed to throw away items purchased by BSU Funds. They must come through Purchasing Services to be recycled.
**B450 MOVE REQUEST - REQUEST TYPES EXPLANATIONS**

**INTER-DEPARTMENT MOVE**

- **Is the request to move item(s) from within the same location.**
- **Such as:**
  - Within the same office.
  - Same room
  - Same department.

**DEPARTMENTAL MOVE**

- **Departmental move is moving your office/location to another.**
- **Such as:**
  - Moving from one building to another building.
  - Example: Cooper Science to Foundational Science
- **This must be scheduled with the Assistant Director of Purchasing Services.**
- **Please add information in the additional notes field of who is the contact person for the departmental move.**
- **The Assistant Director of Purchasing Services will reach out to the contact person listed on the B450 move, to schedule the departmental move.**
B450 MOVE REQUEST- REQUEST TYPES EXPLANATIONS

**LOANED**

- **LOANED** IS A REQUEST TO BORROW AN ITEM(S) FROM ANOTHER DEPARTMENT.
  - THIS IS BETWEEN THE DEPARTMENTS.
  - THIS COULD BE USING FOR BORROWING STANCHIONS, LINENS FOR EVENTS.
- IF YOU ARE TEMPORARY BORROWING AN ITEM(S) FROM ANOTHER DEPARTMENT, YOU WILL USE THIS CATEGORY TO HAVE THE ITEM(S) MOVED.

**LONG TERM STORAGE**

- **LONG TERM STORAGE** IS AN OPTIONS THAT IS FOR DEPARTMENTS, THAT DO NOT HAVE ROOM TO STORE FURNITURE OR EQUIPMENT THAT THEY WANT TO KEEP AND WILL USE WITHIN AN YEAR.
- LONG TERM STORAGE IS APPROVED IF SPACE IS AVAILABLE.
- DEPARTMENT ARE ONLY ALLOWED TO STORE ITEM(S) UP TO AN YEAR AND/OR UNTIL THE REMODELING OF THEIR LOCATION IS COMPLETE.
- ONCE YOU PUT IN A LONG TERM STORAGE REQUEST, IT HAS TO BE APPROVED BY THE ASSISTANT DIRECTOR OF PURCHASING SERVICES.
  - THERE IS AN ADDITIONAL FORM THAT MUST BE FILLED OUT AND WILL BE SENT TO YOU, IF THE ASSISTANT DIRECTOR APPROVES OF YOUR REQUEST.
  - **LONG TERM STORAGE** IS NOT A SPACE TO PUT YOUR EQUIPMENT AND/OR FURNITURE BECAUSE YOU DO NOT WANT TO GET RID OF IT DUE THE POSSIBILITY OF USING IN A FEW.
# B450 Move Request - Request Types Explanations

## Traded
- A department has and/or will be trading in old and/or damaged equipment or furniture.
- The B450 Move Form must have the BSU Tag number, serial number of old and/or damaged item.
- In the additional note field, please add the original PO number if you have it.
- Attach the new PO information to your internal notes.
- Please make sure to contact the Purchasing Agent, if you have not and/or have not worked with them through the process of trading in your item(s).

## Stolen/Lost
- A B450 Move Request is required if an item(s) is lost and/or stolen.
  - Provide the BSU inventory number, serial number and the department it belonged too.
  - If an item has been stolen, please contact the University Police and fill out a Police Report.
    - Attach a copy of the Police Report to your B450 Move Request.
    - If copy is not attached, we will contact you before approving your request.
    - We must have a copy of the Police Report.
      - The University Controller’s office will need this information.
B450 MOVE REQUEST REQUIRED INFORMATION

• **Before you start your B450 move request, you will need to gather so information before filling out your request.**

1. **BSU Tag Number. Please see the next slide for pictures of a inventory tag.**
   1. BSU inventory tag numbers are placed on item(s) that are $5,000 or move.
   2. Electronics will have a BSU inventory tag.

2. **Serial Number of the item(s).**
   1. If the item(s) have a serial number it must be listed on the B450.

3. **Description and quantity of items that are being placed on the B450 move request.**

4. **Location of where the item(s) are located for pickup.**

5. **Location of where the item(s) are being moved to.**

• **Once you have gathered all this information, you are ready to starting filling out your B450 Move request.**
TYPES OF BSU INVENTORY TAGS

Types of BSU inventory tags you will find on your item(s)
B450 MOVE REQUEST – ITEM DESCRIPTION FIELD

• The item description field is a required field, that you must fill out.

• List the item(s) when the best description you in this field.
  - As an example: 2 steel case metal desk, 4 drawer filing cabinet, box of magazines, 5 boxes of hanging folders.

• You MUST list each item on the item description field.
  - You cannot list an item(s) as a box of miscellaneous.
    - If you do list as miscellaneous, your B450 move request will be rejected and sent back to you.
    - Every item(s) purchased with BSU funds must be listed on the B450 move request.

• The additional notes/long term storage purpose box, is not to list the items you want moved.
  - If you list your item(s) in this field, we will reject your B450 move request.
  - You will have to resubmit with the correct fields filled out.
B450 MOVE REQUEST - ADDITIONAL NOTES/LONG STORAGE PURPOSE FIELD

- The picture listed to the right is for additional information, you want us to know.
- Such as:
  - Certain dates and times you are available.
  - Who to contact if you are not available.
  - This item does not need to be moved by us and that it was already moved.
- You have 150 characters to list in this field. If you need space, there are a couple different options for you.
  1. Add the information to the internal number at checkout.
  2. Add the information in the comments after you have completed your B450 move request.
  3. Email additional information to the Assistant Director of Purchasing Services.
  - The Assistant Director of Purchasing Services, can add information for you once your request.

Additional Notes/Long-term Storage Purpose

I am in office on Tuesday and Thursday from 8-4 p.m. If I am not available please contact Zach at 5-1802 to schedule the pick up.

21 characters remaining
The preferred date of completion is a field that helps us schedule your request.
- This is a preferred date only.
- We cannot guarantee that your request will be completed by this date, but will try to have it completed before or on this date.
- Please make sure to leave information in the additional notes, that you feel we need to know.
HOW TO FILL OUT YOUR B450 MOVE REQUEST

- Select the request type.
  - This is a drop down.
- Submit Date - is the day you are filling out form
- Preferred Date of Complete
  - The latest date you would like this request to happen
- Phone Number
- Contact Name
- Department - which department is requesting the move
- Additional Notes/Longterm Storage Purpose.
  - Add anything you want us to know about this move.
  - The more information you give, the easier it is to get the job done.
HOW TO FILL OUT A B450 MOVE REQUEST

- BSU Inventory Number
  - Is required to move an capital asset
- Description of item you are requesting to move
- Serial Number
  - If there is one.
- Location
  - Is where the current item is located
- Move To
  - Where is the item going
- Operational Code of New Location- You do not fill out.
HOW TO START THE CHECKOUT PROCESS OF YOUR B450 MOVE REQUEST

• Click the Red Go button.
  • This will be located in the Right top corner of your B450 Move Request form by the Available Actions drop down.
  • This will take you to your shopping cart
CHECKOUT YOUR B450 MOVE REQUEST

- You can change the name of cart on this screen.
- Click on the Red Proceed to Checkout or Assign Cart.
CHECKOUT YOUR B450 MOVE REQUEST

• **Your Cart should look similar the picture to the right.**
  
  • **Check your Shipping information to make sure that it is correct.**

• **You need to add your Accounting Codes.**
  
  • The accounting Codes will be FOAPAL that this cart will go under.

• This is a free service, but SciQuest still requires a FOAPAL put in.

• Once you put in your FOAPAL number, you will need to click the Red **Save** and/or the **Recalculate and Save** tab.
HOW TO ADD INTERNAL NOTES AND ATTACHMENTS

• **Internal Notes and Attachment** option will be under the Accounting codes field.

• **This is where you can add your Notes and Attachments.**

• **Click on the 🔍 in the right side of the Internal Notes and Attachments.**
  
  • We circled the 🔍 in the top picture to make it easier to located for this presentation.
  
  • **When you click on the 🔍, a box will pop up like the picture to your right.**
  
  • **You have 1000 characters to add to this box.**
  
  • **Leave any additional comments and/or notes you want us to know before submitting.**

• **Once you are finished with this box, click on the red Save tab.**
HOW TO ADD INTERNAL NOTES AND ATTACHMENTS

- **To add an attachment to your B450 move request,** you will need to click on the **Red Add tab.**

- A **box will pop up like the second picture to your right.**
  - **You will click on select files.**
  - **If your attachment has been accept,** you will see a green **line and green ✔ with a Trash can beside it.**
    - **We circled the trash can, for this presentation.**
  - **If you attached the wrong attachment or do not want an attachment on this requisition,** Click the trash can to delete your attachment.
  - **You MUST click on the Red Save Changes,** for your attachments to save to your B450 move request.
COMPLETE YOUR B450 MOVE REQUEST CHECK OUT

• Once you filled in your Accounting Codes, added internal notes and attachments.

• You are ready to place your order or assign Cart to another person.

• Click the Red Place Order to submit your cart to the next approver in your department.

• Or

• Click the Grey Assign Cart tab to assign to another person.
HOW TO ASSIGN A CART

• **If you are assigning your cart to another employee.**

• **Click the word search in red.**

• **A new box will open for you to search for the person, you are assigning this cart too.**

• **Type in the last name and first name of the person you are searching and click the Red Search tab.**
HOW TO ASSIGN A CART

- **A User Search box will open with the names that match your request.**
  - Click on the + sign on the right side.
  - The + sign will add the name.
- **Add any notes you have for the Assignee in the field box below Add to Profile.**
- **Click the Red Assign, when you are done.**
- **This will send your cart to the assigned person.**
- **You are done with your B450 Move Request.**
WHAT IF I HAVE MORE TO ADD MORE THAN SIX LINES?

• If you need to add more items than six to add to your B450 move request you can add an Excel spreadsheet as an attachment.

• The spreadsheet must have the same information that the B450 move request does.
  • To the right is an example of what your spreadsheet must look like.

• Add this attachment to the internal notes and attachment,
HOW TO ADD COMMENTS TO YOUR REQUEST

1. You can look up your requisition by the number in the search bar, which is located by your cart tab.

2. Once you have the requisition pulled up, you can attach your spreadsheet in the comment tab at the top of the requisition and/or the internal notes and attachment.

3. If you enter the attachment in the comments:
   - Click comments.
   - Click the + sign to the right of the page.
     - We circled for the presentation.
     - Add comment box will appear with names from your department.
       - To add someone else you will need to click the red Add Recipient.
       - A User Search screen will come up for you to type in the name you are looking for.
HOW TO ADD COMMENTS TO YOUR REQUEST

• **Once you have found and selected the name,** click the + sign on the right side of the tab.

• **The name will appear with a green check beside it.**

• **Next go down to Attach file (optional)**
  - **Fill in the File Name**
  - **Click on the Choose File tab in grey.**
  - **Click the ✓ in the top right corner to send your comments to the person with the ✓ their name.**

• **Or**
  - **Click the X in the top right corner delete the comment and attachment.**
CONGRATULATION YOU HAVE FINISH THE B450 MOVE REQUEST TRAINING!

If you have any questions and/or concerns about a B450 Move Request, please contact the people listed below.

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