ESM 4015 – Creative Design
Project Design Purchasing Procedures

Melissa Nipper, BEAM Fiscal Technician
Project Budget Management

- Use collaboration tools, such as Google docs and Dropbox’s Project Harmony for team budget management. This will allow your team to create and share a budget spreadsheet online so that everyone can make edits.
- Be thinking about whether or not your project will require Machine Shop work. If so, be sure to allot enough funds in your team’s budget for work orders submitted towards the end of your project term.
# Project Budget Management

**sample budget sheet**

<table>
<thead>
<tr>
<th>Group 4: John Doe, Richard Roe, Alice Pearson, Robin McCorvey - Advisor: DR. SUNNY JUNG</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>John Doe</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Richard Roe</strong></td>
</tr>
<tr>
<td><strong>Alice Pearson</strong></td>
</tr>
<tr>
<td><strong>Richard Roe</strong></td>
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<tr>
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</tr>
</tbody>
</table>

**Total:** 919.49

**Balance:** 80.51
Complete Purchase Request Form (PRF)

- Insert **Team #** in Additional Information section.
- **Must** be approved by assigned advisor before order can be processed.

Access online form at www.esm.vt.edu
How are Orders Placed?

- **HokieMart** is the university’s effective and efficient e-Procurement (purchasing) system for the for placing orders with internal service centers and external suppliers.

- Order requests are entered into HokieMart by Fiscal Technician once **Purchase Request Forms (PRF)** (approved by team’s advisor) are received. Complete a PRF and submit it to your advisor for approval before contacting Fiscal Technician on purchases.

- System will generate a purchase order that is electronically sent to suppliers for processing.

- Any order confirmation received by suppliers will be forwarded to team member.

- Teams are responsible for contacting suppliers regarding order status, fulfillment problems, and returns.

- **REMEMBER** that all packing slips from received shipments must be turned into the main office so that payment can be released to the suppliers.
Frequently Used Vendors for Project Supplies

Industrial supplies:
- McMaster Carr – www.mcmaster.com
- MSC Industrial Supply Co. – www.mscdirect.com
- CST The Composites Store – www.cstsales.com
- Grainger Industrial Supply – www.grainger.com

Scientific supplies:
- Thorlabs, Inc. – www.thorlabs.com
- Sigma-Aldrich – www.sigmaaldrich.com

Computer supplies:
- CDW-G – www.cdwg.com

Electronic supplies:
- Adafruit – www.adafruit.com
- Sparkfun Electronics – www.sparkfun.com
- Newark element14 – www.newark.com
- Digi-Key Corporation – www.digikey.com
Reimbursement Requests

- Amazon.com
- Heavener Hardware
- All Local Dept. Stores (e.g. Lowe’s, Home Depot, Best Buy, etc.)
- Online transactions using personal credit card

- Remember to complete a **Purchase Request Form** and submit it to your advisor for approval *before* purchasing supplies with your own funds. Be sure to indicate in the *Additional Comments* section that you are requesting reimbursement.

- Can turn in collection of receipts as long as they are within 30 days of purchase.

- You must provide proof of payment on all receipts submitted for reimbursement.
Sample Receipts for Reimbursement

What’s wrong with this receipt?
Sample Receipts for Reimbursement

What’s wrong with this receipt?
Sample Receipts for Reimbursement

Receipts showing proof of payment to purchaser:
Sample Receipts for Reimbursement

Receipts showing proof of payment to purchaser:

RUBBER SHEET ROLL ORDER CONFIRMATION

To: [email protected]@bu.edu

ALL STOCK ITEMS HAVE TO BE CUT BEFORE SHIPPING, READ BELOW:

Please allow 1 to 2 weeks for delivery UPS GROUND.

PLEASE VERIFY THAT YOU READ THE DIMENSIONS CORRECTLY ON OUR WEB SITE!! MOST DIMENSIONS ARE IN INCHES DENOTED BY A " SYMBOL.

If you need the order to ship sooner or need a more specific date, please call 866-832-6005 and one of our knowledgeable representatives will be able to help you.

Print this page for confirmation.

The following payment information has been recorded:

Order #: 11999
Date entered: Monday, December 30, 2013
Payment Method: Credit/Debit Card

NEOPRENE RUBBER ROLL, .032 X 12.00 X 50 FT $ 85.40
Quantity: 1
Item total: $ 85.40
Subtotal: $ 85.40
Shipping and Handling: $ 34.80
Order Total: $ 120.20

Credit Card Information:

Visa
[x] xxx-xxxx-xxxx-xxxx-7481

Customer Information:

[Redacted]

[Redacted]@bu.edu

Shipment Information:

[Redacted]
BEAM Machine Shop Orders

- One of the many internal service centers established for the purpose of providing goods and services to university departments and only incidentally to customers outside the university.

**Steps to requesting shop work:**

1. First visit BEAM Shop Supervisor, Dave Simmons to discuss hourly rate and estimated time required to complete your machining needs. **REMEMBER: All dimensions must be provided in inches/feet; not metric.**

2. Complete Purchase Request Form and have advisor sign or email approval prior to submitting it to the Fiscal Technician for processing.

3. An Interdepartmental Service Request (ISR) is then processed within HokieMart and sent to the Machine Shop for services. **Shop will not begin work on your job until official ISR is received from department.**
Frequently Asked Questions:

Can we bring our design projects home with us?  
No, all purchases and design projects paid by the department become property of the university and therefore cannot be removed from the premises.

Can travel costs related to the design project be reimbursed?  
No, funding allotted for Sr. Design Projects are to be specifically used to fund materials, supplies and contractual services only.

What if we need to order from a supplier that is not a Frequently Used Supplier?  
Most vendors who distribute the components and supplies you will use for your project will be available as vendors in HokieMart. However, if an interested supplier is not in our Procurement system, it is possible (if the vendor accepts POs/payment terms) that they can be added as a new supplier. However, this could delay your order; so if time is an issue, you may want to choose a well known supplier, or go ahead and purchase the supplies with personal funds and request a reimbursement.
Any Questions?

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