General
The general method of ordering items through the University’s financial system typically includes the use of a Purchase Order. The requisition and eStores processes are sub processes of the Purchase order process. There are other processes that are used in the processes of creating a purchase order including change orders, bidding, and waivers.

Purchasing process
The purchasing process is bound by multiple policies at the University. The Purchasing Department (www.purchasing.osu.edu) controls the purchasing policy and general University procedures. The policies mainly include:

- Purchasing policy - http://busfin.osu.edu/FileStore/PDFs/221_Purchasing.pdf

The general procedures for the purchasing process can be found at the Universities financial systems assist pages (https://it.osu.edu/assist/).

Purchasing Systems
The University utilizes two primary systems to complete the purchasing process:

- PeopleSoft Financials
- eRequest

Training
Training will be offered by the PSSC on eRequest best practices and usage. We will offer training on a regular basis alternating between in person classes and online courses (Carmen connect). We will also provide one-on-one or small group training on request from our departments.
## Department Roles - eRequest

All access is org/Dnode based.

<table>
<thead>
<tr>
<th>Department - Roles</th>
<th>System Name</th>
<th>Description</th>
<th>Responsibility</th>
<th>Required Training</th>
<th>Suggested Training</th>
</tr>
</thead>
</table>
| Initiator          | N/A         | All employees with a name.# have the ability to initiate an eRequest | Provide accurate and complete information
Attatch all supporting documentation in a timely manner | Core Courses | IDP |
| Requestor          | FR Purchase Requestor | Provides individuals the ability to see all eRequests in the selected org.
Allows them to enter eRequests on behalf of others | Provide accurate and complete information
Attatch all supporting documentation in a timely manner
Complete the distribution panel | Core Courses | IDP |
| Level 1 Approver   | FR Purchase Appr First | Approves purchases. This role is not required. | Ensures the completeness and accuracy of the business purpose
Validates that the purchase is appropriate for the department | Core Courses | IDP |
| Level 2 Approver   | FR Purchase Appr Second | Approves purchases. This is a required role. | Responsible for all of the above
Available budget
Correct chartfield | Core Courses | IDP |

## Department Roles – PeopleSoft Financials

None
### Service Center Roles - eRequest

<table>
<thead>
<tr>
<th>Service Center - Roles</th>
<th>System Name</th>
<th>Description</th>
<th>Responsibility</th>
<th>Required Training</th>
<th>Suggested Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Center</td>
<td>FR Service Center User</td>
<td>Processes the transaction, including the reallocation and approval process</td>
<td>• Determines the most appropriate procurement method</td>
<td>Core Courses</td>
<td>IDP</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Reviews the transaction for compliance with policies and process</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Ensures all transactions have the appropriate approval</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Purchase Order, Requisition and Estores Overview

### Service Center Roles - PeopleSoft

<table>
<thead>
<tr>
<th>Service Center - Roles</th>
<th>System Name</th>
<th>Description</th>
<th>Responsibility</th>
<th>Required Training</th>
<th>Suggested Training</th>
</tr>
</thead>
</table>
| **Delegated Buyer**    | PO_Delegated_Buyer   | Allows user to create direct PO’s based on the authorized amount ($0K or $5K) | • Ensures adherence to University and Purchasing policies  
• Accurate and complete entry into the PeopleSoft Financial System | • Core Courses  
• IDP  
• Purch 1 Policy overview  
• Purch 2 Requisitioner  
• Purch3 Delegated Buyer  
• Purch4 Inquiry  
• Purchasing Experience  
• Purchasing final Assessment |                                                                                     |
| **Requisitioner**      | PO_Requisitioner     | Allows user to create requisitions into PeopleSoft                          | • Ensures adherence to University and Purchasing policies  
• Accurate and complete entry into the PeopleSoft Financial System | • Core Courses  
• IDP  
• Purch 1 Policy overview  
• Purch 2 Requisitioner |                                                                                     |
| **Approver**           | PO_REq_PO_Approver   | Allows user to approve requisitions and PO’s in PeopleSoft                 | • Ensures adherence to University and Purchasing policies  
• Reviews each order for accuracy and compliance | • Core Courses  
• IDP  
• Purch 1 Policy overview  
• Purch 2 Requisitioner  
• Purch3 Delegated Buyer  
• Purch4 Inquiry | • Purchasing Experience  
• Purchasing final Assessment |

Access can be requested through your VP/College unit SFO or their designee.

General Rules and Requirements
The Purchasing process should be utilized when the University’s purchasing decision tree dictates:

- [https://it.osu.edu/assist/assistprocurement84/WebHelp/choose_procurment_methods.html](https://it.osu.edu/assist/assistprocurement84/WebHelp/choose_procurment_methods.html)

Consideration should be given to utilizing eStores vendors, contracted vendors, vendors from contracts other than University contracts (i.e. State term schedules, consortium contracts, etc), MBE, and EDGE vendors prior to using other vendors.

### Turnaround Times

<table>
<thead>
<tr>
<th>Process</th>
<th>Current B&amp;F</th>
<th>Current OAA</th>
<th>Current SL</th>
<th>Future PSSC</th>
</tr>
</thead>
<tbody>
<tr>
<td>eStores</td>
<td>1 day</td>
<td>Same day</td>
<td>3 business days</td>
<td>Same day if approved by 3:00 PM</td>
</tr>
<tr>
<td>Requisitions</td>
<td>N/A (ASAP)</td>
<td>3 business days</td>
<td>3 business days</td>
<td>3 business days from time approved</td>
</tr>
<tr>
<td>Purchase orders</td>
<td>n/a (ASAP)</td>
<td>3 Business days</td>
<td>3 business days</td>
<td>3 business days from time approved</td>
</tr>
<tr>
<td>Critical orders</td>
<td>ASAP</td>
<td>ASAP</td>
<td>1 business day</td>
<td>4 business hours from approval to PSSC completion</td>
</tr>
<tr>
<td>Emergency orders</td>
<td>ASAP</td>
<td>ASAP</td>
<td>4 hours</td>
<td>4 business hours from approval to PO dispatched (central purchasing involvement is included in this time)</td>
</tr>
<tr>
<td>Change orders</td>
<td>3 business days</td>
<td>3 business days</td>
<td>3 business days</td>
<td>3 business days</td>
</tr>
</tbody>
</table>

- Emergency orders are defined as goods or services needed extremely urgently and without these goods or services the safety of the campus community could be threatened.
- Critical orders are defined as goods or services needed urgently but they do not threaten the safety of the campus community.
Questions - Who do I call?

<table>
<thead>
<tr>
<th>Who Do I Call</th>
<th>Why?</th>
<th>How do I reach them</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your department’s business manager/fiscal officer/SFO</td>
<td>• Questions about whether you can purchase something&lt;br&gt;• Budgets</td>
<td></td>
</tr>
<tr>
<td>PSSC</td>
<td>• Procurement methods&lt;br&gt;• General policy questions&lt;br&gt;• Status of an order</td>
<td>(PSSC webpage)</td>
</tr>
<tr>
<td>Purchasing</td>
<td>• Only if you can’t get ahold of the PSSC staff member</td>
<td><a href="http://www.purchasing.osu.edu">www.purchasing.osu.edu</a></td>
</tr>
</tbody>
</table>

PO/Requisition/eStores Workflow processes

- ERequest Workflow in the Service Center
  - Our process was developed to improve efficiency in routing orders as well as to have the best process to ensure compliance with University Policies. The eRequest Workflow was designed to minimize "touches" within the Service Center and to put the reliance of picking up orders on the worklist in eRequest on the Delegated Buyers. This is a similar process to what OAA & B&F currently does and what Student Life recently adapted. It takes the Lead

- Purchase order process
  - The purchase order process relies on the Delegated Buyer to enter compliant & accurate data and to work with the requesting department and purchasing to resolve the majority of issues. The Leads will review the work of the Delegated Buyer to ensure compliance and accuracy.
  - The Gaps noted on the process flow identifies areas where the three areas currently do things differently.
    - The first gap above the box "Buyer changes status to pending completion" is a change for both OAA and Business and Finance. Currently OAA relies on approvals for PO's from a compliance person. The buyer and compliance officer send emails back and forth to communicate approvals. Business & Finance relies on the PeopleSoft Worklist for approvals. This is similar to the Student Life current Process.
    - The second gap is also a change for OAA and B&F. In the new process the Lead (managers) will perform the compliance review and approvals for all orders. For OAA this is a change of responsibility for the current compliance officers who were not really performing an approval but merely clicking a button to move the order.
Purchase Order, Requisition and EStores

along. For B&F, the shift from relying on the PS worklist for approvals to using the eRequest system to route approvals.

- The third Gap is the Changing of the status to Dispatch. There is some concern that this may be confusing to our customers. We will be working with the OCIO’s office to request additional statuses in eRequest to better fit the process. The PSSC will need to develop a communication for all of our customer so they are aware of the meaning of the various statuses.

- Requisition process
  - Much like the PO process, this process was designed to minimize touches within the system and to utilize the eRequest system to facilitate approvals.
  - The Gaps identified are as follows:
    - All areas currently fill in the Requisition # in the transaction field in eRequest. The difference between the areas is what is done with the requisition. Student Life currently attaches a copy of the requisition. B&F sends a notification to the customer that the requisition is submitted. OAA does neither of these typically. It was decided by the workgroup from feedback from both customers as well as Service Center staff that it would be best to only fill in the transaction ID and to not notify the customer or attach a copy of the requisition. The concern is that this will confuse the customer who may not be familiar with the differences between Requisitions and PO’s.
    - The second, third, and fourth gaps deal with the workflow of the requisition. See the PO process for the reasoning.
    - The fifth gap is where the buyer will change the transaction ID to the PO # from the requisition #. This is what OAA currently does. Student Life completes the order once the Requisition is approved so they are unable to change the transaction ID. B&F leaves the Requisition ID in the transaction field. By changing the transaction ID, customers will be able to search for the PO ID more easily in erequests.
    - The sixth gap is a change in how the notification is sent and when the eRequest is marked complete. Currently, SL completes the eRequest when the requisition is approved. This does not allow the buyers to track statuses of orders by utilizing their worklist. This change will allow the SL buyers to better manage orders that are pending completion from central purchasing.

- eStores process
  - This process is the same as each area currently uses.