

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
- Expenditure policy - http://busfin.osu.edu/FileStore/PDFs/411_Expenditures.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 (Buckeye Learn). We will also provide one-on-one or small group training on request from our departments.

Purchase Order, Requisition and Estores

Overview

Department Roles - eRequest

All access is org/Dnode based.

Department - Roles	System Name	Description	Responsibility	Required Training	Suggested Training
Initiator	N/A	All employees with a name.# have the ability to initiate an eRequest	Provide accurate and complete information Attach 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 Attach 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

Service Center - Roles	System Name	Description	Responsibility	Required Training	Suggested Training
Service Center	FR Service Center User	Processes the transaction, including the reallocation and approval process	<ul style="list-style-type: none">• Determines the most appropriate procurement method• Reviews the transaction for compliance with policies and process• Ensures all transactions have the appropriate approval	<ul style="list-style-type: none">• Core Courses• IDP	

Purchase Order, Requisition and Estores

Overview

Service Center Roles - PeopleSoft

Service Center - Roles	System Name	Description	Responsibility	Required Training	Suggested Training
Delegated Buyer	PO_Delegated_Buyer	Allows user to create direct PO's based on the authorized amount (\$0K or \$5K)	<ul style="list-style-type: none"> Ensures adherence to University and Purchasing policies Accurate and complete entry into the PeopleSoft Financial System 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Ensures adherence to University and Purchasing policies Accurate and complete entry into the PeopleSoft Financial System 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Ensures adherence to University and Purchasing policies Reviews each order for accuracy and compliance 	<ul style="list-style-type: none"> Core Courses IDP Purch 1 Policy overview Purch 2 Requisitioner Purch3 Delegated Buyer Purch4 Inquiry 	<ul style="list-style-type: none"> Purchasing Experience Purchasing final Assessment

Access

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_procurement_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

Process	PSSC
eStores	Same day if approved by 3:00 PM
Requisitions	3 business days from time approved
Purchase orders	3 business days from time approved
Critical orders	Same day if approved by 3pm
Emergency orders	Same day if approved by 3pm (central purchasing involvement is included in this time)
Change orders	3 business days

- 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?

Who Do I Call	Why?	How do I reach them
Your department's business manager/fiscal officer/SFO	<ul style="list-style-type: none"> • Questions about whether you can purchase something • Budgets 	
PSSC	<ul style="list-style-type: none"> • Procurement methods • General policy questions • Status of an order 	u.osu.edu/pssc Phone Unit specific email addresses
Purchasing	<ul style="list-style-type: none"> • Only if you can't get ahold of the PSSC staff member 	www.purchasing.osu.edu

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 the PSSC process.
- 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 and do the final approval in the PSSC.
- 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 Leads will review the work of the Delegated Buyer to ensure compliance and accuracy and do the final approval in the PSSC.
- eStores process
 - The process for eStores orders are to help the unit receive their goods or services in a timely manner. PSSC Delegated Buyers will process these orders efficiently and accurately.