

PROCESSING PROCUREMENT AGREEMENTS (PA'S)

Searching for the PA

Viewing PA Workflow-Originator

Submitting the PA Form

Searching for the PA

This job aid includes information regarding the processing of PA's. The focus of the job aid is searching for PAs.

Intended Audience(s): Service Center, Strategic Purchasing, Operational Purchasing, Contract Review team, and Office of Legal Affairs

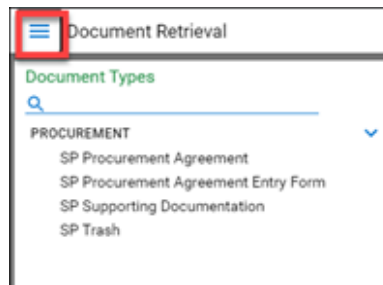
Searching for PA's

1) Log into the web client to access the landing page.

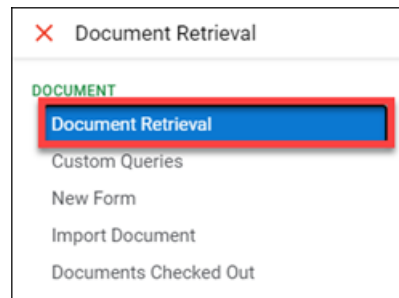
🔗 [HTTPS://EDMQAWD.IT.OHIO-STATE.EDU/](https://edmqawd.it.ohio-state.edu/) (TEST ENVIRONMENT)

🔗 [HTTPS://EDM.OSU.EDU/APPNET](https://edm.osu.edu/appnet) (LIVE ENVIRONMENT)

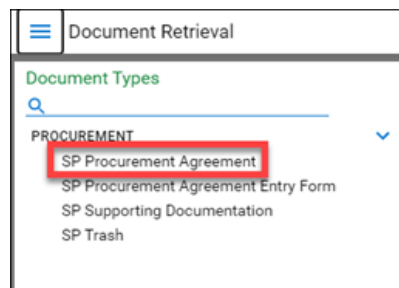
2) Select the three-line menu icon at the top left of the screen, next to **Document Retrieval**.



3) Select **Document Retrieval** in the drop-down menu.



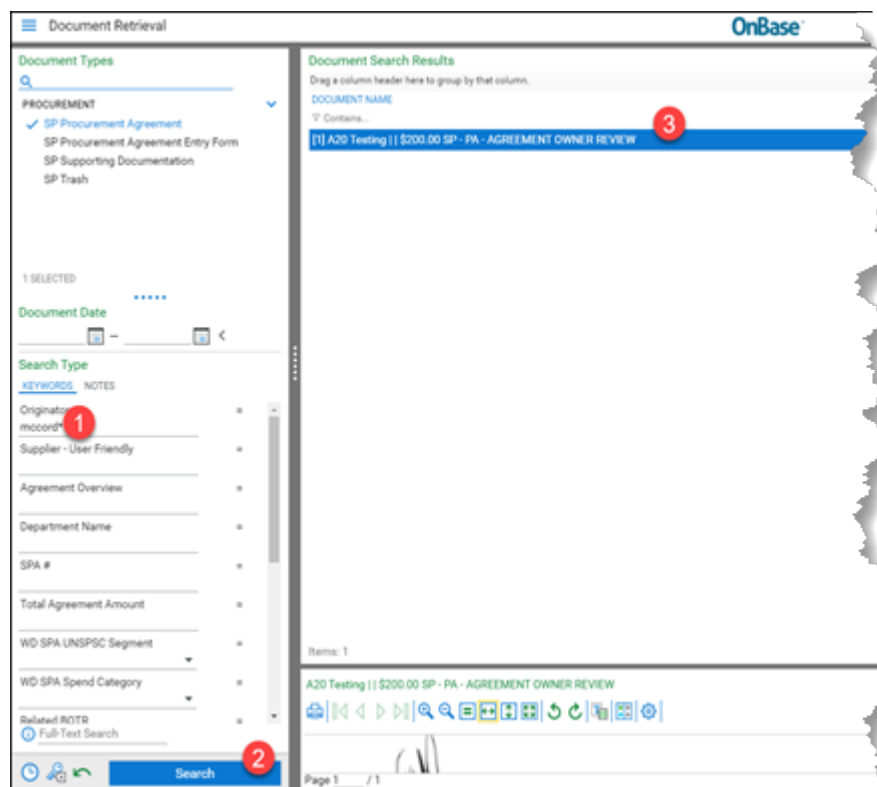
4) Choose **SP Procurement Agreement**.



5) Search for the procurement agreement

- ① **Important:** The search fields will appear, as shown.
 - Search in any field that appears under Search Type.
 - Add an * to a keyword field, and it will retrieve anything related to that search. **Step 1** shows "mccord*" added into the **Originator** field.
 - Select **Search (2)** once you are finished entering into the fields.

The results will populate to the right under **Document Search Results (3)**. Here the one result matching "mccord*" is displayed.



- 6) Right-click the agreement under **Document Search Results**.
- 7) Select **Keywords** to display the data that is associated with this agreement.

Viewing PA Workflow-Originator

This job aid includes information regarding the processing of PA's. The focus of the job aid is viewing the Procurement Workflow for status of the submission.

Intended Audience(s): Service Center, Strategic Purchasing, Operational Purchasing, Contract Review team, and Office of Legal Affairs.

Tracking Workflow

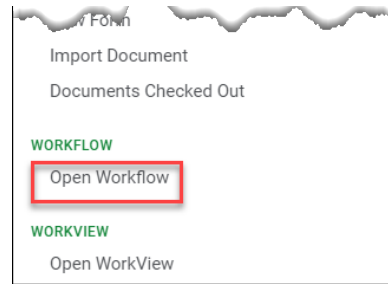
- 1) Log into the web client to access the landing page.

🔗 [HTTPS://EDMQAWD.IT.OHIO-STATE.EDU/](https://edmqawd.it.ohio-state.edu/) (TEST ENVIRONMENT)

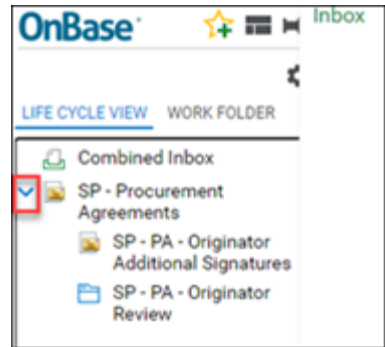
🔗 [HTTPS://EDM.OSU.EDU/APPNET](https://edm.osu.edu/appnet) (LIVE ENVIRONMENT)

- 2) Select the **three-line menu icon** at the top left of the screen, next to Document Retrieval.

- 3) Select **Open Workflow** in the drop-down menu. This will open a new window.

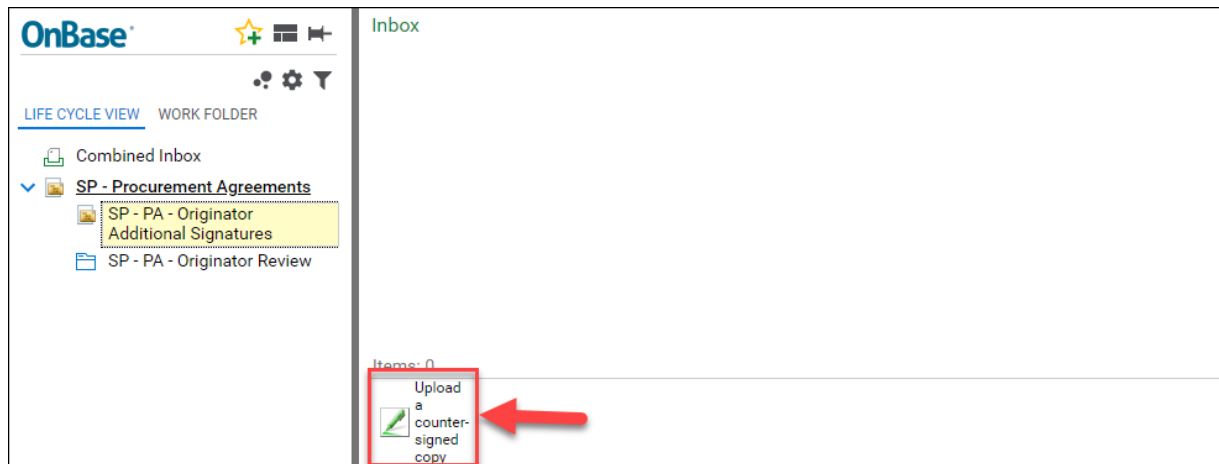


- 4) Click the arrow next to **SP – Procurement Agreements** to display the workflow stages that are available to you.



The stages include:

Originator Additional Signatures – Indicates that the agreement has been redlined by OSU and needs to be reviewed and signed by the supplier before executing the agreement. If a procurement agreement is at this stage, contact the supplier to get the agreement signed, and upload the signed version using the **Upload a counter-signed copy** button on the Originator Additional Signatures panel.



Originator Review – Indicates that the subsequent reviewer of the procurement agreement found an issue in one of the agreement's fields. If it is at this stage, the procurement agreement is sent back to the originator to update the field(s). The agreement will be in the Originator Review window. To resolve the issue, select **Re-index Document** at the bottom of the panel.

Inbox

Drag a column header here to group by that column.

SPA #	REQUISITION NO.	AGREEMENT OVERVIEW	WD SPA SPEND CATEGORY	SUPPLIER NAME	TOTAL AGREEMENT
A20	123456	Testing	MUSICAL INSTRUMENTS - PARTS AND ACCESSORIES [SC10483]	Testing	\$200.00

Items: 1

Re-index Document

The next screen will display all of the fields related to the agreement. Resolve the problematic field. Then, select **Re-index** at the bottom right. This will send the agreement along in the workflow, and it will be removed from your queue.

A20 Testing | \$200.00 SP - PA - ORIGINATOR REVIEW

Document Type: SP Procurement Agreement

File Type: Image File Format

Document Date: 7/14/2020

KEYWORDS

Originator
MCCORD.98

Supplier - User Friendly
Testing

Agreement Overview
Testing

Department Name

Clear Keywords

Re-index Close

Submitting the PA Form

This job aid includes information regarding the processing of PA's. The focus of the job aid is completing, via the web client, the procurement agreement intake form which is the first step in the PA workflow. All individuals with security access may access the PA workflow via the web client. Additionally, individuals in Purchasing and Legal may access the information via the OnBase unity client.

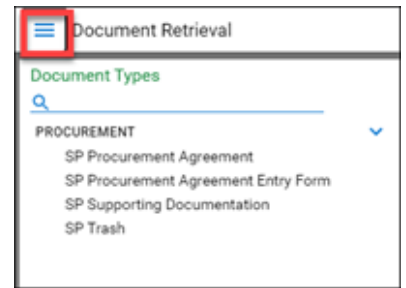
Intended Audience(s): Service Center, Strategic Purchasing, Operational Purchasing, Contract Review team, and Office of Legal Affairs

Accessing the Form

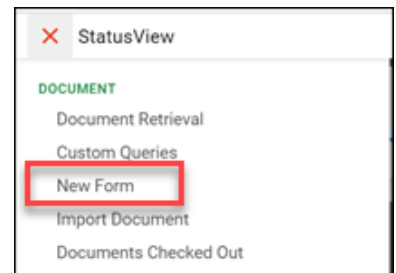
Log into the web client to access the landing page.

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Select the three-line menu icon at the top left of the screen, next to **Document Retrieval**.



Select **New Form** in the drop-down menu.



Select **SP Procurement Agreement Entry Form** to access.



Completing the PA Form

The PA originator, the buyer, must enter the information in order that the PA may be identified, searched, and tracked.

ⓘ **Important:** Red asterisks indicate required fields.

Agreement Information	
Originator (enter name.n) 1 MCCORD.98	UNSPSC Segment* 9
Department Name 2	Spend Category* 10
Requisition No.* 3	Agreement Start Date 11
Agreement Overview (Business Purpose)* 4	Agreement End Date* 12
Supplier* 5	SPA # (generated after submission) 13
Total Agreement Amount* 6	
Is there a related Bid Waiver? 7	
Related BOTR 8	
Attach the requested information below. Please be sure to attach all documentation or the agreement may not be processed.	
Attach SP Procurement Agreement	
SP Procurement Agreement* Attach SP Procurement Agreement 14	
Attach SP Supporting Documentation (Multiple Documents Permitted)	
SP Supporting Documentation Attach SP Supporting Documentation 15	
Submit 16	

- 1) Review the **Originator (enter name.n)** as this field is automatically populated at the start of the process. It identifies the person who initially completed the procurement agreement.
- 2) Enter the name of the department the request is from in **Department Name**.
- 3) Enter the **Requisition No.** from the eRequest PR number.
 - ⓘ **Important:** Beginning January 2021 with the launch of Workday, the requisition number is from that system.
- 4) Enter a brief description of the business purpose for the procurement agreement in the **Agreement Overview (Business Purpose)** field.
 - ⓘ **Best Practice:** The business purpose must support or advance the goals, objectives, and mission of the university, and adequately describe the expense as a necessary, reasonable and appropriate business expense for the university.
- 5) Enter the provider of the good or service in the **Supplier** field.
 - ⓘ **Best Practice:** Use words that will help you or others search for the agreement later. Enter the full name of the supplier; avoid acronyms.
- 6) Total Agreement Amount: Enter the cost of the good or service in the **Total Agreement Amount**.
 - ⓘ **Important:** If this amount is over \$250,000, you will not be able to complete the form. Agreements over \$250,000 must be submitted to the Legal Portal.
- 7) Select the **Is there a related Bid Waiver?** dropdown. Choose **Yes** if the agreement requires a bid waiver, which is indicated by the dollar amount (over \$25,000 for goods and \$50,000 for services).

- ① **Important:** If Yes was selected, please attach all the related paperwork as supporting documentation.
- 8) Select the **Related BOTR** dropdown and select the appropriate response to indicate if a Board of Trustees Resolution applies.
- ① **Important:** If you know the BOTR number, include it here-
- 9) Select the **UNSPSC Segment** dropdown to specify the UNSPSC codes for the good or service. The selection that is made in this field, dictates what is available in the dropdown for the next field.
- 10) Select the **Spend Category** dropdown to specify the spend category.
- ① **Important:** The spend categories displayed are a result of the selection in the UNSPSC Segment dropdown.
- ① **Important:** Some spend categories will add new fields to the form. For example: Selecting **SPEND CATEGORY- IT COMPUTER SOFTWARE** triggers additional prompts:
- Is this a cloud solution?
 - Has this been reviewed by IT Security?
- All cloud-based software must be reviewed by OCIO.
- 11) Enter the start date of the contract in the **Agreement Start Date** field.
- 12) Enter the date on which the contract will end in the **Agreement End Date** field.
- 13) Note the **SPA # (generated after submission)** as this is assigned to the PA and will be useful when checking its status.
- 14) Select the **Attach SP Procurement Agreement** button to upload the PA.
- 15) Select the **Attach SP Supporting Documentation** button if there is additional documentation.
- 16) Select the **Submit** button to process the PA and receive an email confirming the submission.