

College of Education & Human Ecology

Procurement Process Changes with Implementation of Campbell Hall Service Center (CHSC)

Final 3/2011

Need	What will I do?
Travel	Submit an eRequest or eTravel
Prepay airline ticket or conference registration	Submit an eRequest or eTravel
Reimbursed for my travel expenses	See Lindsay Ranly or send receipts to Lindsay using EHE Travel Envelope
Buy something	Submit an eRequest
Use the Pcard to buy something	Submit an eRequest
Get reimbursed for something I purchased	Submit an eRequest
Pay an Invoice	Send invoice to Lindsay Ranly and/or submit an eRequest
Gain access to funds allocated to me	Contact Mark Irvine
Find out how much money I have left in a fund or project	Contact Mark Irvine
Assistance with preparing a non-sponsored project budget	Contact Mark Irvine
Help preparing an OSP project budget	Contact Bing Tian (in the EHE Office of Research)
Develop an MOU/MOA	Contact Mark Irvine
Create a conference or sell goods & services	Contact Mark Irvine
Questions about policies	Contact Mark Irvine
Questions about procurement processes	Contact Lindsey Ranly
Deposit checks & cash received for a conference or earnings operation	See Lindsay Ranly
Deposit a gift check to development	See Mark Irvine or Danna Grant (in EHE Office of Development)

**College of Education & Human Ecology**  
**Procurement Process Changes with Implementation of Business Operations Service Center (BOSC)**

Final 3/2011

Task	Task Description	Current Role	Decision	Impact on Unit	Rationale
Purchasing card manager	Responsible for card; signs out card to faculty/staff; requires knowledge of pcard policies and procedures	unit staff	transfer to BOSC	Task no longer done in unit; Users submit request to BOSC; pick up card @ BOSC and return documentation to BOSC.	Strengthen compliance.
Purchasing card reallocation	Assigns transaction to appropriate chartfield in PeopleSoft. Reviews documentation for compliance.	unit staff	transfer to BOSC	Tasks no longer done in unit	Strengthens compliance and consistency. Ensures pcard transactions are reallocated as required by OSU policy and approved in a timely manner.
Purchasing card approval	Approves pcard transaction in PeopleSoft and ensures compliance.				
Travel Request Initiator	Initiates request for T number in eTravel; initiate request for purchase of airline ticket and other pre-paid expenses	unit staff	transfer to BOSC	Tasks no longer done in unit	Need for quick turnaround in establishing T number. Ability to provide information directly to travelers before trip will minimize traveler frustrations with interpretation of policies and reduce issues with reimbursement.
Travel Request Approver	Approves request for T number in eTravel; approves request for purchase of airline ticket and other pre-paid expenses	unit approver			
Travel Reimbursement Initiator	Initiate request for travel reimbursement in eTravel. Review all receipts and documentation for compliance. Monitors pending travel reimbursements.	unit staff	transfer to BOSC	Unit/traveler forwards all documentation to BOSC. No data entry or approval in eTravel.	Strengthens compliance and consistency. Ensures travel reimbursements are done in a timely manner. Requires extensive knowledge of University policies and procedures. High potential for fraud.
Travel Reimbursement approver	Approve request for travel reimbursement in eTravel. Ensures compliance.	unit approver			
eRequest Initiation	Initiate a request to purchase a good or service or seek a non-travel reimbursement or other payment	new self-service functionality	All employees in college have access	Task no longer required to be done in unit; individual may submit own request	Streamlines procurement process with one-stop website for all types of procurement activity except travel.
eRequest Approval	Approve request for purchase of goods, services, payments and reimbursements. Service center determines best purchasing method		BOSC	Business approval at unit level; budget/policy approval at service center	Streamlines procurement process by electronic approval (via email) of transactions at unit level.
Requisition & purchase order initiation in PeopleSoft	Reviews request to purchase and determines best purchasing method.	unit staff	transfer to BOSC	Unit/employee may use eRequest to initiate request to purchase	Streamlines, strengthens compliance and maximizes strategic purchasing (MBE, aggregate buying opportunities, etc...); Reduces training needs.
Requisition and purchase order approval in PeopleSoft	Approves in PeopleSoft and ensures compliance.	unit approver			
PREP (reimbursement and convenience order) initiator	Initiate request for reimbursement in PREP system. Review documentation for compliance.	unit staff	transfer to BOSC	Unit/employee may use eRequest to initiate a payment	Streamlines, strengthens compliance and consistency.
PREP (reimbursement and convenience order) approver	Approve PREP reimbursement in PeopleSoft. Ensures compliance.	unit approver			
Voucher approval	Approve vouchers for payment	unit approver	transfer to BOSC	BOSC will coordinate with unit to ensure item has been received prior to approving voucher	Strengthens compliance and consistency
Reconciliation	Reconcile all general ledger funds	unit staff	transfer to BOSC	Task no longer required to be done in unit. BOSC will reconcile from paperwork already within BOSC	Increase efficiency and effectiveness
Journal entries, fund transfers	Initiate journal entries and fund/budget transfers	unit staff	transfer to BOSC	Task no longer required to be done in unit	Assists with BOSC continuous performance improvement since BOSC errors will be corrected by BOSC staff. Creates efficiency since processing and reconciliation are also within BOSC.
Deposits	Receives deposit; manages paperwork, enters deposit in PeopleSoft, drops off deposit	unit staff	transfer to BOSC	Relieves unit of cash handling processes	Fewer staff involved in processes. Decreases risk.
Surplus	Proper accounting and disposal of university property	unit staff	unit staff	None	Unit in best position to know status of property (e.g., location, working condition)
Asset Management	Recording and maintenance of assets (property)				