**Purchasing Department**
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Date:     November 22, 2010

To:       College Deans, Senior Vice Presidents and Vice Presidents of Support Areas, and Senior Fiscal Officers

From:     Tom Crawford, Director of Purchasing

Re:       Leveraging Our Spending

Recently you received a memo from Provost Alutto and Geoffery Chatas describing three sourcing initiatives utilizing the University's preferred contracts with UPS and OfficeMax and capturing detailed product and service descriptions. The following is intended as a guide to help us achieve university-wide success and to optimize savings.

- **When Ohio State or one of its recognized funds is providing payment, UPS is to be used for all outbound shipping.** The UPS program offers deeply discounted rates and enables departments to ship/track packages and send email notification to the recipient from their desktops using the UPS-provided self-service ICVS application. A customized program within the application validates chartfields to reduce data errors and prevent unnecessary rework. Many colleges and units already use the UPS application.

  Training is required prior to obtaining access to the self-service desktop software. Sessions are available every Friday from 1:00-2:00 PM. Use the following link to register for ICVS desktop software training:

  http://registrar.oit.ohio-state.edu/lms/studentctr/fnonpub/psciis.dll?mainmenu=fnonpub

  To accommodate your outbound shipping services until your area has been trained to ship via desktop, click http://receivingandmail.osu.edu and link to the Express Shipping Form at the right of the page. Complete the form and attach it to your package. This interim method to ship packages does not provide self-service access for tracking parcels, verification of chartfields, or options and pricing for delivery services.

  A job aid describing how to register for ICVS classes and how to access the Express Shipping form is available at:

  http://receivingandmail.osu.edu/docs/ICVS_JobAidPS_2_.pdf

  In order for shipments to be picked up by UPS same business day (Monday thru Friday), packages must be placed in a campus mailbox by 5:30 PM or hand-delivered to the Mail Room at 2650 Kenny Rd by 6:30 PM. A list of campus mailbox locations can be found at http://receivingandmail.osu.edu/droplocations.aspx#express. If your package cannot be placed in a campus mailbox, contact Mail Services at 292-6967 to arrange for desktop pick up.

  As mentioned in the memo from Provost Alutto and Geoffery Chatas, exceptions are possible but it is asked that these are approved prior to use of an alternative service. To request an exception, contact the Stores Service Center at 292-2694 or email stores@osu.edu.

- **Either OfficeMax or its MBE partner Premier is to be used to purchase all office supplies.** OfficeMax and Premier Office Solutions (the OfficeMax MBE partner) are the contracted office supply companies. Purchases can be made to either company. Faculty and staff can access the OfficeMax and Premier Office Solutions catalogs through eStores. Areas that already have access to eRequest can use it to initiate orders to OfficeMax and Premier. The OfficeMax catalog has an automatic substitution feature. This means that a request for a name brand item may be substituted by an equivalent lower cost item. The user is notified when this substitution is made. The Premier Office Solutions catalog is more expensive and does not have the automatic substitution feature.

  Job aids for ordering items through eStores and by using eRequest are available at:

  http://purchasing.osu.edu/training/default.aspx

  Contact the Stores Service Center at 292-2694 or email stores@osu.edu with any questions.

- **Complete product and service descriptions of what we purchase are needed to be able to fully leverage our spending.** An important part of leveraging our spending with suppliers is having as complete and accurate data as possible relative to the goods and services we buy to improve contracts and the prices paid. To do that, the Purchasing Department will be collecting purchase order data. The following are helpful hints when initiating a request for purchase:

  When creating a standard requisition or purchase order:
  ✓ Provide a detailed description of the products/services to be ordered (Example: Beaker, Pyrex Vista Griffin, 250ml).
  ✓ Ensure the complete contract number is referenced in the Contract Type and ID fields (when creating a PO).
  ✓ Confirm the pricing is correct and reference quotes, if available.
  ✓ Use correct category codes.

  Additionally, blanket purchase orders do not provide detailed information about the purchase. If it is necessary to create a blanket purchase order, indicate the description of the product or service being purchased, as indicated below:
  ✓ Blanket order for pharmaceuticals required for distribution by Student Health Services
  ✓ Blanket order for emergency HVAC repair services required by FOD

  In those instances when it is deemed that a blanket order is the appropriate method of purchase, a complete, detailed description of what was purchased as well as accurate pricing for the product/service ordered must be readily available from the department or the supplier. As an efficiency measure, as eRequest is rolled out to each area, the Blanket Order Release option within eRequest should be used whenever practicable to detail the items being purchased for each release under a blanket purchase order. This will help to streamline the capturing of the needed data. Please work with Purchasing on exceptions to using the Blanket Order Release function.

  See the link below for complete instructions on entering all types of purchase orders:

  https://assist-erp.osu.edu/assistprocurement84/WebHelp/purchase_orders/Purchase_Orders.html

  Contact the Stores Service Center at 292-2694 or email stores@osu.edu with questions.

cc: Brendan Foley, VP Financial Planning and Analysis