CREATING TERM PURCHASE ORDERS: DS SERVICES

DS Services is the current contracted provider for office water service and distilled water. This job aid steps through the Delegated Buyer process when completing a Term Requisition for monthly chiller and water service with DS Services.

REQUEST DETAILS

When creating a Term Requisition for monthly chiller and water with DS Services, the critical details include:

- **Where is the service located?** DS Services is location-based for all of their equipment, agreements and billing.
- **What type of water is requested?** There are currently two water options: Purified or Spring.
- **Is the chiller included in the request?** Even though the chiller has no cost, it must be included on the requisition.
- **What is the delivery frequency?** How many bottles of water should be delivered and how often should they be dropped off?
- **Who is the contact?** DS Services needs a contact person if there are questions about the request or delivery.
- **Who is paying for the request?** Departments frequently split costs when multiple areas are sharing water services.
- **What is the term of service?** Usually this will be for the next Fiscal Year.

PEOPLESOF T – TERM REQUISITION DETAILS

Term Requisitions have the following differences from Standard Requisitions:

<table>
<thead>
<tr>
<th>Field/Page</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting Date</td>
<td>Used to future date the start of the requisition. This is usually the first day of the fiscal year or the date of a new account with the supplier (e.g., 07/01/XX).</td>
</tr>
<tr>
<td>Due Date</td>
<td>Due Date is used to indicate when the purchase order will expire. This is usually the last day of the fiscal year (e.g., 6/30/XX).</td>
</tr>
<tr>
<td>Ship To</td>
<td>Use the delivery location in both the Ship To and Location fields.</td>
</tr>
<tr>
<td>UOM (Unit of Measure)</td>
<td>YR (year)</td>
</tr>
<tr>
<td>Header Comments</td>
<td>Insert the Standard Comment for Term requests and include all contact, delivery and other pertinent information.</td>
</tr>
</tbody>
</table>
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eREQUEST – REQUISITION DISTRIBUTION METHOD

DS Services is a vendor in eStores but the eRequest should not be dispatched using the eStores Distribution Method. A requisition for monthly chiller and water services is a Term Requisition and should be dispatched using the Requisition Distribution Method.

IMPORTANT NOTE!

DS Services counts each chiller as an individual agreement. Each chiller is considered a new location and should have its own requisition.

For example, if the request is monthly service to your four-story building with chillers on each floor, this equates to four separate requisitions.

EXAMPLES

Here is an eRequest for DS Services using the eStores catalog:
Let’s create the Term Requisition in PeopleSoft:
CREATING TERM PURCHASE ORDERS: DS SERVICES

In the Header Defaults:

- Change the Ship To and the Location to the delivery location code
- Change the UOM to YR
- Change the Due Date to the purchase order expiration date
- Enter the Chartfield Distribution

On the Form tab:

- Change the Accounting Date to the beginning of the Fiscal Year
- Enter the eRequest PR Number
- Select items from the eStores catalog
CREATING TERM PURCHASE ORDERS: DS SERVICES

Under the Header Comments:

- Select the Standard Header Comment for a Term Purchase Order
  Std Type = POT
  Comment ID = 260

- Look Up Std Type
  Search Results
  View All
  First
  Next
  Previous
  Last
  1 of 1

- Standard Comments
  *Action: Cut and Paste
  Std Type: POT
  *Eff Date: 04/28/2014
  *Status: Active
  Description:
  Short Desc:
  Comments:
Creating Term Purchase Orders: DS Services

Header Comments
Unit: UNIV Req ID: 35900421AA

Comments
This is a term request for July 2014 - June 30, 2015.
Please contact Julie Boyd at 614/292-0000 or boyd.00@osu.edu with questions.
Term PO for FY15 water cooler service. Replaces PO 359003AZ239
Deliver four 5-Gallon bottles of Purified Water every two weeks to:
Julie Boyd
Finance Service Center, Room 110
2151 N. High Street
Columbus, OH 43220
This request includes one Water Dispenser at no cost.
PR#: 177236
This Purchase Order is for the estimated requirements as specified above. The term of this Purchase Order shall commence on 07/01/2015 and terminate on 06/30/2016. The Ohio State University reserves the right to extend the Purchase Order a maximum of thirty (30) days beyond the normal expiration date.

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document
File Name: File Extension:

Enter the Header Comments for the Vendor, including all contact, delivery and other pertinent information.

Check to send the comments to the Vendor, include at Receipt and on the Voucher.

Comments:
Business Purpose: Drinking water from July 2014 - June 30, 2016 for staff and guests in the Finance Service Center, Office #110, 2151 North High Street, Columbus, OH

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document
File Name: File Extension:

OPTIONAL: Enter a second Header Comment for the Business Purpose.

Business Purpose comments are internal to OSU, so nothing is checked.
Creating Term Purchase Orders: DS Services

The final step is approval:

Here's another eRequest for DS Services.

eStores wasn't used to create this request but it still has the information needed to complete the requisition.

Let's create the Term Requisition in PeopleSoft:
CREATING TERM PURCHASE ORDERS: DS SERVICES

In the Header Defaults:

On the Form tab:
CREATING TERM PURCHASE ORDERS: DS SERVICES

Under the Header Comments:

Select the Standard Header Comment for a Term Purchase Order
Std Type = POT
Comment ID = 260

Standard Comments

Look Up Comment ID

Search Results

Standard Comments

This Purchase Order is for the estimated requirements as specified above. The term of this Purchase Order shall commence on / and terminate on / . The Ohio State University reserves the right to extend the Purchase Order a maximum of thirty (30) days beyond the normal expiration date.
CREATING TERM PURCHASE ORDERS: DS SERVICES

Enter the Header Comments for the Vendor, including all contact, delivery and other pertinent information.

Check to send the comments to the Vendor, include at Receipt and on the Voucher.

OPTIONAL: Enter a second Header Comment for the Business Purpose.

Business Purpose comments are internal to OSU, so nothing is checked.
CREATING TERM PURCHASE ORDERS: DS SERVICES

And then approve the requisition:

![Image of approval process]

ADDITIONAL RESOURCES AND INFORMATION

Administrative Systems NewsLink:
- Most Recent NewsLink Articles
- eRequest Changes Summary - Effective 1/6/12

Procurement ASSIST:
- Entering a Term Requisition in PeopleSoft
- Entering a Standard Requisition in PeopleSoft

eRequest ASSIST:
- Updates: 1/7/2012 eRequest Changes Summary
- Job Aids & Tools:
  - Processing an eRequest – Service Center/Delegated Buyer
  - Setting eRequest Preferences

Contracted Suppliers:
- OSU Purchasing Contract Book
- Alphabetical Supplier Listing
- eStores Supplier List by Category

SUPPORT CONTACTS

eStores for questions about eStores vendors.
Email eRequest@osu.edu for questions about eRequest.
DS Services for service and billing issues.