### Process Documentation for Events and Conferences services Internal Vendor Selection in Workday

Including The Ohio Union, University Catering, North District Event Spaces, Recreational Sports and all other Student Life Event Spaces

SL Events and Conferences - Event Services is listed in Workday under Non-Catalog Request.

The Events and Conferences continue their work with clients, sending updated confirmations from our event planning system EMS. Clients around the University will be responsible for entering the requisition through Workday (like eRequest), in advance of their event, to be processed and (once approved) dispatched to the Events and Conferences Business Office for tracking and updating.

### For Clients:

- 1) Log into Workday: <u>https://workday.osu.edu</u>
- 2) Select "View All Apps" under the Applications on the Home Page
  - a. You can also search for "Create Requisition" in the search bar (top left)



Let's Get Started	It's Friday, February 10, 2023
Awaiting Your Action	••• 88 View All Apps

3) Click "Request Travel or Purchase"

Menu		X Q Search
Apps	Shortcuts	
	Request Travel or Purchase	
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	Career	Started It's Monday, November 28, 2022
	Pay	Ir Action BE View All Apps
	Principal Investigators Summary	
<b>F</b>	Dashboards	28/2022 for \$1,500.00

# OFFICE OF STUDENT LIFE EVENTS AND CONFERENCES

#### 4) Select "Request to procure goods and/or Services"

≡ menu	0	Q Search		
← Req	uest Travel or Purchase			
				_
	1	need to	Description	
		Request preapproval for travel	Create a Spend Authorization to request approval to travel on behalf of the university with or without expected expenses. Embarking on travel and/or the prepayment of travel expenses is only permitted after an approved Spend Authorization is issued.	
		Request an expense reimbursement and/or process PCard transactions	Create an Expense Report to request a reimbursement for costs personally expensed for business needs or travel on behalf of the university and/or process a PCard transaction associated with business expenses. Transactions must be expensed in a timely manner.	
		Request to procure goods and/or services	Submit a requisition for external/internal goods or services off the Marketplace or Non-Catalog Requests. Examples: Office Supplies, Stores Orders, Laboratory Supplies, etc.	
		Request payment for a PO invoice	Request to pay an invoice tield to a purchase order. Examples: Invoices that did not go through Central AP. Please email them to: UNV: apimoices@osur.edu OSUHS: medorithmoices@osurc.edu OSUH: coupimoices@osurc.edu	
		Request payment for a non-PO invoice	Request to pay an invoice not associated with a purchase order and the supplier is an approved vendor in the system. Examples: Utilities	
		Request a one time payment to a non- supplier	Request a one-time payment to a non-supplier. Examples: Honorarium, visiting fellows, etc.	

#### 5) Fill in the following information:

- a. Requester: Should auto populate with your name
- b. Company: Should auto populate with the Ohio State University
- c. Currency: Should auto populate with USD
- d. Requisition Type: You will select the type of PO we are looking to create. In this case we are going to select non-catalog request.
- e. Deliver to: This is where you would like the product delivered. If it is a good you will use your cubical location, if it is a service you will want to change this to where the event is taking place.
- f. Ship to: This is where you would like the product delivered. If it is a good you will use your cubical location, if it is a service you will want to change this to where the event is taking place.
- g. Worktag information for where you are purchasing the items
- h. Click "OK"

Create Rec	isition
Requester	★ Wesley Lindsey … :=
Company	★ X The Ohio State University … :=
Currency	★ × USD … :=
Requisition Typ	★ Non-Catalog Request :=
Deliver-To	★ Columbus Campus > Ohio := Union (0161)
Ship-To	★ X 2650 Kenny Rd Columbus, OH 43210-1060 United States of America
Cost Center	× CC11546 Student Life   Ohio :Ξ Union
Balancing Unit	× BL1498 Student Life   Ohio :≡ Union Earnings
Fund	× FD200 Earnings Auxiliary :≡ Fund

# OFFICE OF STUDENT LIFE EVENTS AND CONFERENCES

6) Select "Request Non-Catalog Items"

≡ menu	0				Q Search		
Create	Requisition						
Company The Ohio Sta	te University	Requester Angela Britton	Currency USD	Requisition Type Non-Catalog Request			
✓ Select	ct an Option						
Request Nor	n-Catalog Items						
lf you can't f	find what you are loo	king for in Buckeye Buy, t	then you need to	submit a non-catalog request for your goods (	or services.		
Connect to S	Supplier Website						
Buckeye Bu	y is the online store t	hat hosts preferred and (	contracted supp	lier catalogs.			
If you are a s	screen reader and/or	keyboard-only user, you	will experience p	problems navigating the internal catalog. For as	sistance, contact the Accessibility Help Line at (614) 292-500	00.	

### 7) Non-Catalog Request Type

- a. New page defaults to Request Goods The recommendation is to change this to "Request Service"
  - i. (Requisition Currency defaults "USD", does not need to be changed)
- b. Description Please enter quick description for purchase.
- c. Commodity Code Does not need to be filled in
- d. Spend Category Is required to be selected (SC10726 Meetings and Facilities Rental)
- e. Supplier Please search for and select SL Events and Conferences

#### Other details to add

Supplier
× SL Events and Conferences ∷
Supplier Contract
:=
Supplier Item Identifier
Memo

f. Supplier Contract – Does not need to be filled in

- g. Start Date The recommendation is to add the first date of your event
- h. End Date The recommendation is to add the last date of your event
- i. Extended Amount The recommendation is to enter the **Grand Total amount** of the most recent confirmation received.
- j. Memo optional field to enter any additional details as you need/want
- k. Select "Add to Cart

### 8) My Cart / View Cart

- a. You can Select "View Cart" to review all items listed
- b. You can Select "Checkout" if you do not need/wish to review your cart items

Q Search			# 🗘 🔮 🗅
Request Non-Catalog Items		My Cart May Cart	لو م
Company The Ohio Stat	te University	test Quantity: 1	\$1.00
Non-Catalog Request Type  Request Goods Request Service			
Goods Request Details Item Description *		Checkout	Total: 1.00 USD
Supplier Item Identifier			
Add to Cart Continue Shopping Cancel			

#### 9) Checkout Page (see next page for image)

- a. Review All default information listed on the top portion of the page for accuracy
- Internal Memo This is the Business Purpose field and is required to be completed.
   Please enter the Event Reservation Number of your upcoming event. That number is 6 digits long and is listed on the front page of your most recent confirmation sent to you by the Events and Conferences team.

# OFFICE OF STUDENT LIFE EVENTS AND CONFERENCES

✓ Requisit	ion Information
Request Date	* 02/10/2021
Currency	* × USD … :Ξ
Requisition Type	× Non-Catalog Request ⋮
High Priority	
Sourcing Buyer	
Submitted by	Christopher McGowan
Memo to Suppliers	
Internal Memo	Events and Conferences Event Res #123456
× Goods Submit	Save for Later Continue Shopping ····

#### c. Review Services lines for accuracy

em							
(+)	Image Item		Description	*Spend Category	Extended Amount	Date	
Θ	<b>C</b>	:=	Events and Conferences	Commodity Code	125.00	Start Date 02/11/2021	
				Spend Category *		End Date	

d. Attachments – Please attach the most recently updated Events and Conferences Confirmation to your request, as well as any other supporting documentation required.

	Drop files here	
	brop mes nere	
	or	
	Select files	

- e. Tax does not need to be changed
- f. Activity Your (the client) preference to "tag" someone. Tagging someone here will send them a notification of this requisition being submitted.
- g. If completed, select "Submit" for processing. If not, there are other options to be selected

#### For the Events and Conferences Business Office

The above listed Non-Catalog Request Purchase Orders will be dispatched (once approved by the department on campus) to the Events and Conference Business Office email: <u>sl-ecbusoffice@osu.edu</u>

- 1. Dispatch should have the Purchase Order number listed
  - a. Enter the PO number into the EMS under the relevant Confirmation
    - i. Under the selected Confirmation
      - 1. Ensure the "Reservation Summary" tab is highlighted
      - 2. Select "Edit" right hand side of the page
        - a. New Pop-Up Window Select "Billing Information" Tab
        - b. Enter PO number with Event Date Range under "Billing Information"
        - c. Select "OK"
      - 3. Confirmation should be updated Select "Properties" Tab
      - 4. Scroll down to Billing Information to ensure information was entered and saved
- 2. File Dispatched PO in the ECBusoffice email as needed
- 3. The Events and Conferences Office runs regular Reservations for Review reports from EMS that are sent to the Event Planning Team
  - a. The newly updated field in EMS is populated on that report
  - b. As those reports are sent the Event Planning team will see those updates to their events