

# EVENTS AND CONFERENCES

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

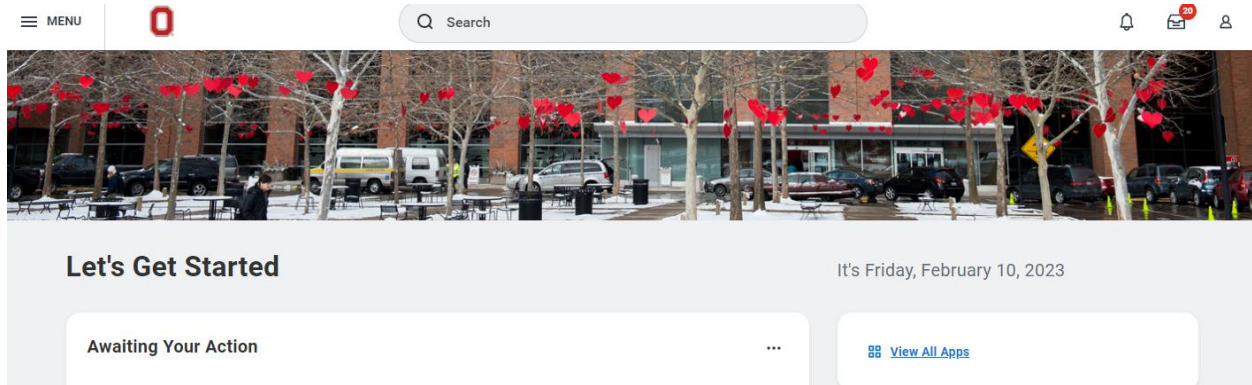
Including The Ohio Union, University Catering, North District Event Spaces,  
Recreational Sports and all other Student Life Event Spaces

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

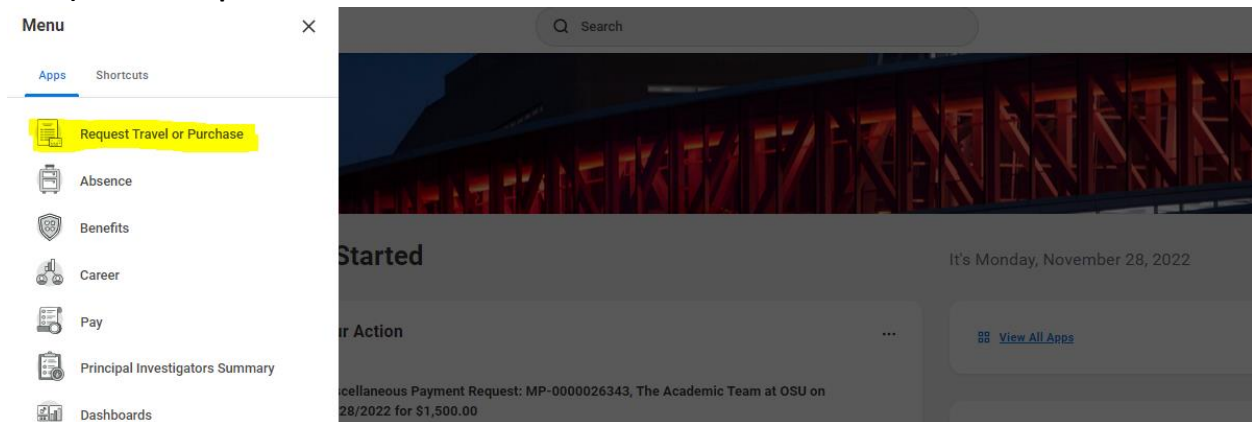
The Events and Conferences continue their work with clients, sending updated confirmations from our event planning system EMS. Clients around the University will be responsible for entering the requisition through Workday (like eRequest), in advance of their event, to be processed and (once approved)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

### For Clients:

- 1) Log into Workday: <https://workday.osu.edu>
- 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)

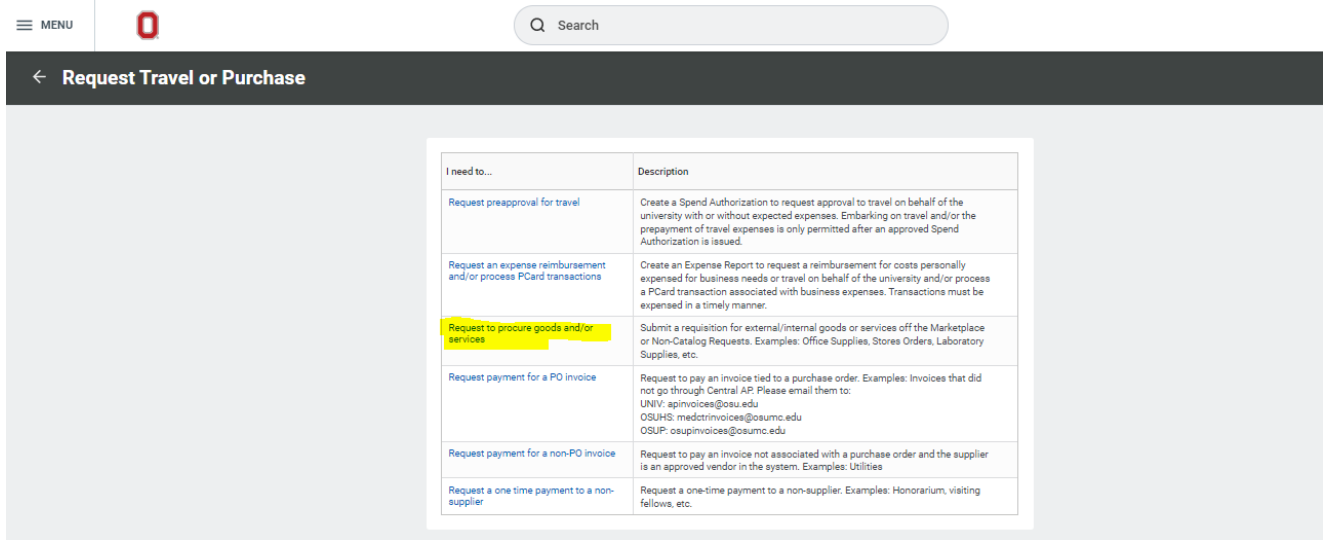


- 3) Click "Request Travel or Purchase"



# EVENTS AND CONFERENCES

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



## 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”

**SAMPLE REQUISITION**

Create Requisition ?

Requester \*

Company \*

Currency \*

Requisition Type \*

Deliver-To \*

Ship-To \*

Cost Center

Balancing Unit

Fund

## 6) Select “Request Non-Catalog Items”

Company: The Ohio State University | Requester: Angela Britton | Currency: USD | Requisition Type: Non-Catalog Request

▼ Select an Option

**Request Non-Catalog Items**

If you can't find what you are looking for in Buckeye Buy, then you need to submit a non-catalog request for your goods or services.

[Connect to Supplier Website](#)

Buckeye Buy is the online store that hosts preferred and contracted supplier catalogs.

If you are a screen reader and/or keyboard-only user, you will experience problems navigating the internal catalog. For assistance, contact the Accessibility Help Line at (614) 292-5000.

## 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

Supplier Contract

Supplier Item Identifier

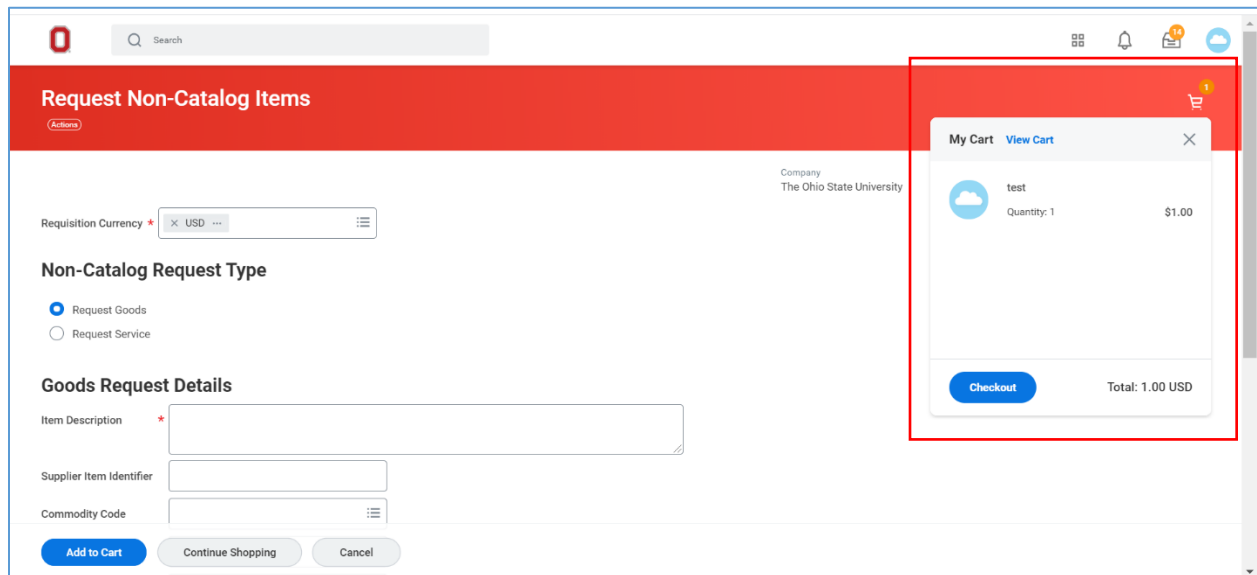
Memo

- 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

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

- a. Review All default information listed on the top portion of the page for accuracy
- b. **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.

# EVENTS AND CONFERENCES

**Requisition Information**

Request Date \* 02/10/2021

Currency \* X USD ...

Requisition Type X Non-Catalog Request

High Priority

Sourcing Buyer

Submitted by Christopher McGowan

Memo to Suppliers

Internal Memo Events and Conferences Event Res #123456

Submit
Save for Later
Continue Shopping
...

c. Review Services lines for accuracy

**Services**

1 item

+	Image	Item	Description	*Spend Category	Extended Amount	Date	D
-		<input type="text"/>	Events and Conferences	Commodity Code <input type="text"/> Spend Category * X Meeting Facilities Rental (SC10726)	125.00	Start Date <input type="text" value="02/11/2021"/> End Date <input type="text" value="02/12/2021"/>	

# EVENTS AND CONFERENCES

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

▼ Attachments

Drop files here

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: [sl-ecbusoffice@osu.edu](mailto:sl-ecbusoffice@osu.edu)

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