## Process Documentation for Rec Sports Space Rental Internal Vendor Selection in Workday

Rec Sports Space Rental - is listed in Workday under Non-Catalog Request.

The Recreational Sports Scheduling Office will 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 Recreational Sports Business Office for tracking and updating.

## For Clients:

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



3) Under I need to... Select "Request to procure goods and/or services"

Q Search			88	Ĵ	₽	0
← Request Travel or I	Purchase					
Ine	ed to	Description				
Req	quest 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.				
Req rein PCa	quest an expense nbursement and/or process ard 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.				
Req and	quest to procure goods I/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.				
Req invo	uest payment for a PO oice	Request to pay an invoice tied to a purchase order. Examples: Invoices that did not go through Central AP. Please email them to: UNIV: apinvoices@osu.edu OSUHS: medctrinvoices@osumc.edu OSUP: osupinvoices@osumc.edu				
Req invo	quest payment for a non-PO pice	Request to pay an invoice not associated with a purchase order and the supplier is an approved vendor in the system. Examples: Utilities				

- 4) The Create Requisition Page
  - a. Company Make sure you are selecting which one you work under (If not medical the selection should default to "The Ohio State University")
  - b. Requester Defaults to you
  - c. Currency Defaults to USD
  - d. Requisition Type
    - i. Please select Non-Catalog Request

Create I	Re	quisition	
	(		
Company	*	× The Ohio State University …	
Requester	*	$\times$ Christopher McGowan $\cdots$	:=
Currency	*	× USD	≔
Requisition Typ	e *	Search × Non-Catalog Request	:=
Deliver-To	*	× Columbus Campus > Ohio Union (0161) > Floor 02 > Ohio Union 2027A	≣
Ship-To	*	× 2650 Kenny Rd Columbus, OH 43210-1060 United States of America	≔

- e. Deliver-To Address on Campus does not need to be changed
- f. Ship-To Defaults to Kenny Road does not need to be changed

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- g. Cost Center Information Enter in the cost center information for the expense (Where the final invoiced amount will be expensed to)
- h. Select "OK"
- 5) Select an Option
  - a. Select "Request Non-Catalog Items"

0	Q Search					¢	4	0
Creat	e Requisition					jĔ	×#	6
		Company The Ohio State University	Requester Christopher McGowan	Currency USD	Requisiti Non-Ca	on Type talog Req	uest	
✓ Se Request I If you car	lect an Option Ion-Catalog Items 't find what you are looking for in Buckeye Buy, then you need to sub	mit a non-catalog request for your	goods or services.					
Connect t Buckeye I If you are	o Supplier Website Buy is the online store that hosts preferred and contracted supplier of a screen reader and/or keyboard-only user, you will experience probl	catalogs. ems navigating the internal catalog	. For assistance, contact the Ac	cessibility He	lp Line at (i	614) 292-	5000.	

### 6) 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
- e. Supplier Please search for and select Rec Sports Space Rental

Request Service

# **Service Request Details**

Description *	
Commodity Code	:=
Spend Category *	
Supplier	Şearch :≣
	× Rec Sports Space Rental …
Supplier Contract	
Start Date	MM/DD/YYYY
End Date	MM/DD/YYYY 🖻
Extended Amount	0.00
Memo	
Add to Cart	Continue Shopping Cancel

- 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

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## 7) 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			i 🗘 🔮 🔿
Request Non-Catalog Items			E.
		My Cart View Cart	×
Requisition Currency * 🛛 × USD …	Company The Ohio State University	Quantity: 1	\$1.00
Non-Catalog Request Type			
Request Goods			
Request Service			
Goods Request Details		Checkout	Total: 1.00 USD
Item Description *			
Supplier Item Identifier			
Commodity Code :=			
Add to Cart Continue Shopping Cancel			

## 8) Checkout Page

- 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 Recreational Sports Scheduling Office.

# Requisition Information

Request Date *	06/10/2021	
Currency *	× USD	∷≡
Requisition Type	× Non-Catalog Request	∷≡
High Priority		
Sourcing Buyer		∷≡
Submitted by	Zachary Talstein	
Memo to Suppliers		
Internal Memo	Rec Sports Confirmation Res #123456	

#### c. Review Services lines for accuracy

#### Services 1 item Extended Date Image Item Description \*Spend Category Amount Commodity Code Start Date Rec Sports Confirmation Res #123456 $\equiv$ 0.00 := MM/DD/YYYY -Expand Spend Category \* End Date × Athletic and Recreational Officials $\equiv$ MM/DD/YYYY 🛱 (SC10745)

d. Attachments – **Please attach the most recently updated Recreational Sports Event Confirmation** to your request, as well as any other supporting documentation required

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<ul> <li>Attachments</li> </ul>		
	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