

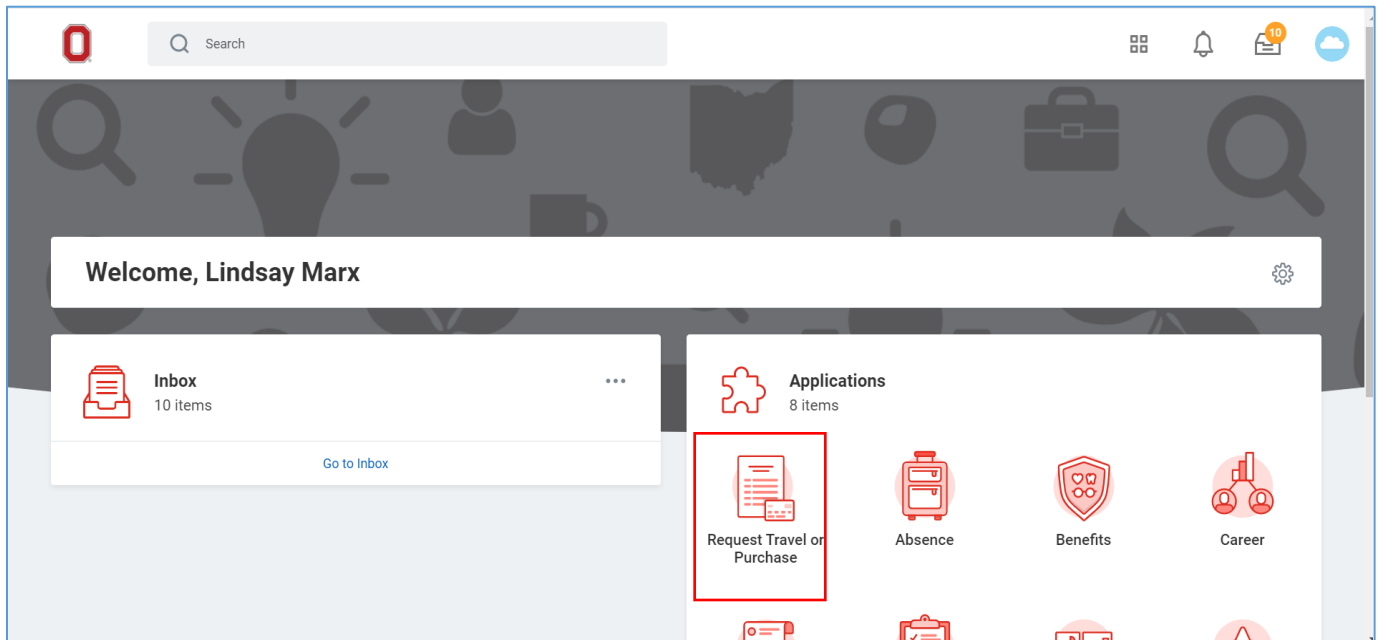
Process Documentation for Ohio Union Event Services Internal Vendor Selection in Workday:

Ohio Union - Event Services is listed in Workday under Non-Catalog Request.

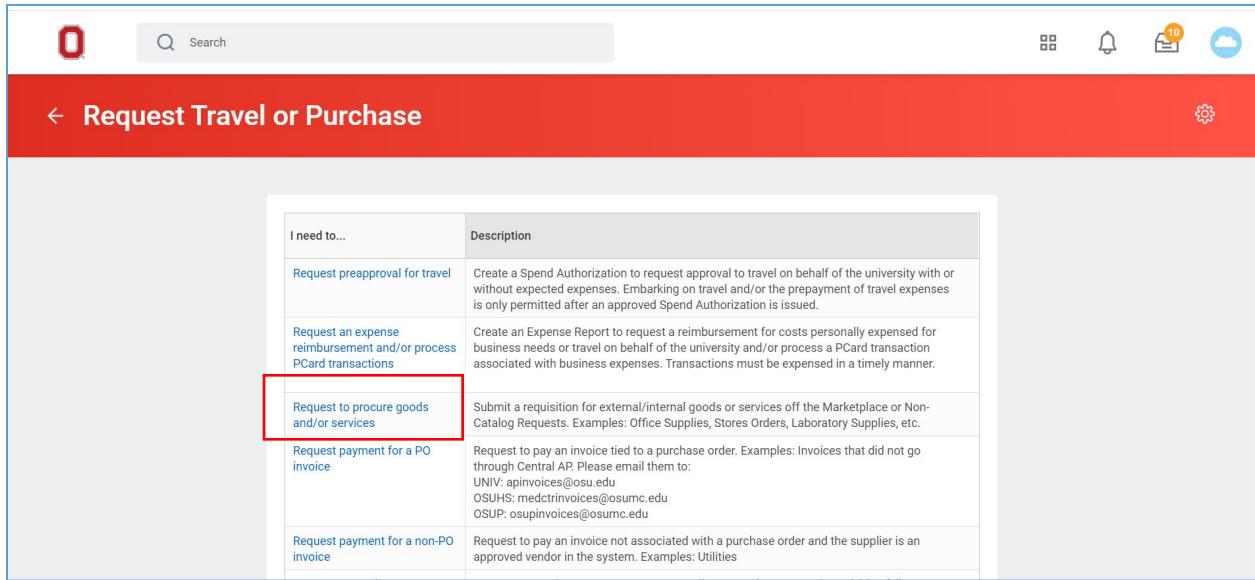
The Ohio Union Events Team will continue their work with clients, sending updated confirmations from our event planning system EMS. Clients around the University will be responsible for entering the requisition through Workday (like eRequest), in advance of their event, to be processed and (once approved)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

For Clients:

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

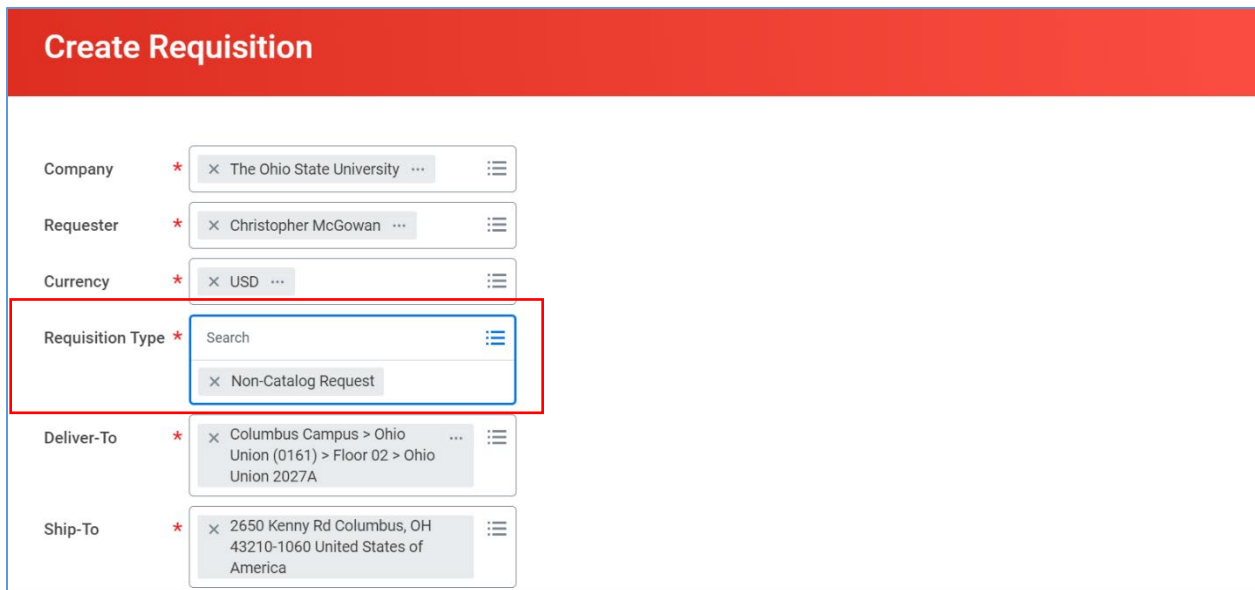


3) Under **I need to...** Select “Request to procure goods and/or services”



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**

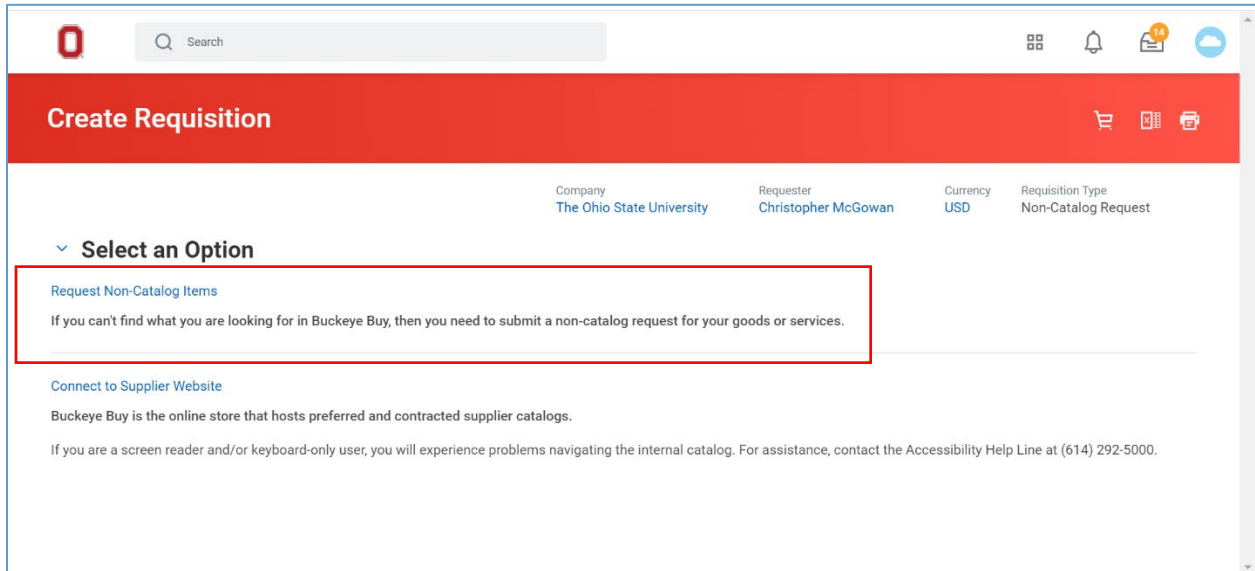


- e. Deliver-To – Address on Campus – does not need to be changed
- f. Ship-To – Defaults to Kenny Road – does not need to be changed

- 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”



6) Non-Catalog Request Type

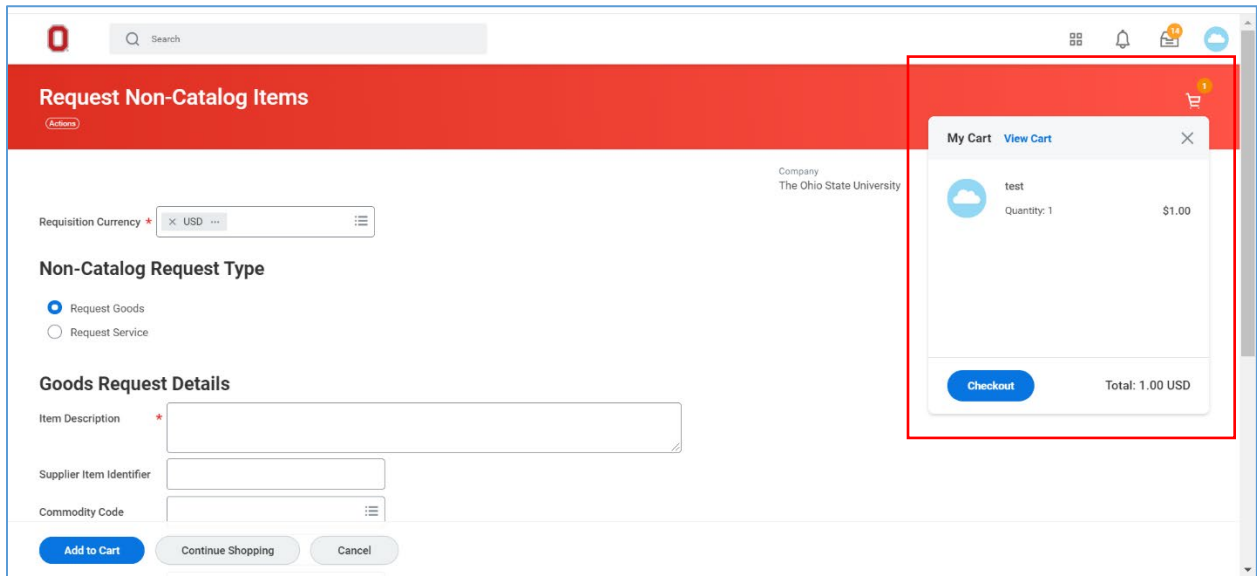
- a. New page defaults to Request Goods – The recommendation is to change this to “Request Service”
 - i. (Requisition Currency defaults “USD” , does not need to be changed)
- b. Description – Please enter quick description for purchase.
- c. Commodity Code – Does not need to be filled in
- d. Spend Category – Is required to be selected
- e. Supplier – Please search for and select **Ohio Union – Event Services**

The screenshot shows a web form titled "Request Service" with a sub-header "Service Request Details". The form contains several input fields and dropdown menus. A red rectangular box highlights the "Supplier" field, which currently displays "Ohio Union - Event Services" with a close button (X) and a menu icon (three horizontal lines). Other fields include "Description" (with a red asterisk), "Commodity Code", "Spend Category" (with a red asterisk), "Supplier Contract", "Start Date" (with a calendar icon), "End Date" (with a calendar icon), "Extended Amount" (with the value "0.00"), and "Memo". At the bottom of the form, there are three buttons: "Add to Cart" (blue), "Continue Shopping" (grey), and "Cancel" (grey).

- 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”

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



8) Checkout Page

- 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 Ohio Union Events Team

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 Ohio Union Event Res #123456

Goods

[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"/>	For Ohio Union Event Res #123456	Commodity Code <input type="text"/> Spend Category * X Meeting Facilities Rental (SC10726)	125.00	Start Date 02/11/2021 End Date 02/12/2021	

- d. Attachments – **Please attach the most recently updated Ohio Union Events 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