Please note Procurement instructions are subject to change. The Ohio State University is currently in the process of updating its current business system to WORKDAY. Information on new Procurement Instructions will be available as we get closer WORKDAY launch date of January 2021.

As a public research university, OSU student, faculty and staff who uses university resources have Stewardship and Ethics responsibility.

Understanding purchasing using university funds
Once funds enter the university system, it is subject to the OSU University procurement policies. OSU is a nonprofit state agency and uses Fund accounting to track accountability.

University funds are separated by its sources in order to ensure it is properly spent and accounted for. Funds must not be intermingled. This means that one fund cannot be substituted for another, and money can be moved from one fund group to another only under limited circumstances.

If you are working on a project, there should be a designated funding number. Faculty who owns the project should have this information.

- Different types of funds you may use to purchase items for your research.

**OSURF/OSP sponsored projects funds**: External funds awarded to a principle investigator for research. These funds are awarded based on an agreement between the sponsor and the university. When using these funds, you will need to follow not only university policies but also OSP policies and sponsors requirements.

Ohio State University Office of Sponsored Programs (OSP) is the entity authorized by the university to seek, accept and administer all Sponsored agreements.

**Univ/General funds**: The General Fund provides the money that sustains the university's core instruction, departmental research, instructional support, and related general administrative costs and facilities expenditures. Funds may be used for any legal and reasonable purpose in carrying out the mission of the institution

**Current Restricted Funds**: Current Restricted Funds must be spent only for the purpose intended by the outside entity that established the restriction. Because the university has a legal stewardship obligation to abide by fund restrictions, it is important to be aware of the restrictions and monitor the funds for appropriate use.
Training for eRequest

eRequest is a web-based procurement system for OSU student, faculty and staff. This online system is used to submit a request for goods, services, or payments. The approval process is handled automatically through routing of the system. Once approved, the request will be fulfilled through either the departmental purchasing card or Arts and Sciences service center or by a delegated buyer.

Anyone can access eRequest to place an order and formal training is not required. However going through training will help you understanding the university business policies, importance of Stewardship and Ethics responsibility you have as part of your role in the university.

BuckeyeLearn is Ohio State's tool to engage faculty, staff and student employees in training and professional development. The training listed below are recommended so you can familiarize yourself with OSU’s standards of doing business before initiating purchases through eRequest:

Institutional Data Policy Course:
B&F Core:
   Financial Onboarding
   Business Responsibilities
   Business Expenditures
   Internal controls
   Understand and Prevent Fraud
Accessing eRequest

You can access eRequest by going to www.erequest.osu.edu and logging on with your OSU dot number and password.
Components of a Successful eRequest:

- If possible use university preferred vendor and eStores to purchase item
- Quote from a vendor or a PDF of the Shopping Cart that includes your order from the vendor’s website
- Quote should not include tax as Ohio State University is tax exempt in most states
- Complete business purpose related to the purchase (who, what, why, when and where)
- Complete vendor information
- Funding source
- Written permission from the owner of the funding source to spend funds for this purpose (upload email exchange as an attachment)
- Complete shipping address

Questions to Ask before submitting an eRequest:

- Who should sign a contract for promise to provide services/materials?

  *If you have any contract that, have legal binding, this need to be reviewed by the University Legal office. Please Contracts to The school Administrate manager or Fiscal Program Coordinator so that it can be reviewed by the college and university legal office.*

  *External contract that have finical obligation needs to be signed by OSU purchasing Internal contracts with finical obligations need to be signed by the college.*

- How do I find OSU’s preferred vendor websites like Fisher Scientific and Gas Warehouse?

  *OSU has a Contract Book that is manage by the university Business and Finance. The Contract Book lists the preferred vendors who are already in the university vendor system and has a purchasing contract with the university.*

  *The list of these vendors can be found on the Business and Finance website. [https://busfin.osu.edu/buy-schedule-travel/purchasing/find-supplier](https://busfin.osu.edu/buy-schedule-travel/purchasing/find-supplier)*

  *If the vendor has not work with OSU, they will need to be set up on the OSU vendor system. The Fiscal Program Coordinator or school Administrate Manager will assist you with this process.*

- How do I look up items in eStores?

  *You can access vendors in eStores by clicking on the red “eStores” button in eRequest*
• How do I pick the Purchasing/Payment option in eRequest?

There are four Purchasing/Payment option listed in the eRerquest. Below criteria can be used to determine what option to use

- **funding source**
- **who the vendor is**

**Standard Purchase Request:** This option includes the use of a purchaser order. Purchase order (PO) is a legal and binding contract for goods and services between the university and the supplier that includes standard university terms and conditions. The vendor accepts the contract by providing the goods or services and invoicing the university. Purchase orders must be created and approved prior to the goods and services being ordered.

- **Funding source**
  - OSURF/OSP sponsored projects funds
  - Univ/General funds
  - Current Restricted fund

- **Vendor**
  - eStores vendors
  - External vendor who accepts purchase orders
PCard Preferred: This option is one of the university's procurement methods for the purchase of goods/services and necessary to conduct university business. Once eRequest is approved, you will need to check out the purchasing card from SES Admin staff.

- Funding source
  - Univ/General funds
  - Current Restricted fund

- Vendor
  - External vendor who accepts credit cards

Internal Order: This option is used to purchase from an internal OSU Department. Example would be Chem Scientific Glassblowing Lab, ASC Machine Shop.

- Funding source
  - OSURF/OSP sponsored projects funds
  - Univ/General funds
  - Current Restricted fund

- Vendor
  - University internal vendor list
eRequest ASSIST

In eRequest ASSIST, you will find information on using eRequest and associated job aids and links. You can access eRequest ASSIST by logging into ASSIST Online Help using your OSU ID and password. Then search “eRequest” for eRequest ASSIST materials.

Below are some training materials in eRequest ASSIST that can help you use the eRequest system.

- Entering an eRequest
- Entering an eRequest for Stores

If you have questions about Procurement processes, the SES Fiscal Program Coordinator and SES Administrate manager can assist you.

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