



**As a public research university, OSU students, faculty and staff who use university resources have Stewardship and Ethics responsibility.**

### **Understanding 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 an accounting system for recording resources whose use has been limited by the donor, grant authority, governing agency, or other individuals or organizations or by law.

University funds are separated by their sources to ensure it is properly spent and accounted for. Funds must not be intermingled.

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

#### ***OSURF/OSP funds:***

- ***Cost Center: CC12395***
- ***Fund:FD520***
- ***Grant:GRXXXX***

*External funds awarded to a principal 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:***

- ***Cost Center: CC12395***
- ***Fund:FD520***
- ***Program: PRXXXX ( this WORKTAG is used if the fund is for a specific program)***
- ***Assignee:ASXXXXX(this WORKTAG is used if the fund is for a specific person)***

*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.*

#### ***Current Restricted Funds:***

- ***Cost Center: CC12395***
- ***Fund: FD510***
- ***Gift: GFXXXXX***

*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.*

**All business/research-related purchasing using university funds must comply with university [Expenditures](#), and [Purchasing](#) policies.**



## School of Earth Sciences Procurement Instructions

### Components of a Successful purchase:

- If possible, use Ohio State's [Contract Book](#) and [Buckeye Buy Request](#) to purchase items
- Get Quote from vendor or PDF of Shopping Cart that includes order from vendor's website
- Quote should not include tax as Ohio State University is tax exempt in most states
- Provide business purpose for the purchase using - who, what, why, when, and where
- Know your WORKTAG
- Written permission from PI/Advisor to use funding source to spend funds for this purpose (Upload email exchange as an attachment)

### Questions to Ask before submitting a Purchase request:

- Who should sign a contract for promise to provide services/materials/Terms and Conditions?  
*If you have any contract that is legally binding, this needs to be reviewed by the University Legal office. Please Contracts to The School Administrative Manager or Fiscal Associate so that it can be reviewed by the college and university legal office.*  
*Both External contract that have financial obligation and Internal contracts need review and approval*
- What is Buckeye Buy  
Buckeye Buy is Ohio State's online store/web site filled with catalogs from contracted suppliers. Buckeye Buy integrates fully with Workday. You can find vendors like Fisher Scientific and Gas Warehouse. OSU has a Contract Book that is managed 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 is on the Business and Finance website. <https://busfin.osu.edu/buy-schedule-travel/purchasing/find-supplier>
- Vendors not in Buckeye Buy  
If the vendor has not worked with OSU, they will need to be set up on the OSU vendor system. The School Administrative Manager will assist you with this process. This process can take up to 2-3 month depending on who the vendor is.

**School Purchasing Card** is used to purchase goods and services for your research and purchases should follow the [PCard policy](#). You can check out the card or ask for purchasing assistance using the purchasing card by contacting the Fiscal Associate.

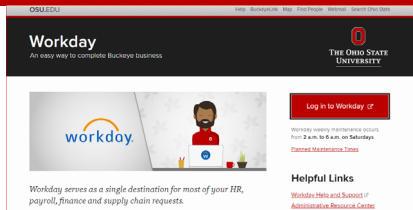
You can make a request by sending an email with below information:

- **Business purpose 5 W (Who, What, When Where, and Why)**
- **If you are making a purchase for a travel, you must have an approved Spend Authorization**
- **Funding source/WORK TAG**
- **Quote**
- **A contact for the vendor**  
*If any Terms and Conditions applies to the purchase, the quote will need to be reviewed and signed by university purchasing. You will need to provide a contact from the vendor who can sign the contract*

**WORRYDAY** serves as a single destination for most of your HR, payroll, finance, and supply chain requests. You use **WORKDAY** to purchase items/request reimbursements. All requests workflow to Administrative Manager for Review and approval.



### School of Earth Sciences Procurement Instructions



[Administrative Resource Center](#) provides guides, job aids, training for WORKDAY and Ohio State IT services

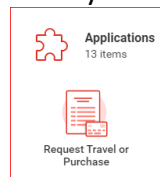
### **Purchasing Item using Requisition**

Use below link to get instructions on how to create Buckeye Buy and non-catalog requests for goods and services. Procurement requests can be initiated by all campus employees

<https://admin.resources.osu.edu/workday/workday-for-core-users-supply-chain/create-a-requisition-to-procure-goods-services>

Below is a quick instruction:

Once you log onto [WORKDAY](#) chose the “Request Travel or Purchase” application



Select “Request to procure goods and/or services”

I need to...	Description
<a href="#">Request preapproval for travel</a>	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.
<a href="#">Request an expense reimbursement and/or process PCard transactions</a>	Create an Expense Report to request a reimbursement for costs personally expended 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.
<a href="#">Request to procure goods and/or services</a>	Submit a requisition for external/internal goods or services off the Marketplace or Non-Catalog Requests. Examples: Office Supplies, Stores Orders, Laboratory Supplies, etc.

If this is an item from Buckeye Buy, select “**Buckeye Buy Request**” as Requisition type  
If item is not from Buckeye Buy, select “**Non-Catalog Request**” as the Requisition type

**Create Requisition**

Company	*	x The Ohio State University ...	☰
Requester	*	x Soyoung Carpenter ...	☰
Currency	*	x USD ...	☰
Requisition Type	*	x Buckeye Buy Request	☰
Deliver-To	*	x Columbus Campus > Mendenhall Laboratory (0054)	☰



### School of Earth Sciences Procurement Instructions

When you are purchasing from **Buckeye Buy Request** select an option **“Connect to supplier Website”**

**Create Requisition**

Company: The Ohio State University | Requester: Soyoung Carpenter | Currency: USD | Requisition Type: Buckeye Buy 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.

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
	The Ohio State University Columbus	Yes		Click "Connect" to search Buckeye Buy online store that hosts preferred and contracted supplier catalogs.	<a href="#">Connect</a>

Use the **“Item search”** function to find item you need and **“Add to Cart”**

Procure

Item search:

Short description (5+):  
 GLOVES - NITRILE - L  
 GLOVES - NITRILE - XL  
 GLOVES 0716 LATEX S29 C5200PR  
 GLOVES 10 GAUGE 100% DUPONT L DZ 1PR  
 GLOVES 10 GAUGE 100% DUPONT S DZ 1PR

Long description (5+):  
 GLOVES - NITRILE - L - NO FLOCK - PAIR  
 GLOVES - NITRILE - XL - NO FLOCK - PAIR

Mfr: VARIOUS  
 Mfr PN: 816-2730 MONTH  
 Customer Item #:

Supplier: HercRentals

[Add to Cart](#)

Click on the **Cart Icon** to access your items.

Procure

Soyoung Carpenter\_202108151117  
 Type: Punchout

ITEM	QTY	SUBTOTAL
GLOVES - NITRILE - L	1	\$2.50 EA
		Total
		\$2.50

See all items

ITEM	PRICE	PACKAGING	QTY
Month Rate - PUMP FLOWMETER BIN	\$489.00	MO	1



### School of Earth Sciences Procurement Instructions

Click "Submit" to check out your items

OPEN CART

Soyoung Carpenter\_202108151...  
1 Items \$2.50

Total Cost: \$2.50

Clean My Cart

Submit

Return Items in cart to your purchasing application

View: Item Details 1 - 1 of 1

ITEM	PRICE	PACKAGING	QTY	SUBTOTAL
<b>GLOVES - NITRILE - L</b> Supplier: ADVANCED TURF SOLU... Supplier PN: CP-HW2400-L Mfr: VARIOUS Mfr PN: CP-HWS40-L Contract: 17-HERBICIDEANDSEED-AdvancedTurfSolutionstnc Customer Item #:	\$2.50	EA	1	\$2.50

This will take you to the WORKDAY application. Click "Checkout" and WORKDAY will take you to the "Checkout" page. If this is your first-time using WORKDAY, edit your address to Mendenhall by clicking on the item with "three dots" next to the "Continue Shopping" button

Checkout

Company: The Ohio State University | Requester: Soyoung Carpenter | Requisition: RQ-1000302174 | Status: Draft | Total Amount: 2.50 USD

Shipping Address

Deliver-To: Columbus Campus > Mendenhall Laboratory (0054)

Ship-To Address: 2650 Kenny Rd, Columbus, OH 43210-1060, United States of America

Requisition Information

Request Date: 08/15/2021

Currency: USD

Requisition Type: Buckeye Buy Request

High Priority:

Sourcing Buyer: [Field]

Submitted by: Soyoung Carpenter

Memo to Suppliers: [Field]

Internal Memo: [Field]

Buttons: Submit, Save for Later, Continue Shopping, [More]

Dropdown menu: Edit Requisition Defaults, Edit Address, Cancel

Update "Deliver -To" to "Mendenhall Laboratory 275"

Edit Address

Click Apply to use the deliver-to and ship-to address on the requisition header and all lines.

Deliver-To: Mendenhall Laboratory 275

Ship-To Address: Search Results (10)

Use Alternate Address:

- Columbus Campus > Mendenhall Laboratory (0054) > Floor 02 > Mendenhall Laboratory 275
- Columbus Campus > Mendenhall Laboratory (0054) > Floor 02 > Mendenhall Laboratory 275B
- Columbus Campus > Mendenhall Laboratory

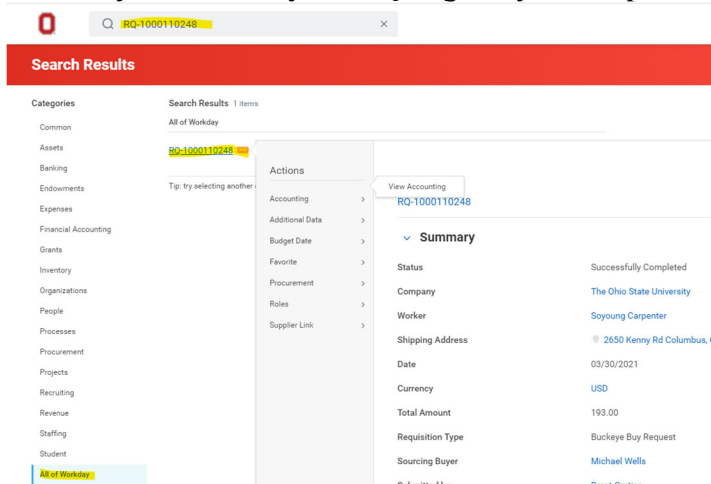
Submit request. **The request will workflow to Administer Manager for review and approval.** If there is any other information needed for your request it will workflow back to you with instructions.



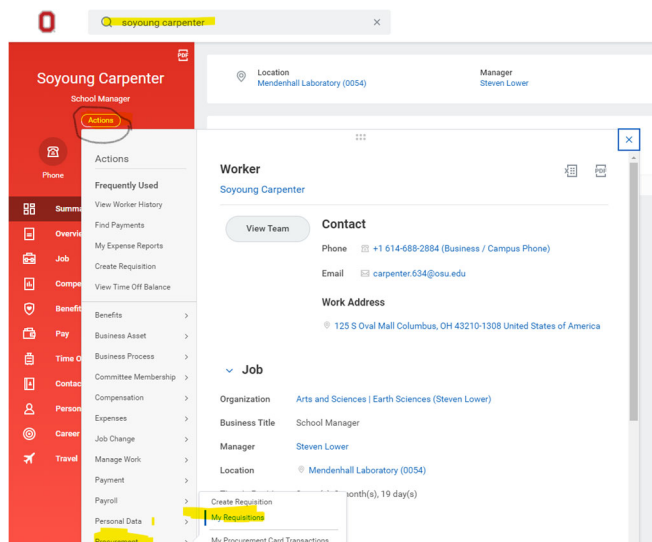
### School of Earth Sciences Procurement Instructions

You can track the progress of your RQ by searching in WORKDAY by:

- Typing the ER number in the search section->Select Categories “All of Workday”->Click on your RQ to go to your request



- Type in “YOUR NAME” in search section -> click on button underneath your name “Actions” -> click on “Procurement” -> click on “My Requisitions”-> Click “OK” button and WORKDAY will display all your RQ





School of Earth Sciences Procurement Instructions

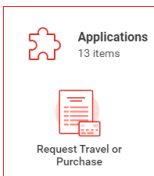
**Reimbursements-Expense Reports**

Expense reports are submitted so that you are reimbursed for business-related costs (travel or non-travel) When employees purchase items on behalf of the university from personal funds, they are usually required to pay the sales tax. The employee may be reimbursed for the cost of the item as well as the sales tax.

Below is the link with instructions on how to creating an “Expense Report” in WORKDAY listed at the Administrative Resource Center.

<https://admin.resources.osu.edu/workday/workday-for-employees/er-create-an-expense-report-for-yourself>

To start your reimbursement request, log onto [WORKDAY](#) chose the “Request Travel or Purchase” application



Select “Request an expenses reimbursement and/or”

I need to...	Description
<a href="#">Request preapproval for travel</a>	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.
<a href="#">Request an expense reimbursement and/or process PCard transactions</a>	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.

If you have questions about Procurement processes, SES Administrate manager can assist you.

SES Administrate Manager  
Soyoung Carpenter  
[carpenter.634@osu.edu](mailto:carpenter.634@osu.edu)  
125 South Oval Mall Rm 275N  
(614) 688-2884