As a public research university, Ohio State requires students, faculty, and staff who use University resources to uphold their Stewardship and Ethics responsibilities.

Understanding University Funds

Once funds enter the University's financial system, they become subject to Ohio State's procurement policies. As a nonprofit state agency, OSU uses an accounting structure to record resources whose use is restricted by a donor, grant authority, governing agency, other external entities, or by law.

University funds are separated by their sources to ensure they are properly spent and accurately accounted for, and funds must not be intermingled.

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

  OSP funds (Research related funds):
  - ***Cost Center: CC12395***
  - ***Fund :FD520***
  - ***Grant :GRXXXX***

  External funds awarded to a principal investigator for research are provided under a formal agreement between the sponsor and the University. When using these funds, you must follow University procurement policies as well as all OSP policies and sponsor-specific requirements. The Ohio State University [Office of Sponsored Programs (OSP)] is the University entity authorized to seek, accept, and administer all sponsored agreements.

  Univ/General funds:
  - ***Cost Center: CC12395***
  - ***Fund: FD100***
  - ***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 resources that sustain the University's core instruction, departmental research, instructional support, and related general administrative 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 essential to understand those restrictions and monitor the funds for appropriate use. An example of these funds is the Friends of Orton research award.

All business- or research-related purchasing using University funds must comply with Ohio State's Expenditures, and Purchasing policies.

Review for Compliance is conducted by the School Manager along with College Service Center or Grant Award Service Center depending on the funding source.

Components of a Successful purchase:

- Use Ohio State's **Contract Book** and **Buckeye Buy Request** to purchase items.
- Obtain a quote from the vendor or a PDF of the shopping cart that includes the full order from the vendor's website.
- Ensure the quote does not include tax, as Ohio State University is tax-exempt in most states.
- Provide a clear business purpose for the purchase using who, what, why, when, and where.
- Know your WORKTAG.
- Obtain written permission from the PI/Advisor to use the funding source for this purchase and upload the email approval as an attachment.

Questions to Ask before submitting a Purchase request:

- **Who should sign a contract that includes a promise to provide services, materials, or Terms and Conditions?**
  If you have any contract that is legally binding, it must be reviewed by the University's Legal Office. Please send all contracts to the School Manager or the Financial Operations Coordinator so they can route the agreement for College and University Legal review. Both external contracts that involve a financial obligation and internal contracts require formal review and approval.

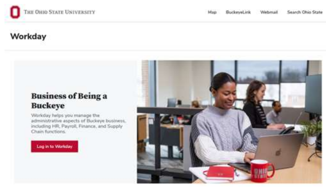
- **What is Buckeye Buy?**
  Buckeye Buy is Ohio State's online store that provides access to catalogs from contracted suppliers, fully integrated with Workday. Common vendors such as Fisher Scientific and Gas Warehouse can be found in Buckeye Buy. OSU also maintains a Contract Book, managed by the University's Office of Business and Finance, which lists preferred suppliers already established in the University's vendor system and under purchasing contracts with Ohio State. The list of these suppliers is available on the Business and Finance website: *https://busfin.osu.edu/buy-schedule-travel/purchasing/find-supplier*

- **How to purchase from Vendors not in Buckeye Buy (Non-Catalog Request)?**
  If a vendor has not previously worked with Ohio State, they will need to be set up in the University's vendor system. The School Manager will assist you with this process. Vendor setup can take up to 2–3 months, depending on the vendor and how quickly they respond to the required documentation.

School Purchasing Card is used to buy goods and services for your research, and all purchases must follow the **PCard policy**. You man check out the purchasing card or request purchasing assistance by contacting the Financial Operations Coordinator.
You can make a request by sending an email with the information below:

- ***Business purpose using the 5 W's: Who, What, When, Where, and Why.***
- ***If the purchase is related to travel, you must have an approved Spend Authorization.***
- ***Funding source/WORK TAG***
- ***Quote for the item(s).***
- ***Vendor contact information.***
- *If any Terms and Conditions apply to the purchase, the quote must be reviewed and signed by University Purchasing. You will need to provide a vendor contact who is authorized to sign the contract.*

WORKDAY serves as the single destination for most HR, payroll, finance, and supply-chain activities at Ohio State. **You use Workday to purchase items, request reimbursements, and submit travel requests.**



Administrative Resource Center provides guides, job aids, and training resources for Workday and Ohio State IT services.

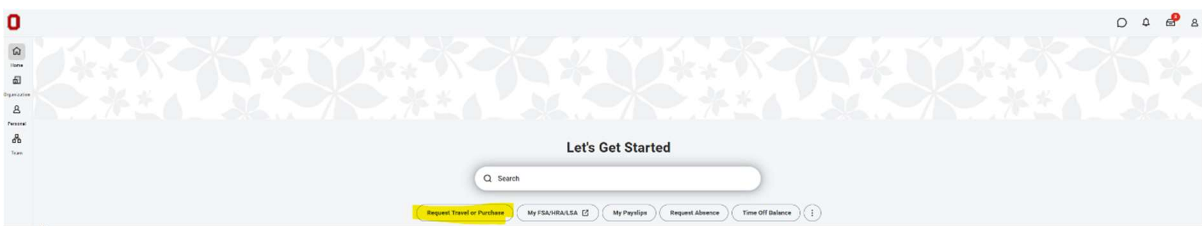
Purchasing an Item using Requisition

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.

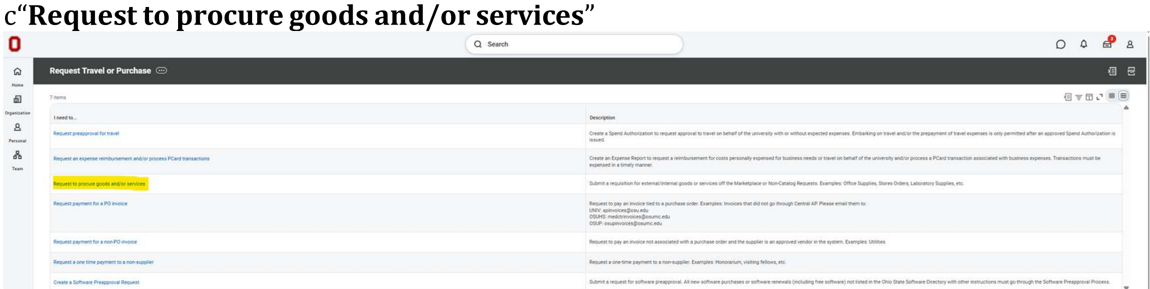
Create a Requisition to Procure Goods and Services | Administrative Resource Center (osu.edu)

Below is a quick instruction:

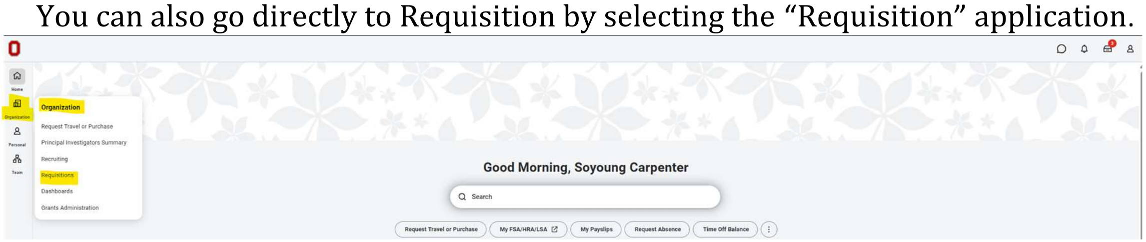
Once you log onto WORKDAY chose the "Request Travel or Purchase" application.



c"**Request to procure goods and/or services**"



You can also go directly to Requisition by selecting the "Requisition" application.



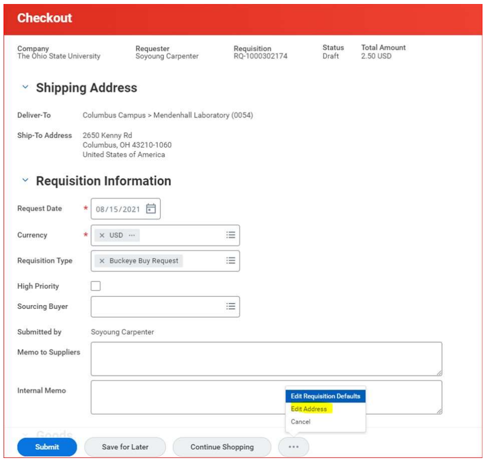
If this is an item from Buckeye Buy, select "**Buckeye Buy Request**" as Requisition type

If item is not from Buckeye Buy, select "**Non-Catalog Request**" as the Requisition type

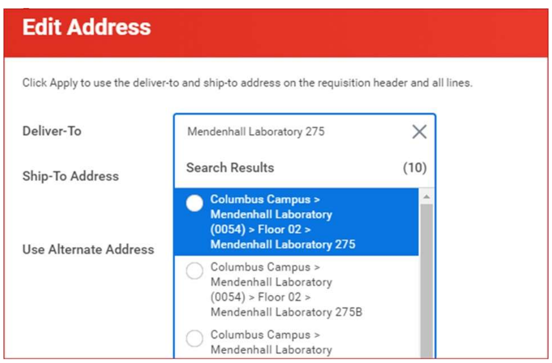
Start Requisition under Requisition Details.

If you need help with your first requisition, no problem — you can set up a Zoom or Teams meeting with the Financial Operations Coordinator, who will walk you through the process step by step for your first purchase.

Useful Tip: When you check out from the supplier's website, you will be redirected to the Workday application. Click "**Checkout**", and Workday will take you to the Checkout page. If this is your first time using Workday, update your delivery address to **Mendenhall** by selecting the item with the three dots next to the "**Continue Shopping**" button.



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



Submit the request. It will route to the School Manager for review and approval. If additional information is needed, the request will be sent back to you in Workday with instructions on what to update or provide.

How to Find Your Requisition in Workday

Follow the steps below to locate and track the status of your requisition (RQ):

- **Go to the Workday Search Bar**
  At the top of your Workday homepage, click into the global search field.
- **Enter Your Requisition Number**
  Type your RQ number exactly as it appears (for example, RQ-00012345).

- **Select the Correct Search Category**
  In the dropdown, choose "Categories: All of Workday."
  This ensures the system searches across all procurement objects.

- **Open Your Requisition**
  When your requisition appears in the search results, click on it to open the record.

- **Review the Status**
  Inside the requisition, you can view:
  - ✓ Current workflow status
  - ✓ Where the request is routed (e.g., School Manager, Purchasing)
  - ✓ Any actions required from you
  - ✓ Attached quotes or supporting documentation

- **Check for Returned Tasks**
  If purchasing or the School Manager needs additional information, the requisition will be sent back to you with instructions.
  You will see this in your Workday Inbox.

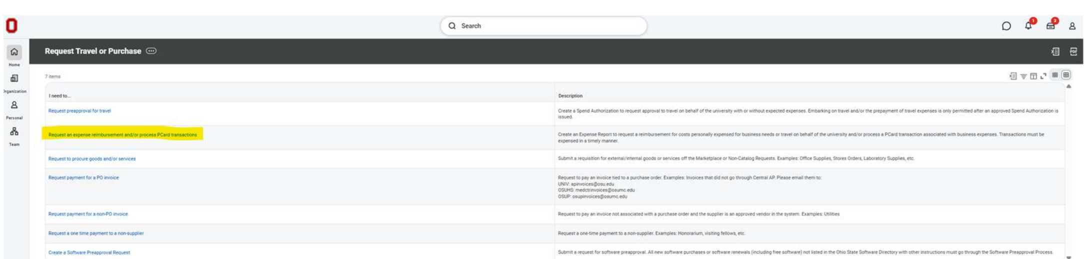
Reimbursements- Expense Reports

Expense reports are submitted on Workday so that you can be reimbursed for **business-related costs**, including both travel and non-travel expenses. When employees purchase items on behalf of the University using personal funds, they are typically required to pay **sales tax** at the point of purchase. In these cases, the employee may be reimbursed for **both the cost of the item and the associated sales tax**, as permitted under University policy.

Below is the job aid from the Administrative Resource Center that provides instructions on how to create an **Expense Report** in Workday.

[Create an Expense Report (Non-Travel) | Administrative Resource Center (osu.edu)]

To begin your reimbursement request, log into Workday and select the "Request Travel or Purchase" application. This will take you to the area where you can initiate an Expense Report for travel or non-travel reimbursements.
"Request an expense reimbursement and/or process PCard transactions"



How to Find Your Expense Report in Workday

Follow the steps below to locate and track the status of your Expense Report (ER):

- **Go to the Workday Search Bar**
  At the top of your Workday homepage, click into the global search field.

- **Enter Your Expense Report Number**
  Type your ER number exactly as it appears (for example, ER-00012345).

- Select the Correct Search Category
  In the dropdown, choose "Categories: All of Workday."
  This ensures Workday searches across all expense-related objects.

- **Open Your Expense Report**
  When your expense report appears in the search results, click on it to open the record.

- **Review the Status**
  Inside the expense report, you can view:
  - ✓ Current workflow status
  - ✓ Where the report is routed (e.g., School Manager, Cost Center Approver, Travel Office)
  - ✓ Any actions required from you
  - ✓ Attached receipts and supporting documentation

- **Check Your Workday Inbox**
  If additional information is needed, the expense report will be sent back to you with instructions on what to update or provide.

If you have questions about Procurement processes, SES Administrative manager and Fiscal Associate can assist you.

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