How to Create a Requisition in Workday for CEMAS Services
Notes:

- This process is required ONLY for users with internal (OSU) funding.

- A requisition is not tied to a specific reservation, service request, or date range. We encourage users to submit a blanket requisition that can cover a larger period of time. Speak with your PI or business unit to learn the amount budgeted for instrument fees, then submit a requisition that has an amount large enough that it could cover month(s) of usage.

- Check out the Chartfield to Worktag Conversion Tool for help determining which account numbers ("worktags") to use.
Overview
Create a Non-Catalog Requisition in Workday:

1. Log into Workday and select “Request Travel or Purchase”
2. Choose “Request to procure goods and/or services”
3. The “Requester” is who will be using CEMAS. If you are submitting on behalf of a CEMAS user, enter their name.
4. Choose “Non-Catalog Request” for requisition type
5. Update Deliver-To address to: “Kinnear Rd, 1275-1305 (0395) > Floor 01 > Kinnear Rd, 1275-1305 101”
6. Consult with your Principal Investigator or business unit to verify worktags are correct and click “okay”
7. Choose “Request Non-Catalog Items” and select “Request Service”
8. Complete Service Request details
9. Choose your Spend Category: USE “SC99999”
10. Choose “CEMAS – Center for Electron Microscopy and Analysis” as the Supplier
11. Click “Add to Cart”
12. Select Shopping Cart icon and review the Checkout page. Update as needed.
13. State the business purpose of the work in the “Internal memo” field
14. Click “Submit” to complete

Workday requisition will be submitted for approval. It must be listed as “Completed” before it can be added to FOM

Add Requisition Number in FOM:

1. Take the requisition number above and to go “My Accounts”
2. Put in requisition into the “Workday Requisition Number”; the description name doesn’t matter
3. Click “add this account” and you should receive success message if it was added. If you receive an error message, check that the requisition was approved in Workday and try again.
Step-by-Step Guide
Create a Non-Catalog Requisition:

**Note:** Non-catalog requisitions are a way to request goods or services not found in Buckeye Buy (formerly eStores)

1. Request Travel or Purchase > “Request to procure goods and/or services”

OR

Search for and select the “Create Requisition” task from the search bar
2. Confirm the information on the **Create Requisition** page:

A) Important: The *Requester* is who will be using the CEMAS facility. If you are submitting on behalf of a CEMAS user, enter their name as the “Requester”

*Note:* The name.# of the Requester must match the name.# of the FOM account, or FOM will reject it.
2. Confirm the information on the Create Requisition page:

B) Update **Deliver-To** field. Type: 1275-1305 (0395) > Floor 01 > Kinnear Rd, 1275-1305 101

**Ship-To** can be Central Receiving 2650 Kenny Rd.
2. Confirm the information on the *Create Requisition* page:

C) Add a Requisition Type to your request

For CEMAS services, select “Non-Catalog Request”
2. Confirm the information on the **Create Requisition** page:

D) Enter your Funding Account: *who will be paying for these services*

Review and enter worktags

Consult with your PI or Business Unit if you are unsure of funding

- **Click “OK” when finished**
3. For CEMAS services, select “Request Non-Catalog Items”

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.

4. For Non-Catalog Request Type, select “Request Service”
A) Fill in a *description of the project* in your own words

- Spell out acronyms

### Service Request Details

<table>
<thead>
<tr>
<th>Description</th>
<th>EXAMPLE: Instrument fees for Air Force Research Lab materials characterization project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commodity Code</td>
<td></td>
</tr>
<tr>
<td>Spend Category</td>
<td>- OFFICE USE ONLY - Do Not Change (SC99999)</td>
</tr>
<tr>
<td>Supplier</td>
<td>- CEMAS - Center for Electron Microscopy and Analysis</td>
</tr>
<tr>
<td>Supplier Contract</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>01/01/2021</td>
</tr>
<tr>
<td>End Date</td>
<td>06/30/2021</td>
</tr>
<tr>
<td>Extended Amount</td>
<td>6,000.00</td>
</tr>
<tr>
<td>Memo</td>
<td>Add additional details if needed.</td>
</tr>
</tbody>
</table>
B) Fill in the **Spend Category**:

- *For CEMAS Services, use “SC99999”*
C) Fill in the *Supplier* – Required for FOM Requisitions

- Select “**CEMAS – Center for Electron Microscopy and Analysis**”
D) Enter a **Start Date** and **End Date**

- Estimation of how long you plan to utilize the CEMAS facility

**Note:** For sponsored projects/grants, not longer than the current project end date
E) Enter **Extended Amount** – amount approved for CEMAS services

- Speak with your PI or Business Unit to learn amount budgeted for instrument fees
- Submit a requisition with an amount large enough that it could cover month(s) of usage

**Note:** Once you reach expense limit, FOM will prevent you from reserving any more time until you enter a new requisition

Click “Add to Cart” to move forward
5. Select Shopping Cart icon and review the **Checkout** page and update as needed.

6. Review the **Requisition Information** section:

- **Internal Memo**: state the business purpose of the work.

  **Note**: it may be good to note **estimated usage** and include link to CEMAS rates.

  EXAMPLE: Instrument fees for materials characterization and analysis at the CEMAS facility. Estimated usage. See CEMAS rates on their website: https://cemas.osu.edu/academia/rates
7. Scroll to review the **Goods** and **Services** lines and change worktags as needed

8. Add **Attachments** if needed (approvals, additional information, etc.)

**Note:** your business unit may require you to upload email approval from your PI
Next Steps
Add Funding Information in FOM

1. Once you create a Requisition and it is approved in Workday, take the Requisition number (example: RQ-100000070) and log into FOM.

2. Go to “My Accounts”.

3. Add requisition into the “Workday Requisition Number”; add description name that will help you identify funding when you are selecting the account to make a reservation.

4. Click “Add this account”.

5. You should receive a success message if it was added. If you get an error, it is likely due to the requisition not being fully approved – check in workday for the status.

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Add a new account

All internal users must provide at least one valid Workday requisition, if you plan on using a facility that bills for usage.

<table>
<thead>
<tr>
<th>Research description name</th>
<th>An easy-to-remember name of the requisition/project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workday Requisition Number</td>
<td>Example: RQ-1000000000</td>
</tr>
</tbody>
</table>
Frequently Asked Questions (FAQ)
Q: Does each Internal User need a separate requisition?
A: Yes. Requisitions cannot be shared between users and can only be used by the “Requester”.

Q: I received an error “The Requested_By Employee_ID of this Requisition Number does not match the user employee ID in FOM system”
A: The “Requestor” name must match the FOM account name login, or FOM will reject it.

Q: Do I need a separate Requisition for each facility I use in FOM?
A: Yes. Requisitions are locked to the facility/supplier.

Q: What address should I use for Deliver-To and Ship-To fields?
A: Click “x” to delete the auto-default address. For Deliver-To, type “1275-1305 (0395) > Floor 01 > Kinnear Rd, 1275-1305 101”. For Ship-To, you can leave as Central Receiving.

Q: How much should I include as the “Extended Amount” for the Requisition?
A: Ask your PI how much is budgeted for instrument fees. We recommend submitting the requisition for an amount large enough to cover month(s) of usage.

Q: I am an external user. Do I need a requisition to utilize CEMAS?
A: No. Workday requisitions for CEMAS services are needed to authorize internal accounts
More Questions?

Contact cemamasadmin@osu.edu