Graduate Student Departmental Policy Handbook 2022

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Introduction

Welcome to the Department of Horticulture!

This handbook has been written to help new and current graduate students become familiar with Department of Horticulture policies and procedures. This handbook covers departmental procedures for making purchases on and off campus, and also includes samples of forms you will need to complete. This handbook includes information regarding processing spend authorizations, a required form to be submitted prior to travel, and travel reimbursement requests, as well as other general departmental policies.

For policies related to your academic program, please review our Graduate Student Academic Policy Handbook on our website (http://www.hort.iastate.edu/graduate-experience/student-handbook/).

Procedures for Making Purchases On and Off Campus

Paperwork must be acquired from the Main Office prior to making most purchases. Following is a list of policies related to different types of purchases. Please submit your order for purchases one-half day in advance to allow time for processing and obtaining required signatures.

On-Campus Purchases

An intramural request form (page 10) is required for IT purchases and purchases at the bookstore. Purchase forms are available on the H-Drive in the Grad Student Information folder. Please complete all requested information on the form. **There is an authorization signature line on the bottom of each form that must be signed by the faculty member or manager who is responsible for the worktag that is being used.** Each line item must also be initialed by the person who signs the authorizing signature line. You will need to plan your purchases in advance to give the office staff time to prepare the intramural. After completing the purchase form, return it to the Main Office and a member of our office staff will type up an intramural and return it to you. If there is not an authorized signature on the form, the intramural will not be prepared. The intramural can be taken to the appropriate center to pick up your item(s). All receipts must be returned to the Main Office immediately. Changes cannot be made to the order without an authorized signature.

CyBuy

CyBuy is a program that has been designed to allow for the procurement of supplies and equipment from contracted vendors in a streamlined online marketplace available through Workday.

Central Stores and Chemistry Stores orders can be completed through Workday using ISU's CyBuy system. Both of these campus entities deliver the orders to the Horticulture building. Central Stores will deliver orders to 106 Horticulture and Chem Stores will deliver orders to the loading dock. If you would like to pick up an order, please indicate "will pick up" in the Fund Acct/Notes box when placing the order.

The following off-campus vendor purchases can be completed using ISU's CyBuy system which is accessed through Workday. Vendors that are currently available on CyBuy that are used frequently by Horticulture faculty and staff include:

Bio-rad	Fisher Scientific	Grainger	New England BioLabs Inc.
Office Depot	Qiagen	VWR International	Carolina Biological
Sigma-Aldrich	B&H Photo	CDW	Promega
Roche Diagnostics	Dell	Eppendorf	Rainin Pipetting
Perkin Elmer	Storey Kenworthy		

The instructions on the following pages show how to access and use the CyBuy system. When a CyBuy order has been received, please remember to turn the packing slip into the main office as proof that the order has been received and can be paid.

Standing Orders

Some faculty members have chosen to set up standing orders at various vendors on campus. A standing order is an authorized form that is submitted to the vendor designating individuals authorized to charge on a specified worktag without obtaining additional paperwork from the department. Your major professor should be informed of any purchases made on a standing order. All accompanying paperwork should be returned to the Main Office immediately after the purchase is made. Please visit with your major professor regarding any standing orders he/she may have set up, or you may check with the main office staff.

Quick Reference: cyBUY Ordering
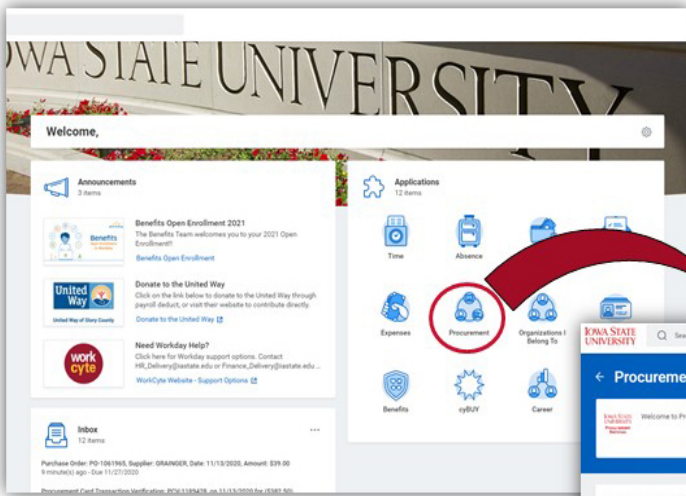
1 Open Workday and click on the Procurement App.

2 Click "Connect to cyBUY" located in the left column.
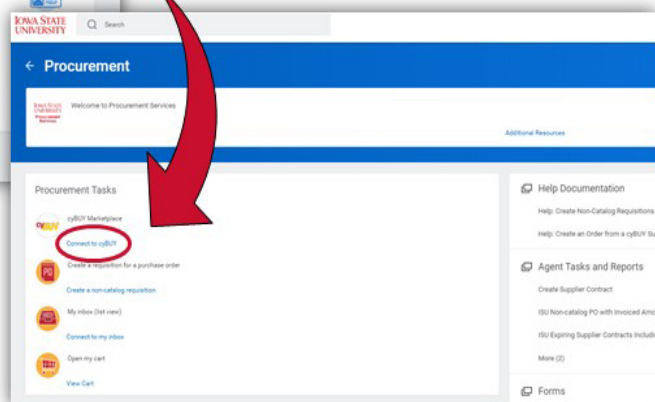
3 Review the information listed below to assure that it is correct.

Information that is not listed below will not impact the order.

Requester: Confirm that this is the correct requester (it will auto-populate with the name of the individual who logged in).

Ship to: Confirm that this address includes your room our suite number (it will auto-populate and will likely need to be changed).

If it does not, search by your 4 digit room or suite number (example: for room 200 you would type 0200) and find the address that contains your room or suite number and your building street address so that your order will reach you.

Worktag Information: Enter the necessary Worktag information to identify where this order should be charged.

Grant: GR
Project: PR or CP or FSU
Program: PG

Gift: EG or SG
Department Detail: DD
Assignee

4 Click the OK button when all information has been reviewed and is correct for this order.
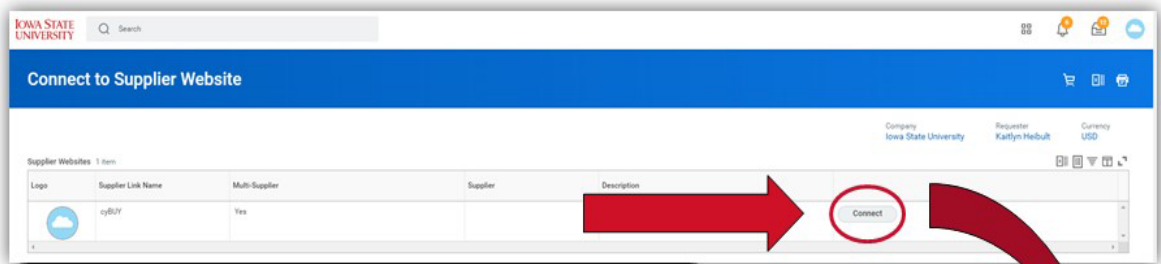
5 Click Connect.

This will open the cyBUY Supplier Marketplace (ESM) and allow you to see the contracted suppliers from which you can place an order.
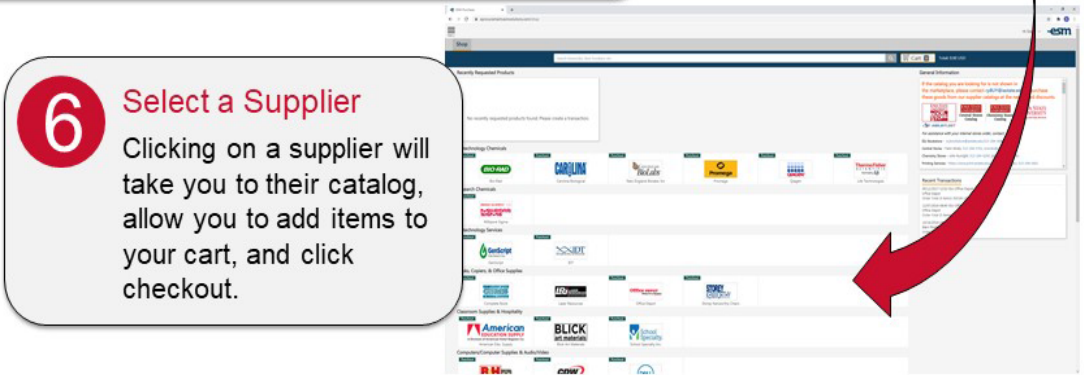
6 Select a Supplier

Clicking on a supplier will take you to their catalog, allow you to add items to your cart, and click checkout.
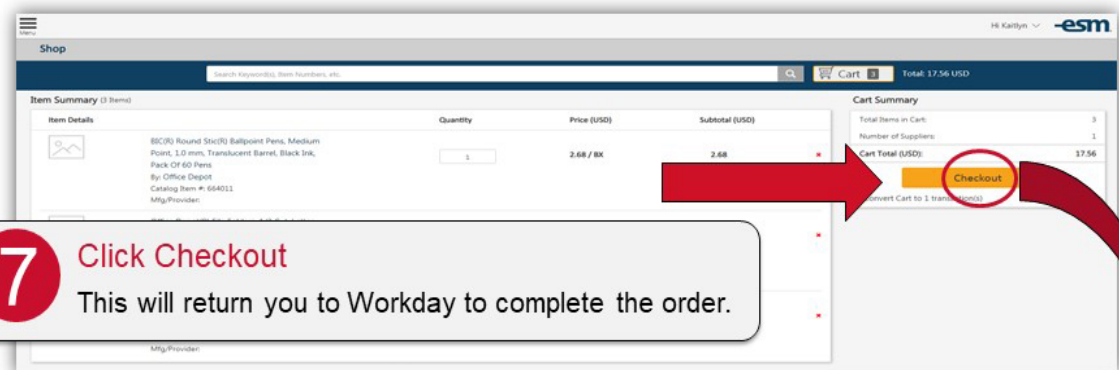
7 Click Checkout

This will return you to Workday to complete the order.
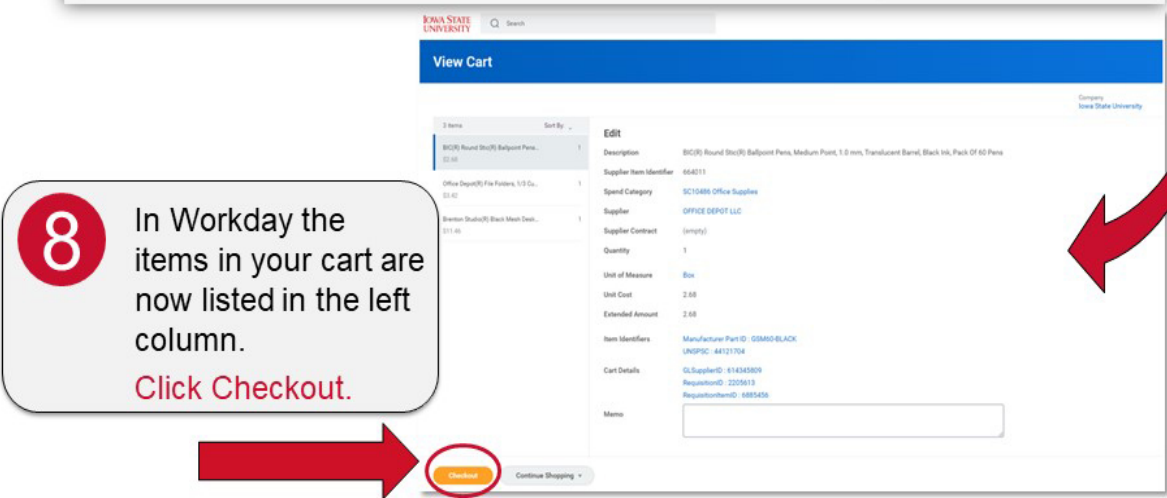
8 In Workday the items in your cart are now listed in the left column.

Click Checkout.

9 Review and add the information listed in red below.

Checkout

Always choose a new Ship-To address that has a room or suite number along with the building street address. The Ship-To address can be changed on the first screen of the Requisition or by clicking on the three dots at the bottom of the Checkout screen and choosing Edit Address.

Shipping Address

Ship to Address: Confirm that this address includes your room our suite number (it will auto-populate and will likely need to be changed).

Internal Memo: Add the University Business Purpose for this purchase.

Worktag Information: Verify that the Worktag that should be charged for this order appears in the corresponding column in this section. If it does not, you will need to enter the correct Worktag for each item.

10 Click Submit.

The order will now route through the ISU approval process, starting with an ISD Procurement and Expense Specialist (PES).

You will receive a Workday notification when the PO is created and sent to the cyBUY supplier to order the requested items.

Additional Resources

Writing a University Business Purpose

Includes information on what should be included in a University Business Purpose Statement as well as examples.

cyBUY Ordering Creating an Order from a cyBUY Supplier Workday Knowledge Base Article

Includes step by step instructions and screenshots for each step in the process.

Procurement Services Website

Includes contact information for the cyBUY team, information on checking your order status and editing orders, and FAQs for ordering through Internal Stores and the Iowa State University Amazon Business Account.

ISD Procurement and Expense Specialists (PES)

If you would like a PES to submit the order on your behalf, please make sure to list the item(s), quantities, Worktag(s), and the university business purpose for each item you would like to have purchased in your email.

Travel Policies and Reimbursement

The Department of Horticulture requires spend authorizations for all out-of-state travel be completed and approved prior to your travel. This form includes a business purpose, an estimate of your expenses, and the funding source that these expenses will be paid from. Please complete the form (sample on page 11) and submit to finance_delivery@iastate.edu for processing. Blank forms can be found in the Graduate Student Information folder on the H-drive.

If you will be traveling by air, ISU travelers can order airline tickets through an ISU contracted agency. Please see step by step instructions below. **Please contact finance_delivery@iastate.edu for assistance.**

A travel expense reimbursement will be processed after your trip for reimbursement of allowable expenses. Reimbursement requests can be submitted on a form (see page 13) and sent to finance_delivery@iastate.edu for processing.

Instructions on Ordering an Airline Ticket through Iowa State's contracted Travel Agencies

If you are flying **domestic** your major professor can purchase your ticket with their travel and hospitality purchase card.

Contact **Corporate Travel Planners** as this is the Iowa State University contracted Travel Agency. To contact a travel agent the phone number is 855-261-7787. Their hours are 7:00 a.m – 6:00 p.m. Monday through Friday. There is a service fee charge of $25.00. You can request an email itinerary from the travel agent to review before booking your ticket.

If you are flying **internationally** Iowa State has a contract with the Travel Agency **Key Travel.** To contact a travel agent at Key Travel the phone number is 646-289-6836. Their hours are 8:00 a.m. – 4:30 p.m. Monday through Friday. Their service fee is $25.00. You can request an email itinerary from the travel agent to review prior to booking your ticket.

Please note that if you choose to purchase your ticket using your personal credit card you will be reimbursed after the trip. By using your personal credit card you assume all risk. If the trip is cancelled, ISU will not reimburse you for the cost of the ticket.

Policies Related to Use of Equipment and Materials in the Main Office

The Main Office will provide you with a copy code number to operate the copy machine in the work room of the horticulture building for official business purposes. The Main Office does a monthly count of the number of copies per person.

Benefits

You will receive a packet from Human Resources explaining your benefits. Please refer to this packet for detailed information.

Office Space for Graduate Students

Graduate students on assistantship are assigned desk space in an office or a laboratory depending on availability. Graduate students who are not on assistantship are provided desk space if space is available. Because of space limitations and a desire to promote collaboration, cooperation, and a sense of community, graduate student desks are often clustered together in offices scattered throughout Horticulture Hall.

Building Keys

Building Security Systems is a unit within Facilities Planning and Management (FP&M) that provides keys and manages building access cards to university faculty, staff and students for all general university buildings.

Building keys are provided to graduate students for the outside door of Horticulture Hall, your assigned office space, greenhouse, and other rooms **as requested by your major professor**. Keys are ordered by main office staff and a signature sheet is provided to you, which is required to pick up your keys. Keys are available for pick up at the General Services Building, key issue desk. Key requests made by 4:45 p.m. during the academic year, 3:45 p.m. during summer, and winter holiday breaks, will be ready at 12:00 p.m. the next business day. Keys requested will be held at the Key Desk for 30 days from the date of the request. After 30 days, keys will be returned to stock, and will require a new key request to be initiated by the department key coordinator. There is a $25.00 replacement charge per key paid by the student or major professor if lost or not returned.

Please complete the Key Request From (sample on page 15) and submit to the main office for processing. Blank forms can be found in the Graduate Student Information folder on the H-drive.

Departmental Computer Hardware, Software and Related Policies

Department of Horticulture Computer Support Model

The Department of Horticulture is associated with central Information Technology for computer hardware, software and support. Included in this support is a part-time ITS professional housed in the Horticulture building and an elevated support model that allows Horticulture graduate students to call the Solution Center at 4-4000 and receive additional help on supported hardware and software. When calling the Solution Center, be certain to reference the ITS support tag that is found on the front of computer hard drives and printers. Hardware and software is tracked by an inventory system so do not move hardware or software without contacting the departmental IT professional.

Getting Started

Information found on the IT http://newtoisu.it.iastate.edu/students provides a quick start guide to ISU's technology and will provide you with the information you need to get started at ISU.

File Storage

CyBox is Iowa State's implementation of Box.com cloud storage. CyBox provides storage and collaborative tools for sharing files within and external to Iowa State. CyBox includes an unlimited quota of cloud-based file storage and sharing for all students with a valid Iowa State Net-ID. Files stored on CyBox can be synched between multiple devices, and accessed from anywhere, including on mobile devices with the Box.com app for iOS and Android.

The Department of Horticulture also has a local storage service called \\MyFiles.iastate.edu\hort$ that is for faculty/staff/graduate students. Files saved in this location can be accessed on campus and can be shared within the department. You will need to talk to your major professor to get access to this file server.

These files can be accessed off campus by using the VPN https://www.it.iastate.edu/howtos/vpn.

University Policy on the Acceptable Use of Information Technology Resources

Iowa State University provides information technology resources to a large and varied group, including faculty, staff, students, and guests. All members of this community are accountable for using these resources in an ethical and respectful manner that protects sensitive University information and follows the information technology policies and procedures listed at this website: https://www.it.iastate.edu/policies/

Horticulture Computer Labs

The Department of Horticulture provides a computer lab in room 61 that is available to all Department of Horticulture students via an access code that will be provided to you by a staff member in the main office. This lab has dual monitors on each computer, Adobe Creative Suite software, printing on a networked printer and there is access to a scanner in the lab.

Use of Campus Mail Service

Postal & Parcel Service, located in the General Services Building (often referred to as the Physical Plant), provides delivery and pickup of all U.S., International, and campus (interdepartmental) mail for major campus buildings. Outgoing U.S. and International mail is collected, and postage is metered and dispatched from Postal & Parcel Service. Personal, pre-stamped first-class mail is also picked up by the U.S. Postal Service from drop boxes located at various spots on campus.

The time of mail pickup in the Department of Horticulture is approximately 9:30 a.m. Mail that has been delivered to our department will be sorted into individual boxes by 10:00 a.m. each day.

All outgoing mail -- Campus Mail / U.S. Mail / International Mail / UPS -- will be picked up once a day from the wire basket in our work room adjacent to the Main Office. Do not put personal mail in the dept outgoing mail as it will not be picked up.

Interdepartmental On-Campus Mail

Brown envelopes (they can be reused many times) can be found on the work table or in the supply cabinet near the copy machine. Simply address it with person's name you are sending it to, name of department, and building name and room number. Then it can be placed in the wire basket on the ledge in front of our mailboxes for pickup.

Outgoing U.S. Mail

Metered postage is applied at the mail center for all outgoing university U.S. mail. All items sent to the Postal & Parcel Service for metering must have an official university return address. Packages, as well as letter mail, will be carried by Postal & Parcel Service carriers. Mailing instruction cards that indicate the type of service desired should be attached to each package. **Mail Instruction Cards are available in the Main Office.** Please attach a bar code label to the card, which is available from your major professor.

International Mail

Letters and parcels destined to foreign countries can be processed by the Postal & Parcel Service. As with U.S. mail, each letter or parcel must have a completed mail instruction card attached indicating the class of service desired. Parcels must have an official university return address. Please attach a bar code label to the card, which is available from your major professor.

UPS, FedEx, Airborne and other Special Services

If you have something that needs to be shipped by one of the above carriers, attach a mail instruction card indicating the service desired. The addressee's name and address must be on the back of the card. These services cannot deliver to a post office box number. The address must contain a street listing or building name. Please attach a bar code label to the card, which is available from your major professor.

Building Address

Department of Horticulture
2206 Osborn Drive
Ames, Iowa 50011-4009

If you can include the addressee's phone number, it would be beneficial.

To be used for graduate student intramural purchase requests

Intramural Request

Intramural Request to:

☐ Bookstore

☐ Information Technology (IT)

☐ Other _____

(Person authorizing this purchase **must** place **initials** after each line.)

Qty	Item Description	Price	Initials

Worktag #: _____

Dept. Detail: _____

Assignee: _____

Authorization Signature: _____ Date: _____

Special Instructions for Processing: _____

Business Purpose

Why item/service is being purchased:

How/Where it will be used:

This is to certify that if the above is being charged to a sponsored project, the items purchased is an allowable expense and will be used 100% on the sponsored project that incurred the cost.

Faculty Signature: _____ Date: _____

Request Spend Authorization

Name:_____
Email:_____
Department:_____
Is the traveler an employee? Yes ___ No___
Department or Cost Center: _____
Traveler's Department or Cost Center: _____
Please enter the funding department for this request

Travel Departure Date:_____

Travel Return Date:_____

Describe Business Purpose: _____

Is travel foreign? Yes___ No____

Does the traveler need an air ticket booked? Yes___ No____

Please estimate expenses for the following categories:

Air Travel
    Airfare _____
    Baggage _____
    Preferred Seating_____
Lodging and Meals
    Lodging _____
    Daily Meals _____
Car and Ground Transportation
    Car Rental _____
    Fuel _____
    Mileage_____
    Parking_____
    Rail/Subway Service _____
    Taxi and Ground Transportation _____
    Tolls_____
Other Travel Expenses
    Seminar Registration _____
    Entertainment (Business Use Only) _____
    Gifts (Business Use Only) _____
    Internet (Business Use Only) _____
Miscellaneous Travel Expenses _____
MISC travel expenses are defined as those costs not considered primary means of transportation, lodging related or included under the University and incidental per diem allowance but still reimbursable under the
Summary of Allowable Expenses

Total Spend Authorization Requested: _____

Funding Information
Driver Worktag: _____
Contact Name: _____
Preferred contact method for follow up:
      email____
      phone____
Contact Phone: _____
Contact Email:_____
Please provide any special or additional requests or specifications: _____
Will you need a travel advance? Yes___ No___
                                           _____
                                           _____
                                           _____
                                           _____

Request a Reimbursement

Requestor Name: _____

Email: _____

Department: _____

Is the traveler an employee? Yes __ No___

Traveler's Name/ ISU ID/ Phone number: _____

Traveler's Department or Cost Center: _____

Please enter the funding department for this request

Travel Departure Date & Time: _____

Travel Return Date & Time: _____

Describe Business Purpose: _____

Departure airport (if applicable): _____

Destination airport (if applicable): _____

Total Mileage to airport: _____

Total Mileage from airport: _____

Additional Mileage and list all destinations (if applicable): _____

Please enter actual expenses for the following categories:

Air Travel

     Airfare _____

     Baggage _____

     Preferred Seating_____

Lodging and Meals

     Lodging _____

     Is this reimbursement paid with grant funds requiring actual meal costs? Yes ___No _____

          If yes: Actual Meal Costs: _____

                 Group Meals: _____

          If no: Include Per Diem Meals? Yes __ No___

                 Group Meals: _____

                 For group meals, please attach a listing of all attendees for meal and a PDF copy of receipt

Car and Ground Transportation

     Car Rental _____

     Fuel _____

     Parking_____

     Rail/Subway Service _____

     Taxi and Ground Transportation _____

     Tolls_____

Other Travel Expenses

     Seminar Registration _____

     Entertainment (Business Use Only) _____

     Gifts (Business Use Only) _____

     Internet (Business Use Only) _____

Miscellaneous Travel Expenses _____

MISC travel expenses are defined as those costs not considered primary means of transportation, lodging related or included under the University and incidental per diem allowance but still reimbursable under the *Summary of Allowable Expenses*

Actual Expense Total: _____

(Not including mileage or per diem meals):

Funding Information
Driver Worktag: _____
Contact Name: _____
Preferred contact method for follow up: email _____ phone _____
Contact Phone: _____
Contact Email: _____
Please provide any special or additional requests or specifications: _____

_____

_____

Receipts are required for lodging, airfare, group meals, and expenses over $75, or if using a grant requiring receipts. If receipts are required, please attach in a PDF format.

<u>Key Request Form</u>

Please return or e-mail this signed form to Kathy Hein, 106 Horticulture or
<u>kahein@iastate.edu.</u> If this form is attached and emailed, this request must
originate from the Faculty or staff member in charge of the space.

Name: _____

Date: _____

University ID: _____

New Key ☐ or Replacement Key ☐ Renew every 3 months, 6 months, or 1 year
List of Room Numbers for Keys Requested in the Horticulture Building

<u>Room #</u>	<u>Key #</u>	<u>Signature of Supervisor of Room</u>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		