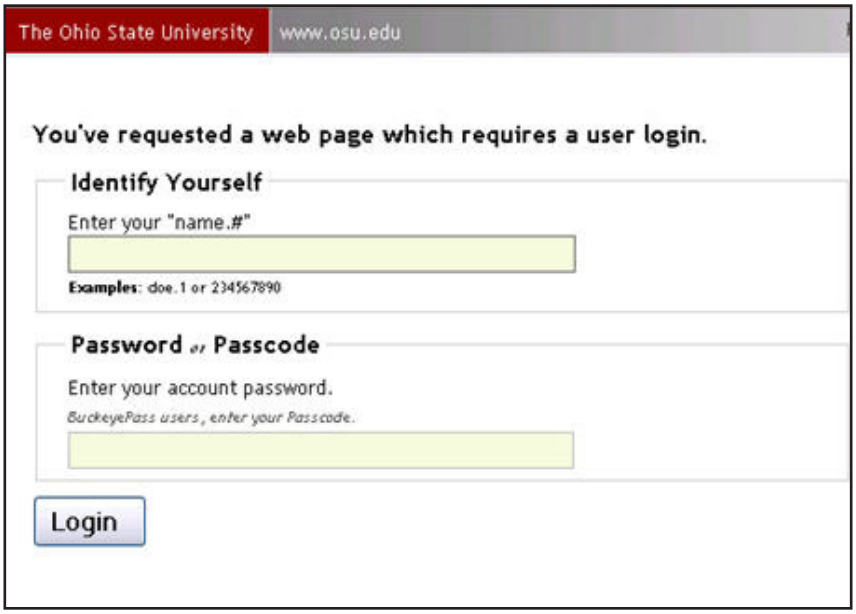
Entering an eRequest

The eRequest is an easy way for an employee to submit a request for goods, services, or payments. No prior knowledge of the University procurement process is necessary for completing this online, electronic form. The approval process is handled automatically through the routing of the form. Once approved, the request will be fulfilled through a local service center or delegated buyer.

Login Page

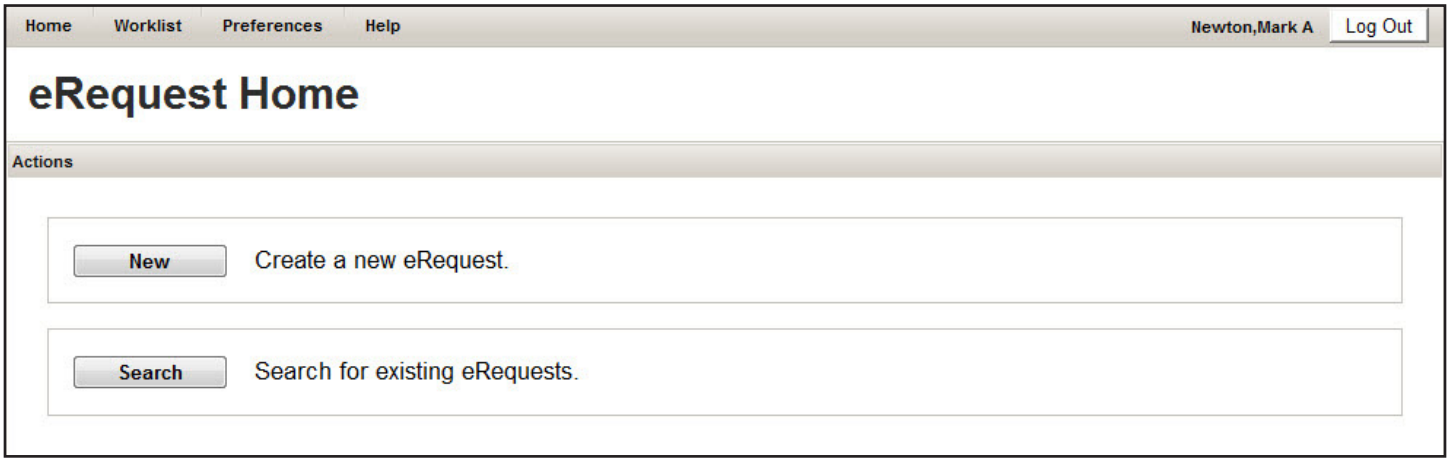
The login page for the online eRequest form can be found at https://erequest.osu.edu. Simply enter your OSU Internet username (Name.#) and password.



Click Login.

eRequest Home

On the eRequest Home page, you may enter a new eRequest or search for an earlier request to check its status.

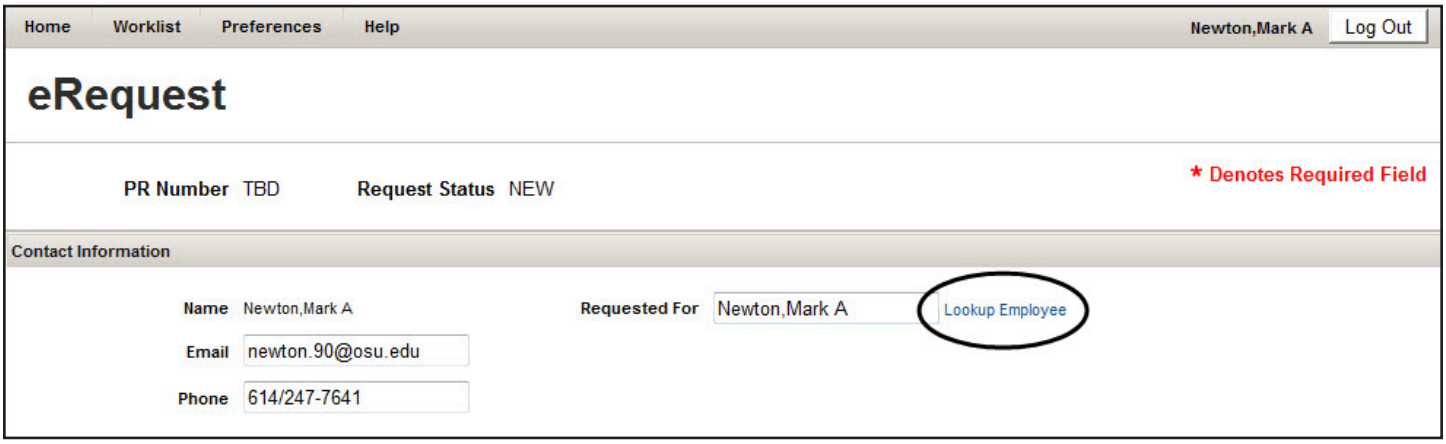


Click to create a new eRequest.

Header and Contact Information

The first thing you will notice on the eRequest form is the **PR Number** which is TBD (To Be Determined). A unique number will be assigned once the request is saved or submitted for approval. You may use this PR Number to track the status of the request. Next is the **Request Status** which will indicate where this request is in the approval/fulfillment process. Right now, the status is **NEW**. After the request is submitted, the status can change to **PENDING**, **APPROVED**, **DENIED**, **CANCELED, or COMPLETED**.

***Denotes Required Field** indicates that any field name preceded by a red asterisk must be completed. If there is no entry, an error message will appear when the request is submitted for approval.

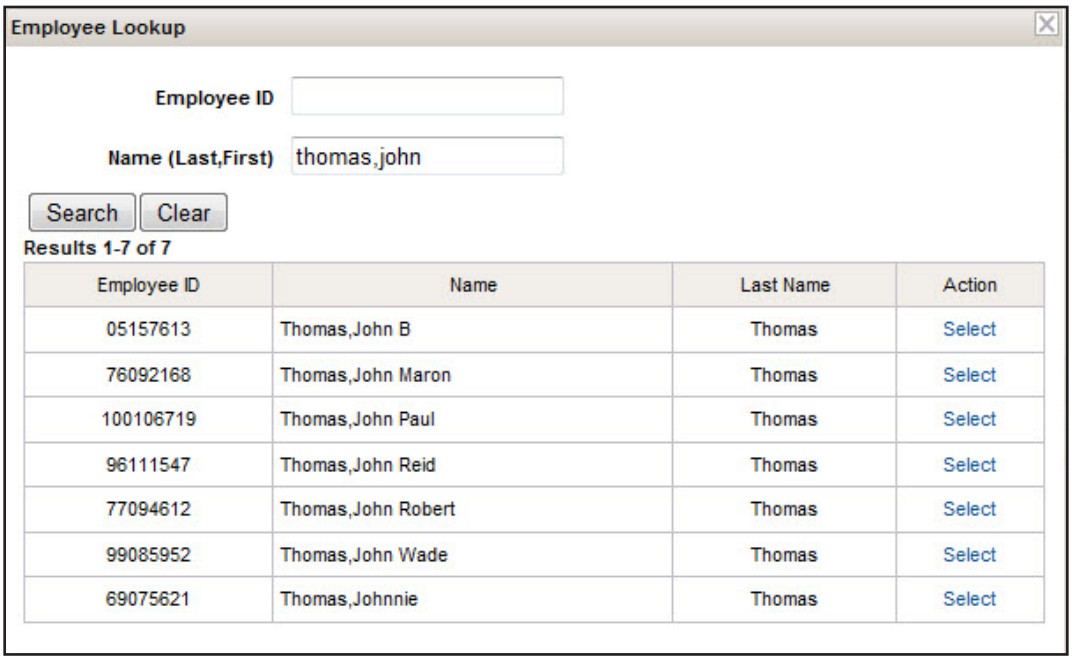


Contact Information is imported from the Faculty/Staff directory based on your login. For those assigned the Self-Service role, the **Requested For** field will also show your name but it cannot be changed. This means you may only enter your own orders.

Those who have the role of Requester may enter orders for others. If you are placing an order for someone else, replace your name by clicking [Lookup Employee] next to the **Requested For** field.

Enter the individual's **Employee ID** (if known) or **Name** in the Employee Lookup box and click Search.

In the results list, click [Select] next to the desired employee to add the employee's name to the **Requested For** field. This will also update this employee's Organization Number in the **Org Number** field on the Funding Source section of the eRequest.



Employee Lookup

Employee ID

Name (Last,First) thomas,john

Search Clear

Results 1-7 of 7

Employee ID	Name	Last Name	Action
05157613	Thomas,John B	Thomas	Select
76092168	Thomas,John Maron	Thomas	Select
100106719	Thomas,John Paul	Thomas	Select
96111547	Thomas,John Reid	Thomas	Select
77094612	Thomas,John Robert	Thomas	Select
99085952	Thomas,John Wade	Thomas	Select
69075621	Thomas,Johnnie	Thomas	Select

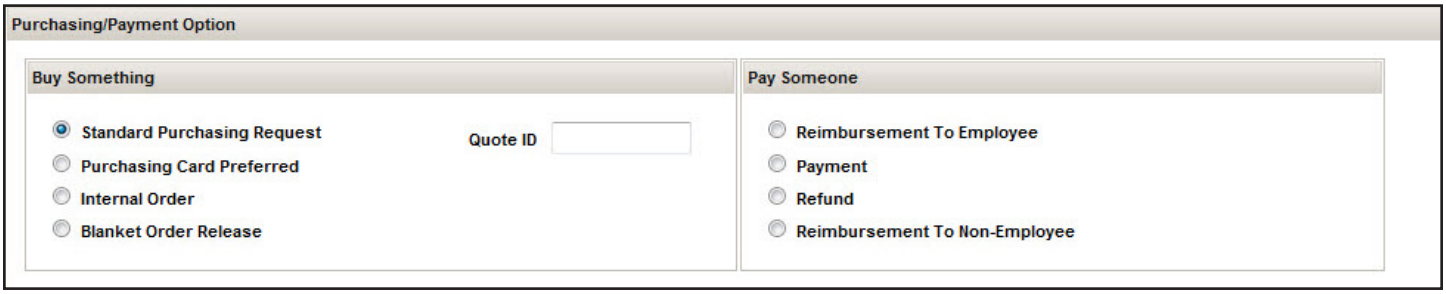
Note: You may simply enter the employee's name by typing it in the **Requested For** field. However, this will not update the **Org Number** on the Funding Source section.

Purchasing/Payment Option

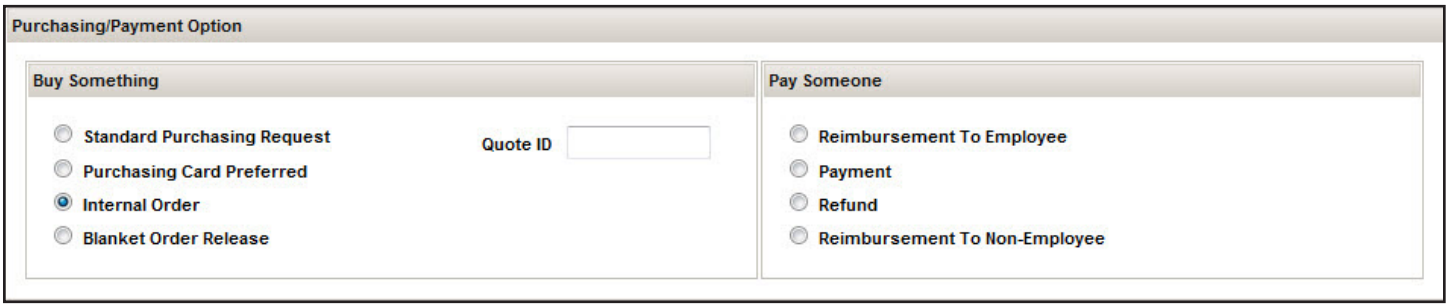
Since eRequest can be used for both purchases and payments, Purchasing Options are shown under **Buy Something** and Payment Options are under **Pay Someone**.

Buy Something

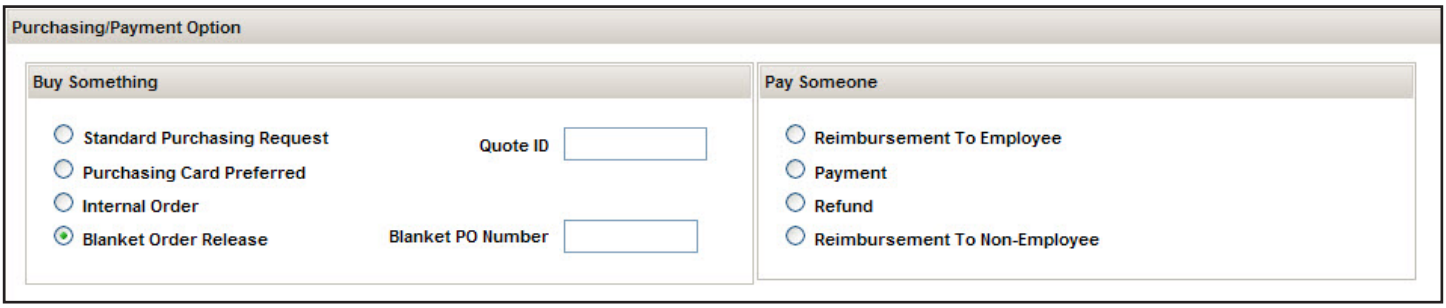
Standard Purchasing Request is the default Purchasing Option and will be used for most of your eRequests for purchases. If you have received a quotation for the purchase, enter the quote number in the **Quote ID** field.



Internal Order is chosen to place an order with an internal OSU supplier (e.g. UniPrint, University Catering, Drake Union/Theatre).



Select **Blanket Order Release** if you know that a blanket order exists for your purchase. Enter the blanket purchase order number in the **Blanket PO Number** field. If you are requesting a new blanket order, select the **Standard Purchasing Request** radio button.

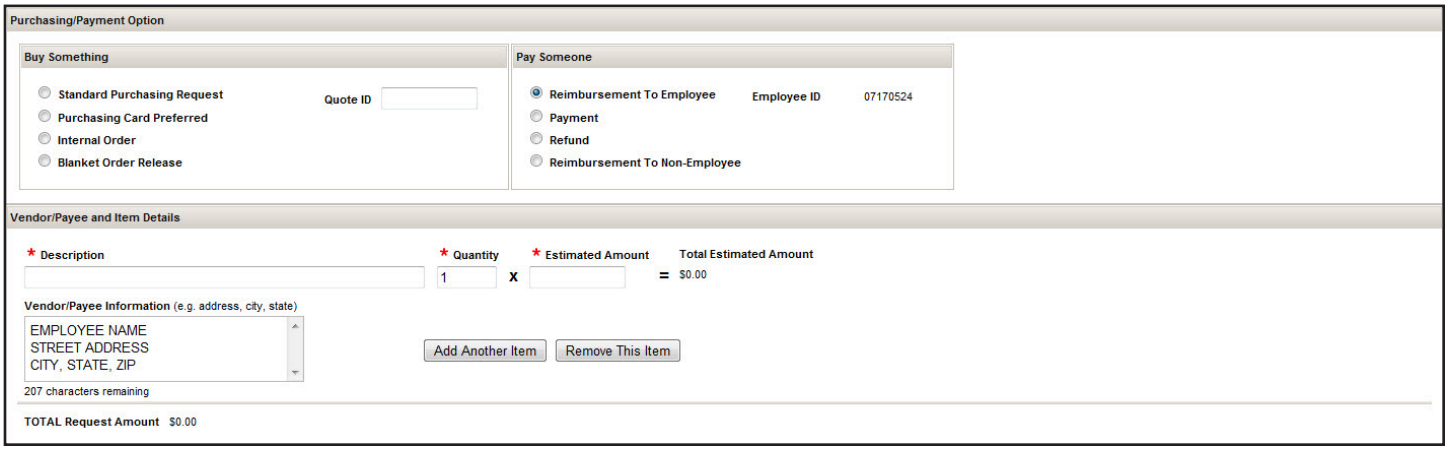


Pay Someone

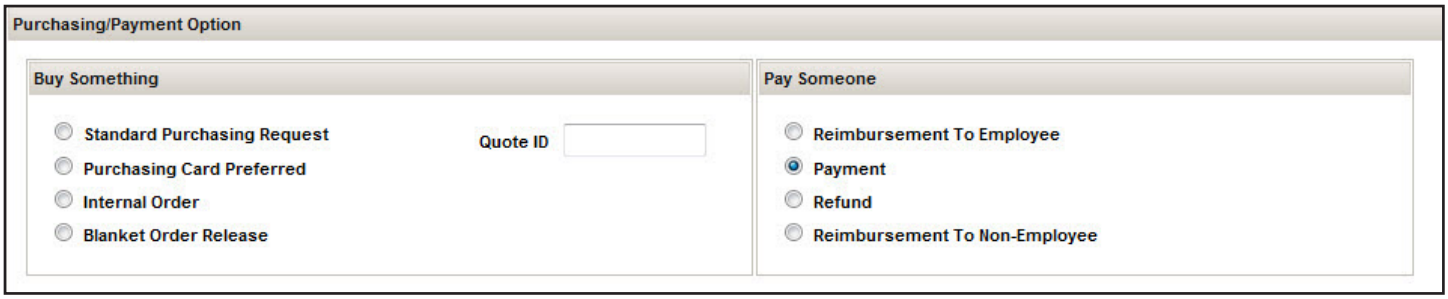
Select **Reimbursement to Employee** to request payment for purchases made on behalf of the University. If you are assigned the Self-Service role you may only request reimbursement for yourself. The **Employee ID** field will populate automatically based on your login.

If your role is that of Requestor, you may enter a reimbursement request for another employee. Enter the **Employee ID** or click the [Lookup Employee] link to find it.

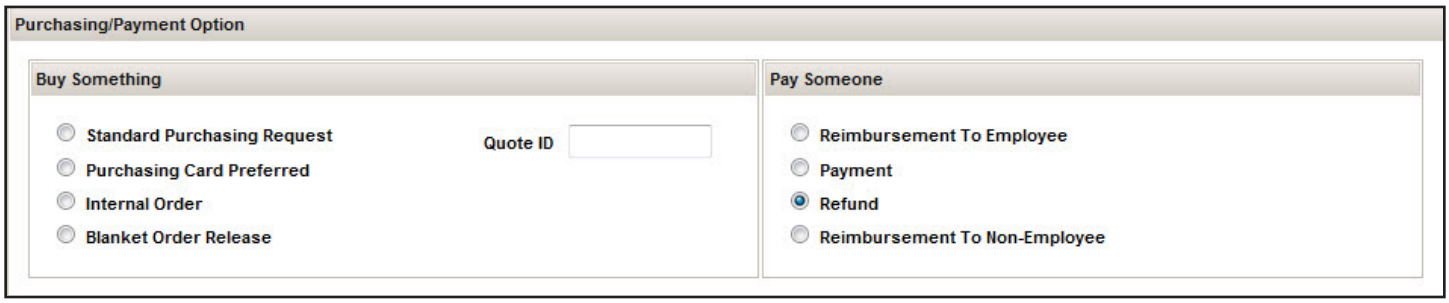
Vendor/Payee Information will show the employee's address based on the Employee ID and information currently in the Human Resources system.



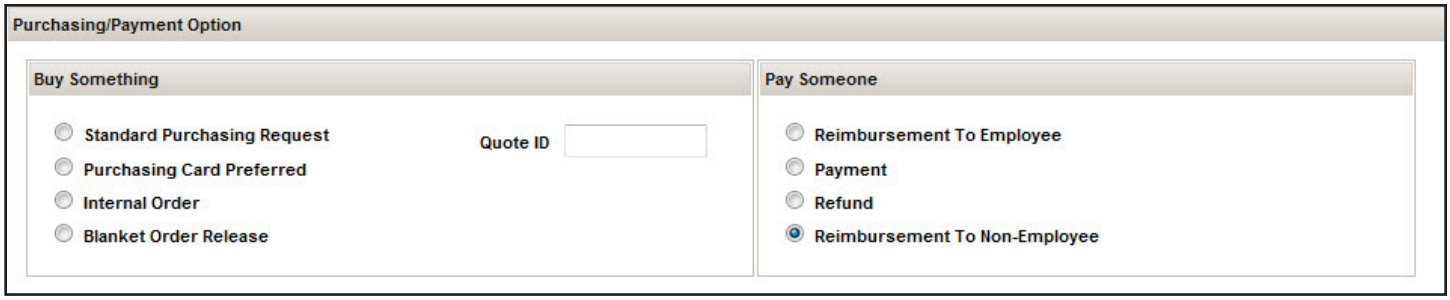
To make a payment against a convenience order number, select **Payment**. Some examples of payments include honorariums, memberships or registration fees.



To request a refund to an employee or non-employee for money paid to the University, select **Refund**.



Select **Reimbursement to Non-Employee** to reimburse a non-employee for money spent on behalf of the University.



Vendor/Payee and Item Details

eStores is the preferred purchasing tool for university faculty and staff to research and order needed goods and/or services. (See the Job Aid Preparing Internet Explorer 7 & 8 for eRequest.) To access eStores from the eRequest, click eStores. This will open the eStores site and you will be able to search for items in OSU hosted catalogs or external supplier catalogs and add selected items to a shopping cart. When you complete the checkout process, the contents of the shopping cart will be transferred to the **Vendor/Payee and Item Details** section of the request. At this point you will not be able to change or add items to the request.

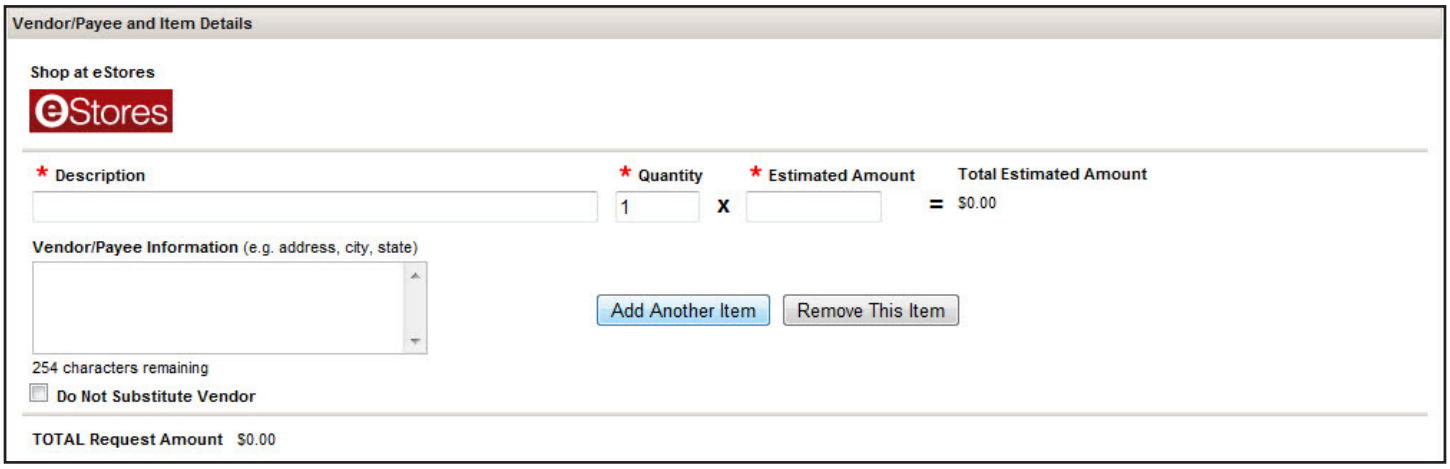
If you decide not to use eStores, you can add items manually. The **Description** field is required and provides a place to enter information about the item. This may include the name, manufacturer, item number, unit of measure, color, etc. You must also include the **Quantity** and **Estimated Amount** for the item. These will be used to calculate the **Total Estimated Amount**.

Note:

- The **Estimated Amount** is limited to 8 characters, including the decimal point. An entry of 99999.99 (eight characters) will be shown as $99,999.99. Entering 99999999 (eight characters) will result in $99,999,999.00.
- The **Estimated Amount** may be a negative number if you are requesting a credit, such as a credit for a Purchasing Card purchase.

In the optional **Vendor/Payee Information** text box, you may include information regarding a vendor or payee for the item including the name, address, phone, fax number, etc. If **Reimbursement to Employee** was selected in the payment options section, the employee's name and address will be seen in the **Vendor/Payee Information** box. The final choice of vendor will be made by your service center or delegated buyer according to established purchasing policies and agreements. If a specific vendor is required, click the **Do Not Substitute Vendor** check box and enter the reason in the **Additional Info** text box in the next section of the form.

Note: You should include only one Payee on an eRequest for a payment.



If you wish to add additional items to the request, click Add Another Item and repeat the above steps. The **TOTAL Request Amount** will show the total estimated cost of all the items on the eRequest.

Click Remove This Item if you decide you do not want an item you have entered.

Remember, if you decide to shop at eStores after entering items manually, all of these items will be lost.

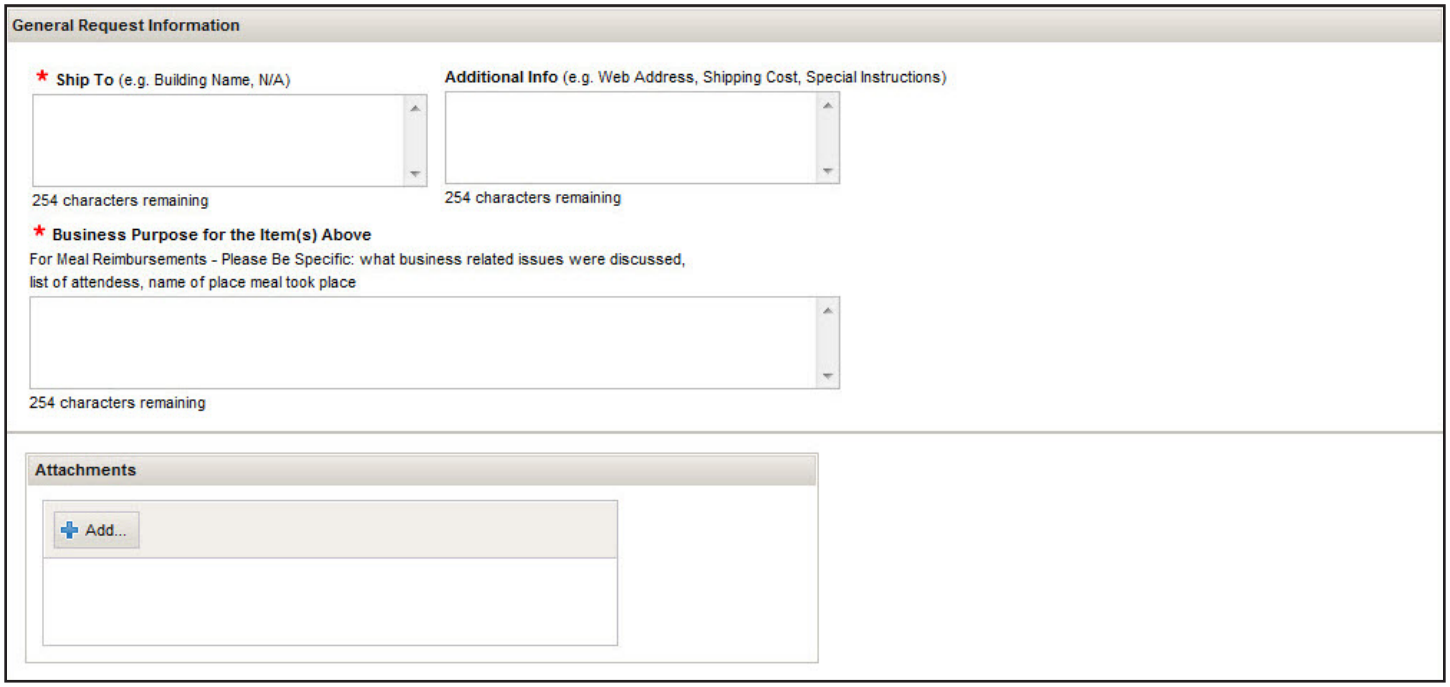
General Request Information

Ship To is a required field used to indicate the final destination for the item. This may include the street address, building and room number. Type N/A if the item will not be shipped.

Note: For payments, use N/A in the **Ship To** text box.

The **Additional Info** text box is for entering important details regarding your order including additional item information, shipping costs, or special instructions regarding the request. Entries are limited to 254 characters.

A valid business purpose must be entered in the **Business Purpose for Item(s) Above** text box. A valid business purpose describes the reason for the purchase or payment.



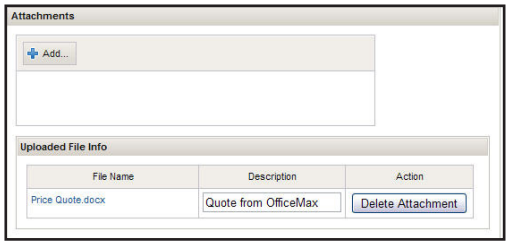
Attachments of up to 10 MB each can be added to an eRequest to provide additional information to approvers such as price quotes, product images, product descriptions, etc.

Click

to add an attachment. Select the correct file, then click

. Acceptable file types are:

- PDF
- Excel
- Word
- Image files (JPEG, GIF, etc.)
- Text and rich-text files



Uploaded File Information will appear in the **Attachments** box.

It is suggested that you add a description to your file to easily identify it later.

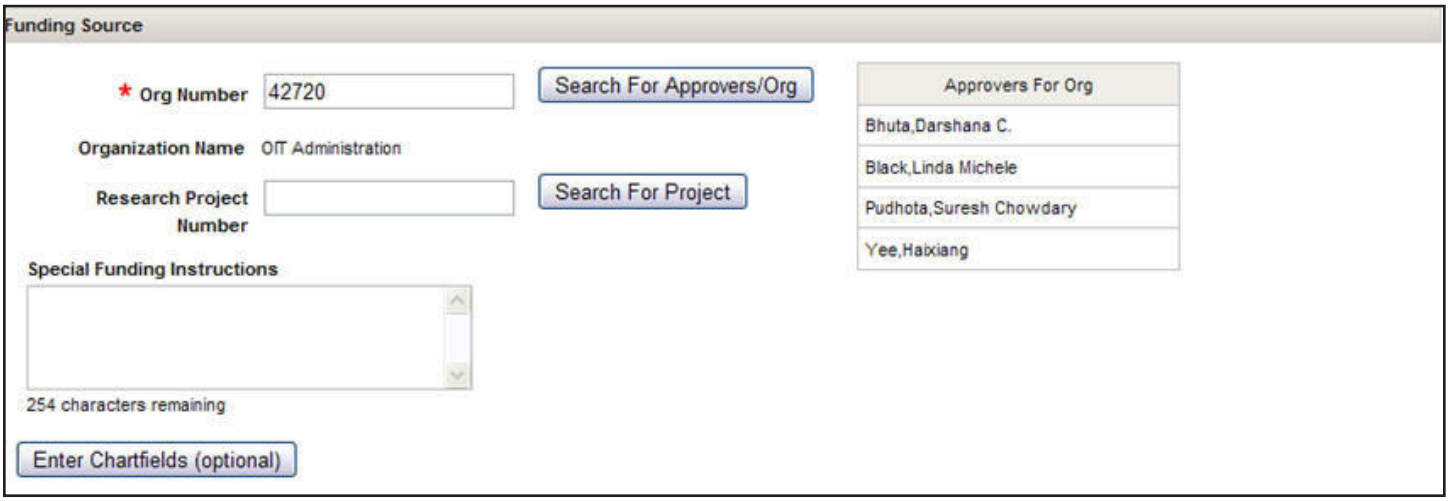
To delete the file, click

.

Funding Source

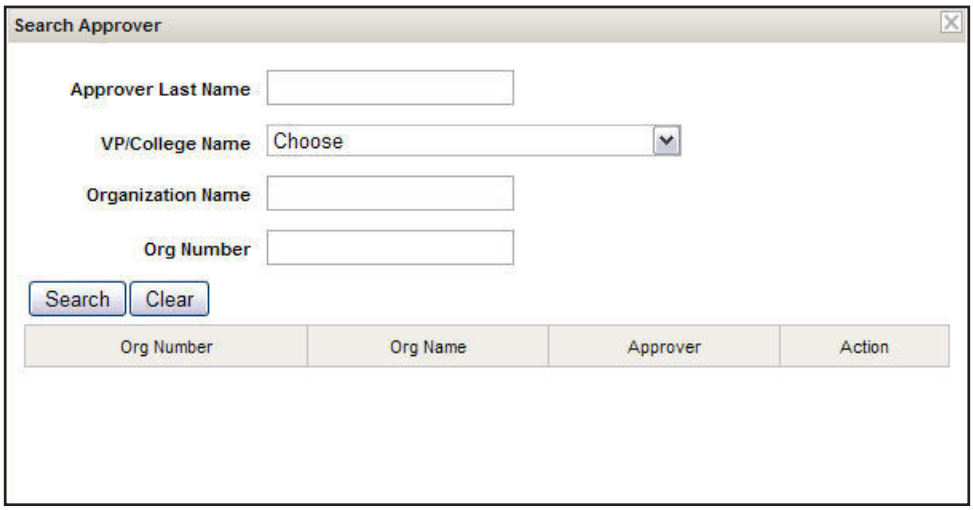
Org Number will have your home organization number as the default.

If you used the Employee Lookup feature to add another employee in the **Requested For** field on the Contact Information section, the **Org Number** will have been updated to that employee's home organization. If you typed the employee's name in the **Requested For** field, this will not update the **Org Number** on the Funding Source section.

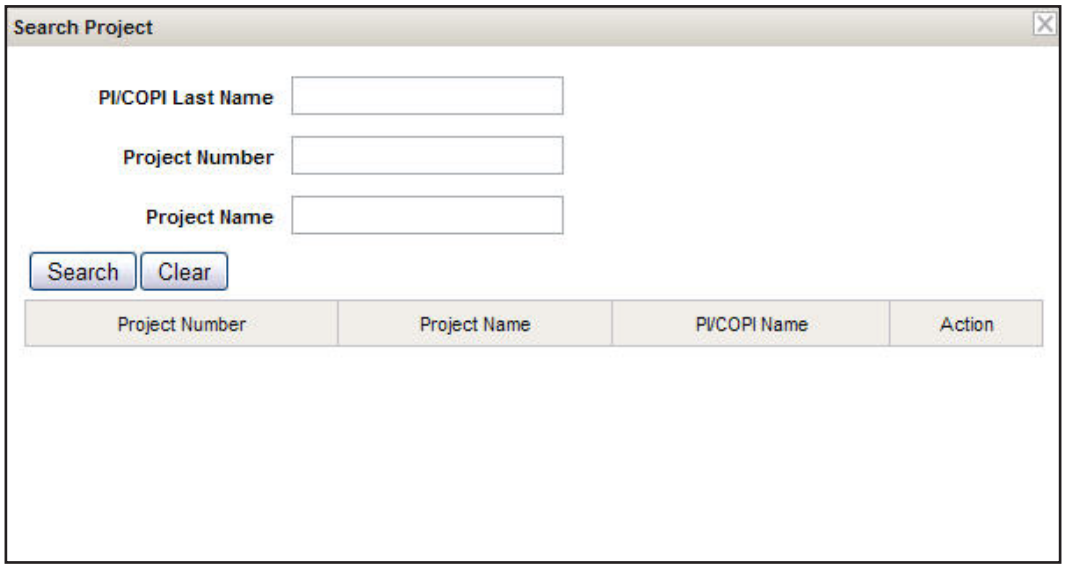


Approvers for Org lists the individuals who will be reviewing this request.

If you are placing a request for another Org or you do not see your approver in the **Approvers For Org** list, you may type in the correct Org Number or click Search For Approvers/Org to search by your **Approver's Last Name**, the **VP/College Name**, the **Organization Name** or the **Org Number**.

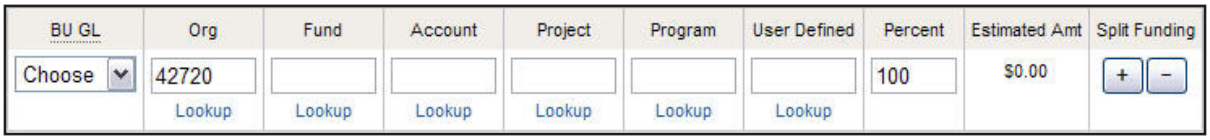


If applicable, enter the **Research Project Number** or click Search For Project if you do not know the number. In the Search Project window, you can search for the project by **PI/COPI Last Name**, **Project Number**, or **Project Name**.



The **Special Funding Instructions** text box can be used to enter additional information or instructions regarding funding.

If you know the chartfields to be used for this request, click Enter Chartfields (optional) and enter the information. Otherwise, these entries will be made during the approval process.



Actions

If you are not ready to submit the request, click Save For Later. Write down the PR Number at the top of the form so that you will be able to search for it later.

To cancel this eRequest, click [Home] at the top of the form. All the information you entered will be lost.

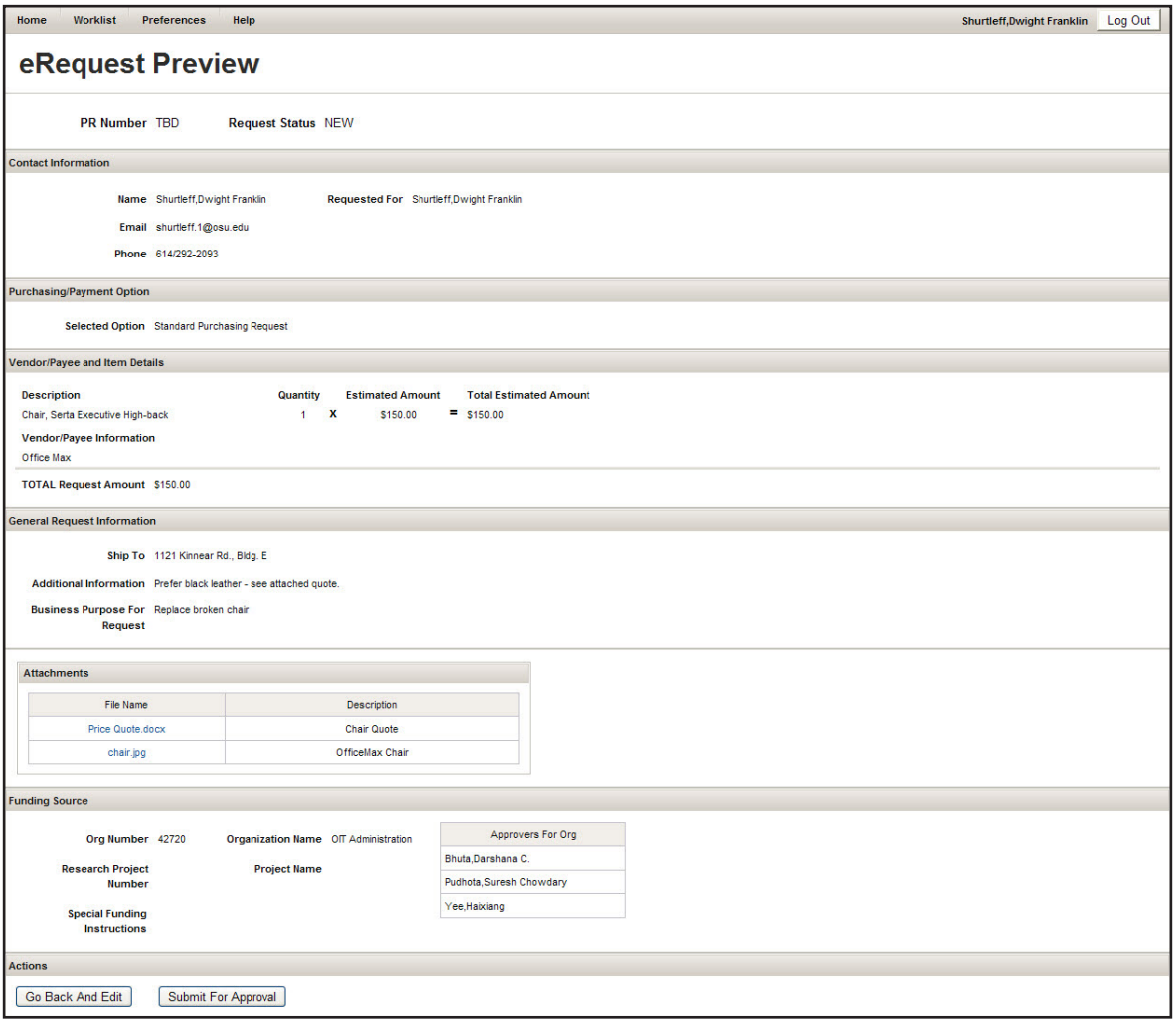
If your request is complete, click Continue to see the eRequest Preview which you may review and submit for approval.

eRequest Preview

The eRequest Preview contains all of the information you just entered in the eRequest. Review this page for accuracy and completeness. You may view the attachments by clicking the file name in the Attachments box. If you find errors or would like to add something, click Go Back And Edit.

Click Submit For Approval to route the request to your approvers.

.



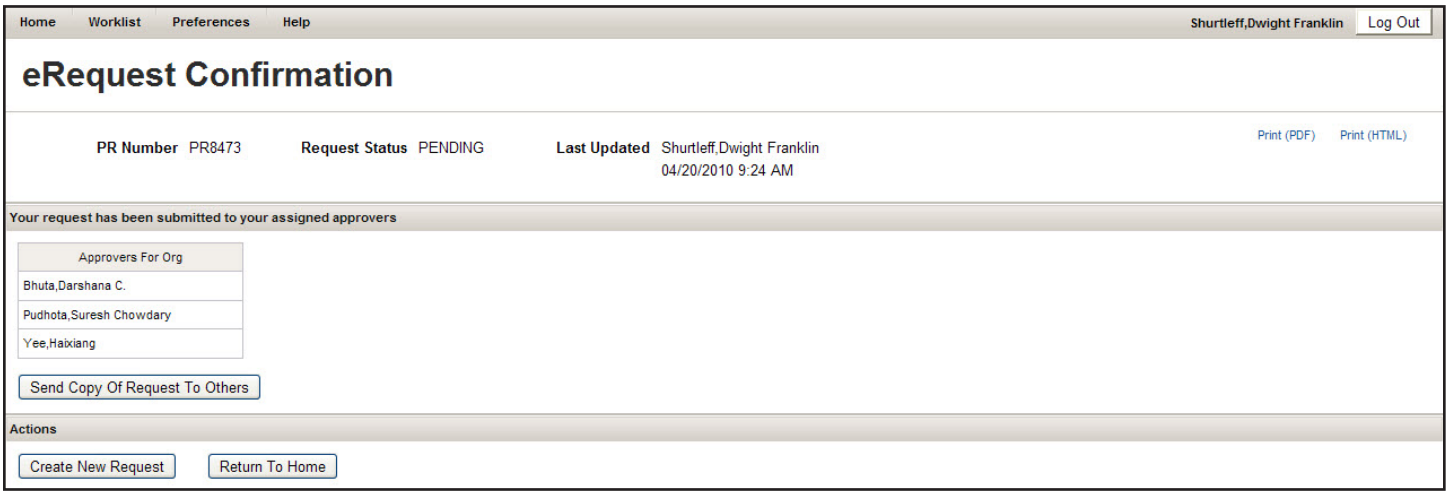
eRequest Confirmation

The eRequest Confirmation shows the **PR Number** and the **Request Status** which changes to PENDING.

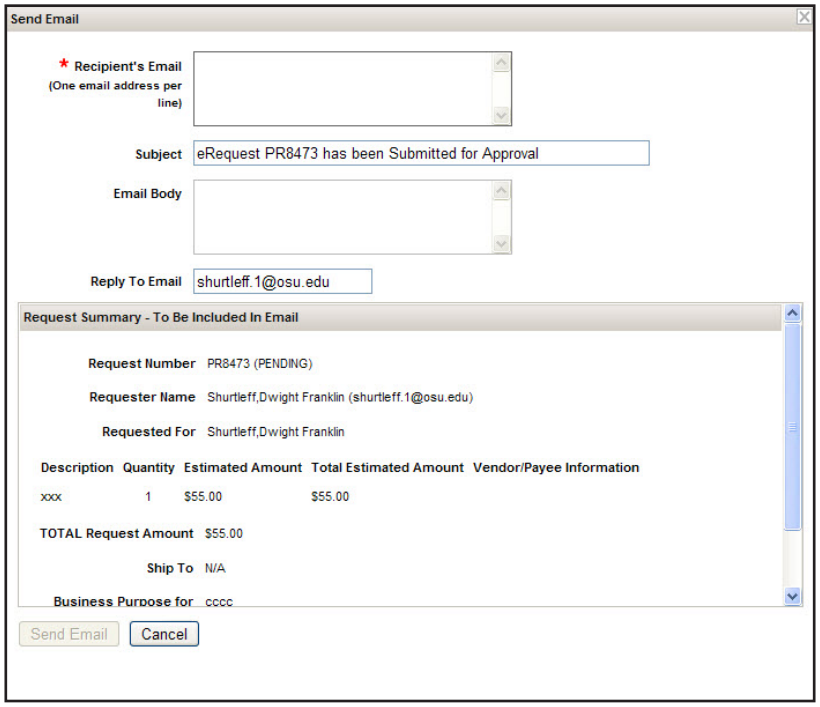
To print the Confirmation page, click the Print (PDF) or the Print (HTML) link at the top-right of the page.

A list of assigned **Approvers for Org** that the request has been submitted to is shown.

If there are others you wish to receive a copy of the request (e.g. the person for whom you placed the request), click Send Copy Of Request To Others.



In the **Send Email** window, enter the email address(es) for the recipient(s). Enter only one email address per line in the **Recipient's email** text box. In the **Email Body** text box, enter any additional information to be sent to the recipients. Click Send Email to send the message (if any) and the **Request Summary**.



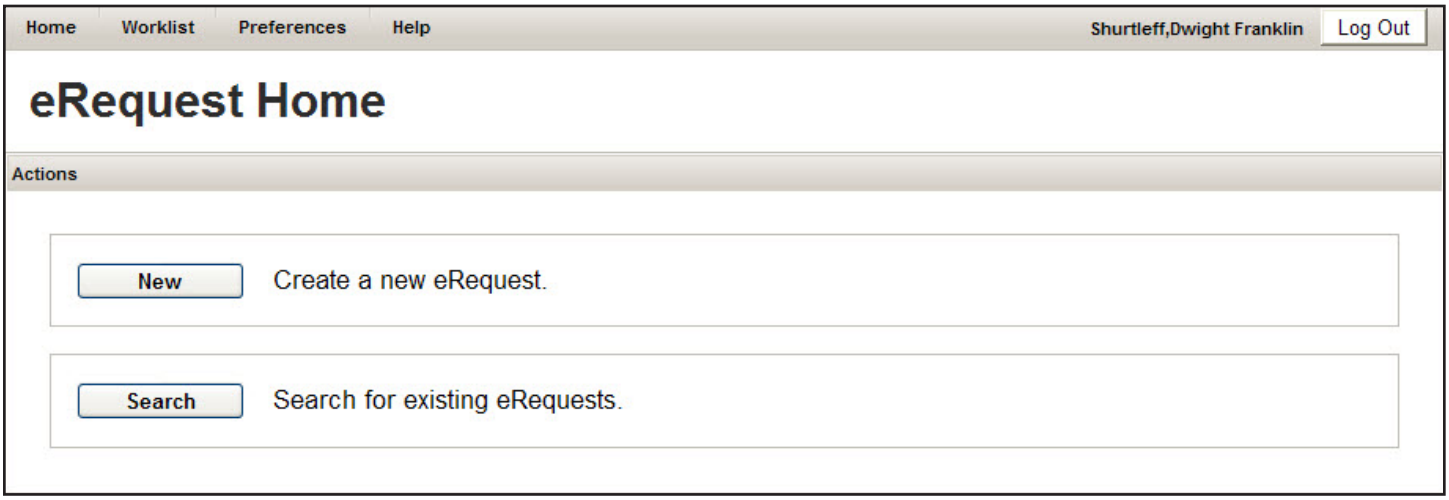
Since this request is completed, click Create New Request to begin another eRequest or click Return To Home to return to the **eRequest Home** page.

To leave the eRequest form, click Log Out. Close your browser to complete the log out process.

Searching for an eRequest

After you have submitted an eRequest, you may want to check its status, make changes, cancel, or print a copy. You can also complete a saved request (NEW status) and submit it for approval.

To search for an existing eRequest, return to the eRequest Home page.



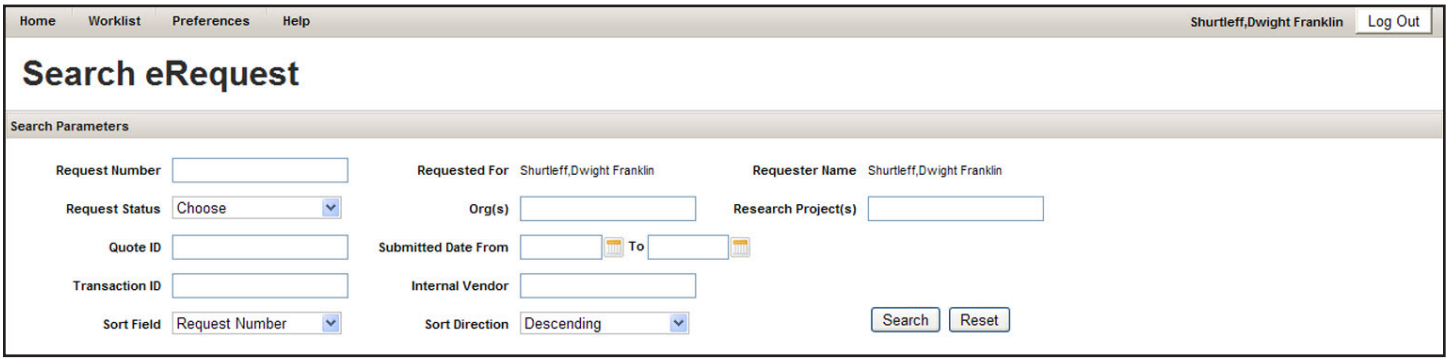
Click Search.

Search Parameters

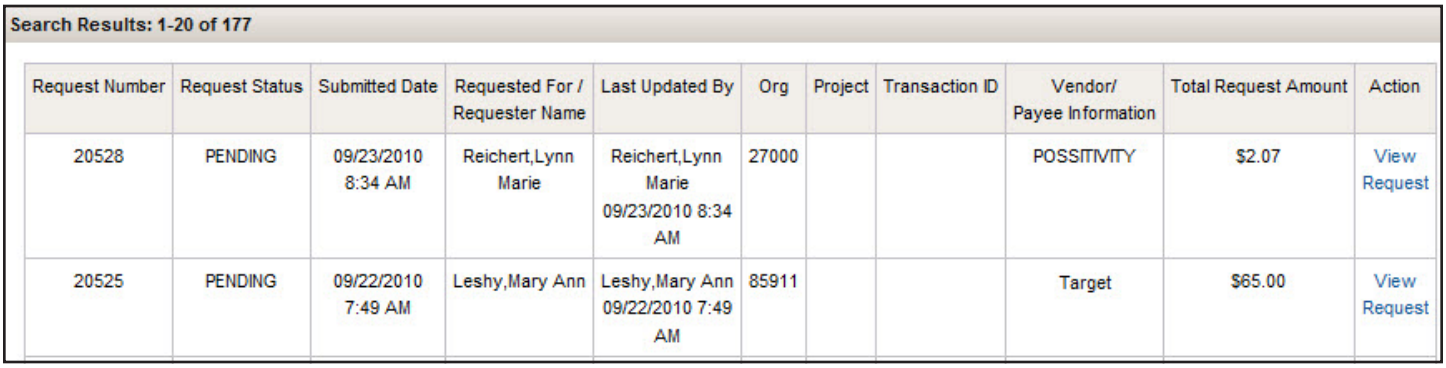
The easiest way to search for a particular eRequest is to type the **Request Number.** Depending on your login and access permissions, you may be able to enter a name in the **Requested For** or the **Requester Name** fields.

You can also filter your eRequest list:

- The **Request Status** field provides a drop down list of NEW, PENDING, APPROVED, DENIED, CANCELED, or COMPLETE.
- You can type in the **Org** number or the **Research Project** number.
- **Quote ID** allows you to search for a quotation number entered on the eRequest.
- Use **Submitted Date** to search requests submitted in a particular date range. Simply enter the **From** and **To** dates or click . to select dates from a pop-up calendar.
- Enter the **Transaction ID**, if known.
- **Internal Vendor** will search for all requests made to a specific Internal Vendor.
- **Sort Field** provides a drop down list which includes Request Number (default), Request Status, Submitted Date, Requested For, Requester Name, Last Updated By, Last Updated Date, Org, and Project.
- **Sort Direction** changes the list order from Descending (default) to Ascending based on the sort field.



Click Search to apply your search parameters.



To select a request, click [View Request] in the Action column in the **Search Results** section.