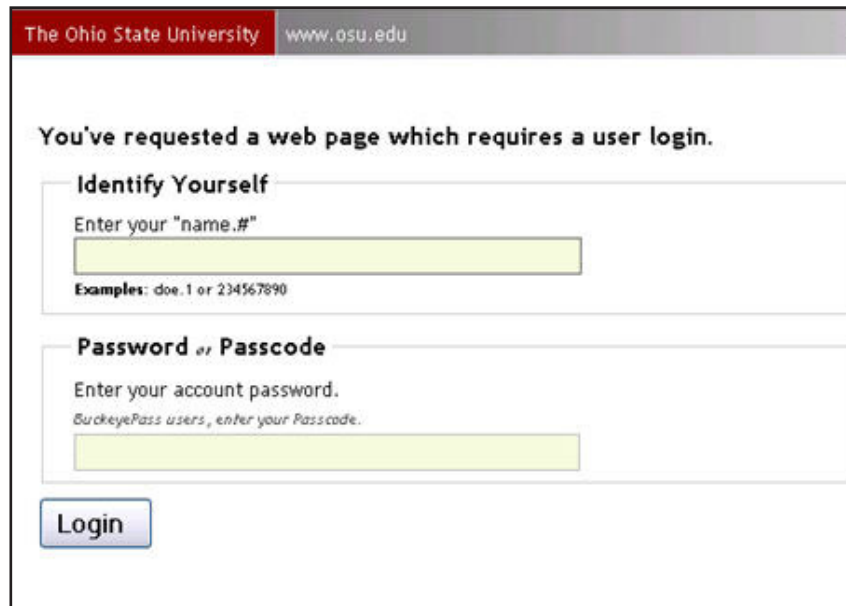


Entering an eRequest

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.



The Ohio State University www.osu.edu

You've requested a web page which requires a user login.

Identify Yourself
Enter your "name.#"

Examples: doe.1 or 234567890

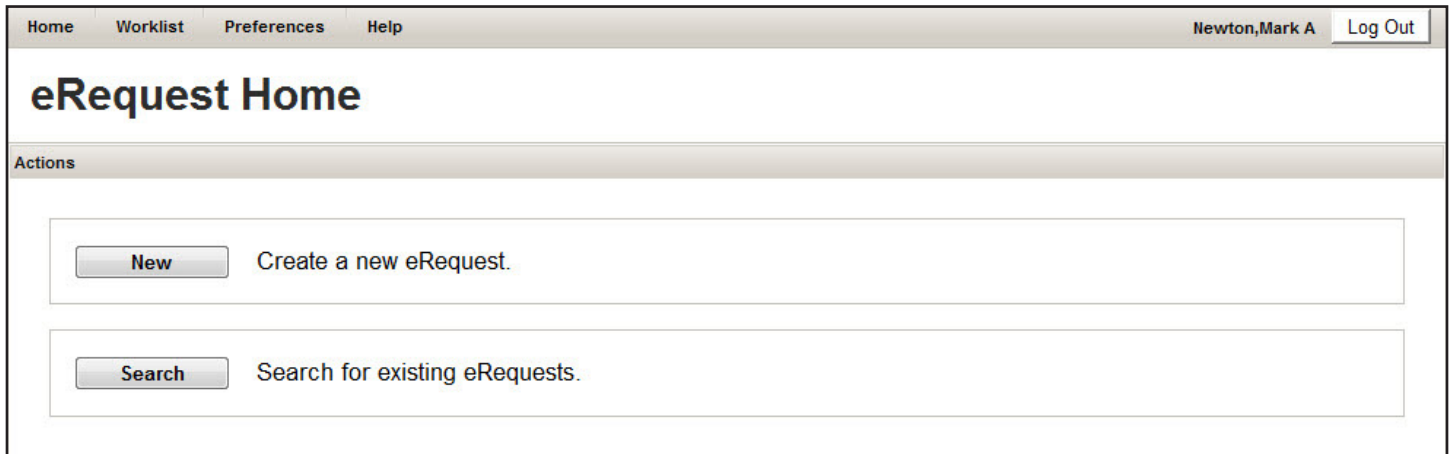
Password or Passcode
Enter your account password.
BuckeyePass users, enter your Passcode.

Login

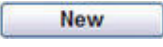
Click .

eRequest Home

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



The screenshot shows the 'eRequest Home' page. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'Preferences', and 'Help'. On the right side of this bar, the user's name 'Newton, Mark A' and a 'Log Out' button are visible. Below the navigation bar, the main heading 'eRequest Home' is displayed. Underneath, there is an 'Actions' section containing two buttons: 'New' and 'Search'. The 'New' button is accompanied by the text 'Create a new eRequest.', and the 'Search' button is accompanied by the text 'Search for existing eRequests.'

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.

The screenshot shows the top portion of the eRequest form. At the top, there is a navigation bar with links for Home, Worklist, Preferences, and Help. On the right side of this bar, the user's name 'Newton, Mark A' and a 'Log Out' button are visible. Below the navigation bar, the title 'eRequest' is prominently displayed. Underneath the title, the 'PR Number' is listed as 'TBD' and the 'Request Status' is 'NEW'. A red asterisk followed by the text '* Denotes Required Field' is positioned to the right of the status information. The 'Contact Information' section follows, containing several input fields: 'Name' (pre-filled with 'Newton, Mark A'), 'Email' (pre-filled with 'newton.90@osu.edu'), and 'Phone' (pre-filled with '614/247-7641'). To the right of these fields is the 'Requested For' field, which is pre-filled with 'Newton, Mark A' and includes a blue button labeled 'Lookup Employee' that is circled in black.

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.

Entering an eRequest

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

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.

The dialog box titled "Employee Lookup" contains two input fields: "Employee ID" (empty) and "Name (Last,First)" (containing "thomas,john"). Below the fields are "Search" and "Clear" buttons. A "Results 1-7 of 7" section follows, containing a table with columns for Employee ID, Name, Last Name, and Action.

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.

Purchasing/Payment Option	
Buy Something	Pay Someone
<input checked="" type="radio"/> Standard Purchasing Request	<input type="radio"/> Reimbursement To Employee
<input type="radio"/> Purchasing Card Preferred	<input type="radio"/> Payment
<input type="radio"/> Internal Order	<input type="radio"/> Refund
<input type="radio"/> Blanket Order Release	<input type="radio"/> Reimbursement To Non-Employee
Quote ID <input type="text"/>	

Entering an eRequest

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

Purchasing/Payment Option	
Buy Something	Pay Someone
<input type="radio"/> Standard Purchasing Request	<input type="radio"/> Reimbursement To Employee
<input type="radio"/> Purchasing Card Preferred	<input type="radio"/> Payment
<input checked="" type="radio"/> Internal Order	<input type="radio"/> Refund
<input type="radio"/> Blanket Order Release	<input type="radio"/> Reimbursement To Non-Employee
Quote ID <input type="text"/>	

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.

Purchasing/Payment Option	
Buy Something	Pay Someone
<input type="radio"/> Standard Purchasing Request	<input type="radio"/> Reimbursement To Employee
<input type="radio"/> Purchasing Card Preferred	<input type="radio"/> Payment
<input type="radio"/> Internal Order	<input type="radio"/> Refund
<input checked="" type="radio"/> Blanket Order Release	<input type="radio"/> Reimbursement To Non-Employee
Quote ID <input type="text"/>	
Blanket PO Number <input type="text"/>	

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.

The screenshot shows the 'Purchasing/Payment Option' section with two panels: 'Buy Something' and 'Pay Someone'. In 'Buy Something', four radio buttons are listed: 'Standard Purchasing Request', 'Purchasing Card Preferred', 'Internal Order', and 'Blanket Order Release'. A 'Quote ID' field is present. In the 'Pay Someone' panel, four radio buttons are listed: 'Reimbursement To Employee' (which is selected), 'Payment', 'Refund', and 'Reimbursement To Non-Employee'. An 'Employee ID' field contains the value '07170524'. Below these panels is the 'Vendor/Payee and Item Details' section, which includes a table with columns for 'Description', 'Quantity', 'Estimated Amount', and 'Total Estimated Amount'. The table shows one row with a quantity of '1' and an estimated amount of '\$0.00'. There are also buttons for 'Add Another Item' and 'Remove This Item', and a text area for 'Vendor/Payee Information' with a character count of 207.

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

This screenshot is similar to the previous one, but the 'Payment' radio button in the 'Pay Someone' panel is selected instead of 'Reimbursement To Employee'. The 'Employee ID' field is empty.

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

This screenshot is similar to the previous ones, but the 'Refund' radio button in the 'Pay Someone' panel is selected. The 'Employee ID' field is empty.


Entering an eRequest

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

Purchasing/Payment Option	
Buy Something	Pay Someone
<input type="radio"/> Standard Purchasing Request	<input type="radio"/> Reimbursement To Employee
<input type="radio"/> Purchasing Card Preferred	<input type="radio"/> Payment
<input type="radio"/> Internal Order	<input type="radio"/> Refund
<input type="radio"/> Blanket Order Release	<input checked="" type="radio"/> Reimbursement To Non-Employee

Quote ID

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 . 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.

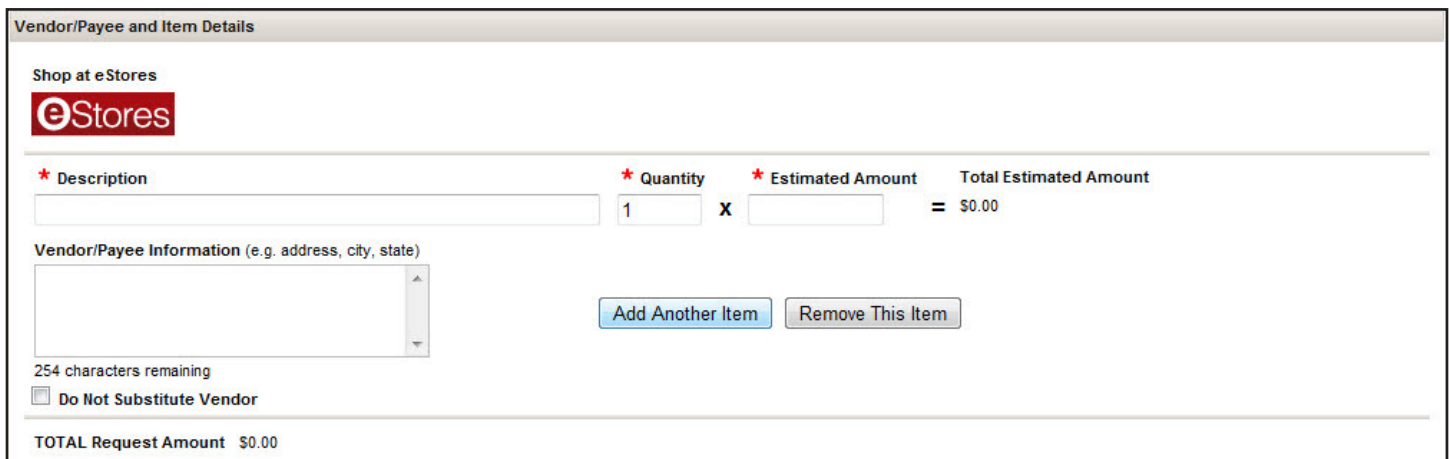
If you decide not to use eStores, you can add items manually. The **Description** field is required and provides a place to enter information about the item. This may include the name, manufacturer, item number, unit of measure, color, etc. You must also include the **Quantity** and **Estimated Amount**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



* Description	* Quantity	* Estimated Amount	Total Estimated Amount
<input type="text"/>	1	X <input type="text"/>	= \$0.00

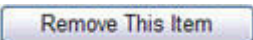
Vendor/Payee Information (e.g. address, city, state)

254 characters remaining

Do Not Substitute Vendor

TOTAL Request Amount \$0.00

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

Click  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.

General Request Information

<p>* Ship To (e.g. Building Name, N/A)</p> <input type="text"/> 254 characters remaining	<p>Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)</p> <input type="text"/> 254 characters remaining
--	--

*** Business Purpose for the Item(s) Above**
For Meal Reimbursements - Please Be Specific: what business related issues were discussed, list of attendees, name of place meal took place


254 characters remaining

Attachments

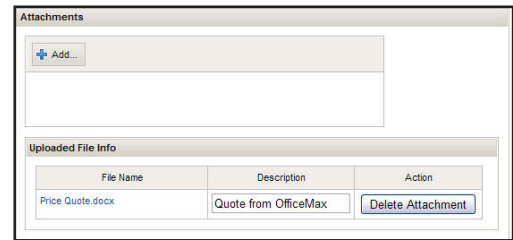
+ Add...

Entering an eRequest

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.

Funding Source

* **Org Number** 42720

Organization Name OIT Administration

Research Project Number

Special Funding Instructions

254 characters remaining

Approvers For Org
Bhuta, Darshana C.
Black, Linda Michele
Pudhota, Suresh Chowdary
Yee, Haxiang

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 to search by your **Approver's Last Name**, the **VP/College Name**, the **Organization Name** or the **Org Number**.

Search Approver

Approver Last Name

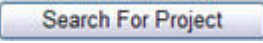
VP/College Name Choose

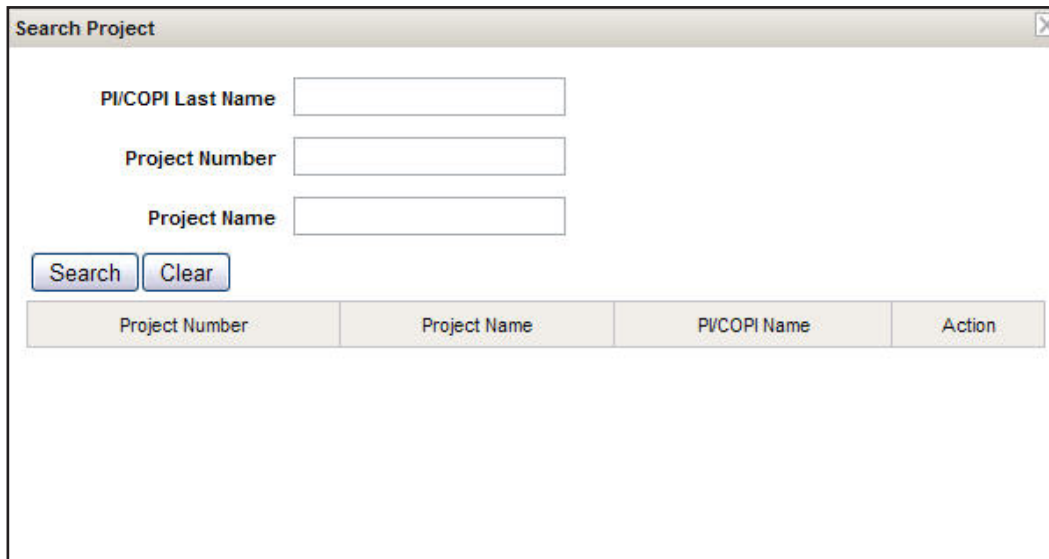
Organization Name

Org Number

Org Number	Org Name	Approver	Action
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Entering an eRequest


If applicable, enter the **Research Project Number** or click  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**.



Project Number	Project Name	PI/COPI Name	Action
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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  and enter the information. Otherwise, these entries will be made during the approval process.

BU GL	Org	Fund	Account	Project	Program	User Defined	Percent	Estimated Amt	Split Funding
Choose 	42720 <small>Lookup</small>	<input type="text"/> <small>Lookup</small>	<input type="text"/> <small>Lookup</small>	<input type="text"/> <small>Lookup</small>	<input type="text"/> <small>Lookup</small>	<input type="text"/> <small>Lookup</small>	100	\$0.00	<input type="button" value="+"/> <input type="button" value="-"/>

Entering an eRequest

Actions

If you are not ready to submit the request, click . 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.

Actions

* Denotes Required Field

If your request is complete, click 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.

Home		Worklist		Preferences		Help		Shurtleff,Dwight Franklin		Log Out																																	
eRequest Preview																																											
PR Number		TBD		Request Status		NEW																																					
Contact Information																																											
Name		Shurtleff,Dwight Franklin		Requested For		Shurtleff,Dwight Franklin																																					
Email		shurtleff.1@osu.edu																																									
Phone		614/292-2093																																									
Purchasing/Payment Option																																											
Selected Option		Standard Purchasing Request																																									
Vendor/Payee and Item Details																																											
Description		Quantity		Estimated Amount		Total Estimated Amount																																					
Chair, Serta Executive High-back		1 X		\$150.00		= \$150.00																																					
Vendor/Payee Information																																											
Office Max																																											
TOTAL Request Amount		\$150.00																																									
General Request Information																																											
Ship To		1121 Kinnear Rd., Bldg. E																																									
Additional Information		Prefer black leather - see attached quote.																																									
Business Purpose For Request		Replace broken chair																																									
Attachments																																											
File Name		Description																																									
Price Quote.docx		Chair Quote																																									
chair.jpg		OfficeMax Chair																																									
Funding Source																																											
Org Number		42720		Organization Name		OIT Administration																																					
Research Project Number		Project Name		<table border="1"> <tr> <td colspan="8">Approvers For Org</td> </tr> <tr> <td colspan="8">Bhuta,Darshana C.</td> </tr> <tr> <td colspan="8">Pudhota,Suresh Chowdary</td> </tr> <tr> <td colspan="8">Yee,Haxiang</td> </tr> </table>								Approvers For Org								Bhuta,Darshana C.								Pudhota,Suresh Chowdary								Yee,Haxiang							
Approvers For Org																																											
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Special Funding Instructions																																											
Actions																																											
Go Back And Edit		Submit For Approval																																									

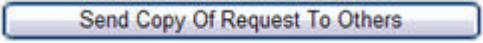
eRequest Confirmation

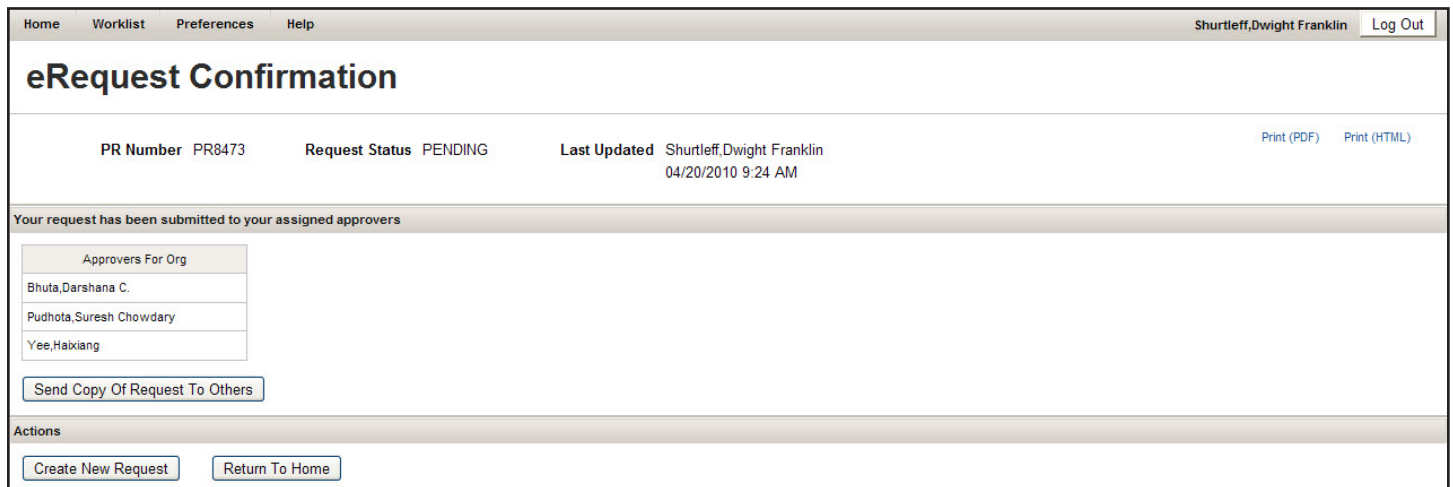
The eRequest Confirmation shows the **PR Number** and the **Request Status** which changes to PENDING.

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),

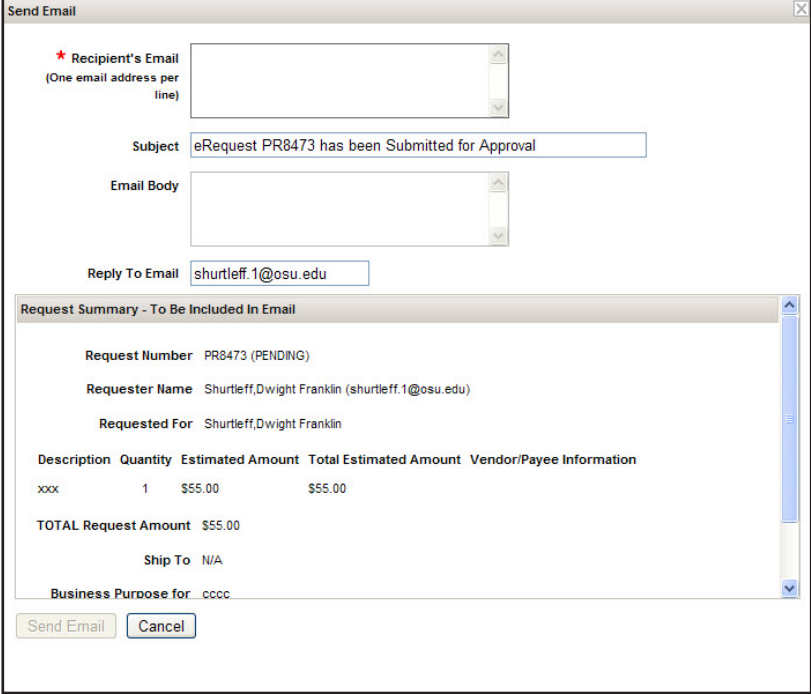
click .



The screenshot shows the 'eRequest Confirmation' page. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'Preferences', and 'Help'. On the right side of the navigation bar, the user's name 'Shurtleff, Dwight Franklin' and a 'Log Out' button are visible. The main heading is 'eRequest Confirmation'. Below the heading, the request details are displayed: 'PR Number PR8473', 'Request Status PENDING', and 'Last Updated Shurtleff, Dwight Franklin 04/20/2010 9:24 AM'. On the right side of this section, there are two links: 'Print (PDF)' and 'Print (HTML)'. A message states 'Your request has been submitted to your assigned approvers'. Below this message is a table titled 'Approvers For Org' with three rows: 'Bhuta, Darshana C.', 'Pudhota, Suresh Chowdary', and 'Yee, Haxiang'. Below the table is a button labeled 'Send Copy Of Request To Others'. At the bottom of the page, there is an 'Actions' section with two buttons: 'Create New Request' and 'Return To Home'.



Entering an eRequest

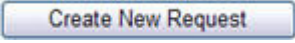

In the **Send Email** window, enter the email address(es) for the recipient(s). Enter only one email address per line in the **Recipient's email** text box. In the **Email Body** text box, enter any additional information to be sent to the recipients. Click  to send the message (if any) and the **Request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




The screenshot shows a "Send Email" window with the following fields and content:

- Recipient's Email** (One email address per line): [Empty text box]
- Subject**: eRequest PR8473 has been Submitted for Approval
- Email Body**: [Empty text box]
- Reply To Email**: shurtleff.1@osu.edu
- Request Summary - To Be Included In Email**:
 - Request Number: PR8473 (PENDING)
 - Requester Name: Shurtleff,Dwight Franklin (shurtleff.1@osu.edu)
 - Requested For: Shurtleff,Dwight Franklin
 - Table:

Description	Quantity	Estimated Amount	Total Estimated Amount	Vendor/Payee Information
xxx	1	\$55.00	\$55.00	
TOTAL Request Amount		\$55.00		
 - Ship To: N/A
 - Business Purpose for: cccc
- Buttons:  

Since this request is completed, click  to begin another eRequest or click  to return to the **eRequest Home** page.

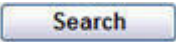
To leave the eRequest form, click . Close your browser to complete the log out process.

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.


The screenshot shows the 'eRequest Home' page. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'Preferences', and 'Help'. On the right side of this bar, the user's name 'Shurtleff, Dwight Franklin' is displayed next to a 'Log Out' button. Below the navigation bar, the main heading 'eRequest Home' is centered. Underneath the heading is a section titled 'Actions'. This section contains two distinct action items, each with a button and a descriptive text: a 'New' button followed by the text 'Create a new eRequest.', and a 'Search' button followed by the text 'Search for existing eRequests.'

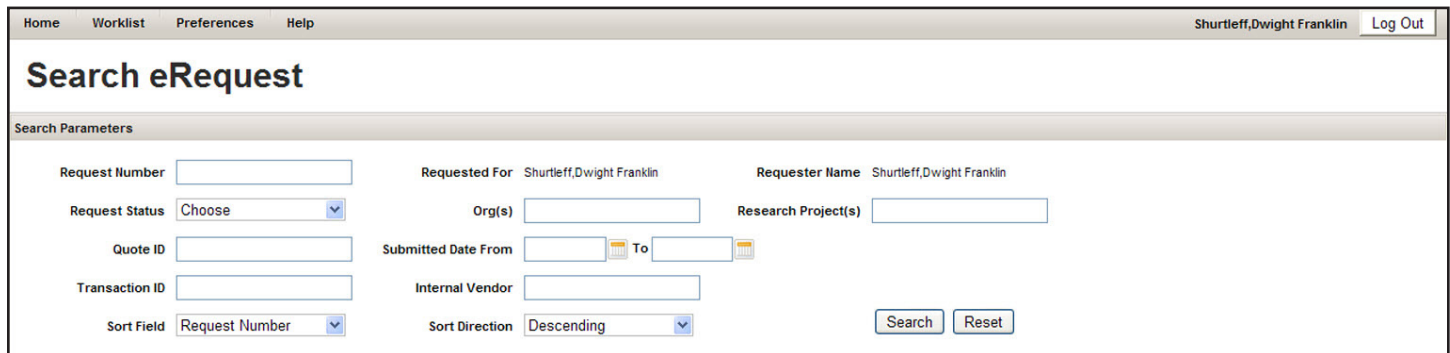
Click .

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  to apply your search parameters.

Search Results: 1-20 of 177

Request Number	Request Status	Submitted Date	Requested For / Requester Name	Last Updated By	Org	Project	Transaction ID	Vendor/ Payee Information	Total Request Amount	Action
20528	PENDING	09/23/2010 8:34 AM	Reichert,Lynn Marie	Reichert,Lynn Marie 09/23/2010 8:34 AM	27000			POSSITIVITY	\$2.07	View Request
20525	PENDING	09/22/2010 7:49 AM	Leshy,Mary Ann	Leshy,Mary Ann 09/22/2010 7:49 AM	85911			Target	\$65.00	View Request

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