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](https://erequest.osu.edu). Simply enter your OSU Internet username (Name.#) and password.

Click **Login**.
Entering an eRequest

**eRequest Home**

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

![eRequest Home](image)

Click **New** to create a new eRequest.
Entering an 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.

See the Setting eRequest Preferences job aid to learn how to add a default name in the **Requested For** field.
Enter either the **Employee ID** or **Name.#** or **Last Name**, with **First Name** or **Home Org** in the **Employee Lookup** box. Click **Search**.

In the results list, click **Employee ID** link 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.
Entering an eRequest

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 Card Preferred is selected if you want to use a Purchasing Card for small dollar purchases of goods or services.
Once your Purchasing Card request is approved, you will receive an email containing the approved eRequest which you will print and submit to your Service Center or Purchasing Card Manager. You will sign the Purchasing Card Internal Tracking Log and be given the Purchasing Card. Once you have made your purchase, you will return the Purchasing Card and sign the Tracking Log again. A receipt for your purchase must also be presented at this time.

Note: If you are assigned the PCard Manager role, the fields Last 4 #s On Card and Name Embossed On Card will become available for you to fill in when you select the Purchasing Card Preferred option.
**Entering an eRequest**

**Internal Order** is chosen to place an order with an internal OSU supplier (e.g. UniPrint, University Catering, Drake Union/Theatre). When **Internal Order** is selected, the **Vendor/Payee Information** text box in the **Purchasing/Payment** section will be replaced by the **Internal Vendor** field. You will be able to enter the name of the Internal Vendor, type a partial name to search for one, or click **View All** to select from a list of all Internal Vendors.

**Notes:**

- If the Internal Vendor is not in the vendor list, type in the Internal Vendor’s name.
- For multiple line requests, the requestor may only select one Internal Vendor. The user will only be able to select the Internal Vendor on the first item.

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. The **Employee ID** shown is from the **Requested For** field. To change this, click the [Lookup Employee] link to find the employee who will receive the reimbursement.

**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.
Entering an eRequest

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, color, etc. You may enter the unit of measure in the optional UOM field.

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 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.
**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 ![Add button](image) to add an attachment. Select the correct file, then click ![Open button](image). 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 ![Delete Attachment button](image).
**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.

See the [Setting eRequest Preferences](#) job aid to learn how to change the default value in the **Org Number** field.

![Funding Source](image)

**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](image) to search by your **Approver’s Last Name**, the **VP/College Name**, the **Organization Name** or the **Org Number**.
Entering an eRequest

If applicable, enter the **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**.

![Search Project](image)

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. Use the **Lookup** link to find or verify your entries. Otherwise, these entries will be made during the approval process.

See [Setting eRequest Preferences](#) job aid to learn how to add default values to the Chartfield fields.

![Split chartfield](image)

To add another chartfield for split funding, first select Percentage or Amount next to **Split chartfield by**. Click and enter the split funding percentage or amount for each chartfield. Add supporting attachments in the General Request Information Section and/or comments in the Special Funding Instructions text box.
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 the Home link 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**.
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 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.
Entering an eRequest

Searching for an eRequest

After you have submitted an eRequest, you may want to check its status, make changes, cancel, print, or copy it. 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.

![eRequest Home](image)

Click **Search**.
Entering an eRequest

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 Project or Program number(s).
- 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 Transaction ID.
- Sort Direction changes the list order from Descending (default) to Ascending based on the sort field.

Click to apply your search parameters.
To select a request, click the Request # link in the Request # column in the Search Results section.

### Copying an eRequest

If you are submitting several, similar eRequests or if you have the Requestor role and wish to duplicate someone else’s order using your contact information, you may want to copy a previous request. You may copy requests in any status: **New** (after save), **Pending**, **Approved**, **Denied**, **Canceled**, or **Complete**.

To copy an eRequest, search for and select the request, as above. Click **Copy Request** in the Actions section of the selected request. Once the request is copied, all fields can be edited.

Note: eStores requests may be copied but the Item Details from the original cart will not be copied. You may visit eStores for the new request or enter a different type of request. The chart fields and other request details are from the copied request.