Setting eRequest Preferences

Setting preferences in eRequest is an easy way to save time if you are frequently entering requests. The Preferences page will enable you to enter a default Ship To address and default Chartfield values. You will also have the option to disable eTravel and eRequest related email.

To open the Preferences page, click Preferences at the top of any eRequest page.

General Preferences

Email

Email is enabled by default in eRequest. To disable email click the Email Enabled check box to clear it.

Purchase/Payment Preferences

Requested For

To add a default name in the Requested For field, click [Lookup Employee] to search by Employee ID (if known) or Last Name with First Name or Home Org in the Employee Lookup box. This option is only available to those with the Requestor role.

Ship To

Enter your preferred shipping address in the Ship To text box. This address will be added to the Ship To field of every new eRequest.

Org Number

Enter a default value for the Org Number. This will show the list of Approvers for that Org.

- Org Number filled in without Chartfield Org: The Org Number entered on the Preferences page will default for both the workflow Org and the chartfield Org on the request page.
- Org Number filled in with Chartfield Org: The Org Number entered on the Preferences page will default in the workflow Org. The Chartfield Org entered on the Preferences page will default in the Chartfield Org on the request page.

Chartfield

If you have a set of chartfield values that you frequently use, enter these in the appropriate columns of the Chartfield.

Service Center Preferences (Service Center/Delegated Buyers Only)

Requisition Ship To (Required)

The Ship To location for initial delivery of eStores orders will be 381 (Stores and Receiving Building) by default. This may be changed, if appropriate.

Location

Enter your preferred default entry for the Location field for eStores orders. An entry will be required when processing an eStores order.
Click [Save] to activate your new preferences. Your preferences will now be displayed in the appropriate fields when you open a new eRequest. Note: You may change the default Ship To, Chartfield, Requisition Ship To, and Location on the eRequest, if necessary.

You may change or delete your preferences at any time by opening the Preferences page, making your changes, and clicking [Save].