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 purchase request will be routed to a local service center or delegated buyer. Your role as a service center member or delegated buyer is to use information from the eRequest to enter the requested items into the procurement/payment system.

**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.
Processing an eRequest

eRequest Home
At the top of the eRequest Home page, click Service Center.

Service Center Worklist
Your worklist contains all of the eRequests that are assigned to you for processing. To begin, click the Request # link in the Request # column for the request you want to review.
If your worklist is relatively long, you may want to filter it to find a specific request.
Processing an eRequest

Filter Worklist

The easiest way to find a specific request is to enter the **Request Number**. If you do not know the number, you can enter a name in the **Requested For** or the **Requester Name** field.

other filters include:

- **Activity Status** (Vendor Setup Initiated, Additional Info Needed, In Process, Dispatched, Pending Completion, Reallocated, Complete, Do Not Fulfill) - The status is determined during the fulfillment process.

- **Org(s)** - Type the organization number. You may also enter a partial organization number or several org numbers separated by commas.

- **Project(s)/Program(s)** - Enter the project/program number(s). You may also enter a partial project/program number or several project/program numbers separated by commas. Project and Program numbers come from the chartfield values entered for these fields.

- **Purchasing/Payment Option** (Standard Purchasing Request, Purchasing Card Preferred, Internal Order, Blanket Order Release, Reimbursement to Employee, Payment, Refund, Reimbursement to Non-Employee) - Choose one from the list.

- **Assigned To** - Enter the name of a service center member or delegated buyer.

- **Submitted Date range** - Enter the **From** and **To** dates or click to select a date from a pop-up calendar.

- **Quote ID** - Type the quotation number entered in an eRequest.

- **Last Updated By** - Enter the name of the last person who worked on the request.

- **Priority** (Routine, Critical, Emergency) - The priority is usually determined during the approval process. Note: For Critical and Emergency priorities, an email alert will be sent to the Service Center upon final approval.

To apply your filter(s), click .

You can sort items in your list by selecting a **Sort Field** from the drop-down list. The default is Request Number but you can choose to sort by Priority, Submitted Date, Requested For, Requestor Name, Last Updated By, Last Updated Date, Activity Status, Assigned To, or Org. You can also change the **Sort Direction** from Descending to Ascending. To apply these sorting changes click .

To erase your filter entries and restore the original worklist, click .

When you locate the eRequest, click the Request # link in the **Request #** column to open the request and begin the fulfillment process.
### Processing an eRequest

**Top Sections of eRequest**

The top sections of the eRequest provide you with the information you will need to fulfill the request.

#### eRequest

<table>
<thead>
<tr>
<th>PR Number</th>
<th>Request Status</th>
<th>Last Updated</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR91825</td>
<td>APPROVED</td>
<td>02/18/2011 10:44 AM</td>
<td>Name: Browne, Leandra Danee Requested For: Beatty, George David Email: <a href="mailto:brown.2004@osu.edu">brown.2004@osu.edu</a> Phone: 614/247-4329</td>
</tr>
</tbody>
</table>

**Business Purpose**

- **Business Purpose For Request**: For air for the controls in Barrett.
- **Business Priority**: Routine

**Vendor/Payee and Item Details**

<table>
<thead>
<tr>
<th>Description</th>
<th>UOM</th>
<th>Quantity</th>
<th>Estimated Amount</th>
<th>Total Estimated Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Compressor #XG6875L01</td>
<td>X</td>
<td>1</td>
<td>$729.30</td>
<td>$729.30</td>
</tr>
<tr>
<td>Vendor/Payee Information</td>
<td>Lawson Products</td>
<td>2350 W Prairie St.</td>
<td>Addison, IL 60101</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Do Not Substitute</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
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<td>Quantity</td>
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<tr>
<td>----------------</td>
<td>-----</td>
<td>----------</td>
<td>------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Starter Kit #XG6875L02</td>
<td>X</td>
<td>1</td>
<td>$59.90</td>
<td>$59.90</td>
</tr>
<tr>
<td>Vendor/Payee Information</td>
<td>Lawson Products</td>
<td>2350 W Prairie St.</td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL Request Amount**: $789.20

**General Request Information**

- **Ship To**: Royer Student Activity Center
  - 65 Curl Dr. Columbus, OH 43210

**Additional Information**
Funding Source

You may edit all chartfield values except the **Org**. Use the **Lookup** links to find or verify your entries. If you update any portion of the chartfield, Combo Edit will run upon clicking Save or Dispatch and Save to ensure that the updated chartfield combination is valid.

**Note:** Communicate changes in the chartfield values to the Requestor and/or Approver when necessary.
**Distribution Method**

**Selected Request Option** shows the Purchasing/Payment Option entered by the requester. The **Distribution Method** includes Requisition, Direct Purchase Order, Blanket Order Release, Purchasing Card, Internal Order, PREP/Voucher, Petty Cash, Journal Entry, eStores, Employee Reimbursement, and Vendor Payment.

If the **Selected Request Option** is **Internal Order** and you select **Internal Order** as the Distribution Method, the selected Internal Vendor will be copied into the **Internal Vendor** field. You may select a different Internal Vendor.

If the **Selected Request Option** is not **Internal Vendor** and you select **Internal Vendor** as the Distribution Method, you will have to type or select the Internal Vendor.
When you first receive the eRequest, the **Activity Status** will be In Process. This is not the same as the **Request Status** (top of form) which is APPROVED. You will change the **Activity Status** to:

- **Vendor Setup Initiated** - if the vendor in the request is new and no suitable existing vendor can be found in PeopleSoft.
- **Additional Info Needed** - if you are asking for additional information from the requestor.
- **Dispatched** - if an Internal Order has been sent to the internal supplier for fulfillment.
- **Pending Completion** - if you want to keep the request on your worklist while waiting for a final step in processing the order.
- **Reallocated** - automatically set when P-Card payment is reallocated in PeopleSoft.
- **Complete** - if you have completed processing the eRequest. The **Request Status** on the request will change to COMPLETED and the request will be removed from your worklist.
- **Do Not Fulfill** - if you receive notification to cancel the request or if it does not meet all the necessary requirements. The **Request Status** will change to CANCELED and the request will be removed from your worklist.

Use the **Activity Log** to enter any relevant information regarding the action you have taken on the request. Click **Add To Log**. The information you typed will appear to the right of the text box with the date, time, and your name.

The **Assigned To** field is for Service Center managers that want to assign the requests to others in their Service Center. The drop-down is based on the organization from the request and who has the service center role for that organization.
Attachments

Attachments of up to 10 MB each can be added to a purchase request to provide additional information. 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. To view an attachment click its File Name.

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

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

To delete a file, click .

Comments

You may wish to add Comments to provide further information regarding the status of the request. Enter your comments in the text box and click .

Work Flow Information

The Workflow Information section shows details regarding the steps in the approval process.
**Processing an eRequest**

**Actions**

Click [Save Changes] to save the request and keep it open.

Click [Return To Worklist] to select another request to process. If you have not saved the request, any changes you have made will be lost.

Click [Copy Request] if you want to copy the request.

Click [Send Notification] to open the **Send Email** pop-up window. 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**.

---

*Action Table*

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save Changes</td>
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<tr>
<td>Return To Worklist</td>
<td>Click to select another request to process. If you have not saved the request, any changes you have made will be lost.</td>
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</tr>
</tbody>
</table>
Processing a Standard Purchasing Request

If the Selected Request Option is Standard Purchasing Request, select Requisition or Direct Purchase Order from the Distribution Method drop-down list. When a selection is made, a Transaction ID text box will appear. Once you have completed the Requisition or Purchase Order, enter the Req ID or PO number.
Processing an eStores Request

eStores requests will show in the Payee/Vendor and Item Details section of the form. When you select eStores from the Distribution Method drop-down list you will see the Send to PeopleSoft button along with the Ship To and Location Fields. The Ship To and Location fields contain default values from the Service Center user’s Preferences Page. Both fields are required and you may change or enter values for either.

When eStores is selected, each item is listed along with its details. Below each item is a Show Chartfields link which will allow you to view and make changes to any of the chartfield values pre-populated from the Funding Source chartfields. Click the Hide Chartfields link to hide the chartfield for an item.

**Note:** eRequests containing items that have an Account code belonging to Capitalized Assets (currently 653XX) cannot be sent to PeopleSoft.

Click to send the eStores request to PeopleSoft. eRequest will validate the required fields and the eRequest will be sent to PeopleSoft. If any fields fail the validation check you will receive an error message instructing you to make the appropriate corrections.

**Note:** If you decide to save the eRequest before sending it to PeopleSoft, click . The required fields will be validated before it is saved. If any fields fail the validation check you will receive an error message instructing you to make the appropriate corrections.
Once the eRequest is sent to PeopleSoft, a requisition is created and the PR# will automatically be added to the PR# field on the PeopleSoft Requisition and Purchase Order pages. (The PR# can also be used for transactions that are directly keyed into PeopleSoft.) A Requisition ID is returned to eRequest immediately. After all PO’s and/or MSR’s are created, the batch process will update the eRequest with the PO/MSR numbers and mark the Activity Status Complete. The batch process runs every two hours.

Notes:

• If you are not a PeopleSoft Requestor the Send to PeopleSoft button will not be activated when you select eStores as the Distribution Method.
• If the BU GL is OSUMC the Send to PeopleSoft button will not be shown for an eStores order. You must select another Distribution Method.
• Only the first line of a multi-line chartfield distribution will be sent to PeopleSoft for Stores/Inventory Items. The entire dollar amount for the item will be sent with the chartfield instead of the split/partial amount.
• The Business Purpose, PR Number, and Contact Information for the Requestor or Requested For individual will be sent to PeopleSoft and be included in the Header Comments of the PO.
• The eRequest PR# has been added as a search field in PeopleSoft on the Requisition Document Status page as well as the Purchase Order Document Status page. The PR# number will be listed on the document status pages as a hyperlink to the original eRequest.
**Processing an eRequest**

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**Processing a Blanket Order Release**

If the **Selected Request Option** is Blanket Order Release, select Blanket Order Release from the **Distribution Method** drop-down list. If the **Blanket PO Number** was entered previously, it will be transferred to the **Transaction ID** text box. This number should be overwritten if it is incorrect (e.g. used last year’s number). If the **Blanket PO Number** was not entered, find and verify the number and enter it as the **Transaction ID**.

Make any relevant additions to the **Activity Log**, **Attachments**, or **Comments** text box and click **Send Notification**. Complete the **Send Email** window and click **Send Email**.

---

**Optional**: After processing the blanket order release you may change the **Activity Status** to Complete. Please Note: eRequests will remain on the Service Center worklist until Complete has been chosen from **Activity Status**.
Processing a Purchasing Card Request

Service Center as Purchasing Card Manager

When the Selected Request Option is Purchasing Card Preferred and the Service Center is also the Purchasing Card Manager, change the Distribution Method to Purchasing Card. Enter the Last 4 #s On Card and the Name Embossed on Card. Click Save Changes, then click Send Notification. Enter the requesters email address and in the email body, indicate that the Purchasing Card is to be picked up from the Service Center with a print-out of the transaction showing the approval. Click Send Email.

Purchasing Card Manager

When the Selected Request Option is Purchasing Card Preferred and the Service Center is not the Purchasing Card Manager, change the Distribution Method to Purchasing Card. If the Purchasing Card needs to be picked up, click Save Changes, then click Send Notification. Enter the requesters email address and in the email body, indicate that the Purchasing Card is to be picked up from the Purchasing Card Manager with a print-out of the transaction showing the approval. Click Send Email.

Optional: Once the Purchasing Card has been returned with receipts for the purchase and the transaction has been reallocated and approved in PeopleSoft, you may open the request and fill in the Purchase Date, Purchase Made By, Actual Total Amount, and T Number, if applicable. Scan in the receipts and attach to the eRequest.

Check the PCard Documentation Complete check box to change the Status to Pending Completion. Click Save Changes.

Please Note:

• When a user enters a value in the Last 4 #s On Card field, the field is validated against the PeopleSoft database. Only valid Last 4 #s On Card values can be used.

• Once the Last 4 #s On Card value is validated, the Name Embossed on Card field will get updated with the corresponding value. If multiple Named Embossed on Card values exist for the Last 4 #s On Card, the user will then be able to select the appropriate name from a drop-down list.
• If a department Purchasing Card Manager initiated/updated the eRequest, the **Last 4 #s On Card** and **Name Embossed On Card** fields may contain values already entered by the Purchasing Card Manager.

• Once the transaction is marked Reallocated and saved in PeopleSoft, the **Activity Status** of the eRequest is changed to Reallocated, and the Activity Log is updated with the name of the reallocator and the date-time stamp of when the transaction was reallocated.

• eRequests will remain on the Service Center worklist until Complete has been chosen from **Activity Status**.
Processing an Internal Order

If the Selected Request Option is Internal Order and you select Internal Order as the Distribution Method, the selected Internal Vendor will be copied into the Internal Vendor field. You may select a different Internal Vendor based on typed criteria or by clicking View All and choosing from the list of vendors.

If the Selected Request Option is not Internal Vendor and you select Internal Vendor as the Distribution Method, you will have to select the Internal Vendor.

Click Dispatch And Save. Click OK in the warning box if you are sure the Internal Vendor is correct.

A message will appear at the top of the page stating “Internal Vendor <vendor name> requires a printout of this eRequest” or that “PR# was dispatched to <vendor name> via Email”. Another message shows that the eRequest was saved. There will be an entry in the Activity Log indicating the dispatch method (printout required or sent via email), your name, and the date/time the order was dispatched. The Dispatch and Save button will no longer appear and the Activity Status will change to Dispatched.

Email to Requestor:

- If the dispatch method is Print, an email is automatically sent to the requestor stating that the order should be printed and taken to the Internal Vendor.
- If the dispatch method is Email, an email to the requestor is optional. An email will only be sent if you click Send Notification and state in the email body that the order has been emailed to the Internal Vendor.

Note: Internal Vendor eRequests requiring Office of Sponsored Programs (OSP) approval will be forwarded to OSP when the request is dispatched. Once approved, an email will be sent to the requester and the request will either be printed and taken to the vendor by the requestor or dispatched by email directly to the vendor. The requestor will also receive an email if OSP denies the request.

For Internal Orders to Departments Not in the Internal Vendor List: Contact the processing department to find out if they require anything additional to the approved eRequest for fulfillment of the order. Depending on the unit, use Send Notification, print and deliver, or fax the eRequest to the department contact who will process the request.
Optional: When the requester delivers a copy of the eRequest and receipt to the service center, scan the receipt and attach it to the eRequest. Please Note: eRequests will remain on the Service Center worklist until Complete has been chosen from Activity Status.

### Processing the Payment Options

#### Reimbursement to Employee

When the Selected Request Option is Reimbursement to Employee, choose Employee Reimbursement as the Distribution Method. If the request includes a valid Employee ID, you can push the request into PeopleSoft by clicking Send Reimbursement To Prep.

![Distribution Method](image)

**Notes:**

- When Employee Reimbursement is selected, the items from the request are listed. Each item has a Show Chartfield link and + and - buttons to add or remove Chartfield lines.
- Service Center users may only lower the estimated amount for a Chartfield record.
- The eRequest will load into PeopleSoft as pre-approved and no further action within PeopleSoft is required.
- Reimbursements using sponsored programs will still stop for OSP approval prior to being released to pay.
- Service Centers may still input reimbursements manually into PREP when necessary, which will continue to workflow in PeopleSoft for approval.
Payment

If the **Selected Request Option** is Payment choose Vendor Payment as the **Distribution Method**. The **Send Payment Request** button will appear along with the **Payee Selection** and **Payment Information** sections.

- The **Payee Selection** section contains the **Choose Payee by Vendor ID** field, which is required.
  - If you don’t know the Vendor ID, click **Lookup Vendor** to search for the Vendor.
  - Once the vendor is selected, all of the values will be populated.
  - If the vendor cannot be found or you know the vendor is new, click **Request a New Vendor**. This will link to the Add/Change Supplier Form on the Purchasing website.
  - If the selected vendor is a non-resident alien, an error message will be displayed which contains a link to the NRA payment request form and the request cannot be submitted to PREP.
- The **Payment Information** section has fields for **Convenience Order Number**, **Payment Handling**, **Check Message**, and a check box for **Separate Check Required**.
  - **Convenience Order Number** is a required field. If not entered, the request cannot be sent to PREP.
  - Click **Lookup** if you need to search for the Convenience Order Number.
  - **Payment Handling** is not a required field. If a value is not selected, “Regular” will be used in PREP.
- When **Vendor Payment** is selected, the items from the request are listed. Each item has a **Show Chartfield** link and **+** and **-** buttons to add or remove Chartfield lines.
  - Service Center users may only lower the estimated amount for a Chartfield record.
  - If the Chartfield contains OSURF as the Business Unit, the Convenience Order Number will default to RF12345 and will not be editable.
  - If OSUMC is the Business Unit, then the request cannot be sent to PeopleSoft.
- Payments using sponsored programs will still stop for OSP approval prior to being released to pay.
- Service Centers may still input payments manually into PREP when necessary, which will continue to workflow in PeopleSoft for approval.
Refund or Reimbursement to Non-Employee
When the Selected Request Option is Refund or Reimbursement to Non-Employee, select PREP/Voucher as the Distribution Method.

Optional: After the information has been entered in PREP, select the appropriate Business Unit and enter the Voucher ID in the Transaction ID text box. Please Note: eRequests will remain on the Service Center worklist until Complete has been chosen from Activity Status.

Petty Cash
If the payment request meets all university and departmental policies, Petty Cash may be selected as the Distribution Method. Petty cash funds are usually used to purchase goods when the university’s present procurement system is not cost effective and when the dollar amount is low. The maximum expenditure amount for petty cash is $50.00 per expenditure unless otherwise approved by Treasury Administration.