Procedure for Entering an eRequest

Go to: http://erequest.osu.edu/

Click on NEW to begin the process.

Contact Information

This information should fill in automatically for you.

If you are requesting this on behalf of someone else and have the ability to change the Requested For information, you will need to click on Lookup Employee link which will appear after your name to search for the person.

Purchasing/Payment Option

Standard Purchasing Request: This option is used for a purchase request which will be made to an outside vendor (a company that is not part of the University).

Purchasing Card Preferred: You will choose this option if you are planning on signing out one of the departmental procurement cards to complete your purchase.

Internal Order: This option is used for purchases made to departments within the University such as Wired Out, Uniprint, OHR, etc.

Blanket Order Release: You will choose this option if you are making a purchase against a blanket order to an outside vendor that is already in place. You will need to provide that 10-digit purchase order number in the Blanket PO Number field. You will want to make sure the chartfield values match the values on the original blanket order request.

Reimbursement to Employee: You will choose this option if you have purchased something on behalf of the university for which you are requesting reimbursement. You will need to click on the Lookup Employee link to search for your employee ID. Once you have located it, you will need to click on the ID so that it is filled in on the form. The vendor information will automatically fill in with your name and home address.

Payment: This option should be used if you are requesting payment of a membership or a conference registration that will not be paid with a procurement card.

Vendor/Payee and Item Details

If you are purchasing something from an eStores vendor, click on the red ESTORES logo to create your shopping cart.

If this is not an eStores purchase, fill in the Description, Unit of Measure (UOM), Quantity, Unit Price and Vendor information. The Vendor Information should begin with the Vendor Name. Do not begin the vendor information with a person's name, a phone number or some other information. This will help identify this order if anyone needs to search the system for this eRequest.

If you have additional items to add to the order, click on the Add Another Item button until you have entered the information for all items on your order.

General Request Information

Ship To: You must enter something into this box. If you are having something shipped from a vendor, fill in the contact person and the full address (room, building, street address) to which the merchandise should be shipped.

Additional Information: Use this box to add additional information regarding this order that does not fit anywhere else.

Business Purpose: This is a required field and should answer the question "why" this is needed. What will it be used for, who will be using it, what purpose will it fulfill, etc.

Attachments

You should attach any documents that pertain to this request such as quotes, contracts, agreements, list of attendees for events, etc. DO NOT SIGN ANY AGREEMENTS. ATTACH THE UNSIGNED COPY TO THE EREQUEST, AND THE FINANCE AREA OR THE SERVICE CENTER WILL TAKE CARE OF GETTING THE PROPER SIGNATURES.

Funding Source

Org Number: This should be the Org that will be funding this purchase. This number is also the value that drives the approval process.

Special Funding Instructions: If you have additional information on the funding of this purchase, you can put that information here.

Enter Chartfields (Optional): Click on this button if it appears at the bottom of the form. You will need to enter at least the Org and Program number that corresponds to the area paying for this purchase.

Submitting Order for Approval

Click on the Continue Button to begin the submission process. This will bring up a copy of your order for you to review and edit if necessary.

If everything looks good on your review, click on the Submit for Approval Button at the bottom of the page.

Items of Note

If you find that it is taking you awhile to complete the eRequest, you will want to go to the bottom of the form and click on the Save for Later button. This will keep you from losing all of the information you have input into the request.

If you don't click on the Save for Later button, you will not be warned about the allotted time expiring. You will know that you went over your time limit when you click on Continue and the system says that you took too long and it deletes your information.

For reimbursements, the request will not be approved for processing until the original itemized receipts have been received by the Finance Area.