

Using Erequest

Revised September 20, 2012

Background: All purchases are now initiated through eRequest. This includes standard purchase orders, purchasing card requests, purchases from internal vendors and reimbursements.

Erequest should be considered a more advanced email communication – it is used to gather all of the necessary information before a purchase is actually in the OSU financials system.

Special note about reimbursements: email Juliana to obtain approval from the chair prior to making purchase with the intent to be reimbursed. Enter the eRequest only after the reimbursement was pre-approved and you have receipts from the reimbursement.

To log-in, go to <http://erequest.osu.edu> using your name.n and password, then click “new”

Purchasing/Payment Option

1. Indicate Purchasing/Payment Option (**internal order** for places on campus like Wired Out, Blackwell; **purchasing card preferred** when you wish to use the pcard; **standard purchase request when a Purchase Order** should be issued; **reimbursement** to employee for reimbursements)

Vendor/Payee and Item Details

2. To purchase office supplies, click the eStores logo and follow these steps, otherwise skip to step 6
 - Click the Supplier Websites tab
 - Click the appropriate vendor link
 - Add items to the cart
 - Click Checkout
 - Click Checkout (again)
 - Click Confirm Checkout
 - Continue to step #6
3. Add details for the first item that you wish to purchase (description and item #), quantity of items, and estimated amount.
4. Add the Vendor information – if you are using a purchasing card you only need to indicate the vendor name (e.g. Target). All other purchases require the full vendor address.
5. To add additional items click the “Add Another Item” button.

General Request Information

6. **Ship To:** This will default to the address you enter on the preferences screen (details at end of document). Please be sure that it arrives to 1036 Derby Hall, 154 North Oval Mall, Columbus, OH 43210. If you are using a purchasing card for an in-person purchase type N/A to indicate that the item will not be shipped.
7. **Additional Info:** Provide any additional information that will assist us in understanding your

request (e.g. website, special instructions, etc.).

8. **Business Purpose:** Indicate a very **specific reason** as to why this purchase needs to be made. (e.g., dinner with visiting speaker so-and-so; purchase of books for research)
9. **Attachments:** Use this area to attach quotes from the vendor. Office staff may assist with scanning and you may also deliver directly to Juliana.

Funding Source

10. **Org Number:** 07330
11. **Special Funding Instructions:** Use this area to indicate where you would like the funding to come from. (e.g. Basin project)
12. **Chartfield Information:** Do not make changes to this section.

Actions

13. **Save For Later:** If you need to gather additional information, click Save for Later. Your request will be saved and you can come back to it later.
14. **Continue:** If you are ready to submit your request click "Continue" to preview and double check your request.

eRequest Preview

15. **Go Back and Edit:** If you made a mistake, use this button to correct your entry.
16. **Submit For Approval:** Clicking this button will submit your request for approval. You will receive an email copy of the request indicating that it has been submitted for approval. Once the request has been approved you will receive a second email indicating that the request has been approved.

Purchase Request Approved

- If this is a purchasing card request, Juliana will email you when the card is ready
- Otherwise, front office staff will notify you when item has arrived
- You will also receive an email notification when a reimbursement is issued to you.

Purchase is Complete

17. If applicable, return Purchasing Card and receipts to Diane
18. Write PR number on receipts or packing slip and return to Juliana

DONE!

NOTES ABOUT ONLINE SHOPPING

Please return both a receipt indicating method of payment (e.g., last 4 digits of credit card) and shipment notification, as credit cards are charged at time of shipment.

First time users:

The first time you log into eRequest you can set a few preferences:

- 1) Click on Preferences (top left corner of the page)
- 2) Make sure that "Email Enabled" is checked
- 3) In the Ship To box put:
 - Department of Geography
 - ATTN: [Your Name]
 - 1036 Derby Hall
 - 154 North Oval Mall
 - Columbus, OH 43210
- 4) In the Chartfield section select UNIV from the dropdown list under "BU GL"
- 5) In the box under "Org" type 07330
- 6) Click Save