

Entering an eRequest for Stores

The eRequest is an easy way for an employee to submit a request for products available from Stores. 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>. Simply enter your OSU Internet username (Name.#) and password.

The Ohio State University www.osu.edu

You've requested a web page which requires a user login.

Identify Yourself

Enter your "name.#"

Examples: doe.1 or 234567890

Password or Passcode

Enter your account password.

BuckeyePass users, enter your Passcode.

Login

Click .

Entering an eRequest for Stores


eRequest Home

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



The screenshot shows the 'eRequest Home' page. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'Preferences', and 'Help'. On the right side of this bar, the user's name 'Newton, Mark A' and a 'Log Out' link are visible. Below the navigation bar is the main heading 'eRequest Home'. Underneath this heading is a section titled 'Actions'. This section contains two distinct actions, each with a button and a descriptive text:

- The first action features a button labeled 'New' followed by the text 'Create a new eRequest.'
- The second action features a button labeled 'Search' followed by the text 'Search for existing eRequests.'

Click  to create a new eRequest.

Entering an eRequest for Stores

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.

The screenshot shows the top portion of the eRequest web application. At the top, there is a navigation bar with links for Home, Worklist, Preferences, and Help, and a user profile for Newton, Mark A with a Log Out button. Below this is the main heading 'eRequest'. Underneath, the PR Number is listed as 'TBD' and the Request Status is 'NEW'. A red asterisk icon is followed by the text '* Denotes Required Field'. The 'Contact Information' section contains several fields: 'Name' is 'Newton, Mark A'; 'Email' is 'newton.90@osu.edu'; 'Phone' is '614/247-7641'; and 'Requested For' is 'Newton, Mark A'. To the right of the 'Requested For' field is a button labeled 'Lookup Employee', which is circled in black.

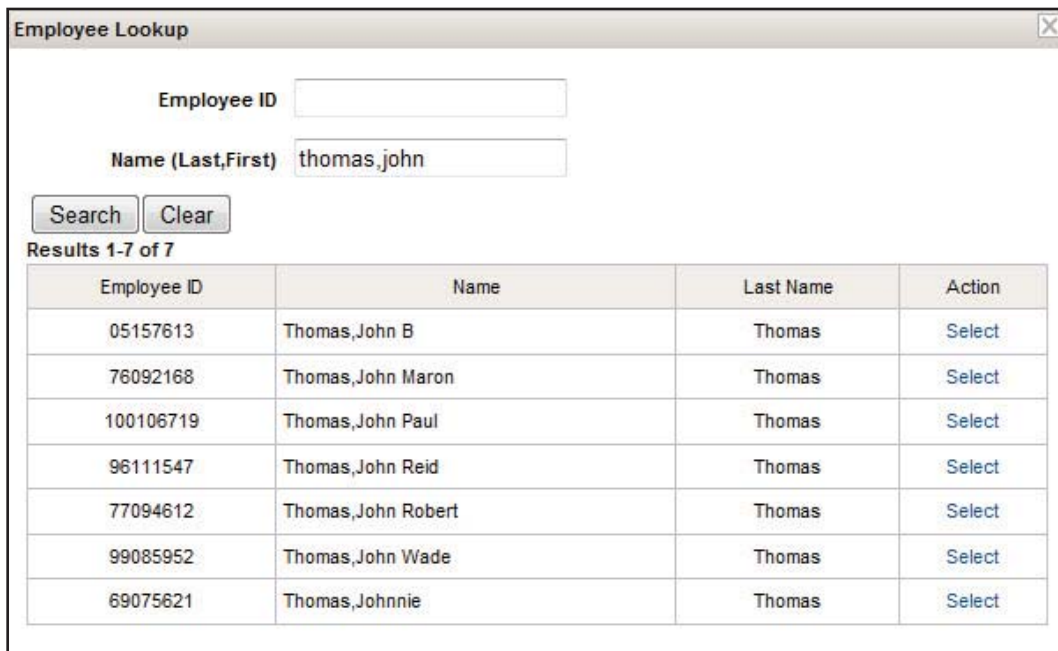
Contact Information is imported from the Faculty/Staff directory based on your login. For those assigned the Self-Service role, the **Requested For** field will also show your name but it cannot be changed. This means you may only enter your own orders.

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.

Entering an eRequest for Stores

Enter the individual's **Employee ID** (if known) or **Name** in the Employee Lookup box and click .

In the results list, click [\[Select\]](#) next to the desired employee 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.



The Employee Lookup dialog box contains the following elements:

- Employee ID:
- Name (Last,First):
- Search Clear
- Results 1-7 of 7
- Table with 4 columns: Employee ID, Name, Last Name, Action

Employee ID	Name	Last Name	Action
05157613	Thomas,John B	Thomas	Select
76092168	Thomas,John Maron	Thomas	Select
100106719	Thomas,John Paul	Thomas	Select
96111547	Thomas,John Reid	Thomas	Select
77094612	Thomas,John Robert	Thomas	Select
99085952	Thomas,John Wade	Thomas	Select
69075621	Thomas,Johnnie	Thomas	Select

Note: You may simply enter the employee's name by typing it in the **Requested For** field. However, this will not update the **Org Number** on the Funding Source section.

Entering an eRequest for Stores

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

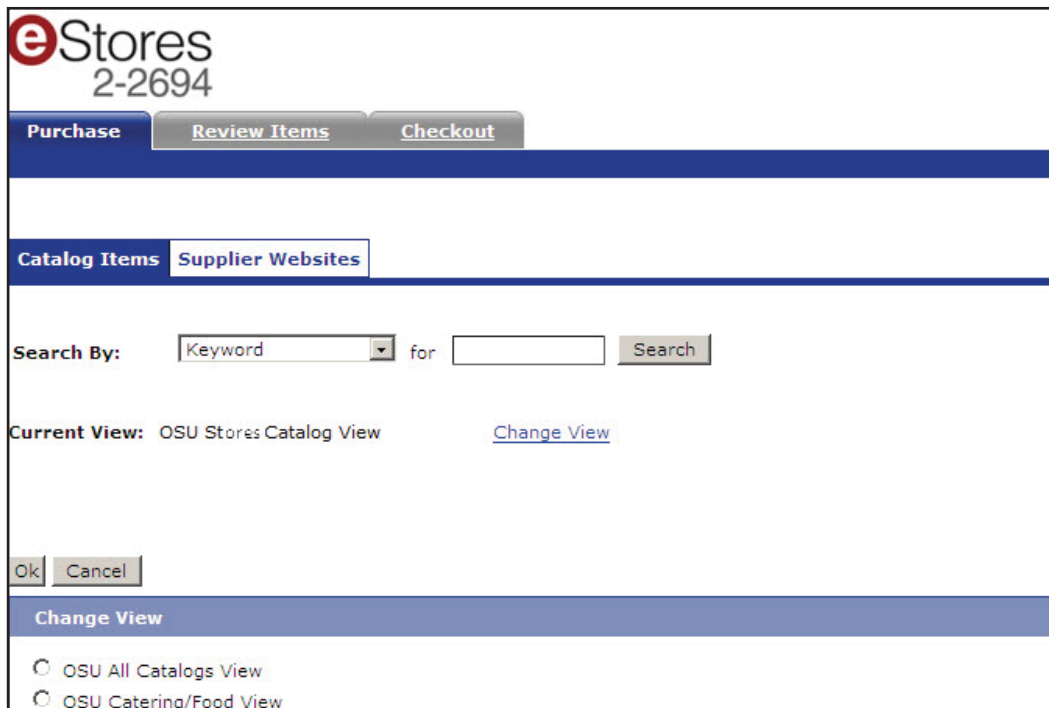
Standard Purchasing Request is the default Purchasing Option and will be used for most of your eRequests for purchases from Stores.

Purchasing/Payment Option	
Buy Something	Pay Someone
<input checked="" type="radio"/> Standard Purchasing Request	<input type="radio"/> Reimbursement To Employee
<input type="radio"/> Purchasing Card Preferred	<input type="radio"/> Payment
<input type="radio"/> Internal Order	<input type="radio"/> Refund
<input type="radio"/> Blanket Order Release	<input type="radio"/> Reimbursement To Non-Employee
Quote ID <input type="text"/>	

Entering an eRequest for Stores

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 hosted catalog search screen. Change the current view by clicking the Change View link. Change the radio button from “OSU All Catalogs View” to “OSU Stores Catalog View” Click OK.



eStores
2-2694

Purchase Review Items Checkout

Catalog Items Supplier Websites

Search By: Keyword for Search

Current View: OSU Stores Catalog View [Change View](#)

Ok Cancel

Change View

OSU All Catalogs View
 OSU Catering/Food View

Search for items need by using one of the three ways to search.

By Keyword: Search by actual item description or a general description of the product.

By Supplier Part Number: Usually referred to as the Stores item number.







By Manufacturer Part Number: This number may or may not be the same as the Supplier part number. The manufacturer part number may be found on the packaging.

Entering an eRequest for Stores

Don't forget you can narrow searches down by **Category**, **Manufacturer Name**, **Federal Classification** and **Price**. You'll see this option in the left margin. Once you select a range, all items not included in that range are eliminated from the search results.

All Categories > Search results for paper

Add to Cart Compare Sort By: Relevance Go Page

Item	Supplier	Manufacturer	Supplier Part Number	Manufacturer Part Number
 Paper, Aspen 30 Recycled 3-Hole 8 12 x 11	OSU Internal Supplier		51261	51261
 Paper, Aspen 30 Recycled Multi Use 8.5 x 11	OSU Internal Supplier		53425	53425
 Paper 20 Green 8.5x11 Boise	OSU Internal Supplier		51168	51168
 Paper 20 Pink 8.5x11Boise	OSU Internal Supplier		51173	51173
 Paper 20 Blue 8.5x11 Boise	OSU Internal Supplier		51158	51158
 Paper 20 Buff 8.5x11 Boise	OSU Internal Supplier		51163	51163

Narrow Search Results

View all

Category

- Paper Materials and Products (45)
- Medical Examination Table Paper (2)
- Laboratory supplies and fixtures (8)
- Waste Disposal Bags (12)
- Toilet Deodorizer Blocks (7)
- Filter media (12)
- Record Books and Registers (1)
- Business Machine Paper (12)
- General laboratory glassware and plasticware and supplies (1)

Supplier Name


- OSU Internal Supplier (100)

Manufacturer Name

- (97)
- Kimberly Clark (2)
- Georgia Pacific (1)

After you have found the items you need and have completed the checkout process, the contents of the shopping cart will be transferred to the **Vendor/Payee** and **Item Detail** section of the eRequest. At this point, you will not be able to change or add items to the request.

Vendor/Payee and Item Details



Item Number	Description	Quantity	Estimated Amount	Total Estimated Amount
53425	Paper, Aspen 30 Recycled Multi Use 8.5 x 11	1 X	\$3.61	= \$3.61

Vendor/Payee Information

OSU STORES

TOTAL Request Amount \$3.61

Entering an eRequest for Stores

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.

General Request Information

<p>* Ship To (e.g. Building Name, N/A)</p> <input type="text"/> 254 characters remaining	<p>Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)</p> <input type="text"/> 254 characters remaining
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*** Business Purpose for the Item(s) Above**
For Meal Reimbursements - Please Be Specific: what business related issues were discussed, list of attendees, name of place meal took place

254 characters remaining

Attachments

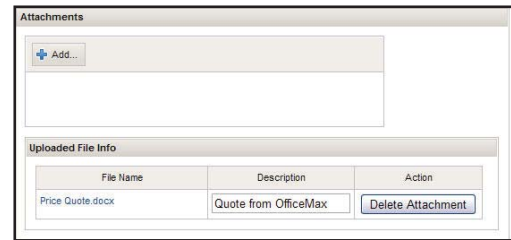
+ Add...

Entering an eRequest for Stores

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

Entering an eRequest for Stores

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.

The screenshot shows the 'Funding Source' form with the following fields and elements:

- Org Number:** A text input field containing '42720' with a red asterisk icon to its left. A 'Search For Approvers/Org' button is positioned to the right.
- Organization Name:** A text input field containing 'OIT Administration'.
- Research Project Number:** A text input field with a 'Search For Project' button to its right.
- Special Funding Instructions:** A large text area with a '254 characters remaining' indicator below it. An 'Enter Chartfields (optional)' button is located below the text area.
- Approvers For Org:** A table listing the following names:

Approvers For Org
Bhuta, Darshana C.
Black, Linda Michele
Pudhota, Suresh Chowdary
Yee, Haxiang

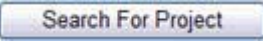
Approvers for Org lists the individuals who will be reviewing this request.

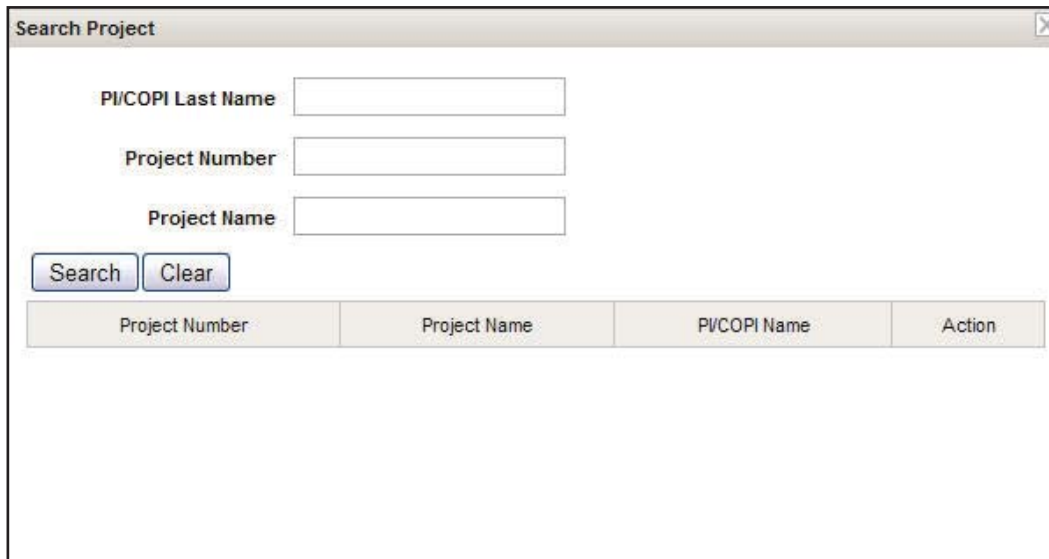
If you are placing a request for another Org or you do not see your approver in the **Approvers For Org** list, you may type in the correct Org Number or click **Search For Approvers/Org** to search by your **Approver's Last Name**, the **VP/College Name**, the **Organization Name** or the **Org Number**.

The screenshot shows the 'Search Approver' dialog box with the following fields and elements:

- Approver Last Name:** A text input field.
- VP/College Name:** A dropdown menu currently set to 'Choose'.
- Organization Name:** A text input field.
- Org Number:** A text input field.
- Buttons:** 'Search' and 'Clear' buttons.
- Table:** A table with the following columns: Org Number, Org Name, Approver, and Action.


Entering an eRequest for Stores

If applicable, enter the **Research 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**.



The 'Search Project' window contains three input fields: 'PI/COPI Last Name', 'Project Number', and 'Project Name'. Below these fields are 'Search' and 'Clear' buttons. At the bottom, there is a table header with four columns: 'Project Number', 'Project Name', 'PI/COPI Name', and 'Action'.

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. Otherwise, these entries will be made during the approval process.

BU GL	Org	Fund	Account	Project	Program	User Defined	Percent	Estimated Amt	Split Funding
Choose ▾	42720 Lookup	<input type="text"/> Lookup	<input type="text"/> Lookup	<input type="text"/> Lookup	<input type="text"/> Lookup	<input type="text"/> Lookup	100	\$0.00	+ -

Entering an eRequest for Stores

Actions

If you are not ready to submit the request, click . 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 [Home] at the top of the form. All the information you entered will be lost.

Actions

* Denotes Required Field

If your request is complete, click to see the eRequest Preview which you may review and submit for approval.

Entering an eRequest for Stores

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.

Home Worklist Preferences Help Shurtleff,Dwight Franklin Log Out

eRequest Preview

PR Number TBD Request Status NEW

Contact Information

Name Shurtleff,Dwight Franklin Requested For Shurtleff,Dwight Franklin
Email shurtleff.1@osu.edu
Phone 614/292-2093

Purchasing/Payment Option

Selected Option Standard Purchasing Request

Vendor/Payee and Item Details

Description	Quantity	Estimated Amount	Total Estimated Amount
Chair, Serta Executive High-back	1 X	\$150.00	= \$150.00

Vendor/Payee Information
Office Max

TOTAL Request Amount \$150.00

General Request Information

Ship To 1121 Kinnear Rd., Bldg. E
Additional Information Prefer black leather - see attached quote.
Business Purpose For Request Replace broken chair

Attachments

File Name	Description
Price Quote.docx	Chair Quote
chair.jpg	OfficeMax Chair

Funding Source

Org Number 42720	Organization Name OIT Administration	Approvers For Org
Research Project Number	Project Name	Bhuta,Darshana C.
Special Funding Instructions		Pudhota,Suresh Chowdary
		Yee,Haxiang

Actions

[Go Back And Edit](#) [Submit For Approval](#)

Entering an eRequest for Stores


eRequest Confirmation

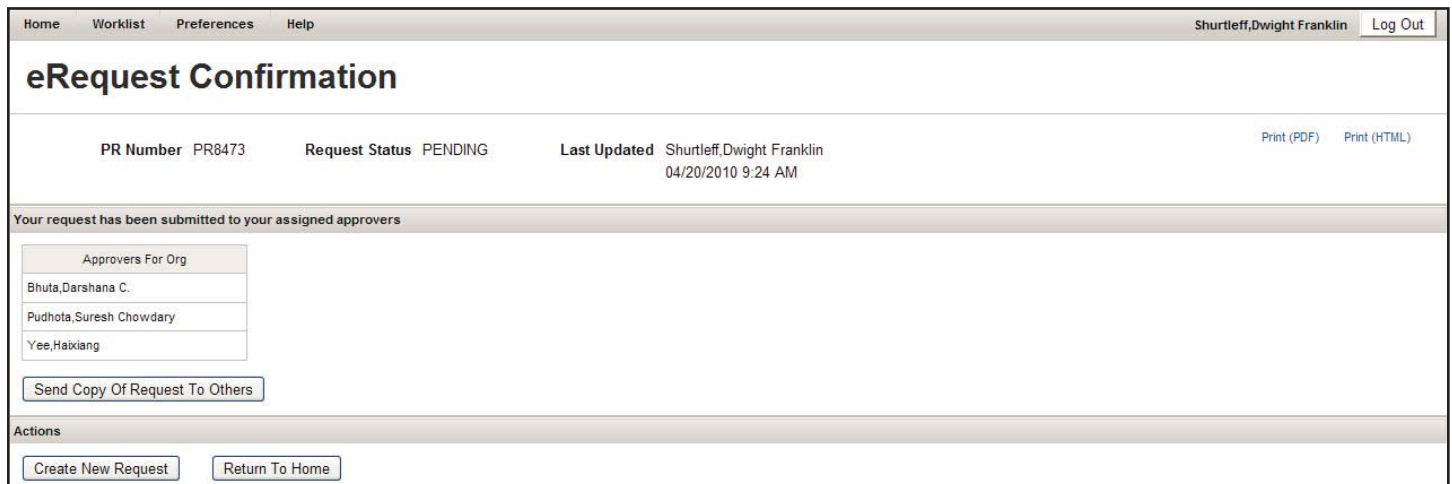
The eRequest Confirmation shows the **PR Number** and the **Request Status** which changes to PENDING.

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.

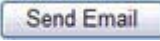
If there are others you wish to receive a copy of the request (e.g. the person for whom you placed the request),

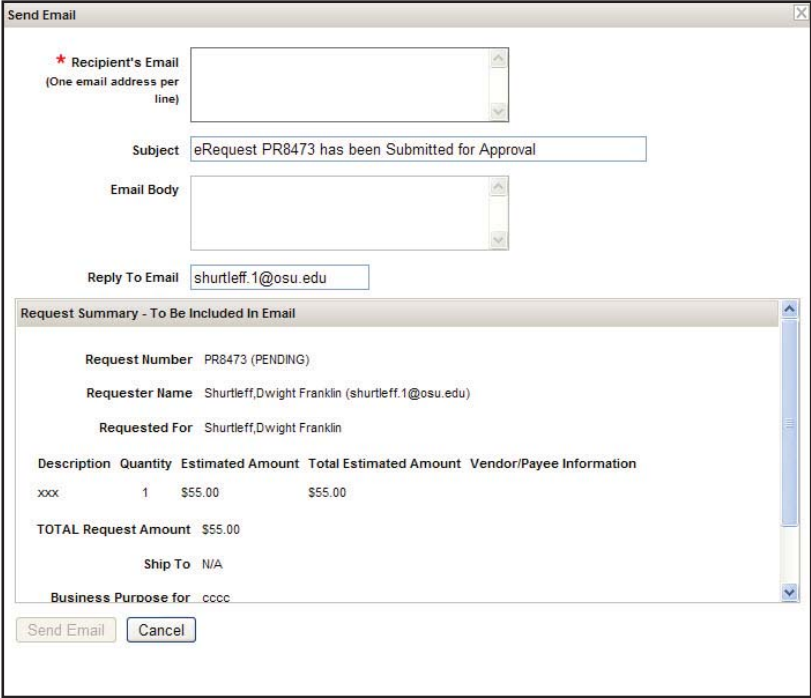
click .



The screenshot shows the 'eRequest Confirmation' page. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'Preferences', and 'Help'. On the right side of the navigation bar, the user's name 'Shurtleff, Dwight Franklin' and a 'Log Out' button are visible. The main heading is 'eRequest Confirmation'. Below the heading, the following information is displayed: 'PR Number PR8473', 'Request Status PENDING', and 'Last Updated Shurtleff, Dwight Franklin 04/20/2010 9:24 AM'. On the right side of this information, there are two links: 'Print (PDF)' and 'Print (HTML)'. A message states: 'Your request has been submitted to your assigned approvers'. Below this message is a table titled 'Approvers For Org' with the following entries: 'Bhuta, Darshana C.', 'Pudhota, Suresh Chowdary', and 'Yee, Haixiang'. Below the table is a button labeled 'Send Copy Of Request To Others'. At the bottom of the page, there is an 'Actions' section with two buttons: 'Create New Request' and 'Return To Home'.

Entering an eRequest for Stores



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  to send the message (if any) and the **Request Summary**.


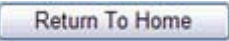


The screenshot shows a "Send Email" window with the following fields and content:

- Recipient's Email** (One email address per line): [Empty text box]
- Subject**: eRequest PR8473 has been Submitted for Approval
- Email Body**: [Empty text box]
- Reply To Email**: shurtleff.1@osu.edu
- Request Summary - To Be Included In Email**:
 - Request Number: PR8473 (PENDING)
 - Requester Name: Shurtleff,Dwight Franklin (shurtleff.1@osu.edu)
 - Requested For: Shurtleff,Dwight Franklin
 - Table:

Description	Quantity	Estimated Amount	Total Estimated Amount	Vendor/Payee Information
xxx	1	\$55.00	\$55.00	
TOTAL Request Amount		\$55.00		
 - Ship To: N/A
 - Business Purpose for: cccc

Buttons:  

Since this request is completed, click  to begin another eRequest or click  to return to the **eRequest Home** page.

To leave the eRequest form, click . Close your browser to complete the log out process.

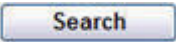
Entering an eRequest for Stores

Searching for an eRequest

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

The screenshot shows the 'eRequest Home' page. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'Preferences', and 'Help'. On the right side of this bar, the user's name 'Shurtleff, Dwight Franklin' is displayed next to a 'Log Out' button. Below the navigation bar, the main heading 'eRequest Home' is prominently displayed. Underneath the heading, there is a section titled 'Actions'. This section contains two distinct action items, each with a button and a descriptive text: a 'New' button followed by the text 'Create a new eRequest.', and a 'Search' button followed by the text 'Search for existing eRequests.'


Click .

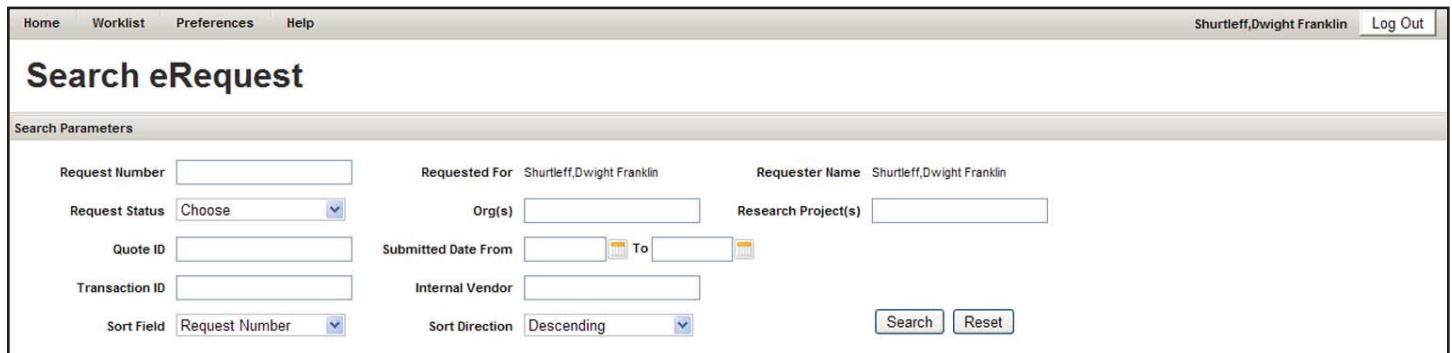
Entering an eRequest for Stores

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 **Research Project** number.
- **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 Project.
- **Sort Direction** changes the list order from Descending (default) to Ascending based on the sort field.



Home Worklist Preferences Help Shurtleff,Dwight Franklin Log Out

Search eRequest

Search Parameters

Request Number Requested For: Shurtleff,Dwight Franklin Requester Name: Shurtleff,Dwight Franklin

Request Status: Choose Org(s) Research Project(s)

Quote ID Submitted Date From To

Transaction ID Internal Vendor

Sort Field: Request Number Sort Direction: Descending

Click  to apply your search parameters.

Search Results: 1-20 of 177

Request Number	Request Status	Submitted Date	Requested For / Requester Name	Last Updated By	Org	Project	Transaction ID	Vendor/ Payee Information	Total Request Amount	Action
20528	PENDING	09/23/2010 8:34 AM	Reichert,Lynn Marie	Reichert,Lynn Marie 09/23/2010 8:34 AM	27000			POSSITIVITY	\$2.07	View Request
20525	PENDING	09/22/2010 7:49 AM	Leshy,Mary Ann	Leshy,Mary Ann 09/22/2010 7:49 AM	85911			Target	\$65.00	View Request

To select a request, click [[View Request](#)] in the Action column in the **Search Results** section.