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.

Click Login.
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**eRequest Home**

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

![eRequest Home]

Click **New** to create a new eRequest.
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**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.

![eRequest Form](image)

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

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.
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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.
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 eStores. 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.

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.
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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.

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.
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.
**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 ![Add](https://example.com/add_icon) to add an attachment. Select the correct file, then click ![Open](https://example.com/open_icon). 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 ![Delete Attachment](https://example.com/delete_icon).
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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.

![Funding Source GUI](image)

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 to search by your Approver’s Last Name, the VP/College Name, the Organization Name or the Org Number.

![Search Approver GUI](image)
If applicable, enter the **Research Project Number** or click **Search For Project** 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**.

![Search Project Window]

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 **Enter Chartfields (optional)** and enter the information. Otherwise, these entries will be made during the approval process.

![Chartfields Window]
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Actions

If you are not ready to submit the request, click [Save For Later]. 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.

If your request is complete, click [Continue] to see the eRequest Preview which you may review and submit for approval.
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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.
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 **Send Copy Of Request To Others**.

![eRequest Confirmation screenshot](image-url)
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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**.

Since this request is completed, click **Create New Request** to begin another eRequest or click **Return To Home** to return to the **eRequest Home** page.

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

Click **Search**.
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.

Click to apply your search parameters.

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