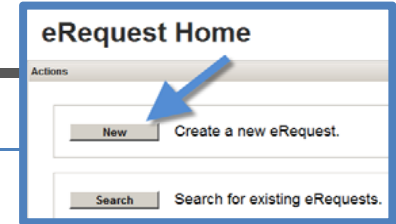


eRequest Initiator Job Aid



You can use eRequests to initiate all of your buying transactions except those from the local checking account.

1. <https://erequest.osu.edu>
2. Sign in with your OSU Internet Username and [Password](#)
3. Click on **NEW**
4. Follow the prompts on the screen to complete the request.

Tips on each Section of eRequest	Internal Order	eStores	Purchase Order* For all PO's	Convenience Order Payments*	PCard Transaction (Non OSP ONLY)	Mileage* (Non OSP ONLY)
Purchasing/ Payment Option	<i>Buy Something – Internal Order</i>	<i>Buy Something – Standard Purchasing Request</i>	<i>Buy Something – Standard Purchasing Request</i>	<i>Pay Someone – Reimbursement, Payment or Refund</i> <i>Buy Something – Standard Purchasing Request</i>	<i>Buy Something – Purchasing Card Preferred</i>	<i>Pay Someone – Reimbursement to Employee or Non – Employee</i>
Vendor/Payee and Item Details	Description, Quantity and Estimated amount Choose or type the <u>internal vendor</u> name. A list of vendors should populate under the cell. Pick the vendor.	Click on the <u>eStores icon</u> . Click "OK" on the pop up. Create a shopping cart. Confirm checkout.	Description, Quantity and Estimated amount Vendor name, address, phone fax, email and PeopleSoft Vendor ID (if known)	Description, Quantity and Estimated amount Vendor name, address, phone fax, email and PeopleSoft Vendor ID (if known) – For Employee Reimbursements this will auto-populate.	Description, Quantity, Estimated amount, Vendor name One PCard receipt per eRequest preferred	<i>Description = Month/Year Mileage</i> Ex. JAN 2012 MILEAGE <i>Estimated Amt = Actual Amt on Mileage Log</i>
General Request Information	- Ship to - Business Purpose (be descriptive)	- Ship to - Business Purpose (be descriptive)	Ship to and Business Purpose (be descriptive) <i>Additional Info:</i> - <u>Previous PO #</u> (if applicable) - <u>Term or Due Date</u> - Special Instructions Note – POs must be set up BEFORE you make a purchase.	<i>Additional Info:</i> Enter the Convenience Order Number associated with the transaction.	<i>Additional Info:</i> Enter the T number associated with all travel Enter Convenience Order Number for Registrations Enter the employee id and name.# for all items gifted to employees.	<i>Business Purpose = Monthly Mileage for Extension Business Travel</i> <i>Ship to = N/A</i>
Attachments – Click the plus sign to add.	Quotes or any emails with the vendor		Quotes, contracts for signature, invoices, emails with the vendor, attendee lists	Receipts, backup information for Payment Requests, attendee lists	Receipts, Attendee lists, packing slips, preapproval for Director's expenses	- Mileage Log - Receipts for Registration - Receipts for all others over \$50

*If you are paying a company or individual for the first time, fax an AP Payment Compliance Form and associated pages to 614-688-0529. Do not attach to the eRequest.



THE OHIO STATE UNIVERSITY

COLLEGE OF FOOD, AGRICULTURAL,
AND ENVIRONMENTAL SCIENCES

eRequest Initiator Job Aid

Funding Source

Click on the “**Enter Chartfield (optional)**” button and add a chartfield. This is *not* optional. The ORG Number at the top routes the workflow. Choose this org number based on the ORG with the highest amount of expense if you are splitting a chartfield.

BUGL = UNIV or OSURF (for OSP)

ORG, FUND and ACCT are required. Use the lookup for Acct or User Defined if needed. Always use a 6xxxx acct #. If you need to split a chartfield use the PLUS sign and Choose split by Amount. If your User defined doesn't exist – delete it from the field and enter in Additional Info section.

Click Continue – it will take you to a preview window.

Review your transactions, make any necessary changes and then click **Submit for Approval**. An email will be sent to your approver.

Process After Submission

Please note: If your vendor (internal or external) requires you to do additional work to get the transaction completed you will need to do this separately.

Example: filling out a registration form to register for an internal meeting

1. Send an electronic version of the eRequest to your eReports Reconciler. They can save electronically to a “pending reconciliation” file until they have seen it appear on the eReports, then it can be moved to a permanent electronic file.
Note: if you used more than one ORG in your chartfield be sure to email ALL ORGS the electronic copy.
2. For Convenience Order requests print the eRequest and mail original documentation to 4 Ag Admin, 2120 Fyffe Road, Columbus, OH 43210 or directly to Accounts Payable at [OSP](#).

	Internal Order	eStores	Purchase Order	Convenience Order	Purchasing Card Transaction	Mileage	OSP
Step 1	Bus Ofc Rep	Bus Ofc Rep	Bus Ofc Rep	Bus Ofc Rep	Reallocator	Bus Ofc Rep	Bus Ofc Rep
Step 2	Vendor	Bus Ofc Approver	Bus Ofc Approver	AP	Bus Ofc Approver	AP	Bus Ofc Approver
Step 3		Vendor	Purchasing (some)				OSP
Step 4			Vendor				
Processed Timing	Daily	Daily	2-4 Weeks	Varies by type	By deadline	13 Business Days	Varies by type
Problems?	Vendor	eStores 614-292-2694	Bus Ofc Rep	Bus Ofc Rep	Reallocator	Bus Ofc Rep	OSP

Resources

- Summary, Detailed and Troubleshooting Job Aids available here: <http://cfaesfinance.osu.edu/training>
- University eRequest/eStores help here: <https://assist-erp.osu.edu/assisterequest/>
- Business Office Rep: <http://cfaesfinance.osu.edu/aboutus>