



SES Student eRequest Instructions

eRequest is a web-based procurement system for OSU student, faculty and staff. This online system is used to submit a request for goods, services, or payments. The approval process is handled automatically through routing of the system. Once approved, the request will be fulfilled through either the departmental purchasing card or Arts and Sciences service center or by a delegated buyer.

eRequest was designed so that request for goods, services, or payments are carried out within the university’s policies and procedures. As a public research university, OSU student, faculty and staff who uses university resources have Stewardship and Ethics responsibility.

Training for eRequest

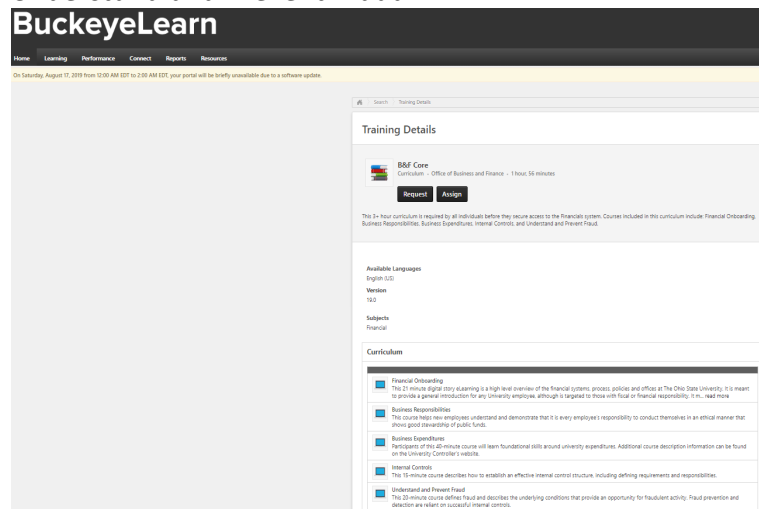
Anyone can access eRequest to place an order and formal training is not required. However going through training will help you understanding the university business policies, importance of Stewardship and Ethics responsibility you have as part of your role in the university.

The Ohio State University recognizes that operational excellence is foundational to the success of the universities future. We as Buckeyes must be a responsible steward of its resources in order to re-direct investment into initiatives that will help us to achieve The Ohio State Universities aspirations.

BuckeyeLearn is Ohio State's tool to engage faculty, staff and student employees in training and professional development. The training listed below are recommended so you can familiarize yourself with OSU’s standards of doing business before initiating purchases through eRequest:

Institutional Data Policy Course:
B&F Core:

- Financial Onboarding*
- Business Responsibilities*
- Business Expenditures*
- Internal controls*
- Understand and Prevent Fraud*





SES Student eRequest Instructions

Understanding the University Funding Source structure

- What is a funding source?

Fund accounting is the accounting method used to segregate the university's money by its sources in order to ensure it is properly spent and accounted for. Funds must not be intermingled. This means that one fund cannot be substituted for another, and money can be moved from one fund group to another only under limited circumstances.

Fund accounting is common to all universities and colleges. The university's Board of Trustees delegates stewardship of the organization's funds to the various colleges and equivalent areas. In turn, day-to-day stewardship responsibility is often delegated to individual departments with many individual employees acting as stewards of the university funds.

If you have questions about funding source, the school Administrative manager or Fiscal Program Coordinator can also assist you with your questions.

If you are working on a project, there should be a designated funding number for that project. You should be able to get this information from the faculty who owns the project.

- Different types of funds you may use in to purchase items for your research.

OSURF/OSP sponsored projects funds: External funds awarded to a principle investigator for research. These funds are awarded based on an agreement between the sponsor and the university. When using these funds, you will need to follow not only university policies but also OSP policies and sponsors requirements.

Ohio State University Office of Sponsored Programs (OSP) is the entity authorized by the university to seek, accept and administer all Sponsored agreements.

Univ/General funds: The General Fund provides the money that sustains the university's core instruction, departmental research, instructional support, and related general administrative costs and facilities expenditures. Funds may be used for any legal and reasonable purpose in carrying out the mission of the institution

Current Restricted Funds: Current Restricted Funds must be spent **only** for the purpose intended by the outside entity that established the restriction. Because the university has a legal stewardship obligation to abide by fund restrictions, it is important to be aware of the restrictions and monitor the funds for appropriate use.



SES Student eRequest Instructions

Accessing eRequest

You can assess eRequest by going to www.erequest.osu.edu and logging on with your OSU dot number and password.

OSU.EDU Help BuckeyeLink Map Find People Webmail Search Ohio State

Login Required

A login is required to access the requested service.

Ohio State Username

Password

Is this a private computer/device? Yes No

Forgot username? Forgot password?

Login

IMPORTANT LOGIN INFORMATION

VIEW SYSTEM STATUS AND MAINTENANCE

Need Help?

Forgot your username? Reset your password? Need to activate your Ohio State Username?

Other questions?

About Ohio State Usernames About OSU Web Login Contact IT Service Desk

erequest.osu.edu/finreq/home.jsf?cid=133506

OSU.EDU Home Worklist Preferences Help

BuckeyePass authentication is being added to eRequest during the month of August. BuckeyePass will be requ

eRequest Home

Actions

New Create a new eRequest.

Search Search for existing eRequests.

OSU.EDU Home Worklist Preferences Help

BuckeyePass authentication is being added to eRequest during the month of August. BuckeyePass will be required in order to create a request. You can enroll at buckeyepass.osu.

eRequest

PR Number	TBD	Request Status	NEW
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Contact Information

Name Carpenter,Soyoung Han Requested For Carpenter,Soyoung Han

Email carpenter.634@osu.edu

Phone 614/688-2884

Purchasing/Payment Option

<p>Buy Something</p> <p><input checked="" type="radio"/> Standard Purchasing Request <input type="text" value="Quote ID"/></p> <p><input type="radio"/> PCard Preferred</p> <p><input type="radio"/> Internal Order</p> <p><input type="radio"/> Blanket Order Release</p>	<p>Pay Someone</p> <p><input type="radio"/> Reimbursement To Employee</p> <p><input type="radio"/> Payment</p> <p><input type="radio"/> Refund</p> <p><input type="radio"/> Reimbursement To Non-Employee</p>
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Vendor/Payee and Item Details

Shop at eStores **eStores**

Description	UOM	Quantity	Estimated Amount	Total Estimated Amount
<input type="text"/>	<input type="text"/>	1	x <input type="text"/>	= \$0.00

Vendor/Payee Information (e.g. address, city, state)

254 characters remaining

Do Not Substitute Vendor

TOTAL Request Amount \$0.00

General Request Information

Ship To (e.g. Building Name, N/A)

254 characters remaining

Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)

254 characters remaining

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



SES Student eRequest Instructions

Components of a Successful eRequest:

- If possible use university preferred vendor and eStores to purchase item
- Quote from a vendor or a PDF of the Shopping Cart that includes your order from the vendor’s website
- Quote should not include tax as Ohio State University is tax exempt in most states
- Complete business purpose related to the purchase (who, what, why, when and where)
- Complete vendor information
- Funding source
- Written permission from the owner of the funding source to spend funds for this purpose (upload email exchange as an attachment)
- Complete shipping address

Questions to Ask before submitting an eRequest:

- How do I find OSU’s preferred vendor websites like Fisher Scientific and Gas Warehouse?

OSU has a Contract Book that is manage by the university Business and Finance. The Contract Book lists the preferred vendors who are already in the university vendor system and has a purchasing contract with the university.

The list of these vendors can be found on the Business and Finance website.

<https://busfin.osu.edu/buy-schedule-travel/purchasing/find-supplier>

If the vendor has not work with OSU, they will need to be set up on the OSU vendor system. The Fiscal Program Coordinator or school Administrate manager will assist you with this process.

- How do I look up items in eStores?

You can access vendors in eStores by clicking on the red “eStores” button in eRequest

The screenshot shows the 'eRequest' web application interface. At the top, there is a navigation bar with 'OSU.EDU' and 'Help: Buckeye'. Below this is a message about BuckeyePass authentication. The main content area is titled 'eRequest' and shows 'PR Number TBD' and 'Request Status NEW'. Under 'Contact Information', the user's name is 'Carpenter Soyoung Han' and the requested for is 'Carpenter Soyoung Han'. The 'Purchasing/Payment Option' section has two columns of radio buttons. The left column includes 'Standard Purchasing Request' (selected), 'PC card Preferred', 'Internal Order', and 'Blanket Order Release'. The right column includes 'Reimbursement To Employee', 'Payment', 'Selfpay', and 'Reimbursement To Non-Employee'. Below this is the 'Vendor/Payer and Item Details' section, which features a red 'eStores' button. A table for item details is visible with columns for 'Description', 'UCM', 'Quantity', 'Estimated Amount', and 'Total Estimated Amount'. The table contains one row with a quantity of '1' and an estimated amount of '\$0.00'. There are also buttons for 'Add Another Item' and 'Remove This Item'.



SES Student eRequest Instructions

- How do I pick the Purchasing/Payment option in eRequest?
There are four Purchasing/Payment option listed in the eRequest. Below criteria can be used to determine what option to use
 - **funding source**
 - **who the vendor**

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

Standard Purchase Request: *This option includes the use of a purchaser order. Purchase order (PO) is a legal and binding contract for goods and services between the university and the supplier that includes standard university terms and conditions. The vendor accepts the contract by providing the goods or services and invoicing the university. Purchase orders must be created and approved prior to the goods and services being ordered.*

- **Funding source**
*OSURF/OSP sponsored projects funds
 Univ/General funds
 Current Restricted fund*
- **Vendor**
*eStores vendors
 External vendor who accepts purchase orders*

PCard Preferred: *This option is one of the university's procurement methods for the purchase of goods/services and necessary to conduct university business. Specific administrative processes in the Financials System are necessary to ensure that purchases made with the PCard are expensed to the appropriate ChartField and are in compliance with the PCard Policy, Expenditures Policy, Travel Policy, Purchasing Policy, Internal Controls Policy and Human Resource Policies.*

- **Funding source**
*Univ/General funds
 Current Restricted fund*
- **Vendor**
External vendor who accepts credit cards



SES Student eRequest Instructions

Internal Order: This option is used to purchase from an internal OSU Department. Example would be Chem Scientific Glassblowing Lab, ASC Machine Shop.

Purchasing/Payment Option

<p>Buy Something</p> <p><input type="radio"/> Standard Purchasing Request</p> <p><input type="radio"/> PCard Preferred</p> <p><input checked="" type="radio"/> Internal Order</p> <p><input type="radio"/> Blanket Order Release</p> <p>Quote ID <input type="text"/></p>	<p>Pay Someone</p> <p><input type="radio"/> Reimbursement To Employee</p> <p><input type="radio"/> Payment</p> <p><input type="radio"/> Refund</p> <p><input type="radio"/> Reimbursement To Non-Employee</p>
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Vendor/Payee and Item Details

Shop at eStores

* Description	UOM	* Quantity	* Estimated Amount	Total Estimated Amount
<input type="text"/>	<input type="text"/>	1 X	<input type="text"/>	= \$0.00

Internal Vendor (Enter Freeform Text, Type To Search or [View All](#))

ASC Machine Shop

Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)

4 characters remaining

* Business Purpose for the Item(s) Above

- **Funding source**
OSURF/OSP sponsored projects funds
Univ/General funds
Current Restricted fund
- **Vendor**
[University internal vendor list](#)

Office of Business and Finance

UNIVERSITY BUSINESS BUY, SCHEDULE, TRAVEL BURSAR INSIDE B&F

Home | Buy, Schedule, Travel | Purchasing | [Find a Supplier](#)

Find a Supplier

Ohio State's contract book can now be searched by category, supplier designation or keyword.

How to search

[View all suppliers alphabetically](#)

KEYWORDS

CATEGORY

CERTIFICATION AND SPECIAL DESIGNATION



SES Student eRequest Instructions

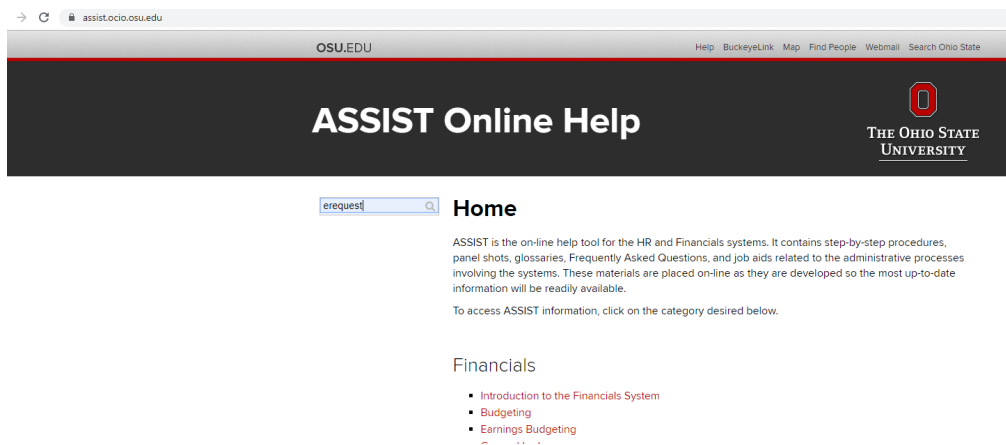
- Who should sign a contract for promise to provide services/materials?

*External contract that have finical obligation needs to be signed by OSU purchasing
Internal contracts with finical obligations need to be signed by the college.*

*If you have any contract that, have legal binding, this need to be reviewed by the University
Legal office. Please Contracts to The school Administrate manager or Fiscal Program
Coordinator so that it can be reviewed by the college and university legal office.*

eRequest ASSIST

In eRequest ASSIST, you will find information on using eRequest and associated job aids and links. You can assess eRequest ASSIST by logging into [ASSIST Online Help](#) using your OSU ID and password. Then search “eRequest” for eRequest ASSIST materials.



Below are some training materials in eRequest ASSIS that can help you use the eRequest system.

- [Entering an eRequest](#)
- [Entering an eRequest for Stores](#)

If you have questions about eRequest, the SES Fiscal Program Coordinator and SES Administrate manager can assist you.

**SES Fiscal Program Coordinator
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