Background

The eRequest is an easy way for an employee to submit a request for goods, services, or payments. 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 to the appropriate department approver as designated by the College. Once approved, the request will be fulfilled through the BOC.

eRequest is the required mechanism for initiating requisitions, purchase orders, reimbursements, payment requests, and internal orders. This applies to both University and OSP purchasing.

eRequest is designed to provide departments with continual status updates. The system, while not a document management system, is utilized as such allowing documents and any other required documentation to be uploaded and attached to a specific order.

General Process

- Department identifies the need for purchase and initiates an eRequest.
- Department initiator enters as much information as possible into the eRequest and uploads any pertinent attachments, i.e. quotes, emails, websites, shopping carts, etc.
- Department initiator submits eRequest to department approver for budget and business purpose approval.
- Approved eRequest is routed to BOC for disposition.
- BOC receives eRequest and makes a determination on the best way to process.
- BOC completes the purchase and notifies the department when complete.
- Department notifies BOC upon receipt of purchased item or service to facilitate payment.

Requisitions

Requisitions will be done at the BOC for eStores orders, orders that require contract approval, or orders for items that are restricted and require special consideration at University Purchasing.

Direct Purchase Order

Requests that are above $100 and do not require special consideration from University Purchasing will be processed as a direct PO buy a BOC delegated buyer.

Purchasing Card (Pcard)

Requests for items that are under $100 and are allowable to be purchased using the pcard will be purchased utilizing the BOC pcard.

Internal Orders

- Internal orders are handled differently according to each vendor.
Any internal order requiring a signature/contract must be forwarded to the College prior to submission to the BOC.

All internal orders must be dispatched by the BOC.

Departments should follow up with vendor.

BOC will communicate with department if special handling instructions are needed.

**ERequest Status and Documentation Guide**

**Statutes:**

**In Process**-Request has been received and assigned to a BOC Fiscal Associate for processing.

**Additional Info Needed**-Additional information has been requested from the department and is either required or necessary to process the request.

**Pending Completion**-Request is pending final step in processing, i.e. central purchasing to create PO, contract approval, etc.

**Complete**-Request has been finalized with the exception of payment and customer has been notified.

**Do Not Fulfill**-Request has been submitted to the BOC and needs to be canceled.

**Distribution Methods:**

**Requisition**-All eStores orders, OSP funded requests, contract obligations to be signed, requests over $5,000.

**Direct Purchase Order**-Requests under $5,000 and does not include items mentioned above.

**Blanket Order Release**-Department requests release of payment against blanket purchase order. The blanket order release is required for all invoices submitted for payment.

**Purchasing Card**-BOC will use for allowable purchases under $100 or for vendors who require credit card payment within the limits of $1,000 per transaction.

**Internal Order**-Requests between University departments.

**PREP**-Reimbursements to employees or payments on convenience orders that allow direct payment.

*Note*: The BOC will record all comments, etc. in the Activity Log. Departments should convey additional information via the Comment section of the purchase request.

**Documentation to Attach**

- Business Meal Form
- Contracts
- Quotes
- Website shopping carts
- Emails