ERSO Intranet User Guide for Requesters

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**ERSO Intranet Access for the Requester Role**

Access to the ERSO Intranet is automatically available to those on department payroll. The functions available to you are based on your assigned role. In a Requester role, your PI or unit lead determines your access level and a dollar threshold for purchase requests.

You may be given Intranet access if you are affiliated with a research team even if you are not employed by the department. In this case, your PI or unit lead must add you to the system manually.

All users require a CalNet ID and passphrase to log in to the system.

**How to Log in to the ERSO Intranet**

1) Go to the ERSO Website home page at [http://www.erso.berkeley.edu](http://www.erso.berkeley.edu)

2) Click on **Intranet**

3) Login to CalNet with your ID and passphrase
You will be automatically redirected to the ERSO Intranet Home screen

- Use the text links in the menu bar to navigate to other Intranet sections
Review or Edit Your Contact Information

1) In the People section, click the Update Personal Profile button
   - A form displays your information from the CalNet campus directory

2) Review the information and change it if necessary, particularly address information which is used as your default shipping address

3) Click the Save information above button to submit changes and return to the main screen, or

4) Click a link from the menu bar to exit the screen without saving
Submit a Purchase Request

1) Select the **Services** link from the menu bar

2) Select the PI or unit head’s name from the drop-down list under the **Requesters** section

3) Click the **Purchase Request** button

4) Follow the instructions above the form to fill it in properly

5) In the **Comments** field, enter the vendor's information if the vendor is not shown in the drop-down list, as well as a ship-to address, contact name and any other information relevant to filling the order

6) Click the **Submit Request** button
   - Your request is submitted and the screen displays the **Upload Document** screen
7) Follow the instructions to upload documents as necessary
8) Click any button or menu item to complete the transaction
   - Your documents are uploaded with your request and automatically routed to the unit head or delegate in your research group for approval. Once approved, the request is forwarded to the appropriate unit for processing

- You’ll receive an email with the subject line [Order Status] Purchase Order Confirmation #XXXX, confirming submission of the request

- Retain your original receipts as backup until the request is processed to insure that the scanned documents are readable by Purchasing Services
Submit a Supply Reimbursement Request

1. Select the Services link from the menu bar.
2. Select the PI or unit head’s name from the drop-down list under the Requesters section.
3. Click the Supply Reimbursement button.
4. Follow the instructions above the form to fill it in properly.
5. Click the Submit Request button.
   - Your request is submitted and the screen displays the Upload Document screen.
6. Follow the instructions to upload documents as necessary.
7. Click any button or menu item to complete the transaction.
   - Your documents are uploaded with your request and automatically routed to the unit head or delegate in your research group for approval. Once approved, the request is forwarded to the appropriate unit for processing.
   - You’ll receive an email with the subject line [Supply Reimbursement Status] Order Requested #XXXX, confirming submission of the request.
   - Retain your original receipts as backup until the request is processed to ensure that the scanned documents are readable by Reimbursement Services.
Submit a Travel Reimbursement Request

1) Select the **Services** link from the menu bar
2) Select the PI or unit head’s name from the drop-down list under the **Requesters** section
3) Click the **Travel Reimbursement** button
4) Follow the instructions above the form to fill it in properly
5) Click the **Submit Request** button
6) Your request is submitted and the screen displays the **Upload Document** screen
7) Follow the instructions to upload documents as necessary
8) Click any **button** or **menu item** to complete the transaction

- Your documents are uploaded with your request and automatically routed to the unit head or delegate in your research group for approval. Once approved, the request is forwarded to the appropriate unit for processing
- You’ll receive an email with the subject line [Travel Reimbursement Status] Requested #XXXX, confirming submission of the request
- Retain your original receipts as backup until the request is processed to insure that the scanned documents are readable by Reimbursement Services
Submit an Entertainment Reimbursement Request

1) Select the **Services** link from the menu bar
2) Select the PI or unit head’s name from the drop-down list under the **Requesters** section
3) Click the **Entertainment Reimbursement** button
4) Follow the instructions above the form to fill it in properly
5) Click the **Submit Request** button

6) Your request is submitted and the screen displays the **Upload Document** screen
7) Follow the instructions to upload documents as necessary
8) Click any **button** or **menu item** to complete the transaction
   - Your documents are uploaded with your request and automatically routed to the unit head or delegate in your research group for approval. Once approved, the request is forwarded to the appropriate unit for processing
   - You’ll receive an email with the subject line **[Entertainment Reimbursement Status]** Requested #XXXX, confirming submission of the request
9) Retain your original receipts as backup until the request is processed to insure that the scanned documents are readable by Reimbursement Services
View and Track Status of Your Requests

1) Select the Services link from the menu bar

2) Click List all requests to view all pending and previous requests submitted by you
   - The screen will display No requests found if none are pending
   - Click a column head to re-sort the table

3) Click the Order ID number link to show details of the order
   - a) Check the Item Status column for status information

4) Click any item in the blue menu bar to return when finished
Cancel or Make Changes to a Request

A request may be cancelled or edited by a requester **only before** being submitted, by clicking the **Cancel** button. Once submitted, requests may only be changed or cancelled by someone with approval authority, or by the processing unit (i.e. ERSO Purchasing or Reimbursement Services).

To Cancel a Request Before Submission

Click the **Cancel Order** or **Cancel** button from within the request form screen, **before** clicking the **Submit** button.

To Cancel a Request After Submission

Send an email to the approver or delegate, providing the order number and reason for cancellation. If the request is already approved, send the edit request to ersointranet@erso.berkeley.edu with reason for the cancellation.

To Edit a Request After Submission

Send an email to the approver or delegate, outlining the change(s). Provide the order number and reason for the change. If the request is already approved, send the edit request to ersointranet@erso.berkeley.edu with reason for the change.