eRequest - Approvers Job Aid

- Each org will be assigned a Level I approver, a Level II approver and backup approvers from Operations Fiscal.
- This electronic approval can be done from any computer and replaces the need for a manual signature.
- Items for approval will appear on the Approver’s worklist.
- Generally, all transactions require preapproval, when our eSystems cannot capture this- a manual process is needed. IE: checking account, PCard, Personal Reimbursement.

The eRequest approver should Ad Hoc another approver when someone other than the normal approver is necessary to approve:

1. **When the initiator is also the ORG authorizer.** For instance if you are a Level I approver initiating a transaction or someone has entered in the transaction for you, you can approve it as it will work flow to Level II. For Area Leaders- Ad Hoc the supervisor to approve this transaction then go ahead and approve. The eTravel system doesn't work the same as eRequest in that it doesn't flow to the initiator for approval. Please notify the backup approver for B5 or Area Leader eTravel requests. For questions on who to Ad Hoc, contact your Operations Fiscal Liaison. If next level is unavailable to Ad Hoc, an attached email is sufficient.

2. **When the ORG authorizer is out of the office.** Approvers, when you know you will be out of the office- notify your backup approver and let them know the timeframe you will be out. You should use backup approvers in the event of an emergency or extended leave.

**Notification**

As an approver you should get an automatic email when an eRequest for your Unit is ready to approve. Simply click on the link in the email or type in the web address below to navigate to your approval Worklist.

**Note:** if as an approver you wish not to receive notification emails you can change your preferences in eRequest by clicking the Preferences button at the top of the page. This might be a good solution for backup approvers or those who check their worklist regularly.

**Web Address:** https://erequest.osu.edu

1. Sign into eRequest using your OSU Internet Username and Password.
2. Click on Worklist- for most people this will default straight to the worklist.
3. Click on blue hyperlink in the Request # column.
   - Note: If you see something on your list that isn’t yours, contact your Operations Fiscal Liaison.
4. Review the information. Most of it will be automatically filled in, but you can change things if you see something incorrect. The main things you should check are:
   - **a. The Business Purpose:** should tell a full story, a valid reason to spend University money.
   - **b. Business Priority:** you can change from Routine to Critical or Emergency.
   - **c. The Chartfield:** you should check to make sure there is an ORG/FUND and ACCOUNT. These items are required for approval.
   - **d. When a different chartfield is used** – that chartfield’s ORG authorizer should be Ad Hoc’d or their preapproval is attached.
5. Review for restricted purchases.
6. Click Approve.

**Confirmation:** There will be a message at the top of the screen confirming your transaction was approved. Note: If there is an error it will appear in RED at the top of the screen and will require you to correct before moving on.

**Process after submission:** The transaction will automatically route through the work flow process.