eRequest - Approvers Job Aid

- Each org will be assigned a primary approver (usually the Unit Director) and a backup approver (usually the Regional Director or someone in the Business Office).
- 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.

The eRequest Initiator should manually email 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 State Unit Director initiating a transaction you should email your Supervisor when there is a PR# for approval on your behalf.
   
   Note: County Director expenses are approved by the Regional Office and are monitored by them. No need to send an additional email.

2. **When the ORG authorizer is out of the office.** You should use backup approvers only in the event of an emergency. If you need your backup approver to approve a transaction the initiator should email them the PR# for approval. Most likely they have turned off the email notifications function of eRequests.

**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 list.

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.

**Web Address:** [https://erequest.osu.edu](https://erequest.osu.edu)

1. Sign into eRequests using your OSU Internet Username and Password.

2. Click on Worklist. For most people this will default straight to the worklist.

3. Click on View Request in the Action Column.
   
   Note: If you see something on your list that isn’t yours, contact your Business Office Representative.

4. Review the information. Most of it will be automatically filled in, but you can change things if you see something incorrect. The two main things you should check are:
   
   a. **The Business Priority:** you can change from Routine to Critical or Emergency
   b. **The Chartfield:** you will most likely have to add GL BU or Business Unit. You should also check to make sure there is an ORG/FUND and ACCOUNT. These items are required for approval.
   c. **Business Unit:** Use either UNIV for regular funds or OSURF for Office of Sponsored Programs Direct and Cost share expenses.

5. 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 to your Business Office Representative.