The eRequest provides an easy way for an employee to submit a request for goods, services, or payments. Once the eRequest is submitted, there are two types of approver: Regular Approvers (Level I and Level II) and Ad-Hoc Approvers.

There are two levels of approval that must be given before the request is sent to the service center or delegated buyer for fulfillment. Approval Level I provides the preliminary approval for the eRequest. Approval Level II provides final approval before the eRequest is sent for fulfillment. As an Regular Approver, you may be assigned to Level I, Level II, or both. Note: If you are assigned both approval levels, you will only need to approve the request once.

One or more ad-hoc approvals may also be required. A Regular Approver may add and remove Ad-Hoc Approvers at Level I or Level II. All Ad-Hoc Approvers and the Regular Approver for the Level must approve the request before it moves to the next step. See the eRequest Ad-Hoc Approver Job Aid for more information.

**Login Page**

The login page for the online eRequest form can be found at [https://erequest.osu.edu](https://erequest.osu.edu). Simply enter your OSU Internet user name (name.#) and password.
eRequest Home

At the top of the eRequest Home page, click **Worklist**.

### Worklist

Your worklist contains all of the eRequests that are assigned to you for approval. If you are both a Regular Approver and an Ad-Hoc Approver, your worklist may contain both types of approvals. To begin the approval process, click the Request # link in the **Request #** column for the request you want to review. If your worklist is relatively long, you may want to filter it to find a specific request.
Filter Worklist

The easiest way to find a specific request is to enter the Request Number. If you do not know the number, you can enter a name in the Requested For or the Requester Name field.

Other filters include:

- **Purchasing/Payment Option** (Standard Purchasing Request, Purchasing Card Preferred, Internal Order, Blanket Order Release, Reimbursement to Employee, Payment, Refund, Reimbursement to Non-Employee) - Choose one from the list.
- **Org(s)** - Type the organization number(s). Separate multiple numbers with commas. You may also enter a partial organization number.
- **Project(s)** - Enter the project number(s). Separate multiple numbers with commas. You may also enter a partial project number. Project numbers come from the chartfield values entered for this field.
- **Program(s)** - Enter the program number(s). Separate multiple numbers with commas. You may also enter a partial program number. Program numbers come from the chartfield values entered for this field.
- **Submitted Date range** - Enter the From and To dates or click to select a date from a pop-up calendar.
- **Last Updated By** - Enter the name of the last person who worked on the request.
- **Priority** (Routine, Critical, Emergency) - The priority is usually determined during Level I approval.

To apply your filter(s), click Filter.

You can sort items in your list by selecting a Sort Field. The default is Request Number but you can choose to sort by Priority, Submitted Date, Requested For, Requester Name, Last Updated By, Last Updated Date, or Org. You can also change the Sort Direction from Descending to Ascending. To apply these sorting changes click Filter.

To erase your filter entries and restore the original worklist, click Reset.

When you locate the eRequest, click Request # link in the Request # column for the request you want to review.
The Approval Process

Your primary responsibility in the approval process is to review the entire request to verify that it meets all departmental and University purchasing requirements. Note: For Ad-Hoc Approvers, the eRequest is view-only except for Attachments and Comments. See the eRequest Ad-Hoc Approver Job Aid for more information.

The first area for review is Business Purpose for Request. If the business purpose for the request is incorrect or not properly stated, type the correct information in the text box.

The Business Priority field has a default value of Routine. You may update this to Critical or Emergency depending on the situation. Note: For non-routine priorities, an email alert will be sent to the Service Center upon final approval.

As an approver you are responsible for ensuring that funds are available for the purchase and that the appropriate chartfields are being used. Confirm or enter the appropriate chartfield values in the Funding Source section. Use the Lookup link to find or verify your entries.

To add another chartfield for split funding, first select Percentage or Amount next to Split chartfield by. Click + and enter the split funding percentage or amount for each chartfield. Add supporting attachments and/or comments, as needed, in the General Request Information section.

When the Level II approver approves the request, the chartfield combination will be checked. This “combo edit” assures that the particular combination of chartfield values is allowable. If it is not, you will see an error message indicating the invalid combination.

Note: No chartfield entries are required for a Blanket Order Release since this information was entered on the original Blanket Purchase Order.
In the **Purchasing/Payment Option** section, you may verify the selected option or select a more appropriate one.

Note: If a request with a **Purchasing/Payment Option** of Purchasing Card Preferred was submitted by a Purchasing Card Manager, the fields **Last 4 #s On Card** and **Name Embossed On Card** may be visible.

If the **Purchasing/Payment Option** is Blanket Order Release, verify that a blanket order exists for this purchase and insure that the **Blanket PO Number** is shown.

Review the **Vendor/Payee and Item Details** and **Ship To** address for accuracy.

You may add **Attachments** or **Comments** if necessary. If attachments have been added previously, click the **File Name to open and view each one.** To add comments, simply type them in the **Comments** text box and click **Add Comment**.

**Note:** If this is an **Internal Order**, you may change the **Internal Vendor** selection made by the requestor. If you change the Purchasing/Payment Option to another option, the **Internal Vendor** field cannot be changed.
The Workflow Information section shows details regarding the approval process for this request.

<table>
<thead>
<tr>
<th>Status</th>
<th>User(s)</th>
<th>Date/Time</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Lesha,Mary Ann</td>
<td>03/25/2011 2:47 PM</td>
<td>Submitted for Approval</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Ahmed Zia S</td>
<td>03/25/2011 2:47 PM</td>
<td>Org 52329 Level 1 Approval</td>
</tr>
<tr>
<td></td>
<td>Hertzfeld Abigail Marie</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Keoghsra Timothy Edward</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Ad-Hoc Approvers section allows the Regular Approver to add and remove ad-hoc approvers. Regular Approvers can add Ad-Hoc Approvers by clicking Search for Ad-Hoc Approvers.

Enter either the Employee ID or Name.# or Last Name, with First Name or Home Org in the Employee Lookup box. Click Search.

![Employee Lookup](image)

Click the Employee ID link to add the Ad-Hoc Approver to the Ad-Hoc Approvers Section.
When the Regular Approver clicks on **Save Changes** or **Approve**, the Ad-Hoc Approver is added to the workflow with the “Pending Approval” status.

<table>
<thead>
<tr>
<th>Status</th>
<th>User(s)</th>
<th>Date/Time</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Leshy Mary Ann</td>
<td>03/25/2011 2:41 PM</td>
<td>Submitted for Approval</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Ahmed Zia S</td>
<td>03/05/2011 2:47 PM</td>
<td>Org 52028 Level I Approval</td>
</tr>
<tr>
<td></td>
<td>Hertzfeld Abigail Marie</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Keppola Timothy Edward</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Leshy Mary Ann</td>
<td>04/27/2011 11:39 AM</td>
<td>Ad-Hoc Approval</td>
</tr>
</tbody>
</table>

To remove the Ad-Hoc Approver, click **Remove** and You will receive a warning message.

Click **OK**.

When the Regular Approver clicks on **Save Changes** or **Approve**, the ad-hoc approval line in the workflow will be updated with a status of “Removed”.

<table>
<thead>
<tr>
<th>Status</th>
<th>User(s)</th>
<th>Date/Time</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Bray Dolores W</td>
<td>03/10/2011 9:46 AM</td>
<td>Submitted for Approval</td>
</tr>
<tr>
<td>Approved</td>
<td>Hertzfeld Abigail Marie</td>
<td>04/18/2011 19:42 AM</td>
<td>Org 52028 Level I Approval</td>
</tr>
<tr>
<td>Removed</td>
<td>Leshy Mary Ann</td>
<td>04/27/2011 19:28 AM</td>
<td>Ad-Hoc Approval</td>
</tr>
</tbody>
</table>
Once you have completed your review, you are now ready to take one of the **Actions**:

- Click **Save Changes** if you want to save the request in pending approval status until you receive additional information. The request will remain in your Worklist.
- Click **Approve** if you are approving the request and want to send it to the Level II approver. The request will be removed from your Worklist and transferred to the Level II approver’s Worklist.
- Click **Deny** if the request does not meet departmental requirements, has errors, or needs additional information. Include the reasons in the **Comments** text box. The request will be removed from your Worklist. A denied request can be corrected and resubmitted by the requester.
- Click **Copy Request** if you want to copy the request.

To send an email to the requestor click **Send Notification**. Enter one email address per line in the **Recipient’s Email** text box. Enter your message in the **Email Body**. Click **Send Email** to send your message and the **Request Summary**.