

Important Information to Consider When Authorizing Approver

If you have an Approver set up on a lower level of the hierarchy, the requisition will go for approval to the person set up on a lower level and not on a higher level of the scale. The following are examples which illustrate how this process works and solutions to consider.

You may set up Approvers on Budget level and on Org. level. The requisition will go for approval to the person set up on a Budget level and the Approver on the Org. code level won't be able to see this requisition.

Example: Terry Smith is the Approver on a budget 65-7157 (which is under the org. code 3040123300) for the limit of \$3,000 plus. Judy Anderson is the Approver on the Org. code 3040123300 for the limit of \$3,000 plus. The requisition placed on the budget 65-7157 will go to Terry Smith for approval and not to Judy Anderson.

The same will happen if you have Approvers set up on lower and higher limits for the same budget number and the same org. code. The Approver with a lower limit will have to approve the requisition, and the Approver on a higher limit won't be able to see it.

Example: Catherine Wade is set up as an Org Approver for the limit of \$2,000 on the org. 3040123200. Paula Johnson is set up as an Org Approver for the limit of \$3,000 plus on the org 3040123200. Catherine Wade will have to approve the requisition placed on this org code for the limit of \$2,000 and below. Paula Johnson will be able to approve the requisitions placed on the limit over \$2,000 on the org 3040123200.

When setting up Approvers you should always think about what end result you want achieve. In a small department you may want to have an Approver set up on the Org code for the limit of \$3,000 plus. This person would approve all the requisition placed in the department. Usually, the administrator of the department plays this role.

In larger departments you may want to set up Approvers on Budget levels and Org levels, on lower and higher dollar authority levels. This way the approval flow will be dispersed between several people in the department. Each person will have the approval function in accordance with the budgets or org codes they use.

Important: You will always need to have an Approver set up for the limit of \$3,000 plus on either individual budgets or at the Org Code Level. This authorization is the catch all for your budgets/Org and will allow you to approve or deny purchases.

Always have a backup person for any Approver set up in the system. This will eliminate the delay of your orders due to absences within your department.