

First Approver - DA4000

Table of Contents

First Approver - DA4000 i
First Approver - DA4000 1

First Approver - DA4000

District Administration > Workflow > First Approver

This page is used to create and maintain a list of first approvers for various requests for each campus/department.

Notes:

- Only one approver per campus/department is allowed.
- If an approver is the first approver for multiple departments, the approver needs to be added to the table multiple times.
- Only a first approver is allowed to insert an approver after his/herself.

Add a first approver:

Field	Description
Workflow Type	Click to select a specific workflow type. • *Warehouse Requisition* • *Restock Requisition* • *Budget Amendment Requests* • *Purchasing Requisition* • *Accounts Receivable* • *Travel Reimbursement*

❑ Click **Retrieve**. A list of first approvers for the various campuses/departments is displayed.

❑ Use the following fields to narrow your search:

Employee Nbr	Begin typing an employee number or name. As you type the data, a drop-down list of corresponding data is displayed. Select the desired employee, or click to select an employee from the Approver Directory. The **Employee Name** field is populated based on the selected **Employee Nbr**. **Note**: To view the first approver for a specific campus/department, leave the **Employee ID** field blank, type a specific campus/department and click **Retrieve**.
Campus/Department	Type a campus ID or click to select a one from the Department Directory. A list of all available campus IDs is displayed. The **Campus/Department Name** field is populated based on the selected **Campus/Department ID**. The Department Directory is populated from the campus/departments that are established on the Tables > District Information > Campus Name/Address page. **Note**: To view all of the campuses/departments for a specific approver, leave the **Campus/Department** field blank, type a specific employee ID number, and then click **Retrieve**.

❑ Click **+Add** to add a row.

Employee Nbr	Type an employee number or click to select one from the Approver Directory. The **Employee Name** field is populated based on the selected **Employee Nbr**.
Print Name	Select to print the signature of the approver on the request or purchase order.
Campus/Department ID	Type a campus ID or click to select one from the Department Directory. A list of all available campus IDs is displayed. The **Campus/Department Name** field is populated based on the selected **Campus/Department ID**.

❑ Click **Save**.

Other functions and features:

Duplicate From Existing	Click to duplicate the first approver data from one workflow type to another. The Duplicate pop-up window is displayed.
	From Workflow Type — Click to select the workflow type from which you want to duplicate first approver data.
	To Workflow Type — The currently selected workflow type is displayed.
	Click **OK**. Otherwise, click **Cancel** to return to the First Approver page.
Print	Click to print the First Approver report for the selected workflow type. Review the report.
	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**. The row is deleted.