



Establish the approval path

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District Administration > Workflow > Approval Path

Create and maintain the sequence or hierarchy of the approvers for the approval process. The order in which the approvers are listed indicates the approval sequence. You can add to or edit the approval path as needed. If a change is made to the approval path, the change applies to all requisitions that have yet to reach that specific approver.

For the approval process, approvers must exist in Security Administration with an assigned employee number and have a current year payroll record.

Image

Workflow > Approval Path Session Timer: 59 min and 38 sec DA4010 County/District #: 020020

Save (arrow)

Approval Path

Workflow Type: Purchasing Requisition (highlighted) Reminder Days: 3 (highlighted)

Reminder Days: 3

**Note - If Reminder Days value is greater than zero, Approver has that many days in order to respond to Approval before reminder email is sent to Approver. Subsequent emails will be sent daily after initial email. **

WARNING
Changing the approval path will update all pending requests for the selected Workflow Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.

HOMERO RODRIGUEZ
DEPUTY SUPT OF ADM & HR Print Name ...

LLOYD VERSTUYFT
SUPERINTENDENT OF SCHOOLS Print Name ...

PEGGY BIELA
ACCOUNTING CLERK Print Name ...

ROGER CAMPOS
WEB & DIGITAL MEDIA SPECIALIST Print Name ...

Dup From Existing + Add

** DRAG-AND-DROP **
Press and hold down the left mouse button on the desired row to "Grab" it.
"Drag" the row to the desired location.
"Drop" the row by releasing the mouse button.

Workflow Type Click ▼ to select the Purchasing Requisition workflow.

Click **Retrieve Workflow**. The selected workflow type data is displayed. If an approval path exists, the list of approvers is displayed and you can make changes as needed.

Click **+Add** to add an approver to the Approval Path.

The drag-and-drop feature is available allowing you to change the order of the approval path.

Reminder Days	<p>Type the number of days after which no action has been taken on an item, and a reminder email should be forwarded to the originator and approver.</p> <p>By default, this field is set to zero indicating that no reminders will be sent.</p> <p>If this field is set to a value greater than zero, the approver has that number of days to respond to the approval before a reminder email message is forwarded.</p> <p>After the initial reminder email message is sent, email messages are sent daily basis until action is taken.</p> <p>The number of reminder days also applies to first approvers. If all approvers in the approval path are removed, the field is reset to zero.</p>
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Click **+Add** to add an approver or click  to edit the approver. The [Approver Directory](#) is displayed.

Employee Name	The name of the selected employee ID is displayed.
Print Name	Select to print the signature of the approver on the request or purchase order.

Click **Save**. Depending on the change, the appropriate application message is displayed indicating the action.

Click  to display the Approval Rules page for the selected approver.



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