

firstapprover

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District Administration > Workflow > First Approver

This page is used to create and maintain a list of first approves for requisitions or change request for each campus/department.

Notes:

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

Add a first approver:

Field	Description
Workflow Type	Click to select a specific workflow type (i.e., Budget Amendment Request, Warehouse, etc.).
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 **Retrieve**. The data that matches the selected workflow type, employee ID, and campus ID is displayed.

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**.
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.
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**.

Campus/Department Name	The name of the selected campus/department ID is displayed.

Click **Save**.

Other functions and features:

+Add	Click to add a row to the grid.


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