



## Approval Path - DA4000



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# Approval Path - DA4000

## District Administration > Workflow > Approval Path

This page is used to 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 will apply to all requisitions or requests that have yet to reach that specific approver.

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

**Notes:** Any changes made to the approval path are immediate and automatically update (move) existing requisitions. If there are existing requisitions and you are adding a new user, first create the new user's approval rules so that any pending items are properly moved when the user is added to the workflow.

The **Purchasing Cutoff** date field on the [District Administration > Options > Purchasing Options](#) page can be used to temporarily restrict users from adding requisitions while the approval path is edited. Be sure to remove the date from the field after the approval path changes are completed.

### Create an approval path:

| Field                | Description                                                                                                                                                                     |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Workflow Type</b> | Click  to select a specific workflow type (i.e., Budget Amendment Request, Warehouse, etc.). |

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.

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

|                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reminder Days</b> | <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> |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Click **+Add** to add an approver or click  to edit the approver. The [Approver Directory](#) is displayed.

|                      |                                                    |
|----------------------|----------------------------------------------------|
| <b>Employee Name</b> | The name of the selected employee ID is displayed. |
|----------------------|----------------------------------------------------|

|                   |                                                                                 |
|-------------------|---------------------------------------------------------------------------------|
| <b>Print Name</b> | 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.

### Other functions and features:

|                                                                                   |                                                                                                                                                         |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>+Add</b>                                                                       | Click to add an approver.                                                                                                                               |
|  | Click to delete a row. A message is displayed asking if you want to delete the row.<br>Click <b>Yes</b> to delete the row. Otherwise, click <b>No</b> . |
|  | Click to display the <a href="#">Approval Rules</a> page and make the necessary updates.                                                                |



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