



First Approver - DA4000

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District Administration > Workflow > First Approver

This page is used to create and maintain a list of first approvers for requisitions or change 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. <ul style="list-style-type: none"> • 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. | |



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