

# Approval Table

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## Approval Table

*Settings > Document Approval > Approval Tables*

Approval tables specify who approves a document and in what order for a branch. The approval order goes from top to bottom of the table bypassing approvers if the document being approved does not meet the stated requirements. Approval requirements can be amount related (minimum or maximum) or conditional.

Conditional requirements can include the following:

- Full account = XX-XX-XX-XX-XXXX-XXXX
- Account segment (Fund, Branch, Major account, etc.) = XX
- Submitted by user = SGA user name
  - This level can be used in the event an item submitted by a user is required to be approved by a supervisor or specific personnel

**See the below example:**

| Account                | Account Description  | Amount            | Comment         |
|------------------------|----------------------|-------------------|-----------------|
| 10-10-00-01-2510-00000 | Office Expense       | \$1,000.00        | Ink and paper   |
| 10-10-00-01-2565-00000 | Staff Shirts         | \$500.00          | Shirts for camp |
|                        | <b>Total Amount:</b> | <b>\$1,500.00</b> |                 |

The branch approval table assigned contains the following criteria:

| Approver | Proxy Approver 1 | Proxy Approver 2 | Notify (Email Address) | Minimum Amount | Maximum Amount | Condition         |
|----------|------------------|------------------|------------------------|----------------|----------------|-------------------|
| SGA      |                  |                  |                        |                |                |                   |
| JDoe     |                  |                  |                        | \$500.00       |                |                   |
| JSmith   |                  |                  |                        | \$2,000.00     |                |                   |
| AJones   |                  |                  |                        |                |                | Minor Acct = 2565 |

As the purchase order progresses through the table it will ultimately require approval from SGA, JDoe, and AJones; JSmith will be bypassed. SGA approval is required as no specific requirements are indicated. JDoe approval is required as the total purchase order amount exceeds \$500.00. JSmith approval is not required as the total purchase order amount is less than \$2,000.00. AJones approval is required as one GL Distribution line contains minor 2565. Once AJones provides approval the document will be fully approved.

In event approver/s are required as the first or last level approval for all documents in the system, instead of having to add each of these approvers to every branch's approval table, you may add an approval branch named **(First)** or **(Last)** (as selected from the dropdown arrow). **(First)** will include the list of approvers at the beginning of the approval table for every branch, while **(Last)** will include them at the end of the approval table of every branch.

When passing the document on for approval, if the approver is **Out of the Office** the document will instead go to the listed Proxy Approver 1.

If Proxy Approver 1 is **Out of the Office**, it goes to the Proxy Approver 2.

If the approver is **Out of the Office** and no proxy approvers are designated, then the request will

be put on hold until the approver is back in the office and approves it.

If at any point a document is awaiting approval from an incorrect user, someone with authority can modify the document to wait on a different user's approval or even change the status (approve the document themselves).

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## Other Item Descriptions

**Notify (Email Address):** You may add an additional email address for another individual to be notified at the same time the Approver is notified. The additional email notification will only happen if an email is in the approval line.

**If there is no one to approve, use this approver:** If you want to insure a document always requires approval, this allows you to specify an approver at the end of the approval table if the document does not meet any of the criteria in the list of approvers.

**Status:** If you have the authority, you can change the status of a document.

**Waiting on user:** If you have the authority, you can change the user being waited on for approval.

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