

# FINANCIAL SYSTEM ENHANCEMENTS

## FINANCIAL APPROVERS SET UP



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# Agenda

- Introduction
- Overview of Approvers and Organizational Hierarchy
- Using FARM and Reporting
- Conclusion



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# Course Objectives

By the end of this session you will be able to:

- Define how approvers are set up and how it are changing
- Describe what Financial Approvers and Related Metadata (FARM) is and how to use it
- Define how FARM is structured
- Define the reports available to FARM users



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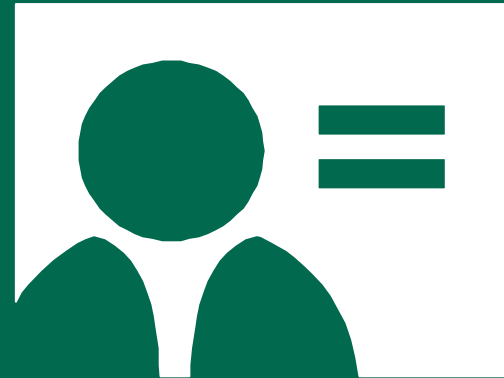
# Activity

**In the past, which of the following challenges have you faced when setting up approvers?**

- A. Setting up a new approvers takes time because it is centrally managed
- B. Concur routing to HR Supervisors makes it difficult to manage my budget
- C. I set up a new Project or ORG and didn't have the correct approvers
- D. All of the above
- E. None of the above



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# Overview of Approvers and Organizational Hierarchy



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# Lesson Objectives

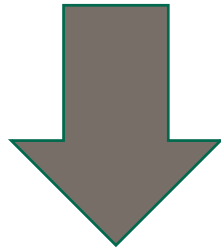
By the end of this lesson you will be able to:

- Describe how approvers are set up and how it is changing
- Describe Organizational Hierarchy and how it is used in FARM
- Describe parent/child levels in FARM

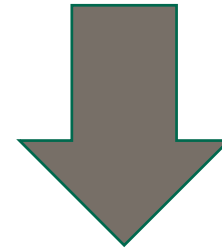


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# Approvers Today



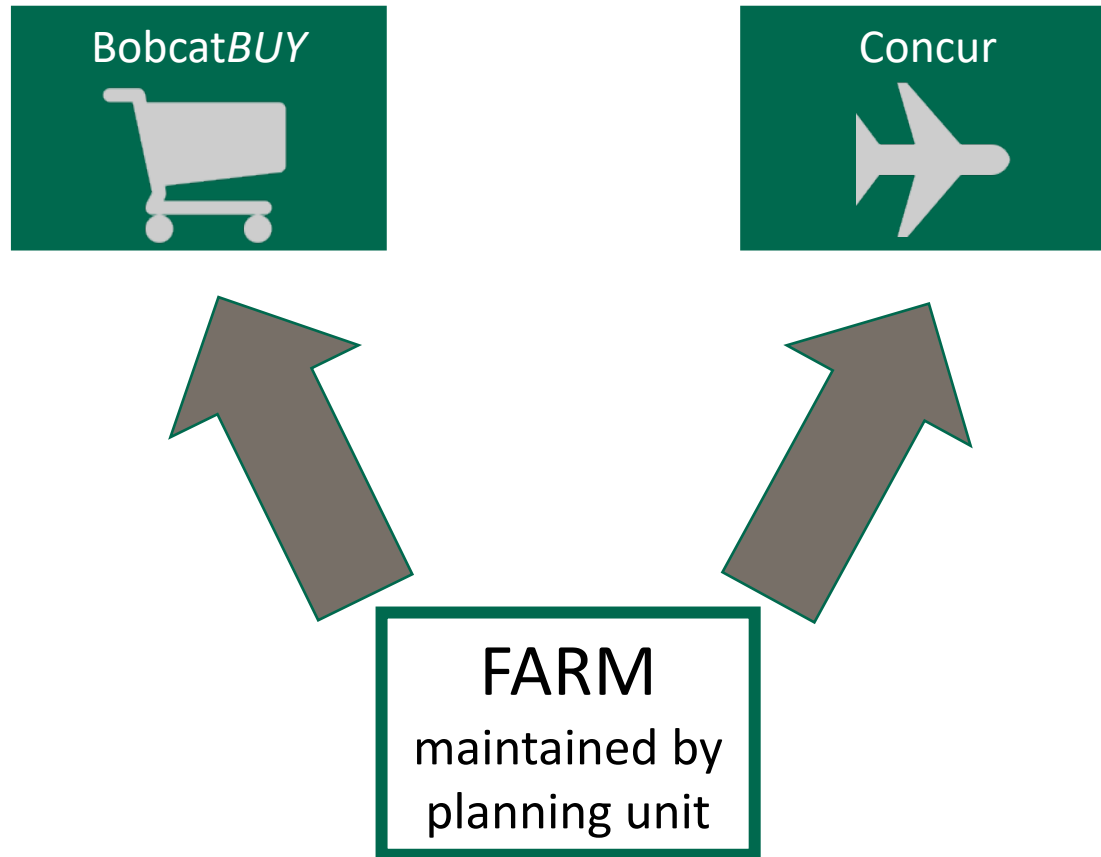
Approvers are maintained centrally for campus



HR Supervisor Approver




# Approvers in FARM






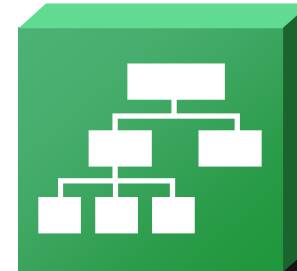
# What is FARM?



**FARM**  
Financial  
Approvers and  
Related  
Metadata



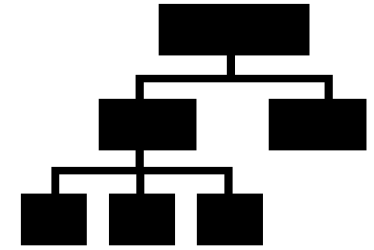
Define and  
maintain  
approvers for  
Bobcat*BUY*  
and Concur



Approvers are  
set up at the  
organizational  
level utilizing  
the  
organizational  
hierarchy



# How Do We Leverage the Hierarchy?



- Reports can be generated for an individual organization value, or at any parent value in the hierarchy
- For OBI dashboards and reports, the user would be able to run the same report for every value/level of their organization hierarchy



# How is the Hierarchy Structured?

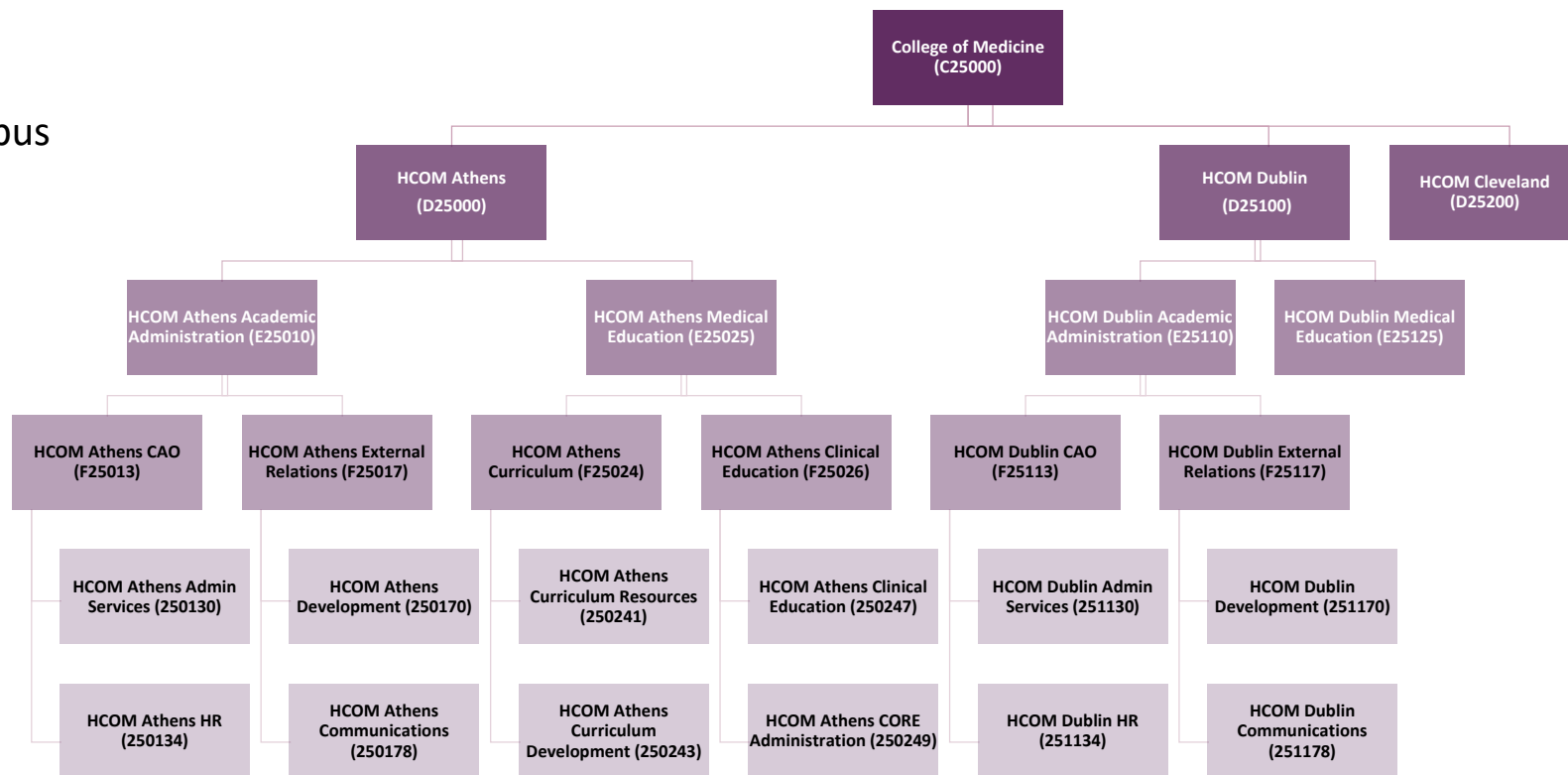
Planning Unit  
(parent value)

Extension Campus  
(parent value)

Departments  
(parent value)

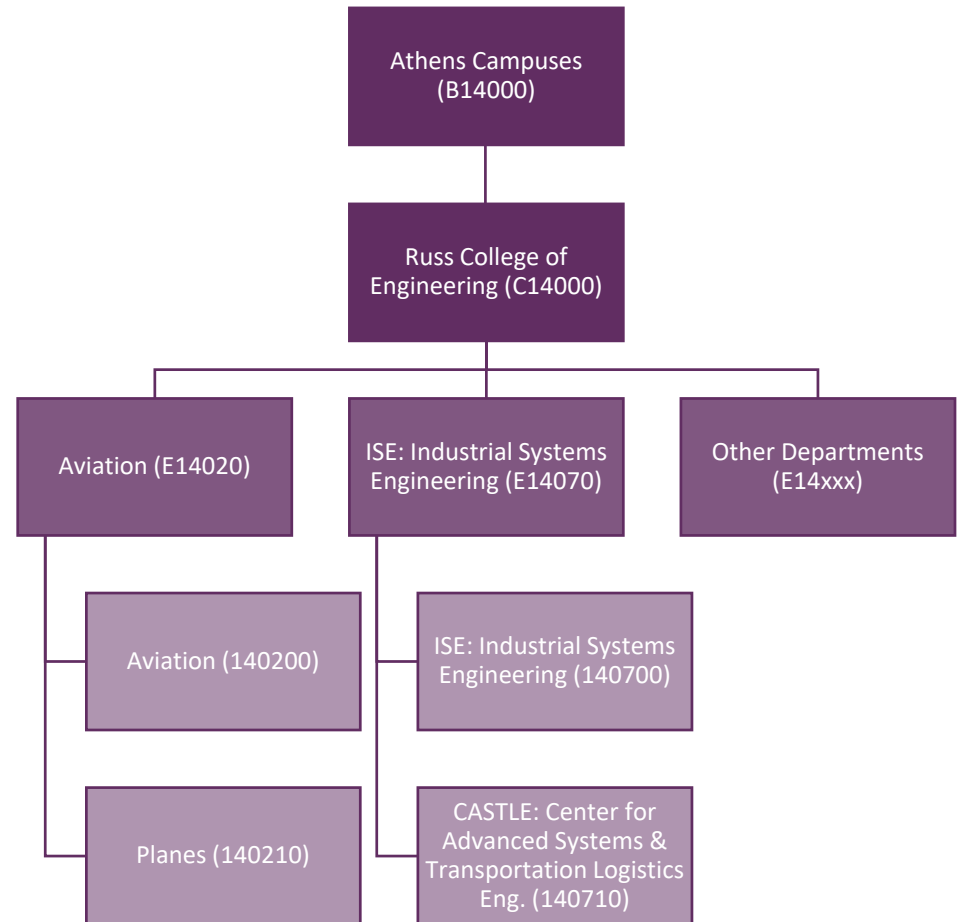
Sub-Depts.  
(parent value)

Organizations  
(child value)



# Parent Levels

- Executive (A level)  
University
- Planning Unit (B and C  
Level)
- Satellite Campuses (D level)
- Departments (E level)
- Organization values



# Financial Approvers

- Approvers can be established at the Planning Unit, Department, or individual organization level
- Authority can cascade from Planning Unit to Department to Individual Organizations

Level	Organizations impacted	Approver
Planning Unit (D69000)	690000 through 699999	Mary, Susan
Department 1 (F69010)	690100 through 690199	Tom
Department 2 (F69020)	690200 through 690299	Bob
Organization (690240)	690240	Nancy

- Approvers would be:

Organization Values	Approvers
690100 through 690199	Mary, Susan, Tom
690200 through 690239 690241 through 690299	Mary, Susan, Bob
690240	Mary, Susan, Bob Nancy





# Lesson Summary

- FARM empowers units to define/maintain the approvers for Bobcat*BUY* and Concur.
- Approvers in FARM are set up to approve transactions in BCB and Concur at the organization level.
- Approval levels set at the parent value will trickle down to the child value.
- Approval levels set at a child value will only apply to the child value.
- Approval levels set at a parent level will apply to any new child values that are added.



# Using FARM and Reporting



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# Lesson Objectives

By the end of this lesson you will be able to:

- Describe roles, approval types and levels in FARM
- Describe how to use FARM to set up and maintain approvers
- Describe the alerts and OBI reporting available to users





# Access and Roles

- Fiscal Officer:
  - CFAO or Financial Lead of planning unit
    - Established and maintained centrally
  - Can establish delegates to maintain approvers
  - Can add or remove delegates and approvers
- Delegates:
  - Can set up approvers at various levels.
    - Approvers can be added, removed, copied or replaced for ease of maintenance
- Approvers do not have access in FARM



# How is FARM Structured?

- Approval types:
  - Bobcat*BUY* (BCB)
  - Concur
  - Individual Compensation Distribution (ICD)
- Approver levels and limits:

Approver Levels	Limit Amounts
BCB \$0-\$1500	\$1,500
BCB \$1500-\$5k	\$5,000
BCB \$5k-\$10k	\$10,000
BCB \$10k-\$25k	\$25,000
BCB \$25k-\$50k	\$50,000
BCB \$50k+*	\$50,000+
Expense Report Approver	Any amount



# Random Routing in Concur

The screenshot shows the Concur dashboard with a navigation bar at the top containing 'CONCUR', 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals', and 'App Center'. A user profile dropdown is visible in the top right corner. The main dashboard area includes a 'TRIP SEARCH' section with flight search filters, a 'COMPANY' section with a welcome message, and a 'MY TASKS' section with various task counts and lists. A blue callout box with a white arrow icon points to the 'Profile' dropdown menu.

To act as a delegate for another user, click Profile.

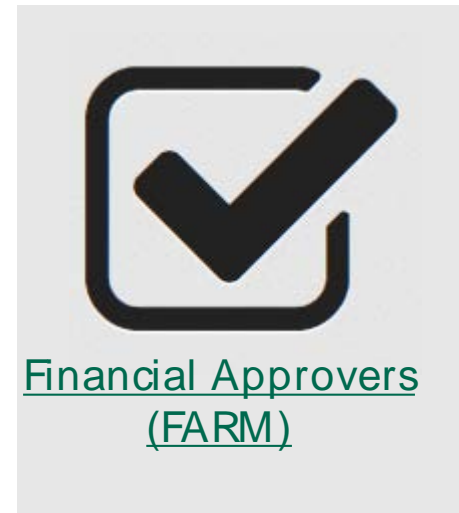
This screenshot shows the 'Acting as other user' dialog box. It includes a 'Profile Settings' link, a 'Sign Out' button, and radio button options for 'Act on behalf of another user' (selected) and 'Act as user in assigned group (Proxy)'. A dropdown menu labeled 'Choose a user' is present. A blue callout box with a white arrow icon points to the dropdown menu.

Enter all or part of the appropriate user's name.



# Log In to FARM

- From [Finance Home page](#)
- From [Systems page](#) in Finance Site
- Use OHIO ID



## Financial and Administrative Systems

Finance Home

Financial and Administrative Systems

+ System Information

News and Updates

<a href="#">BobcatBuy</a>	<a href="#">Concur</a>	<a href="#">Oracle e-Business Suite (e-Biz)</a>
<a href="#">My Personal Information</a>	<a href="#">PaymentNet</a>	<a href="#">Online Graduate Appointments (OGA)</a>
<a href="#">PeopleAdmin</a>	<a href="#">Oracle Business Intelligence (OBI)</a>	<a href="#">Workforce</a>
	<a href="#">Financial Approvers (FARM)</a>	

**OHIO SYSTEMS - INCIDENTS**

NAME: [Catmail and Apple iOS Devices](#)

IMPACT: **minor**

RESOLUTION DAY/TIME: Not Resolved

NAME: [Virtual Desktops \(VDI\)](#)

IMPACT: **minor**

RESOLUTION DAY/TIME: Not Resolved

**SYSTEM TOOLS**

- [Account Verification \[Excel\]](#)
- [Cost Center Lookup](#)



# Set up a delegate



## Planning Unit Setup

Org	Description	Officers	Delegates
C13000	EDUCATION	Stephanie Frisbey	<input data-bbox="1802 701 1908 743" type="button" value="+"/>

**Add Fiscal User** ✕

Ohio Id:

- CASAL, JOSEPH (CASAL)
- CASAL, LEIGH (CASALL)

Delegate

**Add Fiscal User** ✕

Ohio Id:

Delegate



# Add an approver and approval levels

Approver Setup

Search Organizations **1** AND ALL COLLAPSE ALL  Show Previous Fiscal Approvers

Org	Description	Name	Approval Level	Start Date	End Date
▼ A10000	PROVOST - ACADEMIC				
<b>2</b> ▼ B10000	ATHENS COLLEGES & SCHOOLS				
▼ C13000	EDUCATION	Beth Lydic	Approvals for Travel/PCARD expense reports	July 11th, 2017	
		Beth Lydic	Req. Approval 50000.01-5000000.00	July 7th, 2017	
		Jennifer Forsyth	Req. Approval 0.01-1500.00	July 7th, 2017	
		Beth Lydic	Req. Approval 0.01-1500.00	July 7th, 2017	
		Beth Lydic	Req. Approval 5000.01-10000.00	July 7th, 2017	
		Beth Lydic	Req. Approval 1500.01-5000.00	July 7th, 2017	
		Beth Lydic	Req. Approval 10000.01-25000.00	July 7th, 2017	
> E13010	COUNSELING & HIGHER EDUCATION				

**Add Fiscal Approvers for Organization: C13000 -- EDUCATION **1****

Ohio Id: **2**  **3** Approval Type\*  **4**

**5** Start date\*  End date

**6**



# Copy an approver and approval levels

Fiscal Approver User 1  Approval Type: \*  Show Previous Fiscal Approvers

Name	Org	Name	Approval Level	Approval Type	Start Date	End Date
Beth Lydic	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 0.01-1500.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	
	C13000	EDUCATION	Req. Approval 50000.01-5000000.00	BobcatBUY	July 7th, 2017	
	C13000	EDUCATION	Approvals for Travel/PCARD expense reports	Concur	July 11th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	

2

Beth Lydic ×

Ohio Id:  Start date:  Approval Level: \* 1

<input checked="" type="checkbox"/>	Org Name	Approval Level	Approval Type	Start Date	End Date
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 0.01-1500.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 1500.01-5000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 5000.01-10000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 10000.01-25000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 25000.01-50000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	C13000 EDUCATION	BobcatBUY	Req. Approval 50000.01-5000000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	C13000 EDUCATION	Concur	Approvals for Travel/PCARD expense reports	July 11th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 1500.01-5000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 5000.01-10000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 10000.01-25000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 25000.01-50000.00	July 7th, 2017	

2 3 4



# Replace an approver and approval levels

Fiscal Approver User **1**  Approval Type: \*  Show Previous Fiscal Approvers

Name	Org	Name	Approval Level	Approval Type	Start Date	End Date
Beth Lydic	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 0.01-1500.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	
	C13000	EDUCATION	Req. Approval 50000.01-5000000.00	BobcatBUY	July 7th, 2017	
	C13000	EDUCATION	Approvals for Travel/PCARD expense reports	Concur	July 11th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	

**2** COPY  
**2** REPLACE  
REMOVE

**Beth Lydic** ×

Current Fiscal Approver End date **1**

Ohio Id:  Start date:  End date:  Approval Level:  **2**

<input checked="" type="checkbox"/>	Org Name	Approval Level	Approval Type	Start Date	End Date
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 0.01-1500.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 1500.01-5000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 5000.01-10000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 10000.01-25000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010 COUNSELING & HIGHER EDUCATION	BobcatBUY	Req. Approval 25000.01-50000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	C13000 EDUCATION	BobcatBUY	Req. Approval 50000.01-5000000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	C13000 EDUCATION	Concur	Approvals for Travel/PCARD expense reports	July 11th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 1500.01-5000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 5000.01-10000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 10000.01-25000.00	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030 HUMAN AND CONSUMER SCIENCES	BobcatBUY	Req. Approval 25000.01-50000.00	July 7th, 2017	

**3** **4** **5** CANCEL REPLACE USER





# Remove an approver and approval levels

Fiscal Approver User **1**  Approval Type: \*  Show Previous Fiscal Approvers

Name	Org	Name	Approval Level	Approval Type	Start Date	End Date
Beth Lydic	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 0.01-1500.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	
	C13000	EDUCATION	Req. Approval 50000.01-5000000.00	BobcatBUY	July 7th, 2017	
	C13000	EDUCATION	Approvals for Travel/PCARD expense reports	Concur	July 11th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	

**2**

Beth Lydic

End date

**1**

<input checked="" type="checkbox"/>	<b>2</b>	Name	Approval Type	Approval Level	Start Date	End Date
<input checked="" type="checkbox"/>	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 0.01-1500.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13010	COUNSELING & HIGHER EDUCATION	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	C13000	EDUCATION	Req. Approval 50000.01-5000000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	C13000	EDUCATION	Approvals for Travel/PCARD expense reports	Concur	July 11th, 2017	
<input checked="" type="checkbox"/>	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 1500.01-5000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 5000.01-10000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 10000.01-25000.00	BobcatBUY	July 7th, 2017	
<input checked="" type="checkbox"/>	E13030	HUMAN AND CONSUMER SCIENCES	Req. Approval 25000.01-50000.00	BobcatBUY	July 7th, 2017	

**3**

**4**



# Alerts and Notifications



- Once FSE is live, alerts will be sent to Fiscal Officers informing them of approver changes made by their delegates.
- This provides awareness and oversight to work performed by delegates, without requiring Fiscal Officers to log in and spot changes.



# OBI FARM Dashboard Pages



- Report by organization/organization parent showing approvers by type and approval level (similar to what's shown on the screen)
- Report by individual organization values identifying all approvers and their approval levels





# Lesson Summary

- **Fiscal Officer: CFAO or Financial Lead of planning unit**
  - Can add or remove delegates and approvers
- **Delegates:**
  - Can set up approvers at various levels
  - Approvers can be added, removed, copied or replaced for easy maintenance
- **Approvers do not have access in FARM**
- Alerts will be sent to Fiscal Officers informing them of approver changes made by their delegates
- **OBI FARM Dashboard Pages**
  - Report by organization/organization parent showing approvers by type and approval level
  - Report by individual organization values identifying all approvers and their approval levels



# Conclusion



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# Course Summary

- FARM Empowers units to define/maintain the approvers for BobcatBUY and Concur, for now, but may be used for ICD set up as well. **This is not signature authority set up.**
- Approvers in FARM are set up to approve transactions in Concur and BCB at the organization level.
- Fiscal Officers are the CFAO or Financial Lead of planning unit.
- Delegates can set up approvers at various levels.
- Approvers do not have access in FARM.
- Alerts will be sent to Fiscal Officers informing them of approver changes made by their delegates.
- OBI FARM Dashboard pages show approvers by type and level.



# Course Objectives

You should now be able to:

- Determine how approvers are set up and how it is changing
- Describe what Financial Approvers and Related Metadata (FARM) is and how to use it
- Describe how FARM is structured
- Describe the reports available to FARM users



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# Resources & Next Steps

- Deadline to have approvers entered:  
**November 20, 2017**
- Otherwise the Fiscal Officer is the Approver on every transaction.
- Training resources:
  - [FARM web page](#)
  - Quick Reference Guide

Functional questions: contact Finance Customer Care

Technical Questions: contact the OIT Service Desk





# Thank you



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# After the Training....

If you would like to stay after and practice in FARM, we will be available to help you:

- Log in to FARM
- Set up a Delegate

We will be walking around the room to answer questions



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