Financial Approvers: Fiscal Officers - Quick Reference Guide
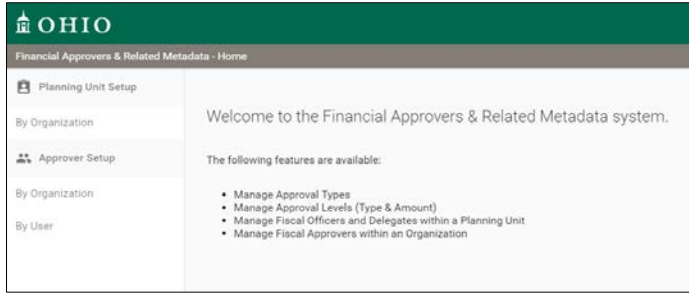
OHIO UNIVERSITY

Accessing FARM

Navigate to the Finance website and click the FARM icon to log in with your OHIO ID. Once you have logged into the system, you will be taken to the home screen.

Approval Levels

FARM: Financial Approvers and Related Metadata

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

Set up a Delegate

As the Financial Officer of a Planning Unit, you can set up Delegate(s) to assist with maintaining approvers in FARM. The Delegate will be able to assign Approvers and levels, but can not set up additional Delegates.

1. To add a Delegate, click on the By Organization button under Planning Unit Setup.

"By Organization" will allow you to search any organization level within the University hierarchy system.

2. Next, click on the + to add a delegate.

3. In the search field, type in the name of your delegate, last name first, or OHIO ID and select their name form the drop down list.
   NOTE: The search field will narrow as you type in the full name of your delegate.

4. Select the Delegate radio button and then click Save to add your delegate.

If you don't select the Delegate radio button you will not be able to save changes.
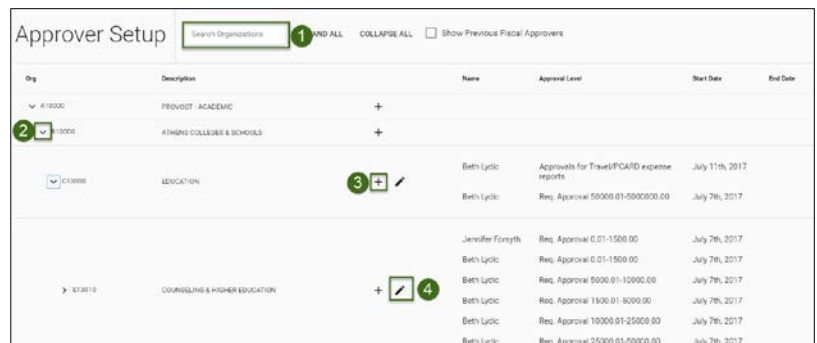

Add an Approver and Approval Level

To add approvers, search by Organization to set up Approver Levels.

To search for an Organization:
1. To locate a specific Organization, you can search by Organization name or number. The search field will narrow as you type in the full name of your Approver.
   NOTE: selecting the check box next to Show Previous Fiscal Approvers will show any Approves no longer active in the system
2. Select down arrow to drill down to the Organization level you would like to edit.
3. Click the + to add new Approvers
4. Click the pencil icon to edit Approvers

Add an Approver and Approval Level, continued

Use the following steps to set up a new Approver by Organization:

1. Locate the Organization you would like to add your new approver to. Click the + within that organization to add a new Approver.

   NOTE: the Organization is listed at the top of the pop up box when you select the +

2. Enter the Name or OHIO ID of the new approver. The search field will narrow as you type in the full name of your Approver.

3. Enter the Approval Type using the drop down menu.

4. Add the Approval Level for the new approver.

5. Select the Start date and End date for this level of Approval. A Start date is required, and End date is not. If you leave the End date blank, there will be no End date for the Approval. An End date is needed if you want to allow for temporary Approval levels.

6. Click Save to save your changes.

Copy an Approver and Approval Levels

When you Copy an Approver, you are applying the same approval levels, of the same organizations to a different Approver. This is a great feature if you have multiple approvers with mirrored responsibilities. Set it up once, and copy the approval levels and types to as many people as needed.

Use the following steps to Copy the Approval settings and levels to a different Approver:

1. Search for the primary Approver you wish to copy by name. The search field will narrow as you type in the full name of your Approver.

2. Select the Copy button.

When the Copy window opens:

1. Select the new Approver's name in the Name/OHIO ID field. Select a Start date and End date if not open ended.

2. If you would like to select all approval levels, click the select all check box at the top of the list.

3. If you would like to limit approvals, click the check box next to the desired Approval Levels and Approval Types.

4. Click **COPY USER** to apply the changes.

Replace an Approver and Approval Levels

When you Replace an Approver, you are applying the approval levels of a primary Approver to a different approver while replacing the primary Approver's levels. This is a helpful feature to use when transitioning responsibilities between employees.

Use the following steps to Replace the Approval settings and levels to a different Approver:

1. Search for the primary Approver you wish to replace by name. The search field will narrow as you type in the full name of your Approver.

2. Select the Replace button.

NOTE: If the previous employee has an end date that has already passed, use the COPY feature instead of REPLACE.

When the Replace window opens:

1. Enter the primary Approver's End date.

2. Select the new Approver's name in the Name/OHIO ID field. Select a Start date and End date if not open-ended.

3. If you would like to select all approval levels, click the select all check box at the top of the list.

4. If you would like to limit approvals, click the check box next to the desired Approval Levels and Approval Types.

5. Click **REPLACE USER** to apply the changes.

Remove an Approver and Approval Levels

When you Remove an Approver, you are end dating an Approver's levels. This feature is used when removing an employee who has left their position. The system will not delete any users, but removing will archive their data, allowing for the Show Previous Fiscal Approvers functionality.

Use the following steps to Replace the approval settings and levels to a different Approver:

1. Search for the primary Approver you wish to replace by name. The search field will narrow as you type in the full name of your Approver.

2. Select the Replace button.

When the Remove window opens:

1. Enter the primary Approver's End date.

2. If you would like to select all approval levels, click the select all check box at the top of the list.

3. If you would like to limit approvals, click the check box next to the desired Approval Levels and Approval Types.

4. Click **REMOVE USER** to apply the changes.