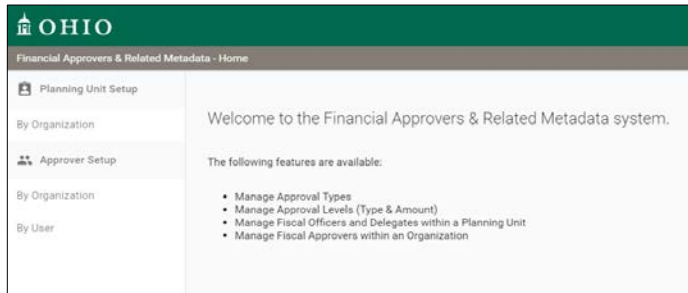




Accessing FARM

To access FARM, navigate to the Finance [website](#) and click the FARM icon and enter your OHIO ID
Once you have logged into the system, you will be taken to the home screen.

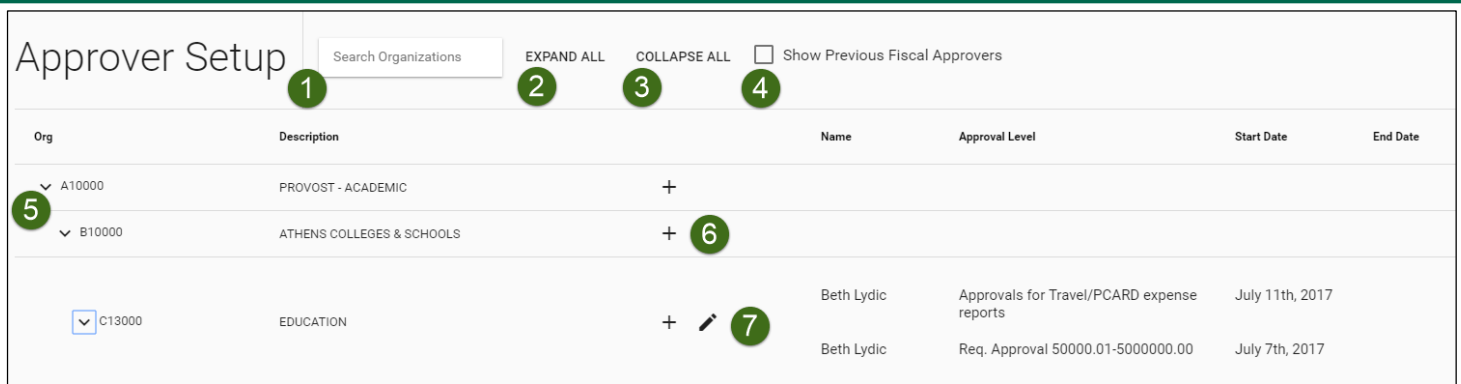


Approval Levels

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

Navigating FARM



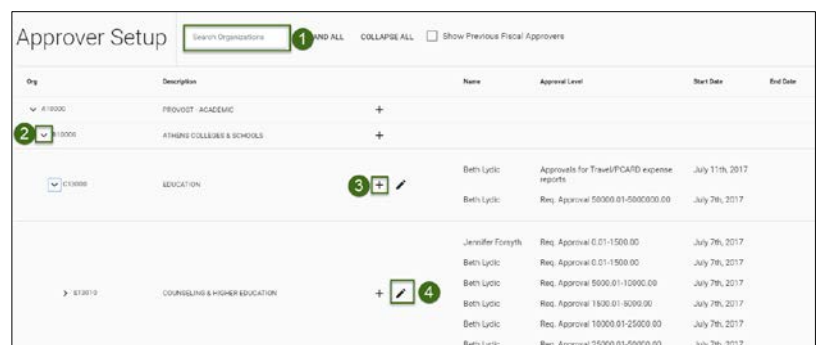
Item	Definition
1.	Search bar. This dynamic search will populate a list of information as you type in the field.
2.	To expand all of the levels under each header in the search results shown on the page, select this option.
3.	To collapse all of the levels open under each header in your search results shown on the page, select this option.
4.	To see previous Fiscal Approvers currently inactive, select the check box.
5.	Use the carrot to expand or collapse information under a specific header.
6.	The + symbol denotes "add".
7.	The pencil icon denotes that the field is editable.

Add an Approver and Approval Level

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

To search for an Organization:

- 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NOTE: selecting the check box next to Show Previous Fiscal Approvers will show any Approves no longer active in the system
- Select down arrow to drill down to the Organization level you would like to edit.
- Click the + to add new Approvers
- 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 where you would like to add the approver. 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, to the same organizations of a different Approver. This is a helpful feature if you have multiple approvers with mirrored responsibilities. Set it up once, and copy the approval levels and types to as many approvers 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.

Name	Org	Name	Approval Level	Approval Type	Start Date	End Date
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		
Beth Lydic	C13000	EDUCATION	Req. Approval 50000 01-500000 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		

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.



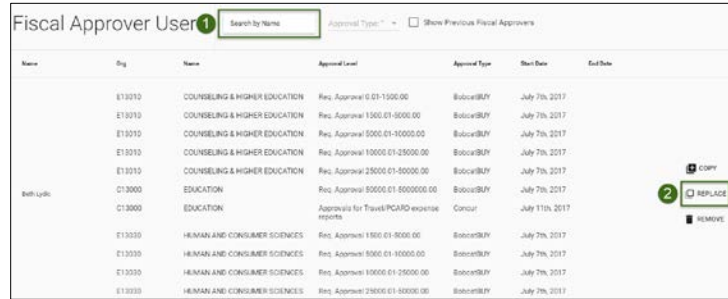
Replace an Approver and Approval Levels

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:

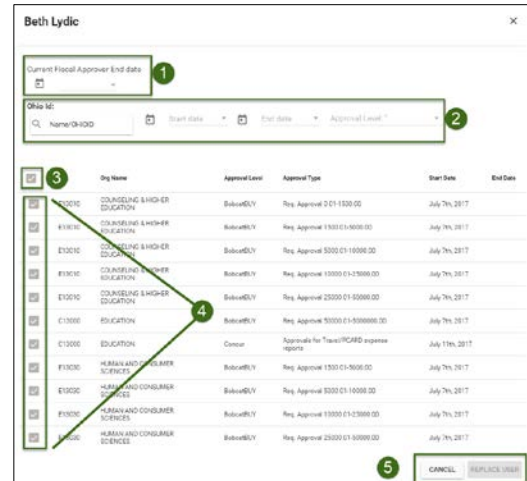
1. Search for the primary Approver you wish to replace by name. The search field will narrow as you type in the full name of your Approver.
2. Select the Replace button.

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



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.

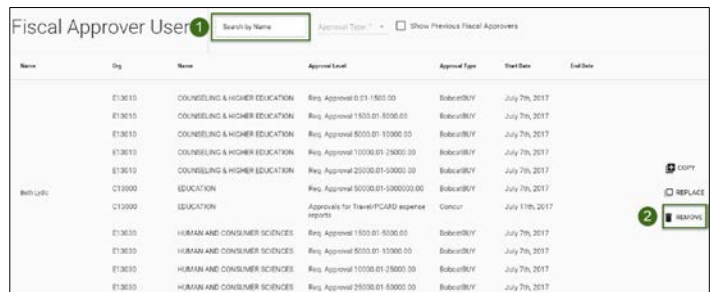


Remove an Approver and Approval Levels

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.





ICD Approver Setup

Individual Compensation Distribution (ICD) Approvers can be populated for any hierarchy level. If an organization has multiple approvers populated at two levels, the approver at the lower level organization will be selected by FARM as the approver. For example, if both A level and C level approvers are populated, the person at the C level will be the approver for that organization.

Real life scenario: The President's Office may choose to set their ICD approvers at the A level (University Level), however, they may set up an exception for the Athletics Department at the C level (Planning Unit Level).

Each organization must have one ICD Approver set up as well one ICD Escalated Approver.

Approver Levels

ICD does not use dollar limits as approval levels. There are two approver levels for ICD:

- 1. ICD Approver - This person is the primary approver for the organization. If the ICD Approver does not respond to the request within FOUR calendar days, the request will time out and route to the ICD Escalated Approver.
2. ICD Escalated Approver - This person will only review requests that the ICD Approver did not approve or reject within FOUR calendar days.

Add, Copy, Replace and Remove Approvers

Use the steps outlined in the previous steps to Add, Copy, Replace, and Remove Approvers in FARM.

Once your ICD Approvers and ICD Escalated Approvers are set up in FARM, the roles will appear as below.

Table showing approver details for B25000 COLLEGE OF MEDICINE, including Maxon, Elizabeth L (Beth) as ICD Escalated Approver and Coates, Kelly as ICD Approver, both with a date of November 8th, 2017.