



## FARM Approvers Dashboard Page

FARM (Financial Approvers and Related Metadata) is a custom software application used by planning unit personnel to maintain their approvers. The FARM Approvers dashboard page is located on the Finance Dashboard on the Lookups tab. This dashboard allows users to easily locate a list of individuals who are authorized to approve financial transactions for accounting organizations in the eBiz systems.

Two choices for output:

- **Approvers by Organization** shows all approvers for individual organizations
- **FARM Setup Data** shows only approver data as established in FARM (i.e., at parent organization values rather than cascaded to individual organization values)

## Dashboard Prompts

Multiple prompt options are available on this dashboard. Please select the approval type and other prompts as appropriate to limit the report by specific criteria as appropriate.

The screenshot shows the 'Finance' dashboard with the 'Lookups' tab selected. Under 'Lookups', 'FARM Approvers' is highlighted. The 'Prompts' section contains the following fields:

- \* Approval Type: --Select Value--
- Approval Level: --Select Value--
- Approver Status: --Select Value--
- Approver Name contains any: [Text Input]
- ORG Parent Level: --Select Value--
- ORG Parent #/Desc: --Select Value--
- Organization Between: [Text Input] - [Text Input]
- \* Report Type: Approvers by Org
- \* Active or Inactive Rows?: Active

Buttons for 'Apply' and 'Reset' are located at the bottom right of the prompts section.

## Prompt Definitions

Term	Definition
*Approval Type	Select checkboxes for BobcatBUY, Concur, ICD, Planning Unit roles, and/or Planning Unit Signature Sub delegation. *Required field
Approval Level	Select approval levels to include in the report. This list will only display levels related to the Approval Types selected above.
Approval Status	Select Active and/or Inactive to show active or Inactive employees. <i>NOTE: If you select Inactive, you will be able to identify approval levels with employees with an inactive employee status.</i>
Approver Name contains any	Allows you to search for an approver by entering a portion of their name. Will return all employees matching the search criteria.
ORG Parent Level	The parent level (letter) of the Organization hierarchy.
ORG Parent #/Desc	A specific Organization parent number with description.
Organization between	A specific range of Organization values.
Report Type	Select either Approvers by Org or FARM Setup Data, depending on output desired.
Active or Inactive Rows	Select checkboxes for Active and/or Inactive approver rows.

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## Dashboard Output

### FARM Setup Data

This planning unit established their BobcatBUY approvers at the planning unit level (C11000). When you view the Approvers by Org, you will see these approvers listed for each org in the planning unit.

Approval Type Desc	ORG #/Desc	Full Name ▲▼	OHIO ID	Assign Status	Approval Level Desc	Fiscal Approver Start Date	Fiscal Approver End Date	Last Upd Name	Last Upd Date
BobcatBUY	C11000 BUSINESS	Creamer, Jessica L	kantnerj	Active	Req. Approval 0.01-1500.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 1500.01-5000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 5000.01-10000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 10000.01-25000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 25000.01-50000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval >\$50K	02/04/2019	12/31/4712	blakee	02/04/2019
	Nice, Jill A	nicej	Active	Req. Approval 0.01-1500.00	11/14/2017	12/31/4712	blakee	05/09/2018	
				Req. Approval 1500.01-5000.00	11/14/2017	12/31/4712	blakee	11/14/2017	
				Req. Approval 5000.01-10000.00	11/14/2017	12/31/4712	blakee	11/14/2017	
				Req. Approval 10000.01-25000.00	11/14/2017	12/31/4712	blakee	11/14/2017	
	Taylor, Phillip Albert III	taylorp	Active	A&E Exceptions	04/30/2018	12/31/4712	allison	04/30/2018	

### Approvers by Org

The Approvers by Org output shows all approvers at each approval level.

Approval Type Desc	ORG #/Desc	Full Name	OHIO ID	Assign Status	Approval Level Desc	Fiscal Approver Start Date	Fiscal Approver End Date ▲▼	Last Upd Name	Last Upd Date
BobcatBUY	110210 GRADUATE & EXTERNAL PROGRAMS	Creamer, Jessica L	kantnerj	Active	Req. Approval 0.01-1500.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 1500.01-5000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 5000.01-10000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 10000.01-25000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 25000.01-50000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval >\$50K	02/04/2019	12/31/4712	blakee	02/04/2019
	Nice, Jill A	nicej	Active	Req. Approval 0.01-1500.00	11/14/2017	12/31/4712	blakee	05/09/2018	
				Req. Approval 1500.01-5000.00	11/14/2017	12/31/4712	blakee	11/14/2017	
				Req. Approval 5000.01-10000.00	11/14/2017	12/31/4712	blakee	11/14/2017	
				Req. Approval 10000.01-25000.00	11/14/2017	12/31/4712	blakee	11/14/2017	
	Taylor, Phillip Albert III	taylorp	Active	A&E Exceptions	04/30/2018	12/31/4712	allison	04/30/2018	
	110213 MASTER OF SPORTS ADMINISTRATION	Creamer, Jessica L	kantnerj	Active	Req. Approval 0.01-1500.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 1500.01-5000.00	02/04/2019	12/31/4712	blakee	02/04/2019
					Req. Approval 5000.01-10000.00	02/04/2019	12/31/4712	blakee	02/04/2019

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## ICD Approvers

Individual Compensation Distribution (ICD) uses different logic than BobcatBUY and Concur to identify approvers. If an organization has ICD approvers populated at more than one organization level, only the person at the lowest level organization will be selected as the approver. For example, if both C level and E level approvers are populated, the person at the E level will be the approver for that organization.

In this example below, notice that the ICD department head approver is set up at the C, D, and E level.

Approval Type Desc	ORG #/Desc	Full Name	OHIO ID	Assign Status	Approval Level Desc
ICD APPROVAL LEVELS	C11000 BUSINESS	Creamer, Jessica L	kantnerj	Active	Dept Head approval
		Taylor, Phillip Albert III	taylorp	Active	Escalation for DEPT Head (nonresponse)
	D11100 COB DUBLIN	Nice, Jill A	nicej	Active	Dept Head approval
	D11800 COB ECAM	Nice, Jill A	nicej	Active	Dept Head approval
	E11020 GRADUATE & EXTERNAL PROGRAMS	Nice, Jill A	nicej	Active	Dept Head approval
	E11030 EXECUTIVE EDUCATION	Nice, Jill A	nicej	Active	Dept Head approval

However, only the ICD department head approver for E level is displayed for these organizations. It does not list the department head approver that was set at the C level.

Approval Type Desc	ORG #/Desc	Full Name	OHIO ID	Assign Status	Approval Level Desc
ICD APPROVAL LEVELS	110210 GRADUATE & EXTERNAL PROGRAMS	Nice, Jill A	nicej	Active	Dept Head approval
		Taylor, Phillip Albert III	taylorp	Active	Escalation for DEPT Head (nonresponse)
	110213 MASTER OF SPORTS ADMINISTRATION	Nice, Jill A	nicej	Active	Dept Head approval
		Taylor, Phillip Albert III	taylorp	Active	Escalation for DEPT Head (nonresponse)
	110214 FULL-TIME MBA	Nice, Jill A	nicej	Active	Dept Head approval
		Taylor, Phillip Albert III	taylorp	Active	Escalation for DEPT Head (nonresponse)

The escalation for department head is set up at only the C level in this example, so it is used for all organizations in the C11000 hierarchy.