Approval Path/Type Information Guidance

# Introduction

This is a guide for an Organization Administrator to create a new Approval Path. Approval Paths can be manually created or cloned from an existing one. The tables below detail the fields that are found when creating an Approval Path.

# Approval Types

The following are fields for creating a new Approval Type.

|  |  |
| --- | --- |
| Field | Description |
| Cascade Setting | The following options change the ability of a user to select approval paths on a document. It is recommended to only use Auto Cascading.  **No Cascading:** You will only be able to select from one specified approval path.  **Non-Auto Cascading:** You will be able to select from any and all specified approval paths.  **Auto Cascading:**  OregonBuys will implement cascading automatically. You will see the paths that have been selected automatically but cannot change them. |
| Approval Type ID | **Ten-digit** alpha numeric ID. Once set it cannot be changed. |
| Description | Description of the Approval Type. |
| Priority | A numeric ordering sequence for priority: smaller numbers appear before larger numbers. |
| Status | Active, Inactive, Pending, or Deleted. |
| View Related | For already established Approval Types. Used to view Approval Paths associated with an Approval Type. |

# Approval Paths

The following are fields for creating a new Approval Path.

# General Tab

This is the main tab for creating a new Approval Path.

| Field | Description |
| --- | --- |
| Approval Path ID | Ten-digit alpha numeric ID for this Approval Path. Once set it cannot be changed. |
| Description | Description of what this Approval Path will capture. |
| Approval Type | Dropdown selection of what Approval Type is associated with this Approval Path. |
| Dollar Range | The dollar amounts that will trigger this Approval Path. |
| Roles | User roles this Approval Path will trigger for. If none are selected, it will apply to all users. |
| Status | Dropdown selection of Active, Deleted, Inactive or Pending. |
| Cross Organizational | When checked, the administrator will be able to designate the organizations an approval path should apply to.  Cross organizational approval paths will trigger for document approvals under multiple organizations. Approvers must have multi-org approval rights to be on this kind of approval path. |
| Approval Docs/Doc Sub Types | Select all the types of documents that will apply to this path. |
| Approvers (Level, Approver, Alternate) | Sets the approvers, their priority order (level) and their alternate that will be notified to approve any document this path is attached to.  With Cross Organizational Approval Paths, approvers must be “Granted Multiorg Approval Rights” from other organizations to be selected as an approver for an Approval Path from another Organization. |

# Change Order Tab

This tab only appears if PO Change Order is a Document Type for this Approval Path.

|  |  |
| --- | --- |
| Field | Description |
| Apply Approval Path for all Changes to Document | When selected all Change Orders must go through the Approval Path, regardless of the dollar amount changed. |
| Dollar Increase | This value will identify the dollar amount change that triggers this Approval Path.  If Cumulative is selected, it will be based off of all Change Orders. |
| Percent Increase | This value will identify the percent changed that triggers this Approval Path.  If Cumulative is selected, it will be based off of all Change Orders. |

# Misc./Freight Tab

This tab only appears if Invoice is a Document Type for this Approval Path.

| Field | Description |
| --- | --- |
| Dollar Increase | This value will identify the dollar amount change from the Misc/Freight that triggers this approval path. |
| Percent Increase | This value will identify the percent change  from the Misc/Freight that triggers this approval path. |

# Department/Location Tab

Select specific Departments/Locations this Approval Path is associated with. Selecting none will mean the Approval Path is associated with all Departments/Locations.

# Email Tab

Edit email notification to Approvers.

# NIGP Code Tab

Select specific NIGP Codes this Approval Path is associated with. Selecting none will mean the Approval Path is associated with all NIGP Codes.

# Account Segment Tab

Select specific Accounting Codes this Approval Path is associated with. Selecting none will mean the Approval Path is associated with all Accounting Codes.

# Vendor Tab

This tab only appears if Vendor Performance, Invoice, or Credit Memo is a Document Type for this Approval Path.

Select specific Vendors this Approval Path is associated with. Selecting none will mean the Approval Path is associated with all Vendors.