

ADMINISTRATIVE PROCEDURES



Procedure Number: 22-53

Effective Date: 12/01/2005

Revision Date: 08/01/2006

C. Dulac Berry

County Administrator

SUBJECT: **APPROVING DOCUMENTS IN SYNERGEN**

DEPARTMENT RESPONSIBLE: **ALL COUNTY DEPARTMENTS**

I. STATEMENT

Approval Titles on Approval Routes may choose Agree, Disagree, or Approve for documents that require Approval Routes. Approval Titles as Next Approver must choose Agree for Cost Adjustments, Timesheets, or Projects. There are two Synergen structures for approving documents with Approval Routes, each of which can be used; Approval Portal and Approval Wizard.

This procedure will describe the process for approving documents by the portal and by the wizard and agreeing with Cost Adjustments and Timesheets.

II. TERMINOLOGY

Mandatory – The Approval Title must indicate a decision of Approve, Agree, or Disagree.

Notify Only – The Approval Title will be notified that the document has been created and is in Pending Approval status. Notification occurs immediately upon the document Status being changed to Pending Approval.

Approve – The Approval Title agrees with and approves the document. The final Approval Title on the route must Approve, not Agree.

Agree – The Approval Title contains the document, but the dollar limit is not large enough to approve or the Approval Title determines not to Approve, but only to Agree.

Disagree – The approver does not agree with the document. If the approver is a Mandatory approver, the route stops and the Initiator of the document receives an Alert that the route has been stopped due to a disagreement. If the approver is a Notify Only approver, the route for final approval continues.

III. PROCEDURE

- A. The Approval Portal may be used to approve documents with an Approval Route. Notification of a document requiring approval will appear in the Alerts box and may be received via email.
1. Upon notification via email that a document requires approval, click on the email link and the Approval Portal will open for use.
 2. Upon notification from the Alerts box that a document requires approval, click on the Approval Portal icon and the Approval Portal will open for use.
 3. The Approval Portal allows the choice of Agree, Disagree, or Approve.
 4. Additionally, there is a field to enter comments to support the response. This field is optional, but if it is used, the entry will appear at the bottom of the Approval Log of the document.
- B. The Approval Wizard may be used to approve documents with an Approval Route and offers a greater range of options than the Approval Portal.
1. Upon notification from the Alerts box that a document requires approval, click on the document and the Approval Wizard will open for use.
 2. The Approval Wizard allows the choice of Agree, Disagree, or Approve.
 3. Additionally, there is a field to enter comments to support the response. This field is optional. If it is used, the entry will appear at the bottom of the Approval Log of the document.
 4. The Approval Wizard allows an addition to the Approval Route so that if an employee is normally not required to approve a document, but occasionally must, one can add the employee through the Approval Wizard.
 - a. Click on Add on the left side of the second Approval Wizard screen.
 - b. Enter a Sequence Number and an Approval Title.
 - c. Click on Mandatory.
 - d. Click on Finish

The document will then be routed to the Title that was added for approval. After approval, the document will be sent to the next Title on the route.

- C. For Cost Adjustments, Timesheets, and Projects, when the document is created, the Next Approver field is completed using an Approval Title.
 - 1. Upon changing the Status to Pending Approval, the document is then routed to the employee name attached to the Title.
 - 2. The employee to approve the document will then click on Approvals under Views.
 - 3. Enter the Approval Title, choose Agree, and enter another Approval Title in the Next Approver field.
 - 4. When the Next Approver has the authority to choose Final, the document is then approved.

IV. OFFICE OF PRIMARY RESPONSIBILITY

Each Approval Title is responsible for approving, agreeing, or disagreeing with any document requiring such.

The Financial Management System Coordination section is the primary contact point for approval questions.

V. REFERRAL PROCEDURE

For detailed instructions, please refer to FINANCE PROCEDURES FOR SPL/SYNERGEN FN-53, APPROVING DOCUMENTS IN SYNERGEN.