Approval Queue Form Directions

LIBERTY
UNIVERSITY.
FINANCE

Approval Queue Form

General Information
Enter the email, department, phone, and employee ID for the employee requesting an Approval Queue Form.

Email ⟨1⟩

Department ⟨2⟩

Phone Number ⟨3⟩ *

Employee ID ⟨4⟩

Approval Chain Request
A fund/org combination or an index code is required to submit this request.

◉ New Approval Chain ⟨5⟩   ○ Modify Approval Chain ⟨6⟩   ○ Inactivate Approval Chain ⟨7⟩

Fund Code ⟨a⟩   and Org Code ⟨b⟩   or Index Code ⟨c⟩

Additional Comments:
⟨d⟩

Approval Chain Set Up
Enter the necessary approvers in their respective spots. If a level is not required check N/A next to the Approver Email.

Approval Chain ⟨e⟩	Limit	Approver Email	N/A
Level 1 - Initial Approver	$0		☐
Level 2 – Department Supervisor	$ 0		☐
Level 3 - Approver	$0		☐
Level 4 – Departmental Budget Manager	$ 2,500		☐
Level 5 – Departmental Budget Coordinator	$0		☐
Level 6 – Director/Coach/Academic Chair	$ 0		☐
Level 7 – Divisional Budget Coordinator	$ 0		☐
Level 8 – Exec. Director/Dean/VP	$ 9,999,999,999		☐
Level 10 – Executive/Senior VP or Provost	Not Applicable	Not Applicable	☑
Add an additional approver	Yes ○ No ◉ ⟨f⟩		

This form requires a level 8 or 10 approver. If both are entered the workflow will notify the level 8 for approval of this request. To fill both levels of approver, fill the level 8 approver before unchecking the level 10.

◀ Cancel   ✓ Submit ⟨g⟩

Fill out each of the fields as follows:

General Information

1. **Email**: Enter your liberty email address. If needed you can utilize the address book by clicking the book icon to the right of the field.

2. **Department**: Use the dropdown arrow to the right of the field to scroll down until you located your department. (Note: If the department is not found in the dropdown menu, use the next level up in the department hierarchy.)

3. **Phone Number**: Enter your phone number *(enter only numbers and the form will format your number)*.

4. **Employee ID**: Enter your Liberty ID number.

Approval Chain Request

These sections will be filled out differently depending on which options is chosen. The options are New Approval Chain, Modify Approval Chain, or Inactivate Approval Chain.

New Approval Chain

5. **New Approval Chain**: Click this radio button to indicate that this is a new Approval Chain Request.

    a. Fund Code: Enter the Fund Code for the new Approval Chain (examples: 111101, 111111, etc.)

    b. Org Code: This is the Organization Code for the new Approval Chain *(Note in the Additional Comments section if this is a new Org Code and a form has been submitted)*.

    c. Index Code: Enter the Index Code for the new Approval Chain. *This field is mandatory and is representative of the Fund and Organization Code (Note in the Additional Comments section if this is a new Index Code and a form has been submitted)*.

    d. Additional Comments: Enter any additional information that may be helpful to those who are creating the queue. *This includes indicating whether form(s) for a new organization and/or index codes have also been submitted.*

    e. Approval Chain Set Up: Use these fields to enter the information for each person in the chain. Keep in mind that the "odd" number approvers will have a "$0" limit. A typical approval que follows:

        • Level 1 – Initial Approver: *Usually left blank*

        • Level 2 – Department Supervisor: *Usually left blank*

        • Level 3 – Approver: Usually left blank

- Level 4 – Department Budget Manager: $2500: This individual approves Infor expense reports and is typically the first approver in the chain (In buyLU or Banner this individual can approve purchases only up to his or her specified dollar limit).

- Level 5 – Departmental Budget Coordinator: $0: This approver is an administrative reviewer.

- Level 6 – Director/Coach/Academic Chair: $5000: This individual approves Level 4's p-card purchases, and can also approve Infor expense reports if needed. He or she can only approve purchases up to the specified dollar limit.

- Level 7 – Divisional Budget Coordinator: $0: This individual is an administrative reviewer and typically is set up to pre-approve transactions for Leadership.

- Level 8 – Exec. Director/Dean/VP: $999,999,999: This individual can approve all purchases that are over the Level 6 Approver's dollar limit. He or she also is the approver for viewing access to payroll budgets.

- Level 10 – Executive/Senior VP or Provost: Not Applicable (in Banner they will be given approval up to $1,000,000,000.

- Add an additional approver – Use this option if your department desires several individuals in a Level (Example: 2 Level 4 approvers).

IMPORTANT!!! When setting up a new approval chain remember that purchases in buyLU will require review and approval from each person in the approval chain up to the total purchase of the shopping cart.

Modify Approval Chain

6. **Modify Approval Chain**: Click this radio button if there is currently an Approval Chain set up for this Budget Code and you are modifying it.

   a. Fund Code: Enter the Fund Code for the Approval Chain (examples: 111101, 111111, etc.)

   b. Org Code: Enter the Organization.

   c. Index Code: Enter the Index Code for the Approval Chain. *This field is mandatory.*

   d. Additional Comments: State *specifically* which parts of the approval chain need to be modified and how.

   e. Approval Chain Set Up: Enter the approval chain that is *currently* in place in Banner (changes to the queue should be specified in the Additional Comments section).

Inactivate Approval Chain

7. **Inactivate Approval Chain**

   a. Fund Code: Enter the Fund Code for the Approval Chain (examples: 111101, 111111, etc.)

   b. Org Code: Enter the Organization.

   c. Index Code: Enter the Index Code for the Approval Chain. *This field is mandatory.*

   d. Additional Comments: State the reason the queue is being inactivated.

   e. Approval Chain Set Up: Enter the approval chain that is *currently* in place in Banner (for clarification). Current approval chains can be viewed via the Index Mapping Tool.