

Workflow Groups and Approvals

There are three responsibility groups used to define the Spending Authority Delegates Matrix. The Operation Group represents a major operating segment typically associated with a vice president. Each Operation Group has several Divisions assigned to it, and lastly the Departments are assigned to Divisions. Each group should have two or more employees assigned to it, with the first employee acting the primary approver, and additional employees acting as backup for that group when the first is unavailable. The system workflow routes the spending requests to the appropriate individuals associated within matrix defined in the Workflow Group Delegates and Accounts report as listed in the table below. For more details on how the workflow emails will be routed, please refer to the [Email Spending Request Approvals](#) page.

| Threshold | First Approver | Second Approver |
|-----------------------|--------------------|----------------------|
| Under \$5,000 | Spending Requestor | Department |
| \$5,000 to \$15,000 | Department | Division |
| \$15,000 to \$25,000 | Division | Operation Group |
| \$25,000 to \$100,000 | Operation Group | VP Finance and Admin |

To run the report, click on the [Workflow Groups and Approvals](#) report link, and login as instructed on the report home page. The report will prompt the user to select the Operations Group umbrella (multiple can be selected). Below is a description for each of the report levels:

Operation Group

- First Approver for \$25k-\$100k
- Second Approver for \$15k-\$25k

Typical setup for Operation Groups

1. Vice President of area
2. Backup is VP Finance

Division

- First Approver for \$15k-\$25k
- Second Approver for \$5k-\$15k

Typical setup for Divisions

1. Dean/Director for area
2. Backup is VP for area

Department

- First Approver for \$5k-\$15k
- Second Approver for \$0-\$5k

Typical setup for Departments

1. Manager/Chair or area designate
2. Backup is Dean/Director for area

There can be more than one Manager/Chair assigned prior to backup

Accounts

Accounts assigned will have the approval request routed to the delegates of the three groups in the hierarchy based on the \$ threshold of the spend. If the account is misallocated to the groups it is assigned to, please advise the Finance Office so we can update the listing.

| Operations Group | Delegates | | Division | Delegates | | Department | Delegates | | Accounts Allocated | |
|------------------------|-----------|----------|----------------|-----------|----------|---|-----------|----------|--------------------|-----------------------|
| 40 - Finance And Admin | Pri | User | 4010 - Finance | | | 401015 - Institutional Dues, Fees, Etc. | | | 64000 | INST.DUES,LEGAL,AUDIT |
| | 1 | ABECKETT | | 1 | HMACGREG | | 1 | LCRAIG | | |
| | 2 | HMACGREG | | 2 | LCRAIG | | 2 | HMACGREG | | |