FACILITIES MANAGEMENT
230 Approvals

U236: Transferring Authority
EXAMPLES NEEDED FOR TRAINING

1. The only thing required for this training unit is that all student logins have access to the Transfer Approval Authority forms.
# U236 TRANSFERRING AUTHORITY

**SUBJECTS COVERED IN THIS UNIT:**

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What is meant by transferring authority?

- Authority to approve purchase requisitions, PO change orders, and invoices can be transferred to another employee for a specified period of time.

- When the PREQ Approval, POCO Approval, or Invoice Approval form is opened, COMPASS will access the Transfer Approval Authority table to determine which records should be displayed.

- The Transfer Approval Authority form is used to establish the specific details of a transfer.
Intentionally Blank Slide
1. Access the *Transfer Approval Authority* form from the Navigator screen. All active transfers will appear; if there are various, use the **pg dn** and **pg up** keys to scroll through them, or they can be queried as well. The transfers can be modified as long as they are still active. If there are no transfers in affect, only the **From** field and the **Start Date** fields will have data entered. The **From** field may default to the employee ID of the person logged in to COMPASS and the **Start Date** field will default to the current date and time. If necessary, enter the employee ID in the **From** field.

2. Enter the employee ID of the person you wish to transfer your authority to. Press the F9 key to query for an employee.

3. Enter the date the transfer should start. This field defaults to the current date and time. Click the LOV to choose a date using the calendar window. If the start date is set to a future date, the start time will be 12:00 a.m. of that day. The **Start Date** cannot be changed to a date earlier than the current date.

4. Enter the date the transfer will expire. Click the LOV to choose a date using the calendar window. The expiration time will default to 12:00 a.m. of the day selected.

5. Check the checkbox next to the type of approval to be transferred. More than one box may be checked.

6. Click the **Save/Commit** icon or press the **F10** key to save the transfer record.

**Reference Function Buttons:**

- **Suspend Now:** Immediately de-activates a previously entered transfer of approval authority. This button will be inactive when a new record is being entered.
- **Dates:** To view the a list of the most recent date/time a record was entered, modified or closed. Each date and time is followed by the ID of the user who made the change.
CREATING AN APPROVAL AUTHORITY TRANSFER

EXERCISE 1

1. Access the Transfer Approval Authority form from the Navigator screen.
2. Press the F9 key to access the LOV for the To field.
3. Query up SMITH% and highlight one of the employees and click OK.
CREATING AN APPROVAL AUTHORITY TRANSFER

4. Click the LOV button for the Start Date and choose the following Monday
5. Click the LOV button for the End Date and choose the first day of the following month
6. Click all three radio buttons
7. Click the **Save/Commit** icon or press the **F10** key
8. Close the *Transfer Approval Authority* form
CHANGING AN APPROVAL AUTHORITY TRANSFER

EXERCISE 2
1. Access the Transfer Approval Authority form again
2. Change the End Date to the last day of the following month
3. Uncheck the Purchase Requisition Approval radio button
4. Click the Save/Commit icon or press the F10 key
TRANSFER APPROVAL AUTHORITY CAVEATS

- The amount of the approval limit cannot be transferred.
  
  For example, if Employee A transfers approval authority to Employee B, the approval limit will be based on the limit set for Employee B. If the PREQ amount is greater than Employee B's approval limit, the PREQ will be routed to Employee B's supervisor.

- The PREQ Approval form queries PREQs to be approved based on who requested the PREQ (the requestor).
  
  For example, PREQ approval authority was transferred from Employee A to Employee B. Employee C (whose supervisor is Employee A) created a PREQ. Employee B attempted to approve it, but the amount was beyond Employee B's approval limit, so it was routed to Employee B's supervisor, Employee D. Now, if Employee A queries PREQs awaiting approval, this PREQ will be displayed even though the next approver is now Employee D.

- Multiple, simultaneous transfers are not supported.
  
  For example, if a transfer from Employee A to Employee B is in effect, a transfer from Employee B to Employee C will not be supported.
The End!!!