UF | Training & Organizational Development
Human Resources
UNIVERSITY *of* FLORIDA

Editing the Approval Path

You can edit the approval path for a faculty assignment report. The approval path determines the routing of the form, and specifies who is allowed to perform a given step in the workflow.

Editing the approval path is useful when you need to prepare a FAR for a dean, department chair, or anyone else who serves as a FAR Approver. By editing the approval path, you can prevent a situation in which that person would be required to approve their own assignment. It's also useful when a person in the approval path is absent or otherwise unavailable to participate in the form's approval.

To perform this workflow, you must have the following myUFL security role:
UF_ET_FAR_INITIATOR.

Adding a User to an Approval Role

1. Open the FAR for which the approval path will be edited. To locate the FAR:

    a) Click the **Main Menu**.

    b) Click **Effort Reporting** and then click **Faculty Assignment Reports**.

    c) Click **Faculty Assignment Reports**.

    d) To search for the FARs, click the **My Queue Only** check box.

    e) Click **Search**. The search results display.

    f) Click the link for the form you want to modify.

2. Click the **Approval Detail** tab. Here, you can view each step of the approval path.

3. To view the users in the approval path, click the **Show Approvers** button. The screen updates to display the users assigned for each of the FAR roles.

4. Click the **Add User(s) to Approval Roles** link.

5. Click the **Approval Step** drop down arrow and then click the role to be edited.

6. In the User ID field, type the UFID for the user to be added.

7. Click **OK**. The system returns to the Approval Detail tab and the approver added now displays in the list.

8. Click **Save**.

Removing a User from an Approval Role

As a final step, you should remove the individual as a FAR Approver for his/her own assignment.

1. From the Approval Detail tab, click the **Inactivate** check box for the user to be removed.

2. Click the **Save** button. The Approval Path is updated.

Note: This process updates the approval path for the current form only.