

Implementing the QMUL Scheme of Delegation of Financial Authority on Agresso - From 1 August 2014

Date – will depend on go live date for each area

Confirmation of go live for your area

Please note: this is the 4th of 4 emails related to the implementation of new workflows on the Agresso system. **You will only receive this email once your area has gone live with the new workflow set up that your area has requested.**

Email 1 – Background, key changes, implementation and who to contact

Email 2 – “How to...for requisitioners”

Email 3 – “How to...for approvers”

Email 4 – Confirmation of go live in your area and the workflow details set up

Following on from emails 1 - 3, which outlined the changes being implemented in relation to the new workflow setup on Agresso, provided tips for requisitioners and approvers, this email confirms that your area has now gone live with the new workflow set up agreed with your co-ordinator(s).

This means that from now on, requisitions created by requisitioners in your area, will workflow through the approval chain to the relevant budget holder (or their approved delegate).

1. Confirming your workflow set up on Agresso

- Names of requisitioners set up with the ability to create requisitions
Table listing the names of requisitioners related to each specific area
- Approvers in the approval chain against the relevant cost centres and their delegated approval limits *(please be aware that depending on the value of a requisition created, the requisition will flow through for approval at each level in the approval chain set up for your area, until it reaches the approval limit required). E.g. a requisition for a higher value may flow through 2 or 3 approvers before being turned into a purchase order. This will depend on the number of approval levels requested by a particular area.*
Table showing the approvers in the approval chain against cost centres for the area with their approval limits
- Substitute approvers for periods when the approver is out of the office
Table showing the substitutes set up for approvers (to delegate approval limits when out of the office)

2. Queries and who to contact

- **Queries about the workflow set up for your area**

If you have any queries about the set-up of the workflows for your area including which budget codes to use, please contact your representative (**as per Appendix 1 – sent out with Email 1**)

- **Queries about the Scheme of Delegation of Financial Authority**

If you have any queries about the Scheme of Delegation of Financial Authority, please contact Janice Trounson, Deputy Director Financial Control (j.trounson@qmul.ac.uk).