Changing Buy@Duke Org Settings

Overview
Buy@Duke organizational settings, which include purchasing thresholds and system-level approvers, were set for your organizational unit at the time of system implementation by the i2 Team and are maintained by Accounting Systems Administration (ASA). In the event that these settings need to be changed, a standard form can be completed and sent to ASA to create a change request. This document provides context to these settings, and explains how to complete the form and file a request.

The form accepted by ASA for requesting Buy@Duke organization settings can be found at: http://finance.duke.edu/procurement/documents/BuyatDukeOrgSettingsRequest.xls

Review of org approvals
When a Submitter submits a cart for order, the system looks to the cost objects in the cart and the user’s role to determine if approval is necessary. If the cart’s total value surpasses the established threshold, the cart routes to the approver(s) designated in Master Data (see 1 below). If the cart total surpasses the high dollar threshold established for your unit, the cart will workflow to an assigned High Dollar Approver subsequent to fund code-level approval (2, below). Please note that system routing uses the first restricted code listed in the cart to determine the need for approval(s). If a restricted code is not utilized, the cart will workflow based off of the first unrestricted code used. Please note: If a fund code approver submits a cart that requires review and a second approver is listed in Master Data for the code being charged, the cart will route to the second approver for approval.

Purchasing thresholds
Purchasing thresholds for restricted and unrestricted funds in your organizational unit are maintained in three categories: Submitter 1, Submitter 2, and High Dollar. The SAP Org Unit General Attribute codes that correspond to these categories are listed below:

- Restricted fund Submitter 1 threshold: SC_G20
- Restricted fund Submitter 2 threshold: SC_G30
- Restricted fund High Dollar threshold: SC_GHD
- Unrestricted fund Submitter 1 threshold: SC_O20
- Unrestricted fund Submitter 2 threshold: SC_O30
- Unrestricted fund High Dollar threshold: SC_OHD

Thresholds tell the system when a particular cart requires approval, and changing the purchasing thresholds for a particular org unit will affect all codes housed in that unit. Please note that changing
your org’s established thresholds will affect all carts routing for approval on codes owned by the org unit, and could have a dramatic effect on your users.

System-level approvers
As reviewed above, purchasing thresholds trigger cart workflow to fund code-level approvers assigned in Master Data. Buy@Duke also has several system-level approval roles that are specific to the tool and are maintained by ASA. High Dollar Approvers for restricted and unrestricted funds are required, and each unit established these roles for one or more individuals during implementation. In some cases, carts may charge codes that do not have a responsible person associated with them in Master Data (e.g., a brand new cost object, 7XX codes). Once submitted, these carts would automatically route to Procurement for approval. To avoid this, the system includes a catch-all approver at the org level, termed the Departmental Approver, for all codes without a person listed in Master Data. Lastly, the Alternate Approver role receives notifications for every cart submitted for order using your org unit’s cost objects that require approval. The SAP Organization Workflow Object codes that correspond to these roles are listed below:

- Restricted fund High Dollar Appraoever: ZW SC_OTH
- Unrestricted fund High Dollar Approver: ZW SC_OHD
- Departmental Approver: ZW SC_OTH
- Alternate Approver: ZW_SC_DA

Completing the change request form
To request changes to thresholds or system-level approvers, use the above link to download the Buy@Duke Organizational Settings MS Excel form. Instructions for completing the form fields are described below. Please note that the items in **bold** are required regardless of the changes requested.

- **Identifier:** Enter the organization number(s) for your unit. Please note, this is an eight digit number beginning with a 5 (e.g., 50000855) and is different than a BFR code. The orgs entered here should be where your codes reside, not necessarily where your users are housed. If a parent org is provided, all of the codes housed in the child orgs will inherit the parent’s settings. Please note that more than one org can be entered on a single form if the indicated settings will apply to all of the orgs listed.
- **Org Name:** Please provide the title(s) of your organization.
- **Restricted and Unrestricted Funds Purchasing Thresholds:** Enter purchasing thresholds for Submitter 1, Submitter 2, and High Dollar carts ordered on restricted and unrestricted funds. Please note that it is not necessary to use both Submitter levels in your unit. If you choose to use a single Submitter threshold, please enter a value of $0 for the unused Submitter level. Please note that School of Medicine units are required to set high dollar thresholds for restricted and unrestricted funds at $9,999.99 or lower.
- **Restricted and Unrestricted High Dollar Approvers:** List the position number of the individual(s) in your unit that will approve high dollar carts. The unit business manager or divisional administrator typically occupies this role.
- **Department Approver:** The individual(s) listed in this role acts as a catch-all approver for carts routing for approval that do not have GMs or RFPs designated in Master Data or for 7XX codes. If this role is left blank, and a cart matching this description routes for approval, it will workflow to Procurement. Enter the position numbers of the individuals that need to have this role.
• **Alternate Approver:** The individual(s) listed in this role will receive a copy of the approval emails and UWL entries for all carts requiring approval that route on codes owned by your organization. The individual(s) listed in this role could serve as a backup for your GM and RFP approvers. Please note, however, that these individuals could receive a substantial number of approval notices depending on the purchasing habits of your users and your threshold levels. As above, enter the position numbers of the individuals that need this role.

**Once completed, please email your form to:** acctgsysadmin@duke.edu