Electronic Requisition Approval Training

Approver

Arkansas Tech University

Electronic Requisition Approvals Process

What is it?

- Requisition approval process facilitated through existing Banner software.
- Replaces the current process with standardized approvals throughout all departments.
- Currently applies only to requisitions. Procurement and Travel will continue to evaluate requisitions for compliance.
- Two roles exist-approver and initiator. Security prevents one person from being in both roles.

Why do we need it?

- Allows for procurement and travel requisitions to be approved via Banner Self Service.
- Reduces paperwork necessary for the completion of the procurement cycle.
- Promotes budgetary responsibilities across departmental levels.

Scheduled to begin August 1, 2019

Electronic Requisition Approvals Process

What changes will I see?

- Procurement and Travel will no longer gather approvals for departments. However, A.A. Travel Request Form is still in use until further notice.
- All purchasing and travel requisitions will flow through the electronic approval process.
- Action will be required on your part as the approver to move the requisition through the process.
- Each approver will assign a proxy to approve in his/her absence.
- You will work with your proxy to coordinate approvals as notification emails will be received simultaneously.

Approval Limits

Approved by the Executive Council and serve as dollar amount basis for approval routing

Division	$0-$2,500	>$2,500-$5.000	>$5,000-$50,000	>$50,000
Academic Affairs	Department Head	Dean	Vice President	President
Administration and Finance	Specific Area Director		Vice President	President
Advancement	Vice President			President
Athletics	Head Coach, Head Trainer, Sports Information Director	Athletic Director		President
Enrollment Management	Specific Area Director		Vice President	President
Ozark	Department Head	Chief Officer	Chancellor	President
President	Specific Area Director		Chief of Staff	President
Student Affairs	Associate Dean	Dean of Students	Vice President	President
Grant Funds-All grant funds will forward to Principal Investigator and Budget Office queues for approval prior to moving to the Department Head queue and so on.	Department Head	Dean	Vice President	President

APPROVAL PROCESS

1. Requestor enters requisition.
2. Automatically forwarded to first approval queue. Approvers and proxies in that queue receive immediate email notification.
3. Reminder email notifications are sent out at 7 a.m. and Noon (12 p.m.) to all approvers who have pending requisitions. This includes proxies.
4. Approver accesses Banner Self Service.
5. Approves or disapproves requisition.
6. **If approved** and additional approvals are required, the requisition is forwarded to the next queue and the approver for that queue receives an email notification.
7. This process continues until all approvals are granted or the requisition is disapproved.
8. Once all approvals are granted, the requestor receives an email notification that the requisition has been approved and it is forwarded to Procurement or Travel for evaluation and processing.
9. **If disapproved**, requestor receives email notification containing comments entered by disapprover and requisition is cancelled by Procurement or Travel.

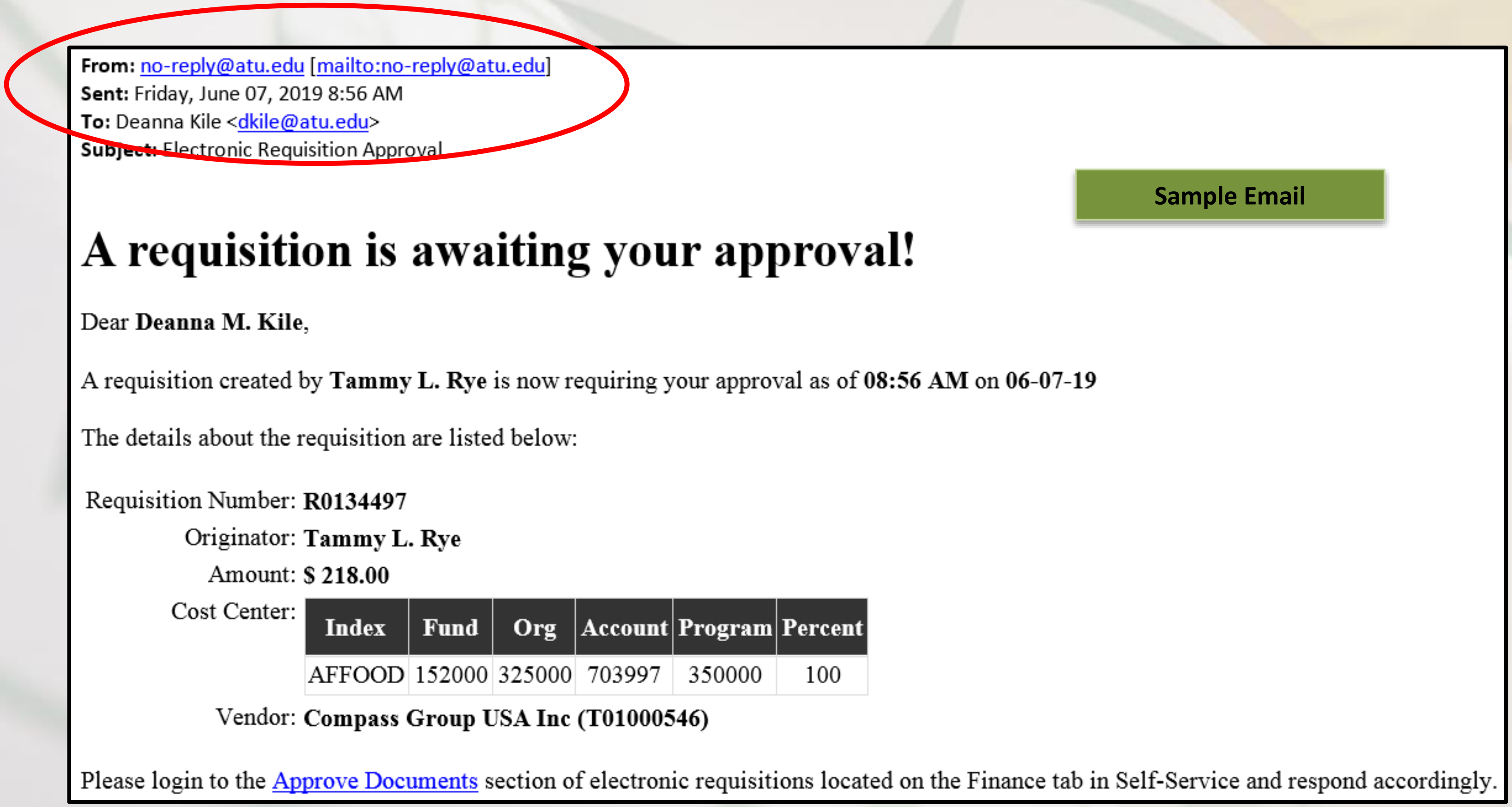
Q.
A.

Approval Notification

1. Requisition is entered and forwards to first approval queue. Selection of queues that requisition must travel through is based upon
   a) Dollar amount of requisition
   b) FOAP (Fund Organization Account Program) Information
2. Approver and Proxy listed on first queue immediately receives notification email
   a) Reminder emails are scheduled to be sent at 7 a.m. and Noon (12 p.m.) and will continue as long as there are requisitions in the queue.
   b) As the requisition moves through the queues required for final approval, approvers and proxies will receive notification(s).
   c) Approver can access queue and review requisitions prior to email notification.

Note: Proxy approvers **will** also receive these same notifications. It will be up to the Approvers and Proxies to coordinate approval of these requisitions.

Sample Approver Email



Sample Email

From: no-reply@atu.edu [mailto:no-reply@atu.edu]
Sent: Friday, June 07, 2019 8:56 AM
To: Deanna Kile <dkile@atu.edu>
Subject: Electronic Requisition Approval

A requisition is awaiting your approval!

Dear **Deanna M. Kile**,

A requisition created by **Tammy L. Rye** is now requiring your approval as of **08:56 AM** on **06-07-19**

The details about the requisition are listed below:

Requisition Number: **R0134497**
Originator: **Tammy L. Rye**
Amount: **$ 218.00**
Cost Center:

Index	Fund	Org	Account	Program	Percent
AFFOOD	152000	325000	703997	350000	100

Vendor: **Compass Group USA Inc (T01000546)**

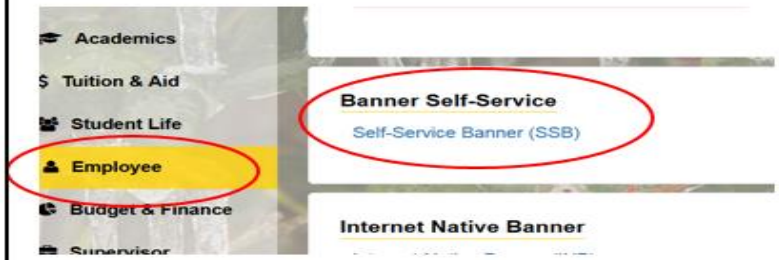
Please login to the Approve Documents section of electronic requisitions located on the Finance tab in Self-Service and respond accordingly.

Available for view on smart phones and other mobile devices.

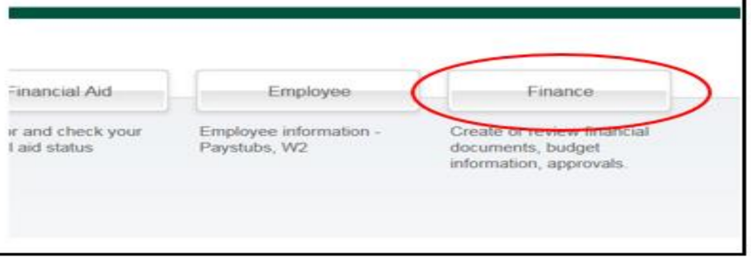
Approvals Step-by-Step

Step 1. Log into Self Service Banner with the Approve Documents link in the notification email or https://onetech.atu.edu/cp/home/displaylogin

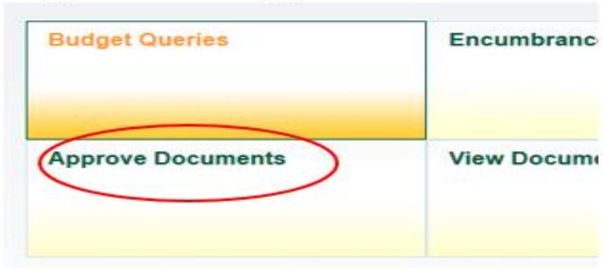
Step 2: Click on the **Employee** link


Academics
Tuition & Aid
Student Life
Employee
Budget & Finance
Supervisor
Banner Self-Service
Self-Service Banner (SSB)
Internet Native Banner

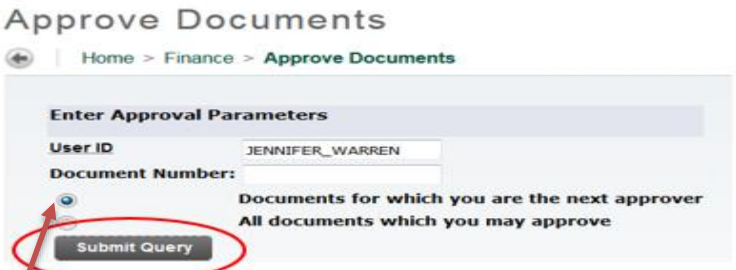
Step 3: Click on the **Finance Tab**


inancial Aid
r and check your
l aid status
Employee
Employee information - Paystubs, W2
Finance
Create or review financial documents, budget information, approvals

Step 4: Click on **Approve Documents**


Budget Queries
Encumbranc
Approve Documents
View Docum

Step 5: Click on **Submit Query**


Approve Documents
Home > Finance > Approve Documents

Enter Approval Parameters

User ID JENNIFER_WARREN

Document Number:

● **Documents for which you are the next approver**

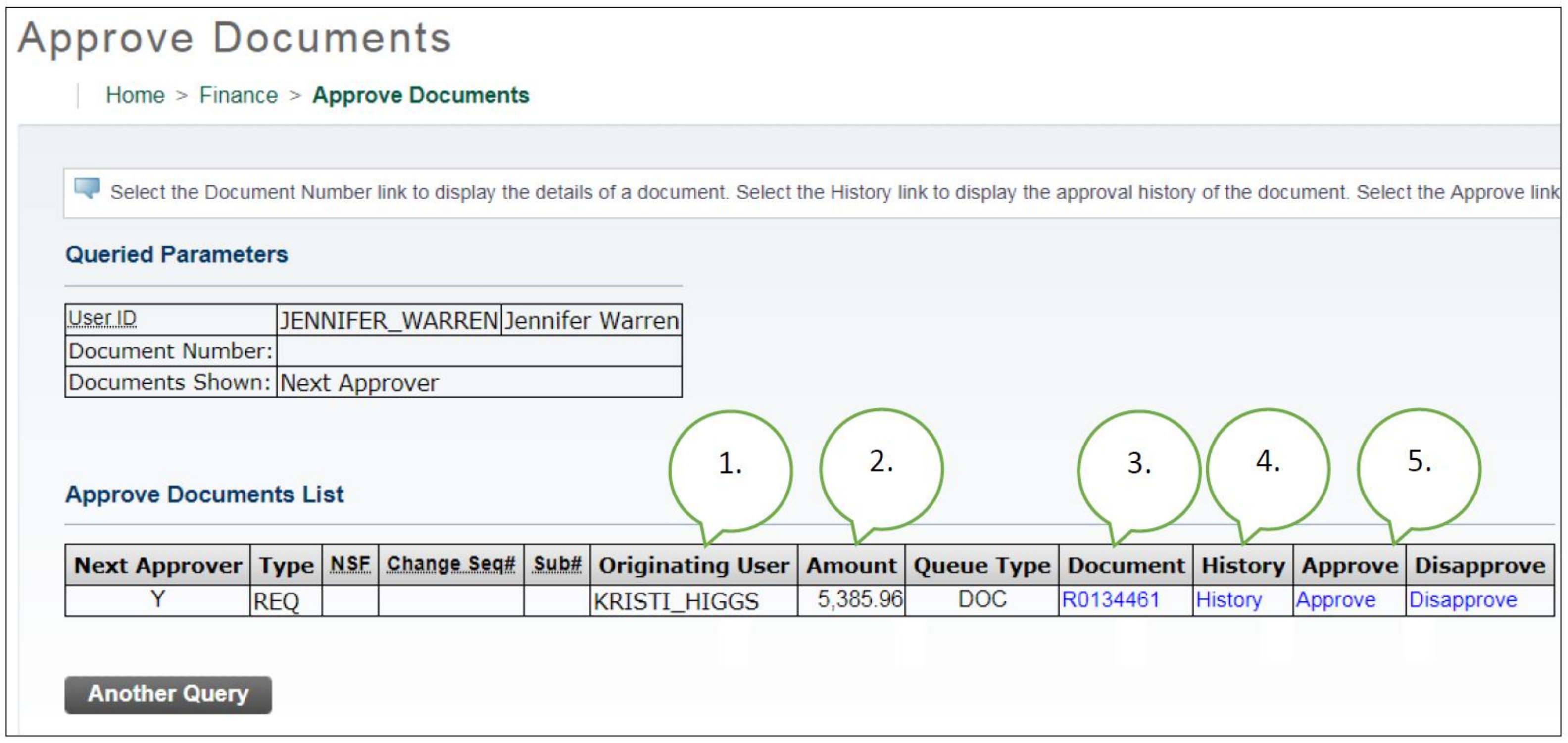
○ **All documents which you may approve**

Submit Query

Note: It's important to ensure that you select **Next Approver** rather than the All Documents. Selecting All Documents will display requisitions that may not have received approval from lower level yet.

Approval Step-by-Step (cont.)

Clicking Submit Query displays this screen.



Approve Documents

Home > Finance > **Approve Documents**

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link

Queried Parameters

User ID	JENNIFER_WARREN	Jennifer Warren
Document Number:		
Documents Shown:	Next Approver	

Approve Documents List

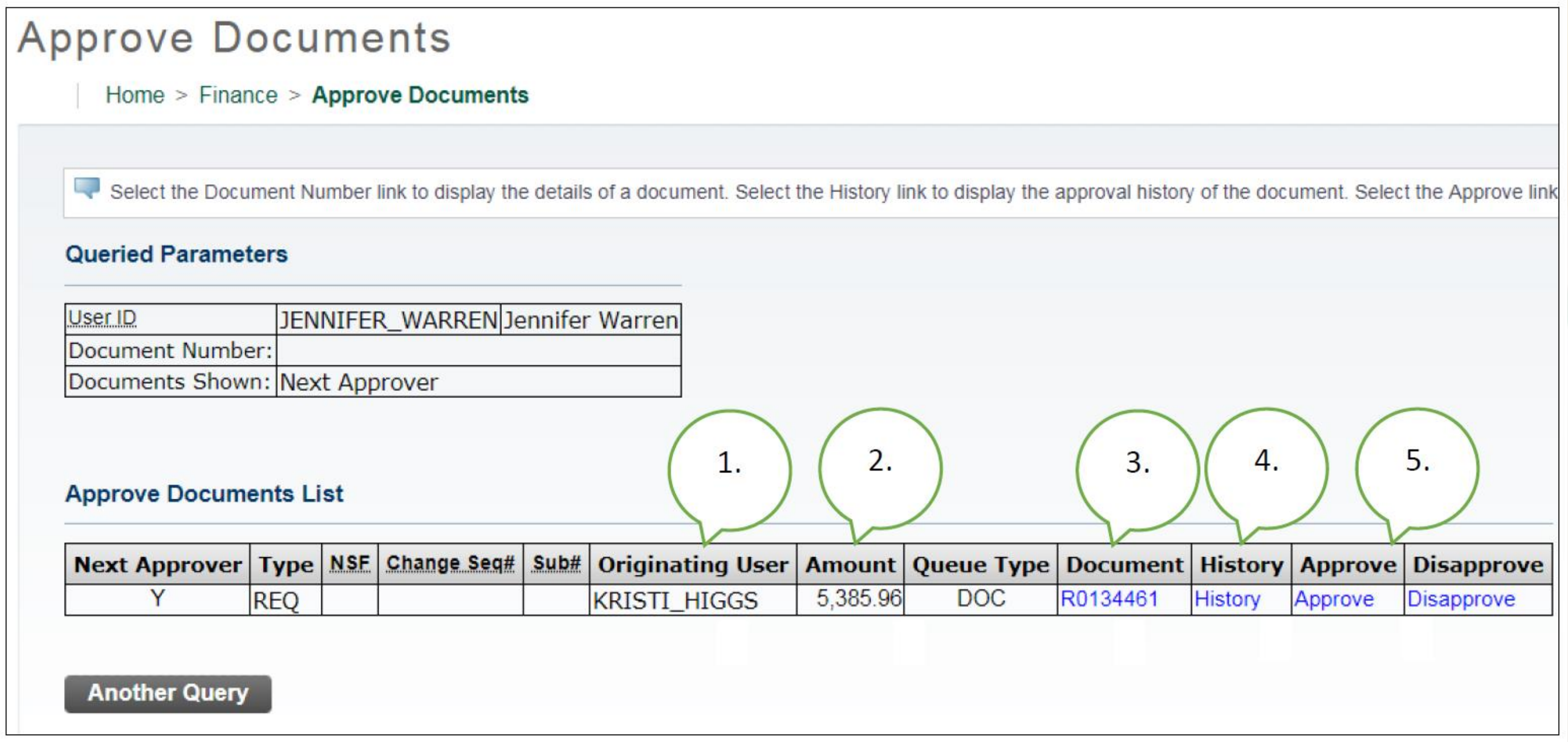
Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

1. Person who entered the requisition.

2. Total dollar amount.

3. Requisition Number-Click on the **blue requisition number hyperlink** to display the requisition contents.

Approval Step-by-Step (cont.)



Approve Documents

Home > Finance > **Approve Documents**

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link

Queried Parameters

User ID	JENNIFER_WARREN	Jennifer Warren
Document Number:		
Documents Shown:	Next Approver	

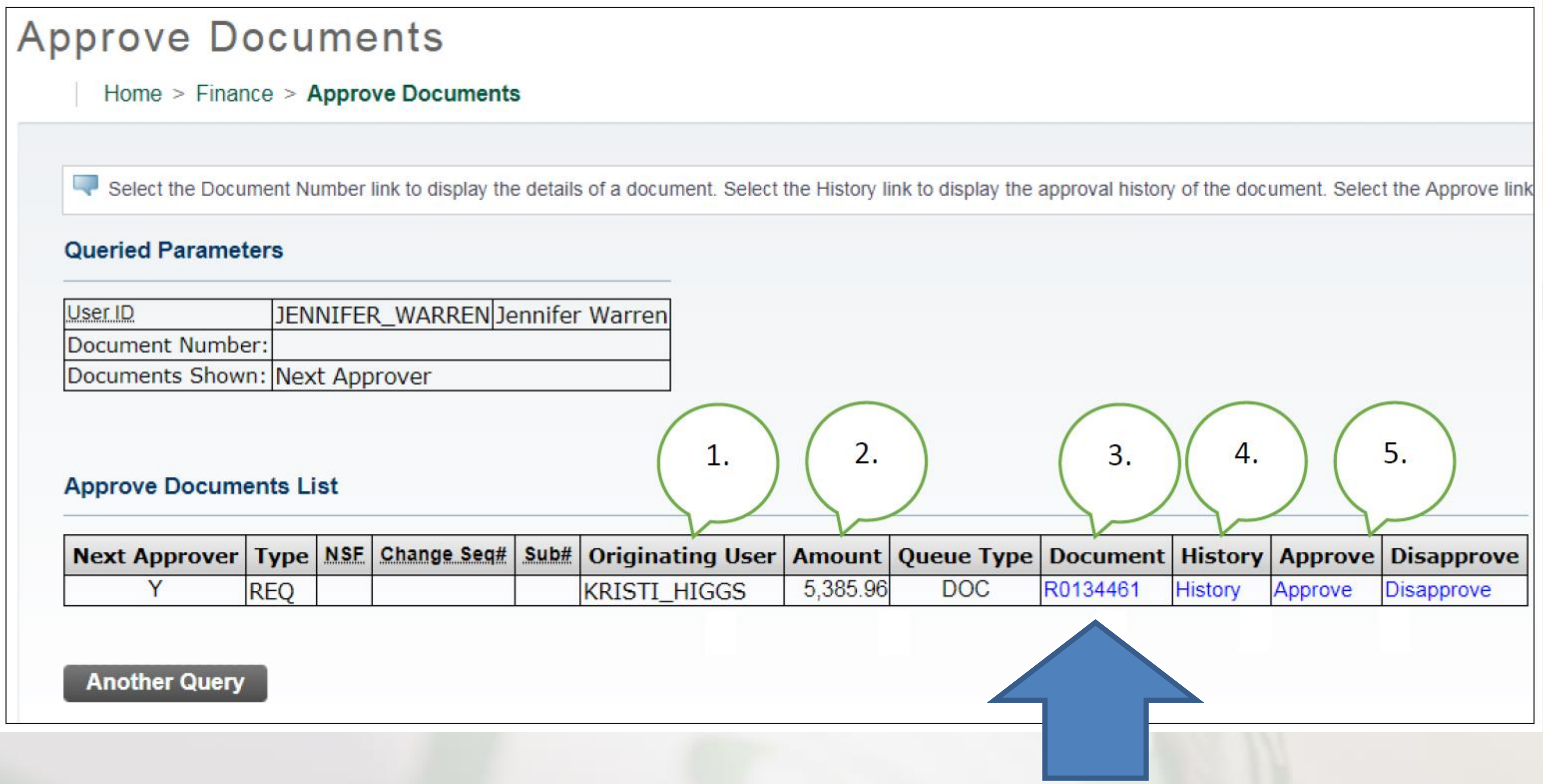
Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

4. Approval History Link-Click on the **blue History hyperlink** to display

1. who has already approved this document
2. who is required to approve this document
3. who is able to approve this document (if multiple approvers are assigned.)

Approval Step-by-Step (cont.)



Approve Documents

Home > Finance > **Approve Documents**

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link

Queried Parameters

User ID	JENNIFER_WARREN	Jennifer Warren
Document Number:		
Documents Shown:	Next Approver	

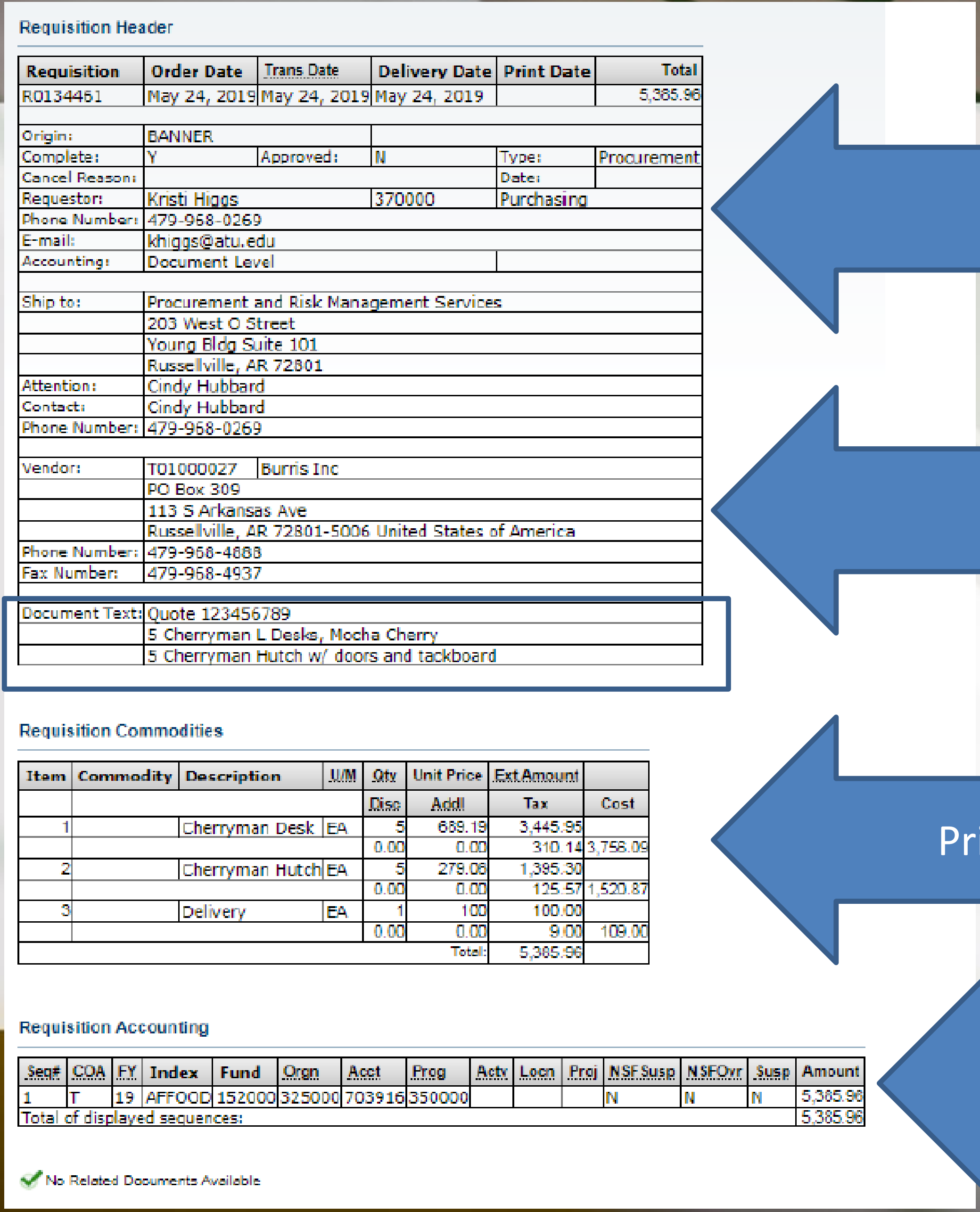
Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

5. Links to Approve/Disapprove

Step 6: Click the blue requisition number hyperlink to view the details of the requisition.

Requisition Details



Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0134461	May 24, 2019	May 24, 2019	May 24, 2019		5,385.96

Origin:	BANNER				
Complete:	Y	Approved:	N	Type:	Procurement
Cancel Reason:				Date:	
Requestor:	Kristi Higgs		370000	Purchasing	
Phone Number:	479-968-0269				
E-mail:	khiggs@atu.edu				
Accounting:	Document Level				
Ship to:	Procurement and Risk Management Services				
	203 West O Street				
	Young Bldg Suite 101				
	Russellville, AR 72801				
Attention:	Cindy Hubbard				
Contact:	Cindy Hubbard				
Phone Number:	479-968-0269				
Vendor:	T01000027	Burris Inc			
	PO Box 309				
	113 S Arkansas Ave				
	Russellville, AR 72801-5006 United States of America				
Phone Number:	479-968-4888				
Fax Number:	479-968-4937				
Document Text:	Quote 123456789				
	5 Cherryman L Desks, Mocha Cherry				
	5 Cherryman Hutch w/ doors and tackboard				

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount	
				Disc	Addl	Tax	Cost
1		Cherryman Desk	EA	5	689.19	3,445.95	
				0.00	0.00	310.14	3,756.09
2		Cherryman Hutch	EA	5	279.06	1,395.30	
				0.00	0.00	125.57	1,520.87
3		Delivery	EA	1	100	100.00	
				0.00	0.00	9.00	109.00
					Total:	5,385.96	

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Susp	NSFOvr	Susp	Amount
1	T	19	AFFOOD	152000	325000	703916	350000				N	N	N	5,385.96
Total of displayed sequences:														5,385.96

✓ No Related Documents Available

Requestor information

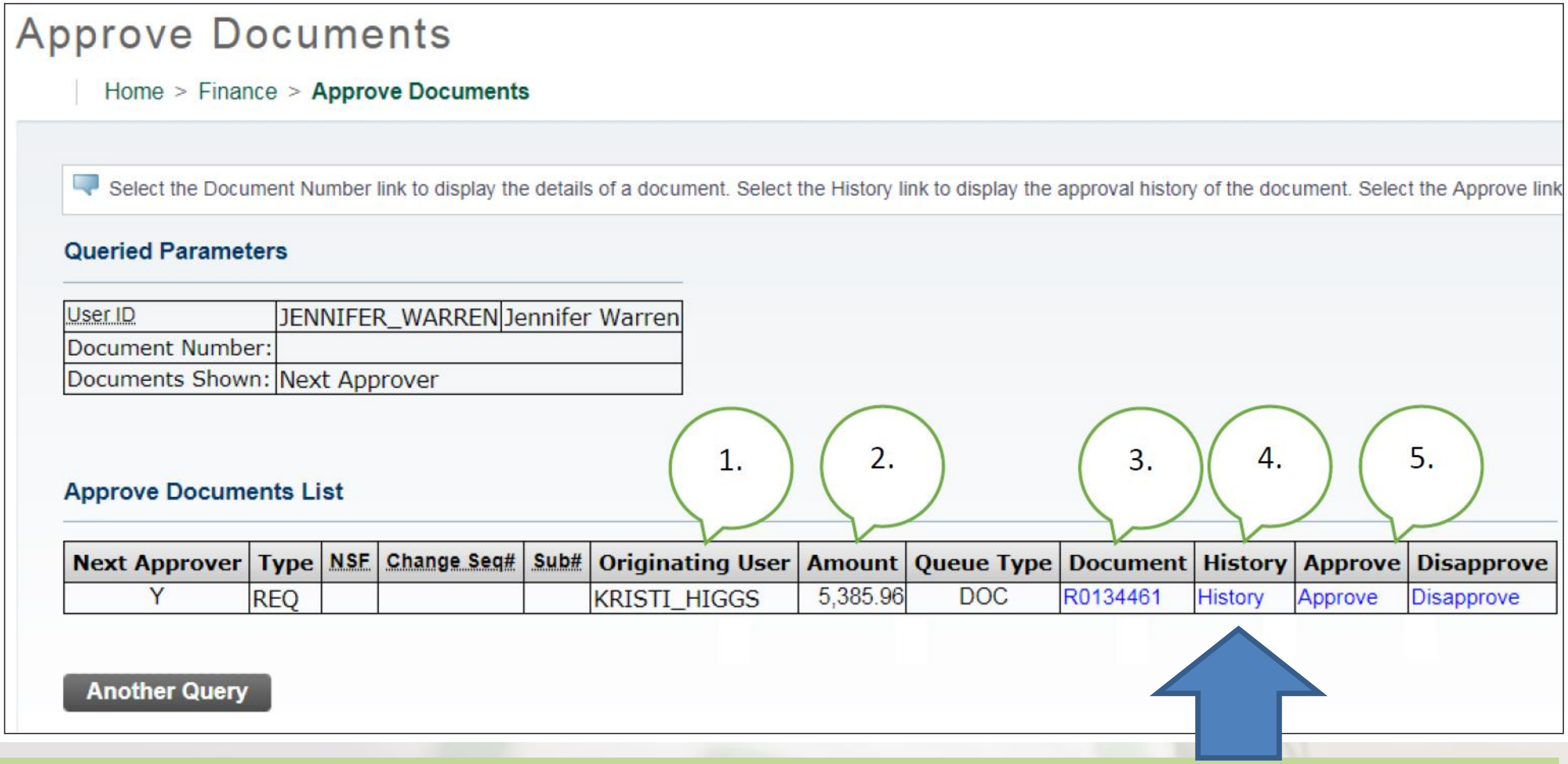
Vendor Information

Pricing and Commodity Details

Accounting Information

Requisition Approval History

Step 7



Approve Documents

Home > Finance > **Approve Documents**

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link

Queried Parameters

User ID	JENNIFER_WARREN	Jennifer Warren
Document Number:		
Documents Shown:	Next Approver	

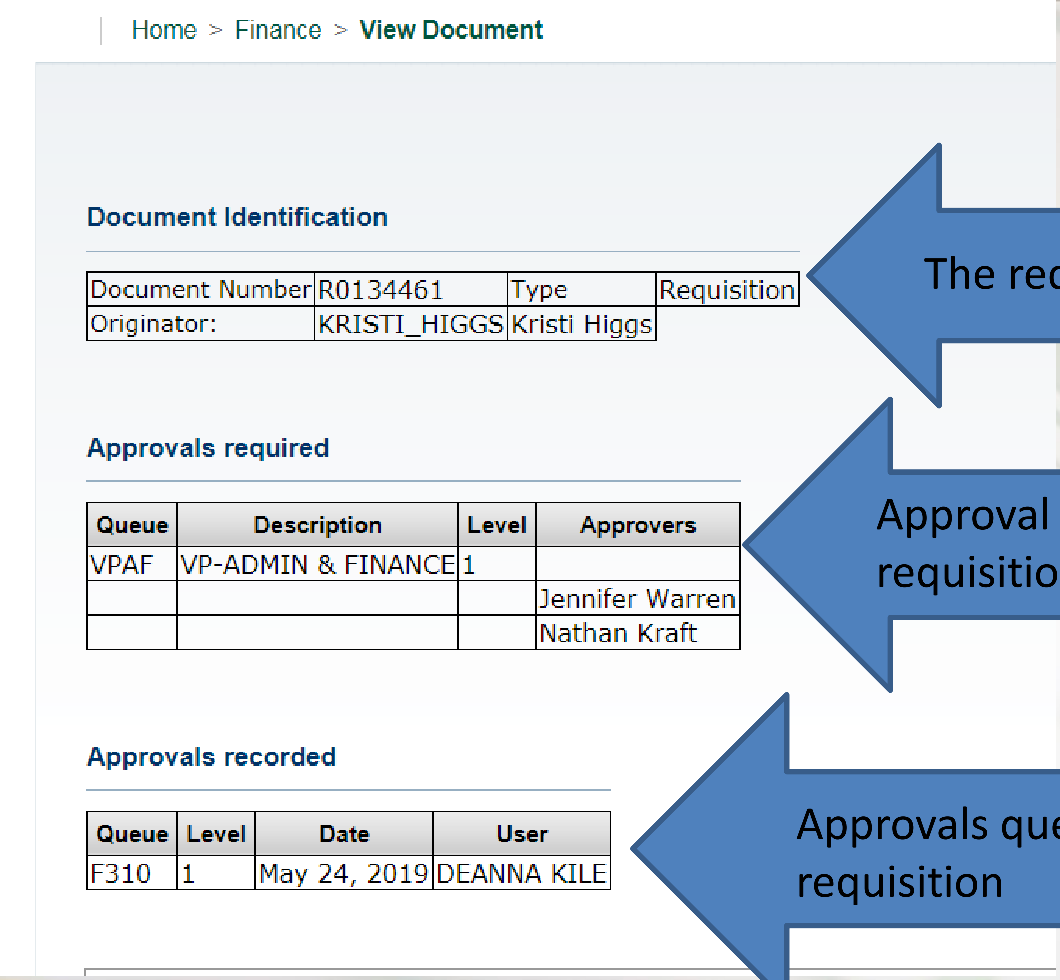
Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

4. Approval History Link-Click on the **blue History hyperlink** to display

1. who has already approved this document
2. who is required to approve this document
3. who is able to approve this document (if multiple approvers are assigned.)

Requisition Approval History



Home > Finance > **View Document**

Document Identification

Document Number	R0134461	Type	Requisition
Originator:	KRISTI_HIGGS	Kristi Higgs	

Approvals required

Queue	Description	Level	Approvers
VPAF	VP-ADMIN & FINANCE	1	
			Jennifer Warren
			Nathan Kraft

Approvals recorded

Queue	Level	Date	User
F310	1	May 24, 2019	DEANNA KILE

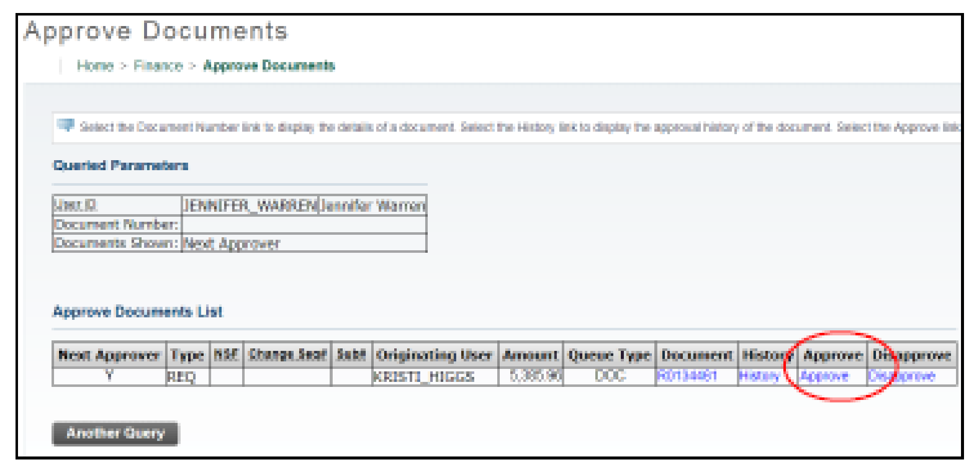
The requisition number and requestor

Approval queues that have not approved the requisition

Approvals queues that have approved the requisition

To navigate back to the approval document page, click the back arrow on your browser.

Approving a Requisition



Approve Documents

Home > Finance > **Approve Documents**

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve

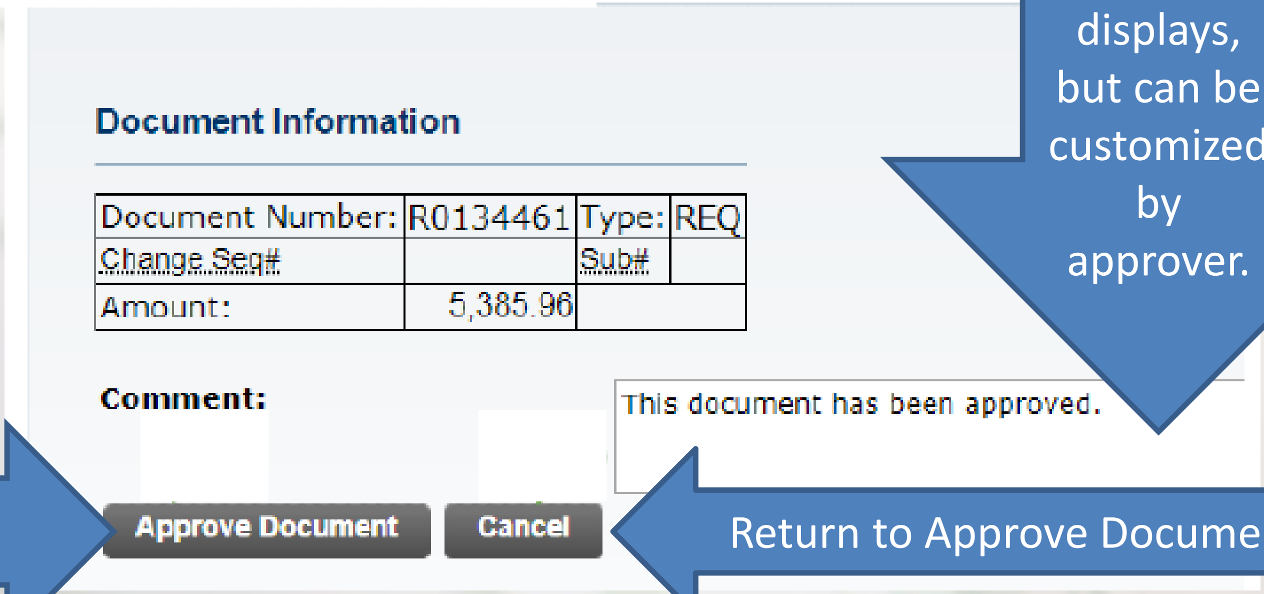
Queried Parameters

User ID	JENNIFER_WARREN	Jennifer Warren
Document Number:		
Documents Shown:	Next Approver	

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

Step 8: Click on the Approve hyperlink



Document Information

Document Number:	R0134461	Type:	REQ
Change Seq#		Sub#	
Amount:	5,385.96		

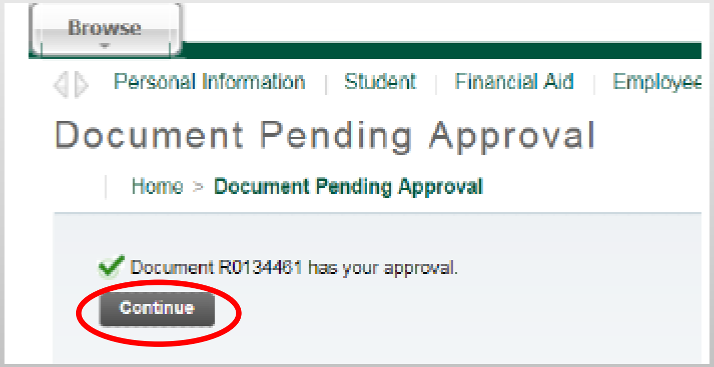
Comment: This document has been approved.

Standard message displays, but can be customized by approver.

Click to approve requisition.

Return to Approve Documents

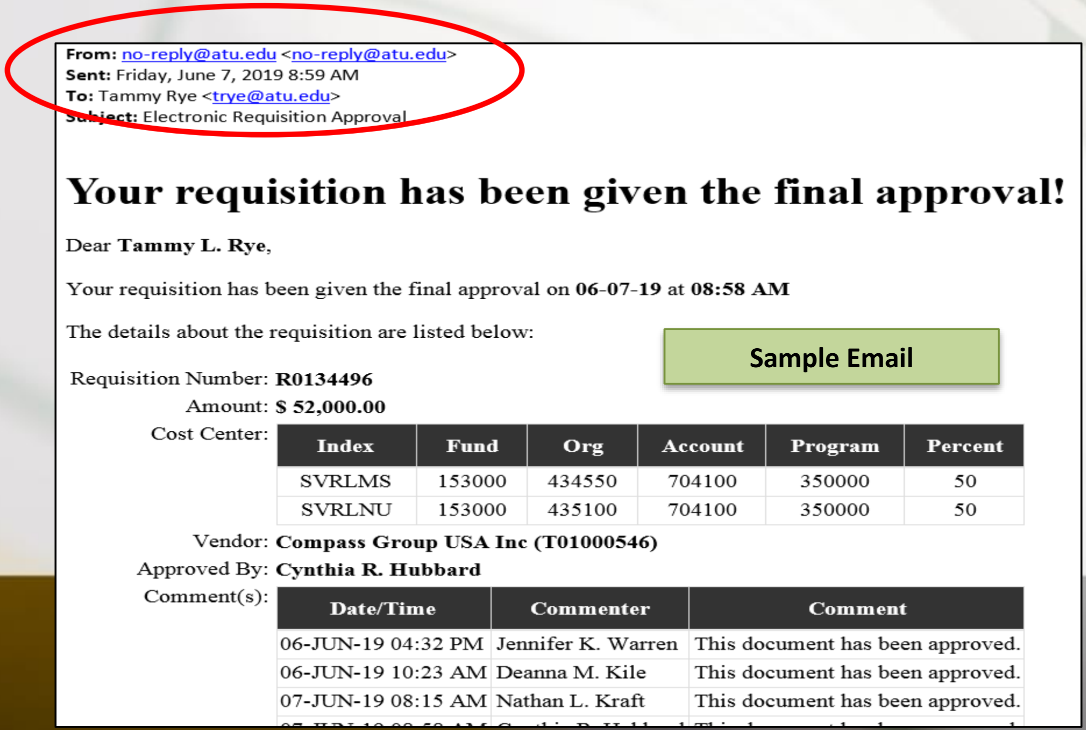
Approving a Requisition (cont.)


Browse
Personal Information | Student | Financial Aid | Employee
Home > Document Pending Approval
Continue

Document Pending Approval

✓ Document R0134461 has your approval.

Once approved this screen will display and the requisition will advance to the next queue, if applicable. Clicking continue will take you back to the Approve Documents screen.



From: no-reply@atu.edu <no-reply@atu.edu>
Sent: Friday, June 7, 2019 8:59 AM
To: Tammy Rye <trye@atu.edu>
Subject: Electronic Requisition Approval

Your requisition has been given the final approval!

Dear **Tammy L. Rye**,

Your requisition has been given the final approval on **06-07-19** at **08:58 AM**

The details about the requisition are listed below:

Requisition Number: **R0134496**
Amount: **$ 52,000.00**
Cost Center:

Index	Fund	Org	Account	Program	Percent
SVRLMS	153000	434550	704100	350000	50
SVRLNU	153000	435100	704100	350000	50

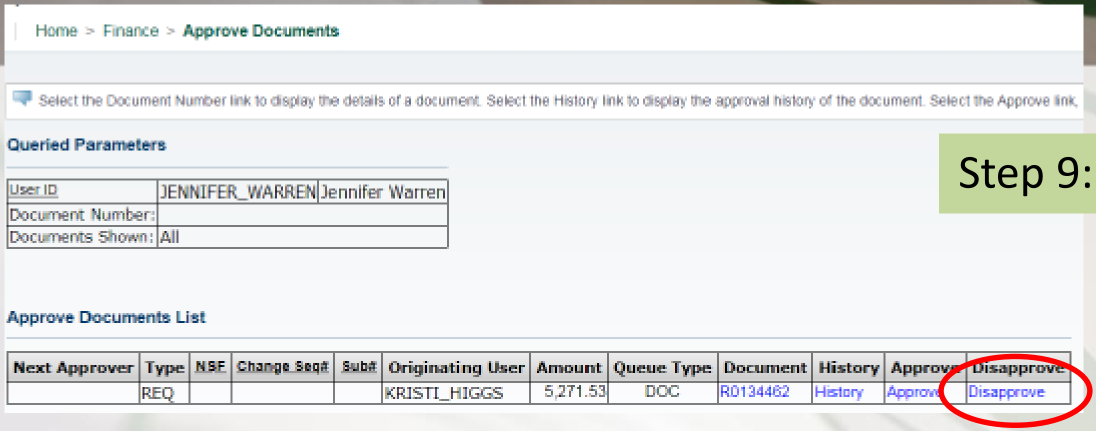
Vendor: **Compass Group USA Inc (T01000546)**
Approved By: **Cynthia R. Hubbard**
Comment(s):

Date/Time	Commenter	Comment
06-JUN-19 04:32 PM	Jennifer K. Warren	This document has been approved.
06-JUN-19 10:23 AM	Deanna M. Kile	This document has been approved.
07-JUN-19 08:15 AM	Nathan L. Kraft	This document has been approved.

Sample Email

If your approval is the final approval necessary, the **requestor** will receive an email like this one and the requisition will forward to Procurement or Travel for PO assignment and processing.

Disapproving a Requisition



Home > Finance > **Approve Documents**

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link,

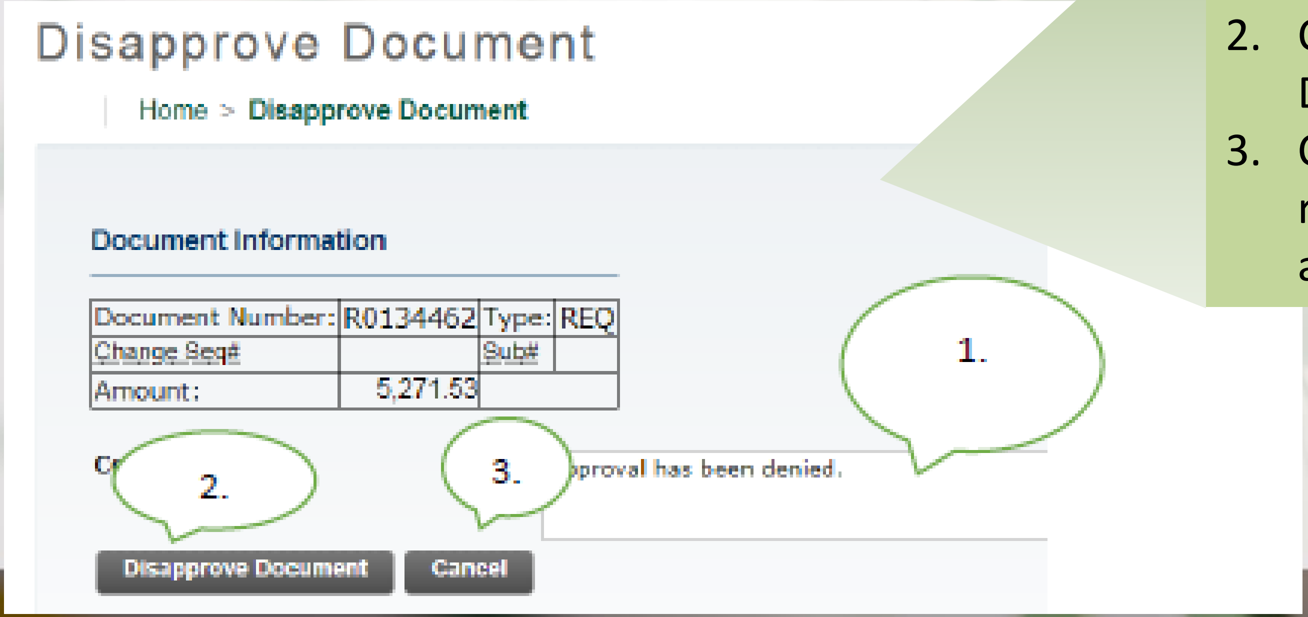
Queried Parameters

User ID	JENNIFER_WARREN	Jennifer Warren
Document Number:		
Documents Shown:	All	

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
	REQ				KRISTI_HIGGS	5,271.53	DOC	R0134462	History	Approve	Disapprove

Step 9: Click on the Disapprove Link



Disapprove Document

Home > **Disapprove Document**

Document Information

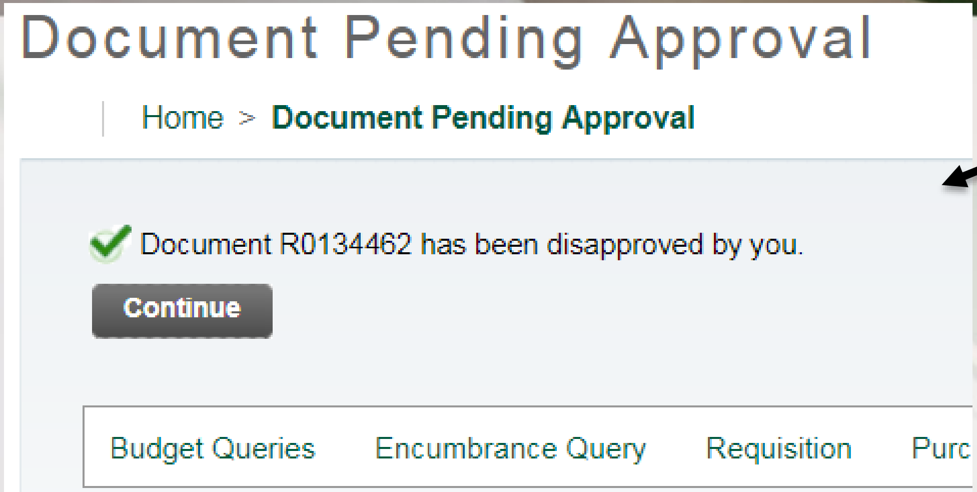
Document Number:	R0134462	Type:	REQ
Change Seq#		Sub#	
Amount:	5,271.53		

C

pproval has been denied.

1. Comment section can be customized.
2. Click to Disapprove Document.
3. Cancel to return to requisition list awaiting approvals.

Disapproving a Requisition (cont.)

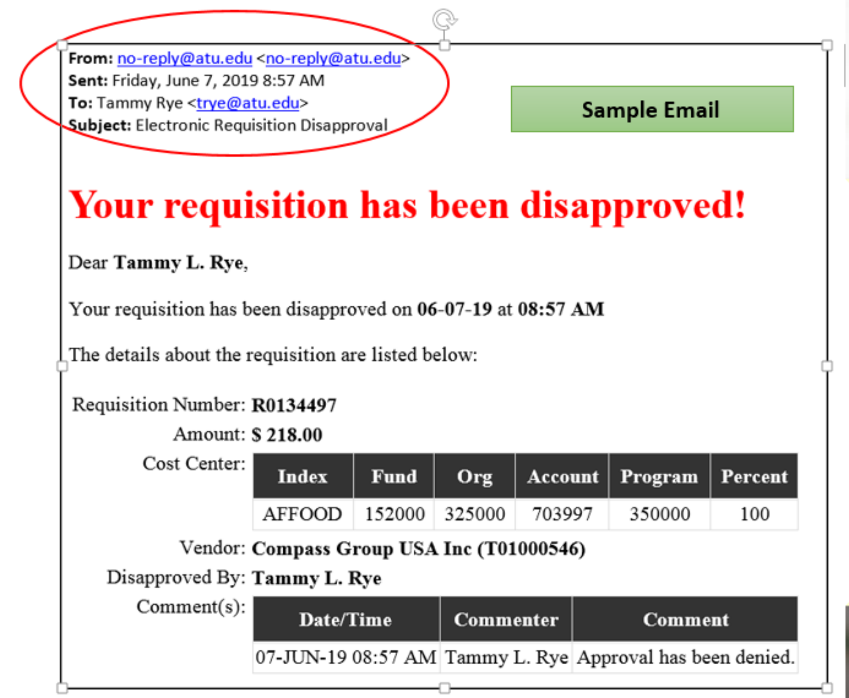


Document Pending Approval

Home > Document Pending Approval

✓ Document R0134462 has been disapproved by you.

This screen will display after **Disapprove Document** has been clicked.



From: no-reply@atu.edu <no-reply@atu.edu>
Sent: Friday, June 7, 2019 8:57 AM
To: Tammy Rye <trye@atu.edu>
Subject: Electronic Requisition Disapproval

Your requisition has been disapproved!

Dear **Tammy L. Rye**,

Your requisition has been disapproved on **06-07-19** at **08:57 AM**

The details about the requisition are listed below:

Requisition Number: **R0134497**
Amount: **$ 218.00**
Cost Center:

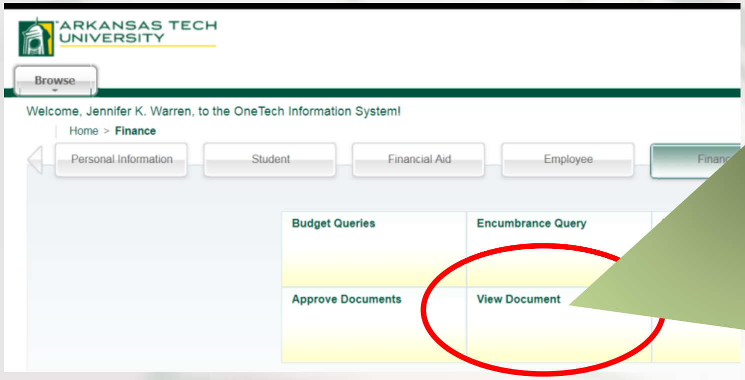
Index	Fund	Org	Account	Program	Percent
AFFOOD	152000	325000	703997	350000	100

Vendor: **Compass Group USA Inc (T01000546)**
Disapproved By: **Tammy L. Rye**
Comment(s):

Date/Time	Commenter	Comment
07-JUN-19 08:57 AM	Tammy L. Rye	Approval has been denied.

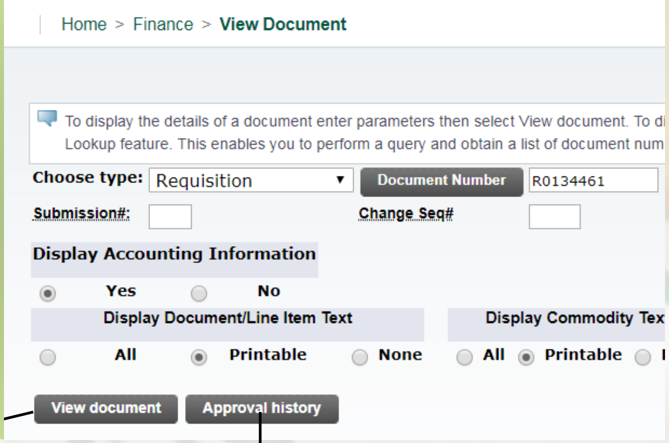
Once disapproved it will be removed from your list awaiting approval and you will no longer receive a reminder notification for this requisition and the requestor as well as Procurement will receive an email notification like this. Procurement or Travel will then cancel requisition.

Checking Approval Status


ARKANSAS TECH UNIVERSITY
Browse

Welcome, Jennifer K. Warren, to the OneTech Information System!

Home > Finance
Personal Information
Student
Financial Aid
Employee
Financ
Budget Queries
Encumbrance Query
Approve Documents
View Document


Home > Finance > View Document

To display the details of a document enter parameters then select View document. To di
Lookup feature. This enables you to perform a query and obtain a list of document num

Choose type: Requisition ▾ **Document Number** R0134461

Submission#: **Change Seq#**

Display Accounting Information

● Yes ○ No

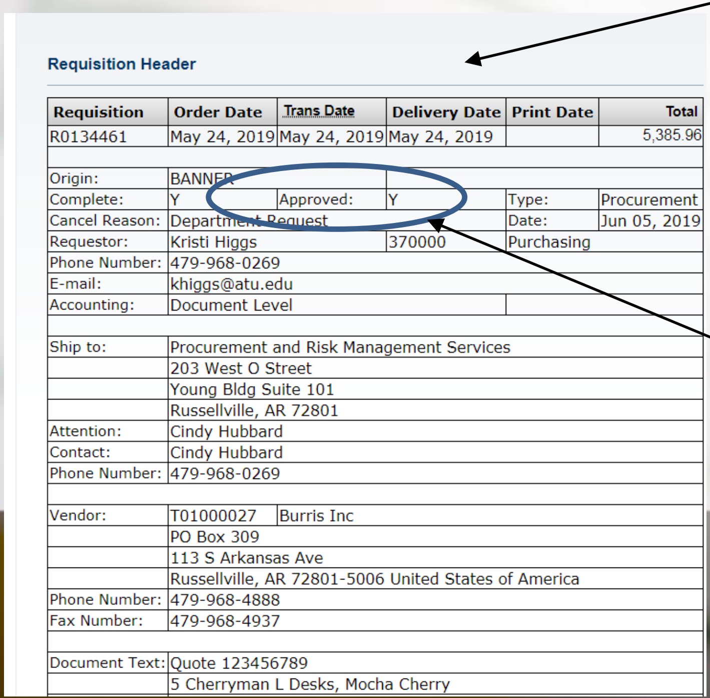
Display Document/Line Item Text

○ All ● Printable ○ None

Display Commodity Tex

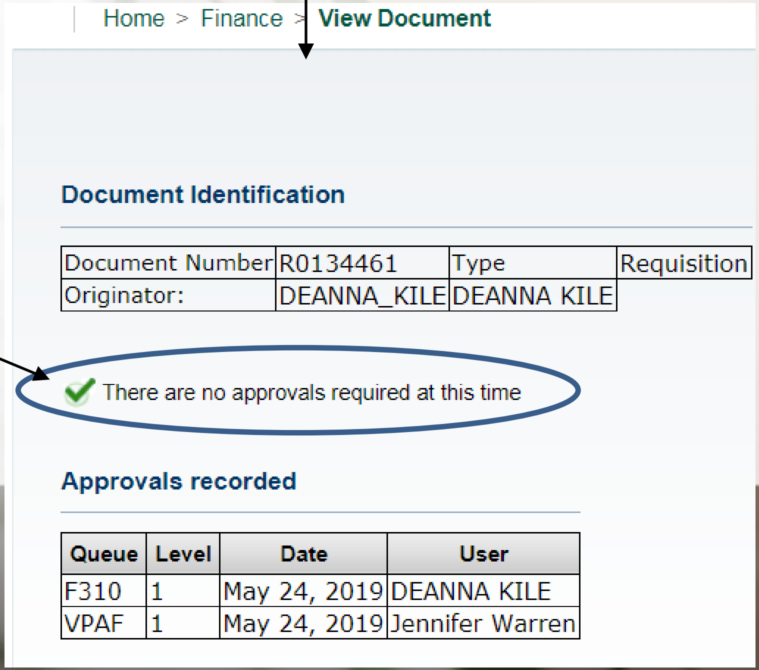
○ All ● Printable ○

View document
Approval history



Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0134461	May 24, 2019	May 24, 2019	May 24, 2019		5,385.96
Origin:	BANNER				
Complete:	Y	Approved:	Y	Type:	Procurement
Cancel Reason:	Department Request			Date:	Jun 05, 2019
Requestor:	Kristi Higgs		370000	Purchasing	
Phone Number:	479-968-0269				
E-mail:	khiggs@atu.edu				
Accounting:	Document Level				
Ship to:	Procurement and Risk Management Services				
	203 West O Street				
	Young Bldg Suite 101				
	Russellville, AR 72801				
Attention:	Cindy Hubbard				
Contact:	Cindy Hubbard				
Phone Number:	479-968-0269				
Vendor:	T01000027	Burris Inc			
	PO Box 309				
	113 S Arkansas Ave				
	Russellville, AR 72801-5006 United States of America				
Phone Number:	479-968-4888				
Fax Number:	479-968-4937				
Document Text:	Quote 123456789				
	5 Cherryman L Desks, Mocha Cherry				


Home > Finance > View Document

Document Identification

Document Number	R0134461	Type	Requisition
Originator:	DEANNA_KILE	DEANNA KILE	

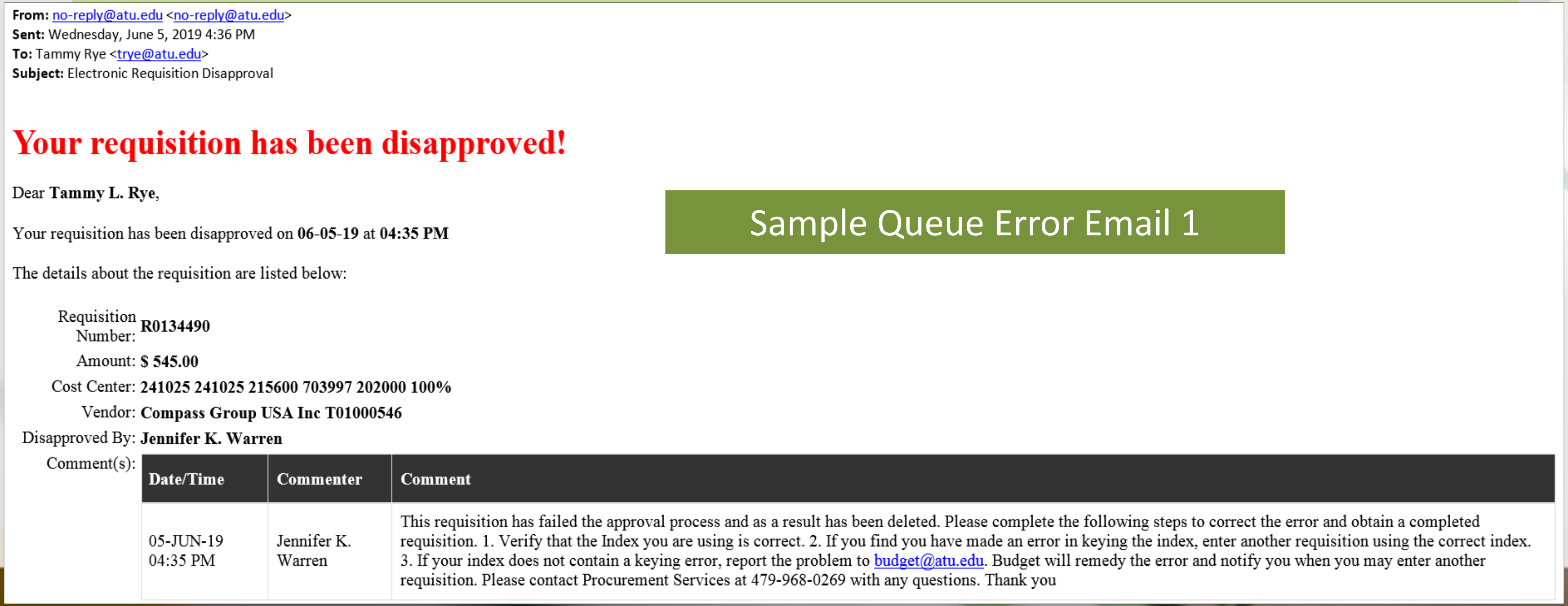
✓ There are no approvals required at this time

Approvals recorded

Queue	Level	Date	User
F310	1	May 24, 2019	DEANNA KILE
VPAF	1	May 24, 2019	Jennifer Warren

Approval Queue Errors

Occasionally a requisition may encounter an error while traveling through the approval process. Should this happen the requestor will be notified by receiving one of two emails depending on the cause of the error. The instructions listed in these emails must be followed to begin the process to correct the error and obtain a completed requisition



Sample Queue Error Email 1

From: no-reply@atu.edu <no-reply@atu.edu>
Sent: Wednesday, June 5, 2019 4:36 PM
To: Tammy Rye <trye@atu.edu>
Subject: Electronic Requisition Disapproval

Your requisition has been disapproved!

Dear **Tammy L. Rye**,

Your requisition has been disapproved on **06-05-19** at **04:35 PM**

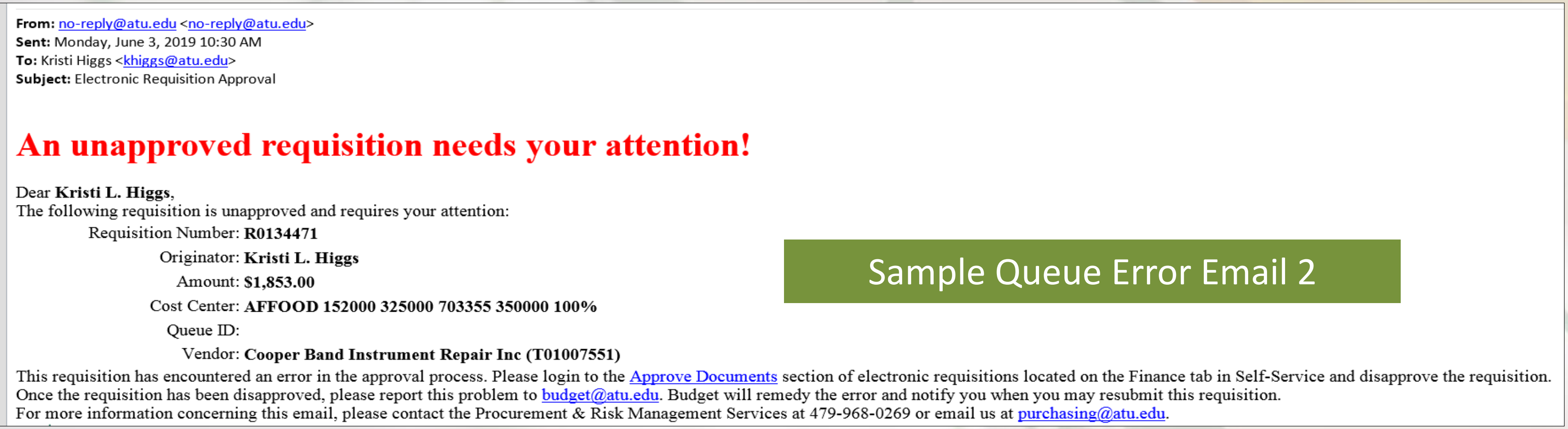
The details about the requisition are listed below:

Requisition Number:	**R0134490**
Amount:	**$ 545.00**
Cost Center:	**241025 241025 215600 703997 202000 100%**
Vendor:	**Compass Group USA Inc T01000546**
Disapproved By:	**Jennifer K. Warren**

Comment(s):

Date/Time	Commenter	Comment
05-JUN-19 04:35 PM	Jennifer K. Warren	This requisition has failed the approval process and as a result has been deleted. Please complete the following steps to correct the error and obtain a completed requisition. 1. Verify that the Index you are using is correct. 2. If you find you have made an error in keying the index, enter another requisition using the correct index. 3. If your index does not contain a keying error, report the problem to budget@atu.edu. Budget will remedy the error and notify you when you may enter another requisition. Please contact Procurement Services at 479-968-0269 with any questions. Thank you

Approval Queue Errors



From: no-reply@atu.edu <no-reply@atu.edu>
Sent: Monday, June 3, 2019 10:30 AM
To: Kristi Higgs <khiggs@atu.edu>
Subject: Electronic Requisition Approval

An unapproved requisition needs your attention!

Dear **Kristi L. Higgs**,
The following requisition is unapproved and requires your attention:

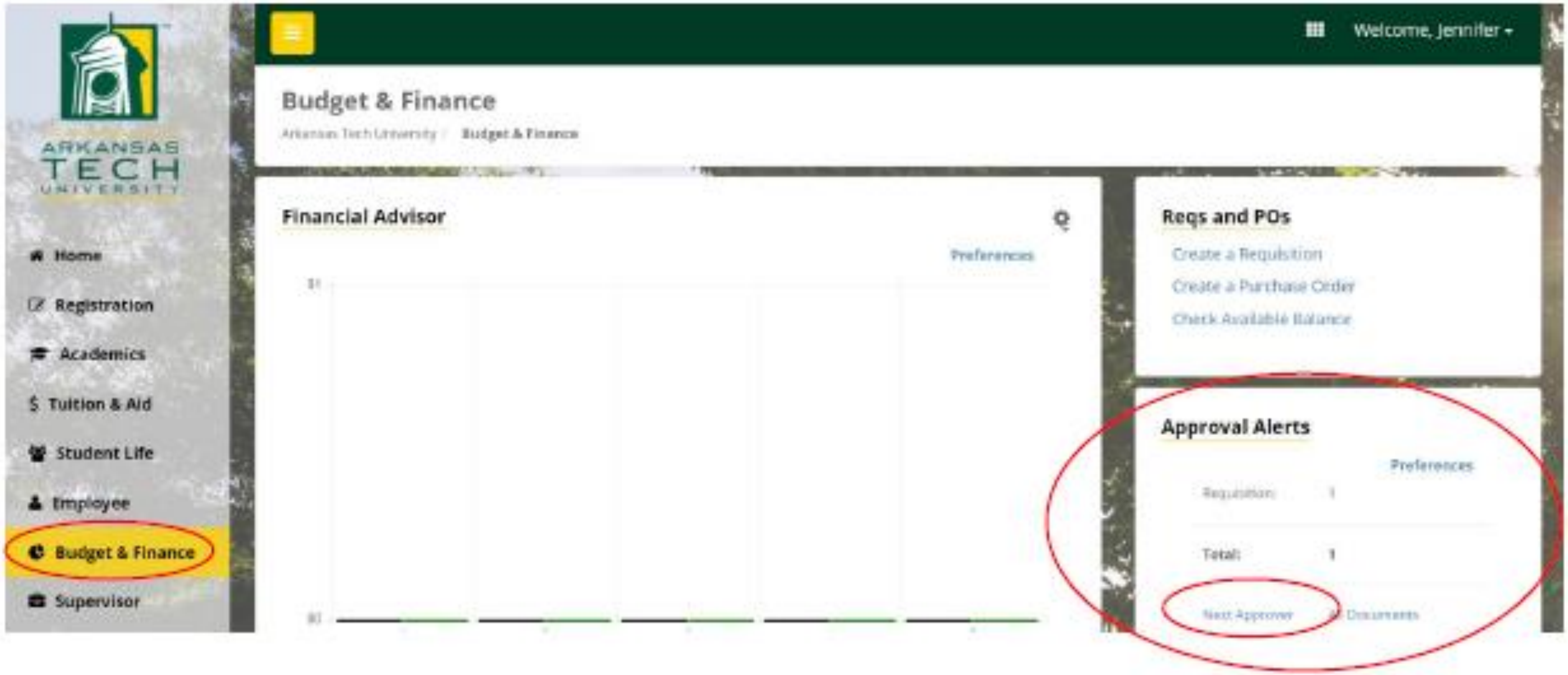
Requisition Number: **R0134471**
Originator: **Kristi L. Higgs**
Amount: **$1,853.00**
Cost Center: **AFFOOD 152000 325000 703355 350000 100%**
Queue ID:
Vendor: **Cooper Band Instrument Repair Inc (T01007551)**

This requisition has encountered an error in the approval process. Please login to the Approve Documents section of electronic requisitions located on the Finance tab in Self-Service and disapprove the requisition.
Once the requisition has been disapproved, please report this problem to budget@atu.edu. Budget will remedy the error and notify you when you may resubmit this requisition.
For more information concerning this email, please contact the Procurement & Risk Management Services at 479-968-0269 or email us at purchasing@atu.edu.

Sample Queue Error Email 2

Q.
A.

Add’l Access Point for Req. Approval


ARKANSAS TECH UNIVERSITY
Home
Registration
Academics
Tuition & Aid
Student Life
Employee
Budget & Finance
Supervisor
Welcome, Jennifer
Budget & Finance
Arkansas Tech University / Budget & Finance
Financial Advisor
Preferences
$1
$0
Reqs and POs
Create a Requisition
Create a Purchase Order
Check Available Balance
Approval Alerts
Preferences
Next Approver
Documents

Requisition: 1

Total: 1

Click **Next Approver**. This will take you to the Approve Documents section of Banner Self Service where requisitions requiring your approval are listed.

Take Away

- Notification emails will be received when requisitions enter queues and 2x daily until queue is cleared of requisitions.
- Approver and Proxy will receive these emails simultaneously. Therefore, you must coordinate approval duties with your proxy.
- Select **Documents for which you are next approver** on Approve Documents screen. Selecting All Documents will display requisitions that may not have received approval from lower level queues.
- Failure to approve in a timely manner will hinder efficiency of procurement process.
- Contingency plan is in place for approval queue errors.
- Outlook rule can be created to manage email notifications.

Q.
A.

Questions or Comments?
Please contact Procurement Services at 479-968-0269 or purchasing@atu.edu.
Check out www.atu.edu/purchasing for additional resources and updated information.