Electronic Requisition Approval Training

Initiator (Requestor)

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.
- 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

Steps in requisition entry remain the same. No changes are being made to the SSB screen used for requisition entry.

What changes will I see?

- Information entered must be clear, concise and complete to allow for approver to evaluate the requisition. However, A.A. Travel Request Form is still in use until further notice.
- Procurement and Travel will no longer gather approvals for departments.
- All purchasing and travel requisitions will flow through the electronic approval process. Approvals/Disapprovals must be done before Procurement or Travel can view the requisition.
- If a requisition is stalled in a queue, you may need to reach out to that approver.
- Each approver will assign a proxy approver to work in his/her absence.

Approval Limits

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

<table>
<tr><th>Division</th><th>$0-$2,499.99</th><th>$2,500-$4,999.99</th><th>$5,000.00-$49,999.99</th><th>≥$50,000</th></tr>
<tr><td>Academic Affairs</td><td>Department Head</td><td>Dean</td><td>Vice President</td><td>President</td></tr>
<tr><td>Administration and Finance</td><td colspan="2">Specific Area Director</td><td>Vice President</td><td>President</td></tr>
<tr><td>Advancement</td><td colspan="3">Vice President</td><td>President</td></tr>
<tr><td>Athletics</td><td>Head Coach, Head Trainer, Sports Information Director</td><td colspan="2">Athletic Director</td><td>President</td></tr>
<tr><td>Enrollment Management</td><td colspan="2">Specific Area Director</td><td>Vice President</td><td>President</td></tr>
<tr><td>Ozark</td><td>Department Head</td><td>Chief Officer</td><td>Chancellor</td><td>President</td></tr>
<tr><td>President</td><td colspan="2">Specific Area Director</td><td>Chief of Staff</td><td>President</td></tr>
<tr><td>Student Affairs</td><td>Associate Dean</td><td>Dean of Students</td><td>Vice President</td><td>President</td></tr>
<tr><td>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.</td><td>Department Head</td><td>Dean</td><td>Vice President</td><td>President</td></tr>
</table>

APPROVAL PROCESS

1. Requestor enters requisition.
2. Automatically forwarded to first approval queue. Approvers and proxies in that queue receive immediate email notification. Proxies are backup approvers.
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.

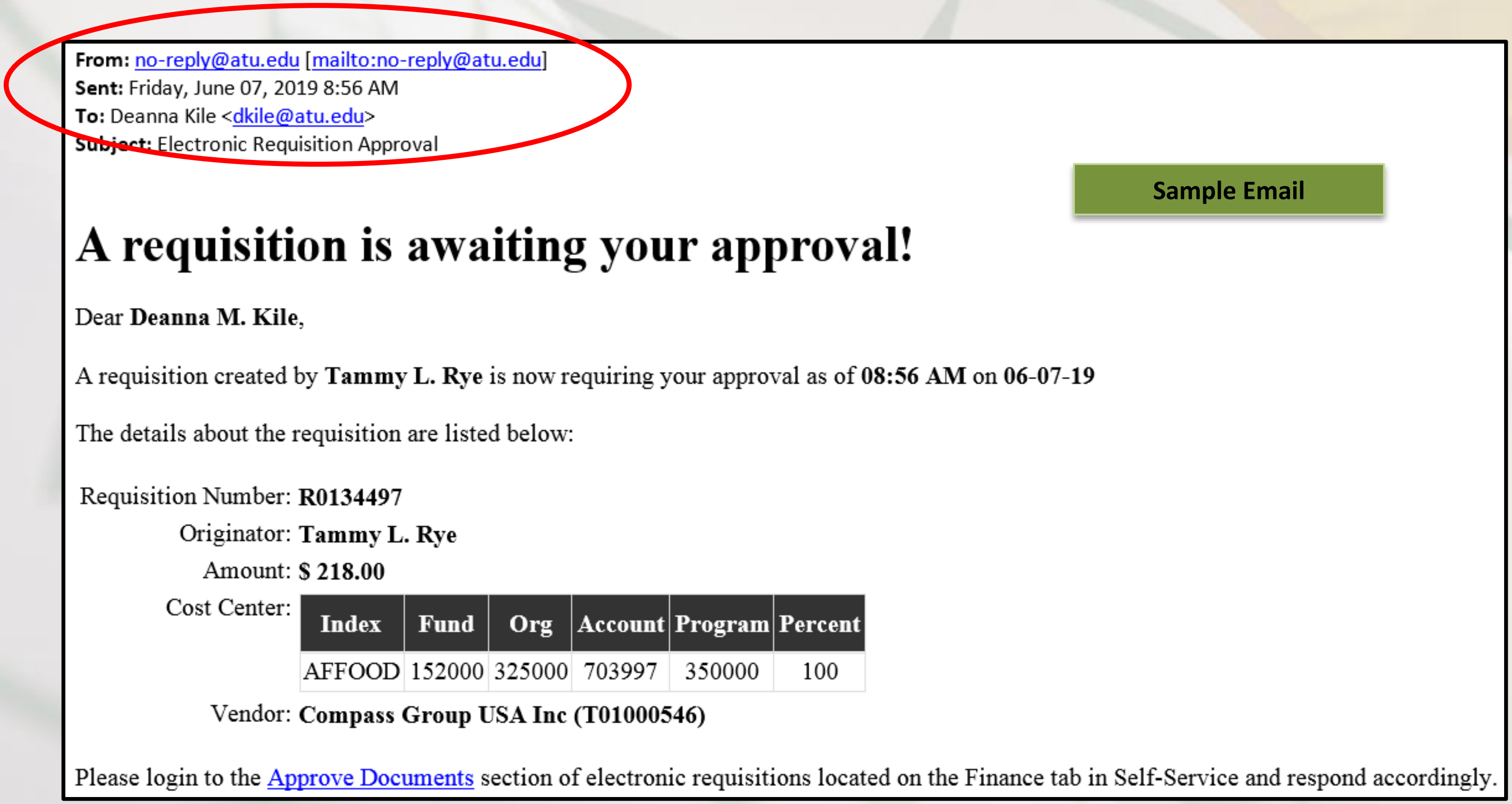
Approval Notification

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 receive 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 will receive notification(s).
    c) Approver can access queue and review requisitions prior to email notification.

NOTE: Steps in requisition entry remain the same. No changes are being made to the SSB screen used for requisition entry.

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



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

Sample Email

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)**

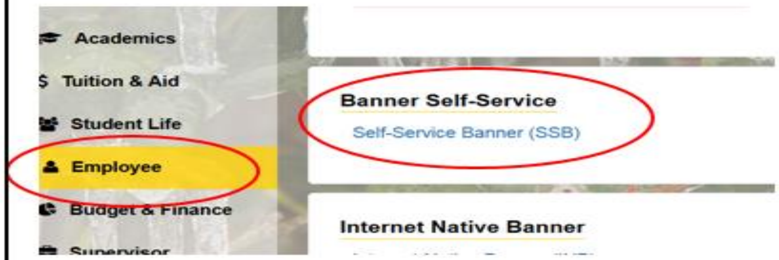
Please login to the Approve Documents section of electronic requisitions located on the Finance tab in Self-Service and respond accordingly.

Available for view on smart phones and other mobile devices.

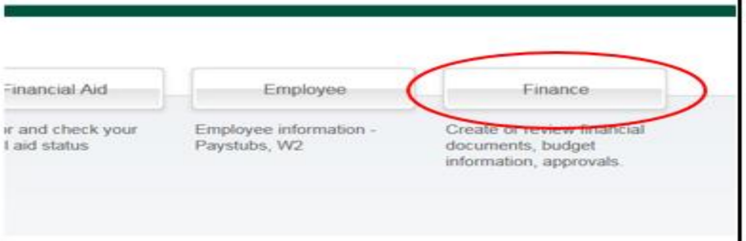
Approvals Step-by-Step

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

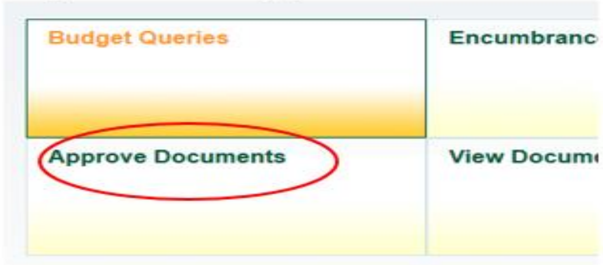
Step 2: Click on the **Employee** link


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

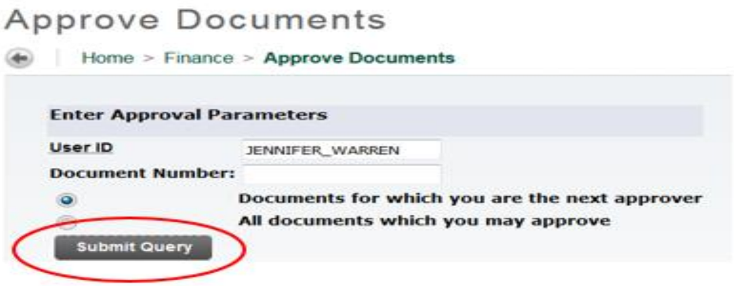
Step 3: Click on the **Finance Tab**


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

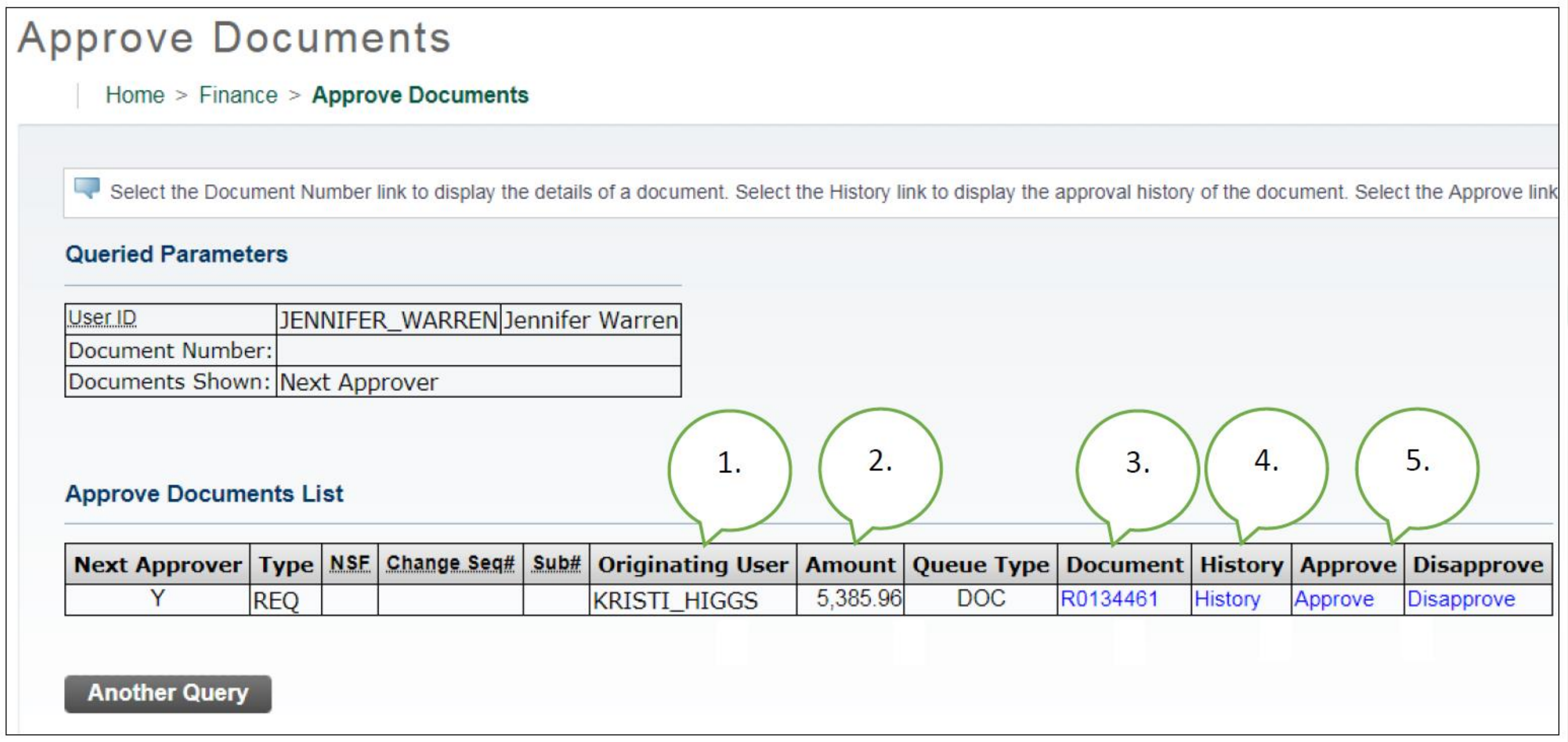
○ All documents which you may approve

Submit Query

Note: It’s important to ensure that approver selects **Next Approver** rather than the All Documents. Selecting All Documents will display requisitions that may not have received approval from lower level queues 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

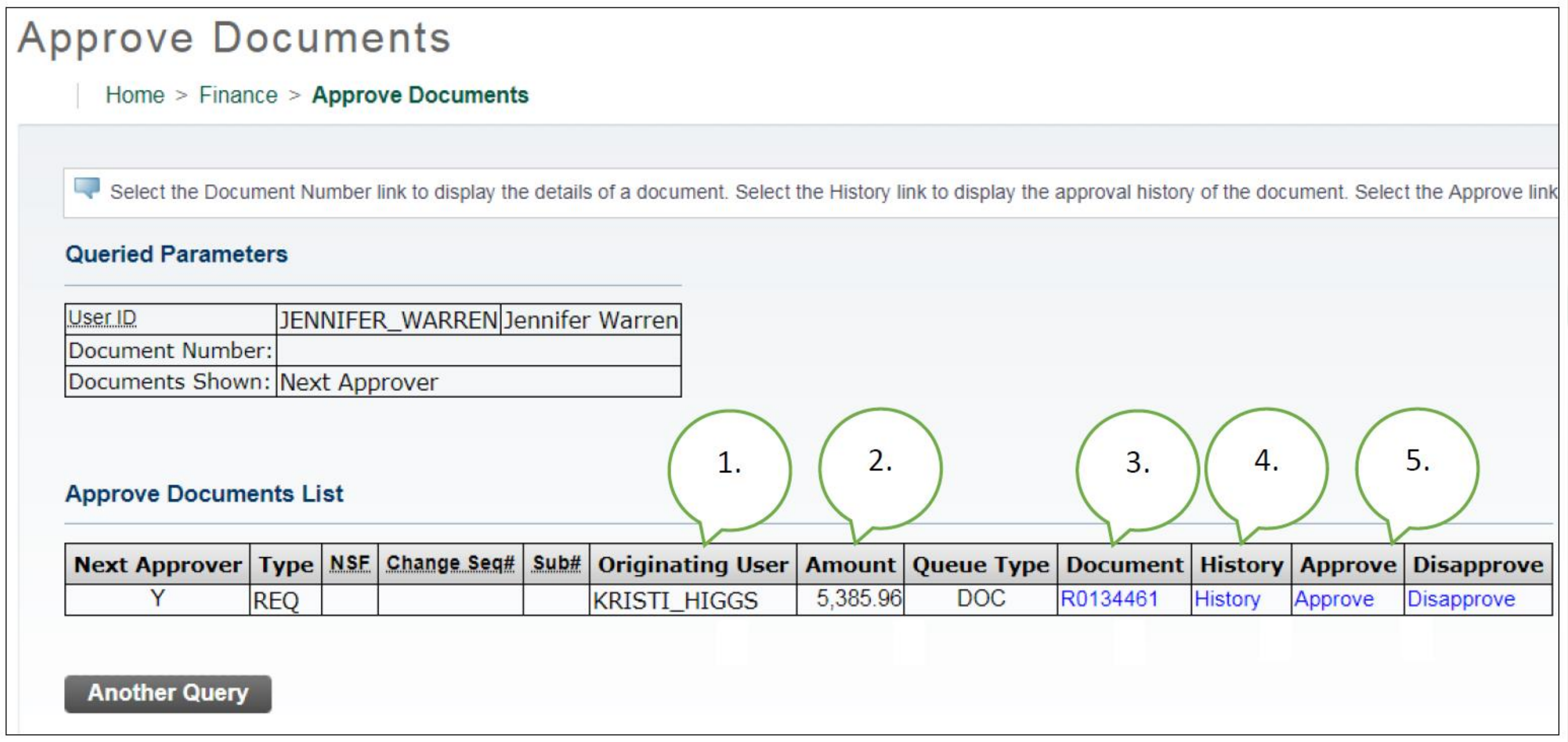
Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

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

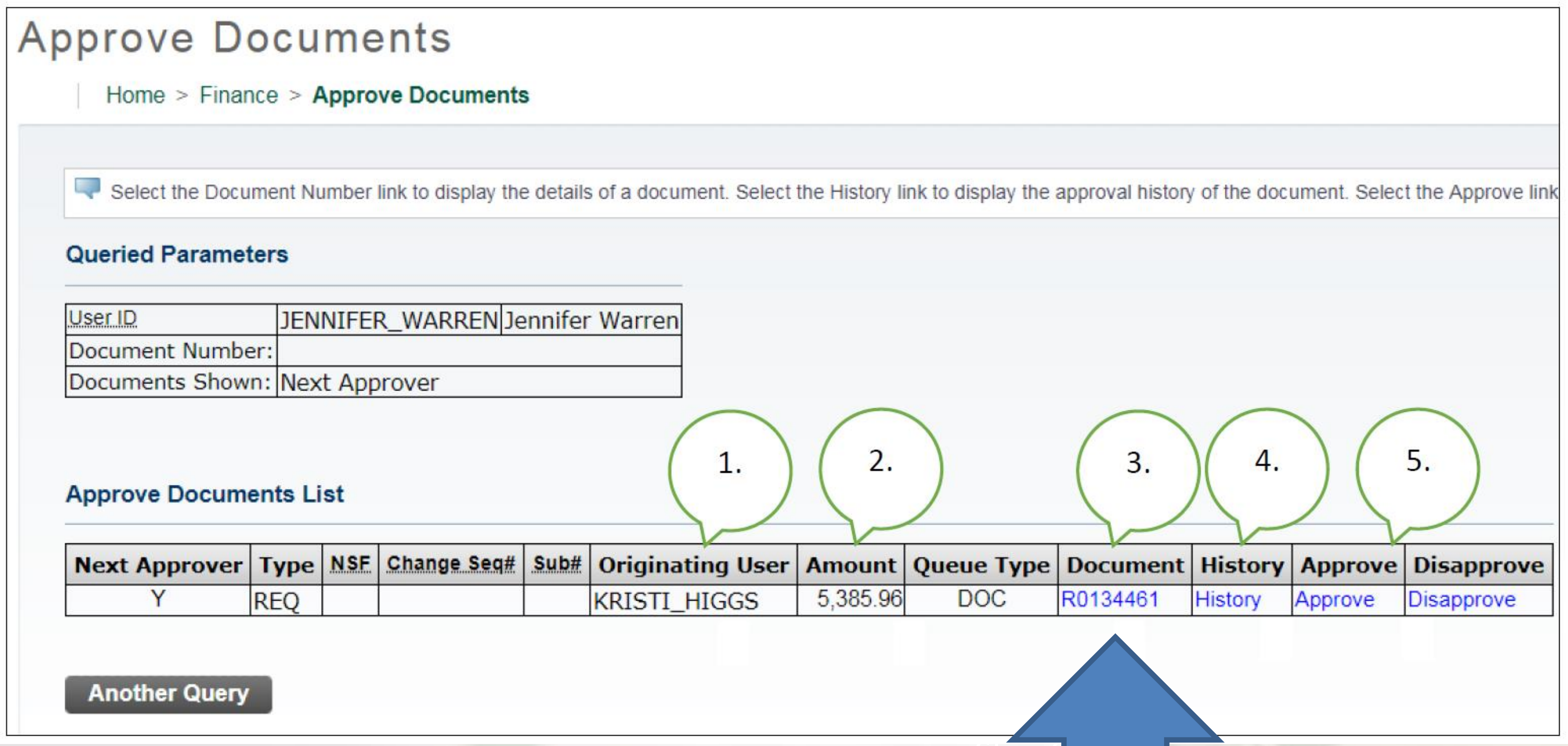
Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				KRISTI_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

Another Query

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	

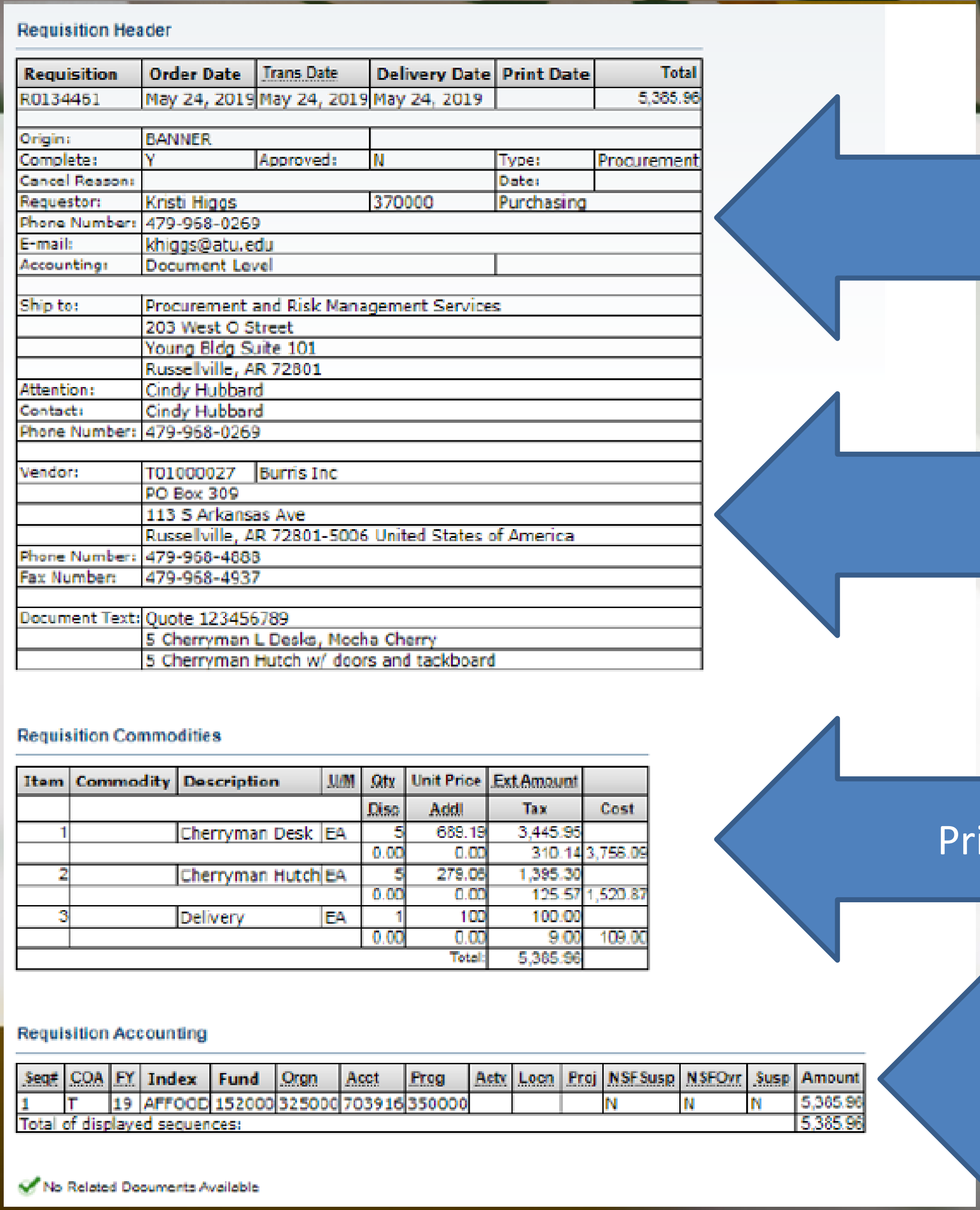
Approve Documents List

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	NSF Ovr	Susp	Amount
1	T	19	APFOOD	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

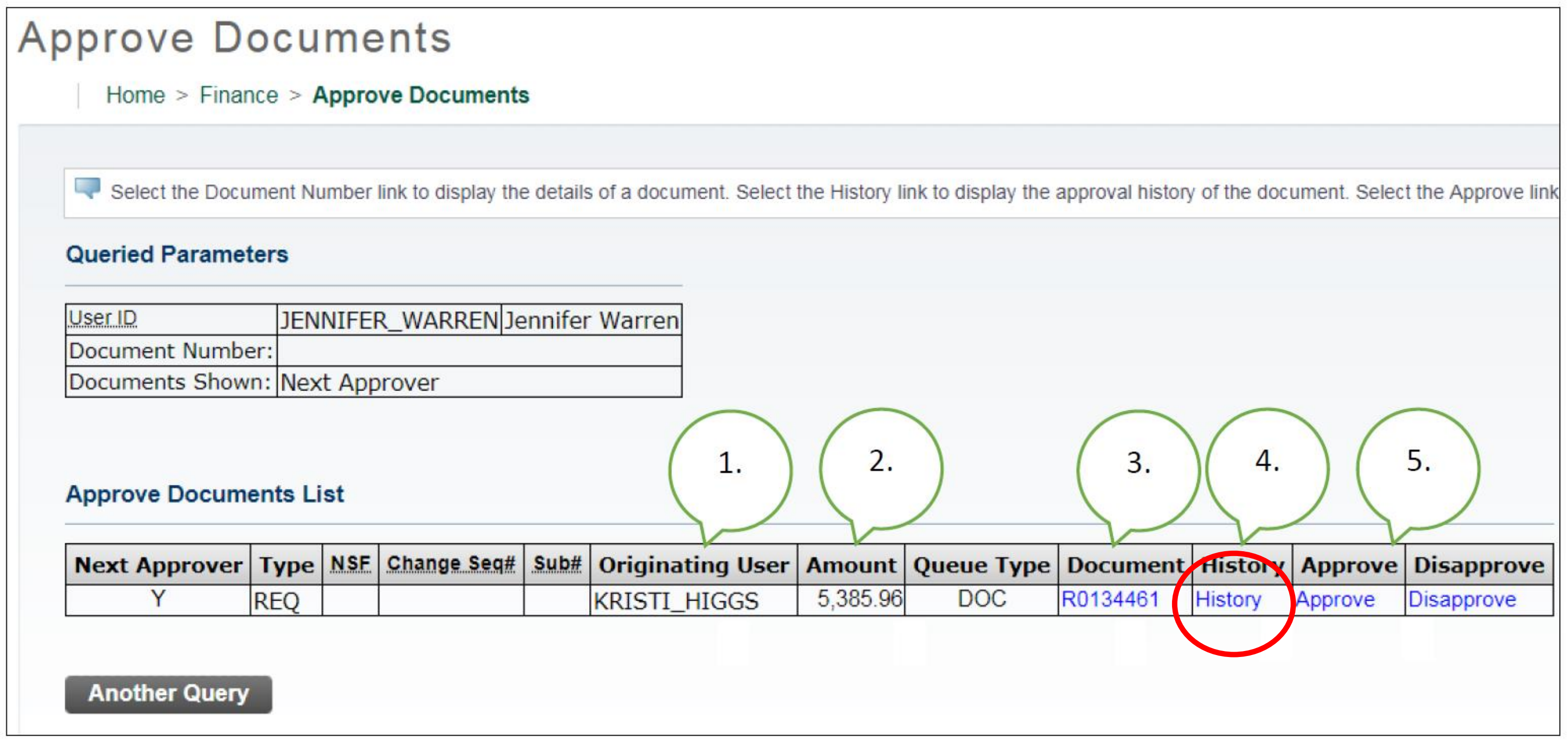
Pricing and Commodity Details

Accounting Information

Approval Step-by-Step (cont.)

- Click the back browser button to navigate back to the Approve Documents section.

Step 7: Click the blue **History** link displays the history of approvals for the 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 link

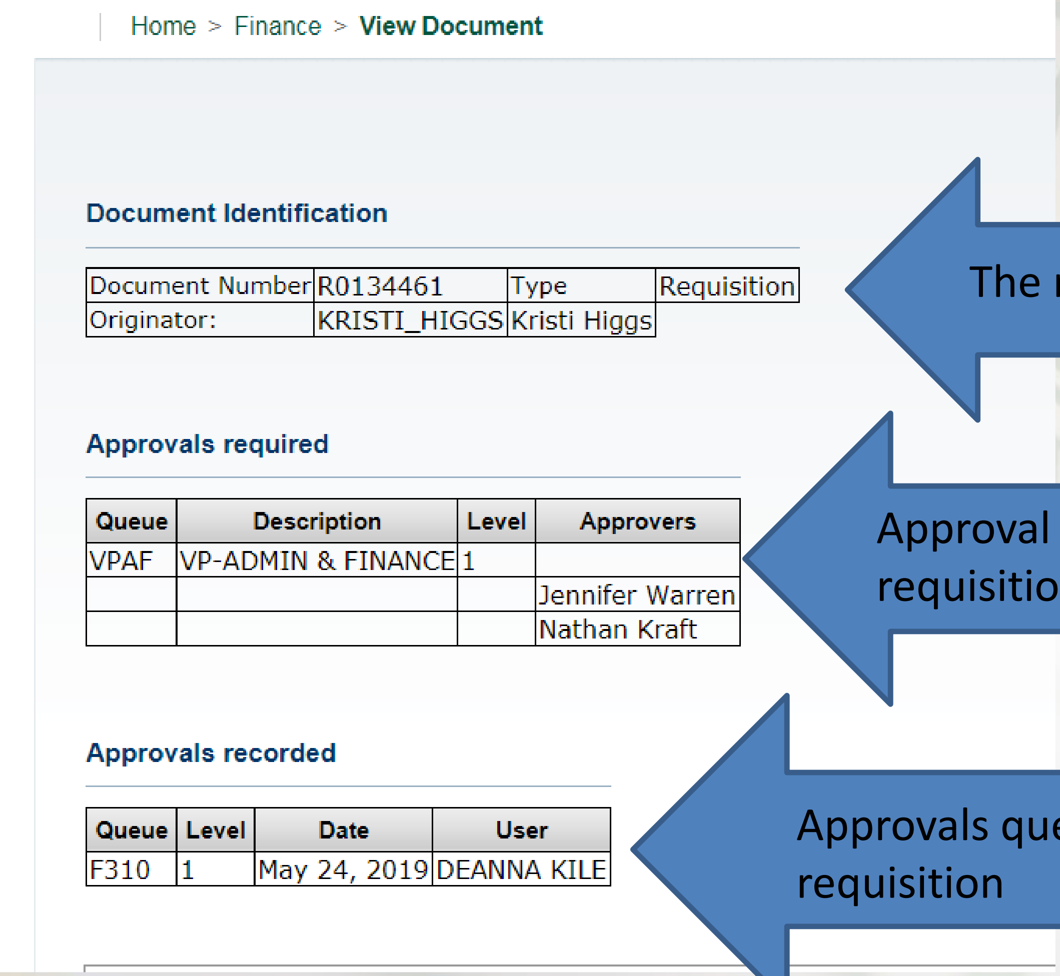
Queried Parameters

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

Requisition Approval History



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

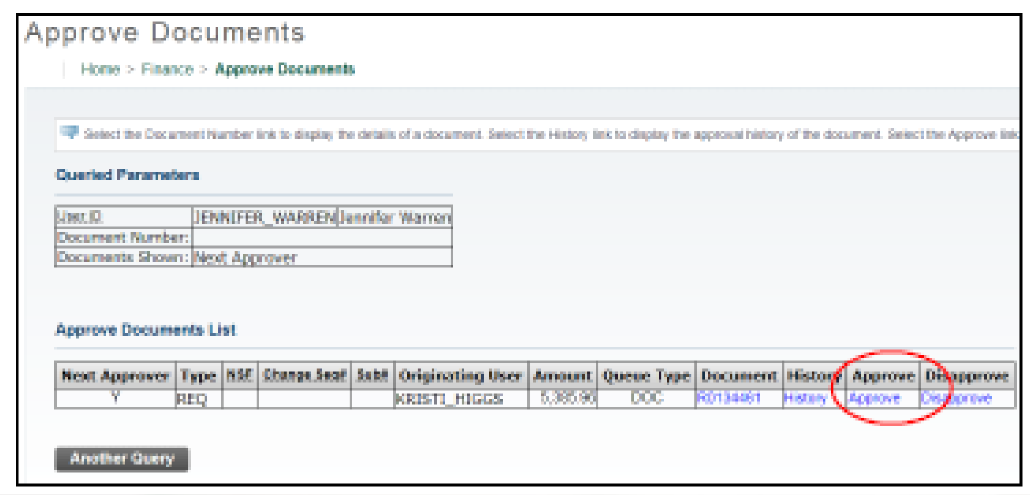
The requisition number and requestor

Approval queues that have not approved the requisition

Approvals queues that have approved the requisition

To navigate back to the approval document page, approver clicks the browser back arrow.

Approving a Requisition



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 li

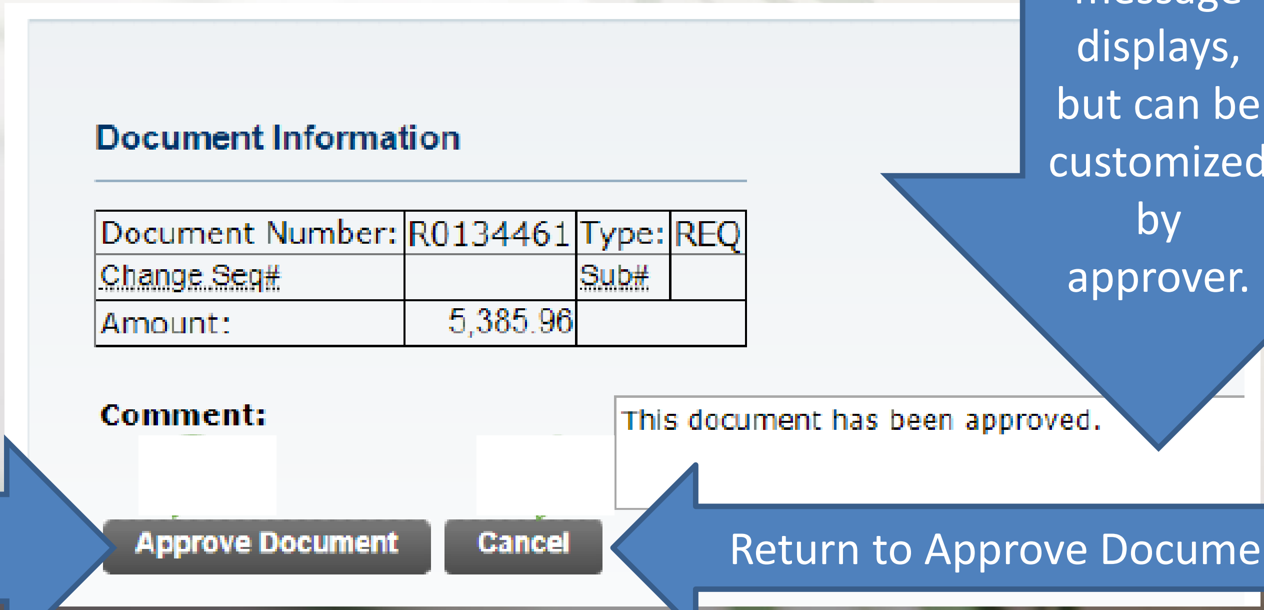
Queried Parameters

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		

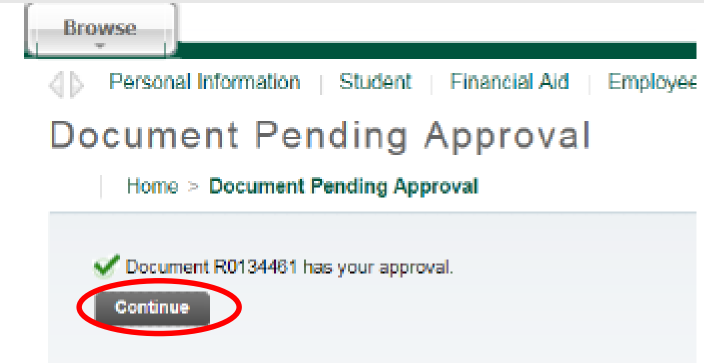
Comment: This document has been approved.

Standard message displays, but can be customized by approver.

Click to approve requisition.

Return to Approve Documents

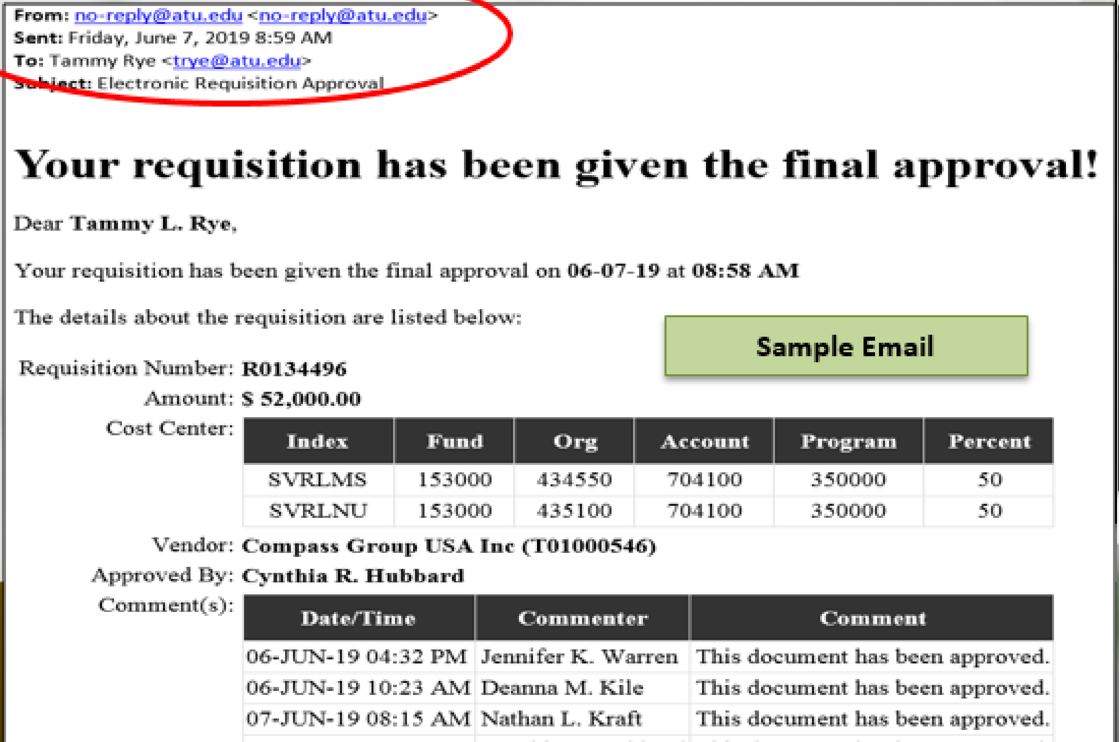
Approving a Requisition (cont.)


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:

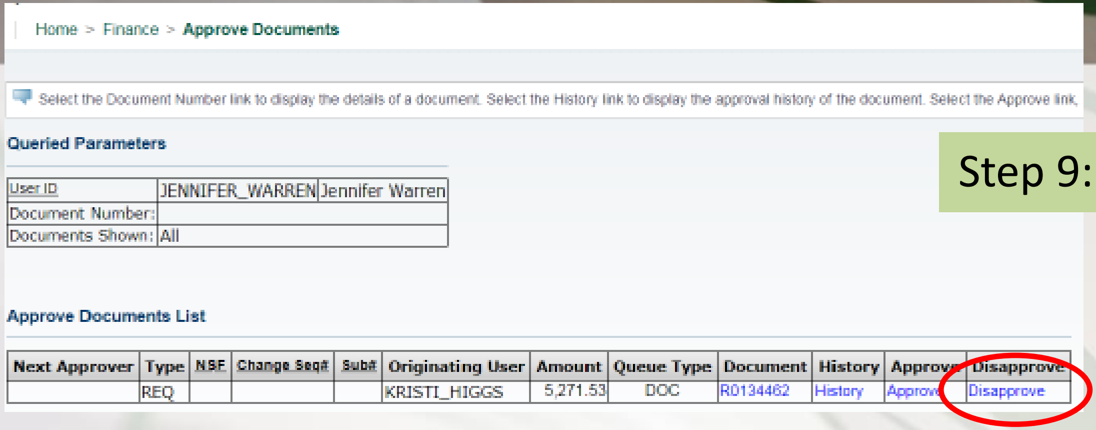
Index	Fund	Org	Account	Program	Percent
SVRLMS	153000	434550	704100	350000	50
SVRLNU	153000	435100	704100	350000	50

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.

If this approval is the final approval, you as 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,

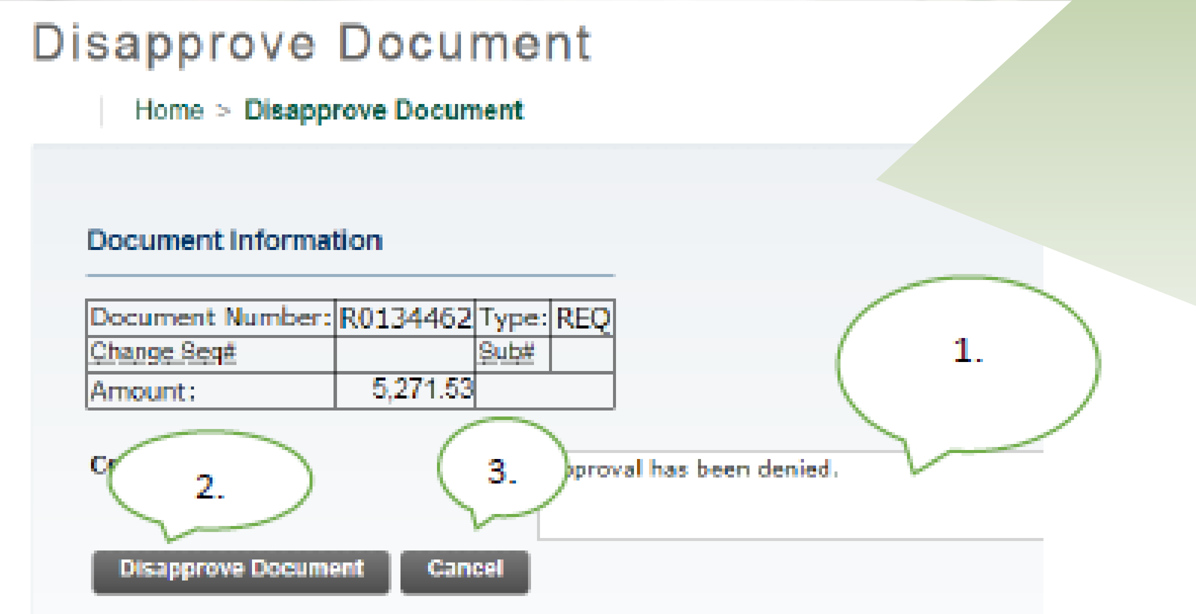
Queried Parameters

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	Approv	Disapprove
	REQ				KRISTI_HIGGS	5,271.53	DOC	R0134462	History	Approv	Disapprove

Step 9: Click on the Disapprove Link



Disapprove Document

Home > **Disapprove Document**

Document Information

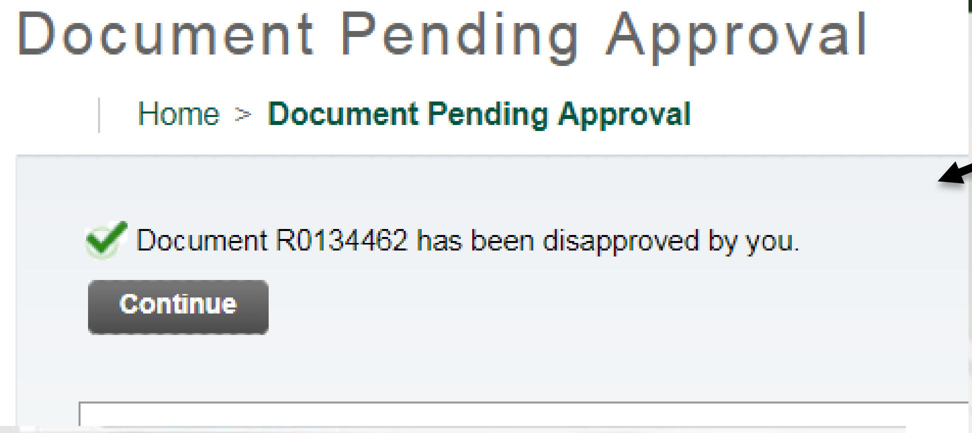
Document Number:	R0134462	Type:	REQ
Change Seq#		Sub#	
Amount:	5,271.53		

C

proval 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.)



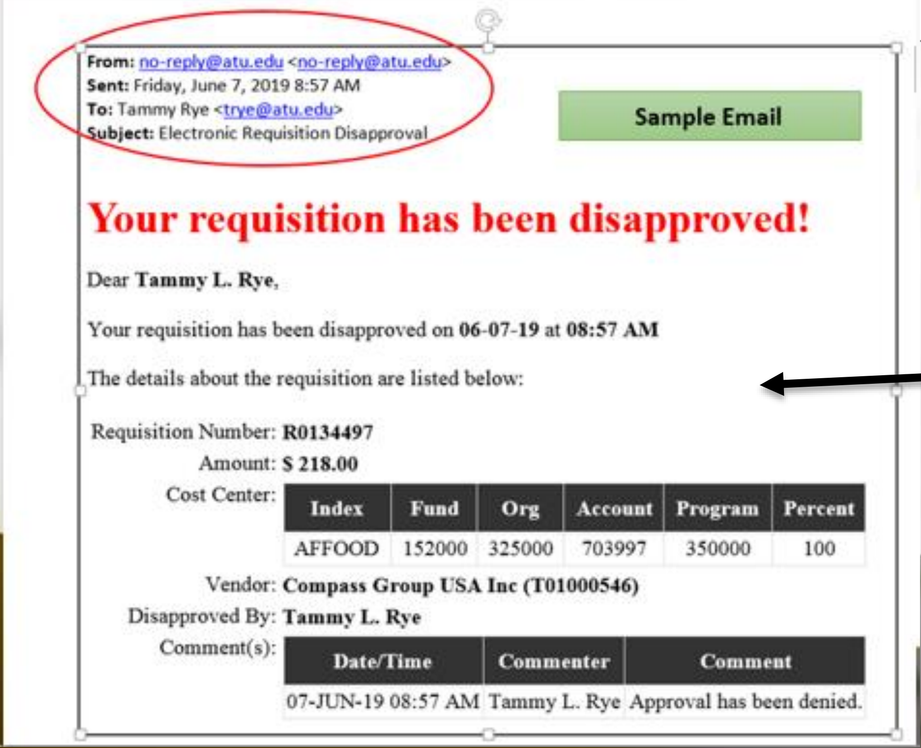
Document Pending Approval

Home > **Document Pending Approval**

✓ Document R0134462 has been disapproved by you.

Purc

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

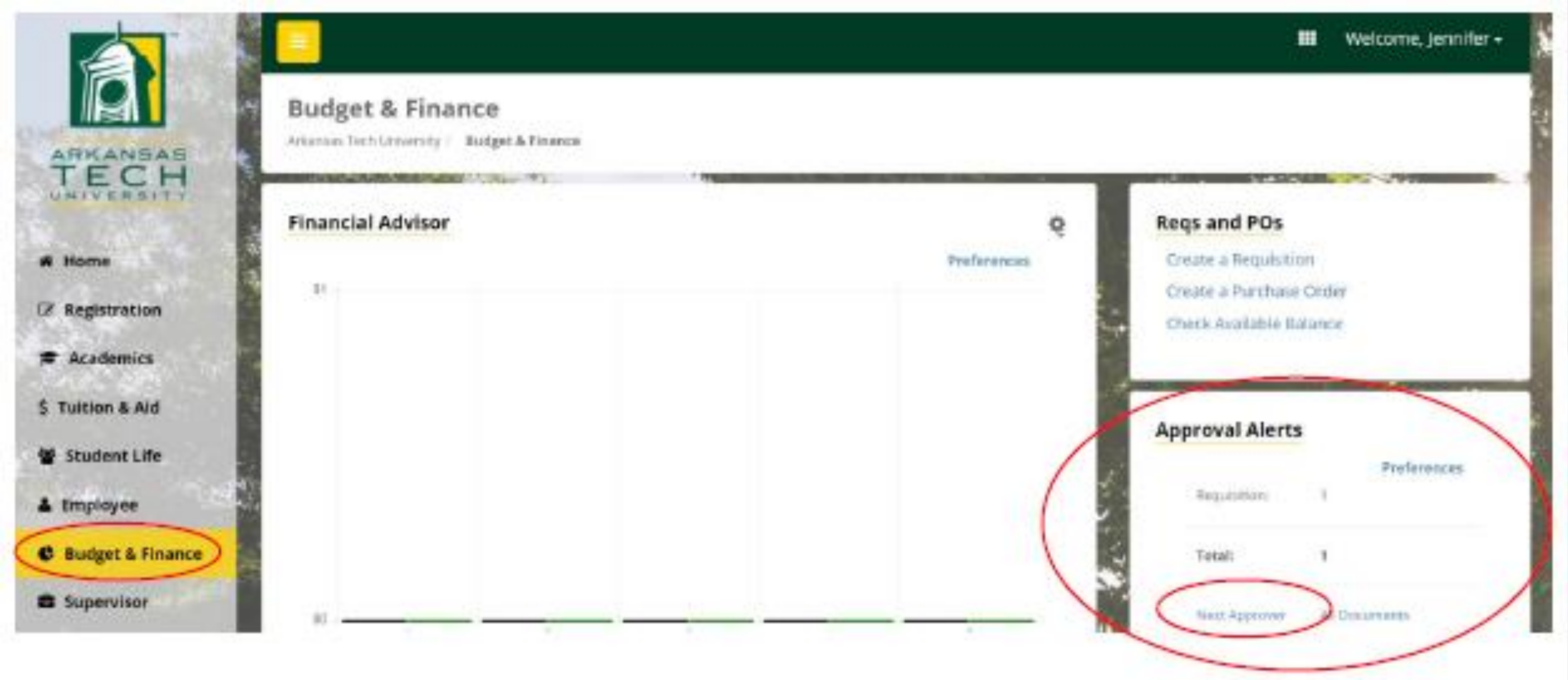
Vendor: **Compass Group USA Inc (T01000546)**
Disapproved By: **Tammy L. Rye**
Comment(s):

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

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

Q.
A.

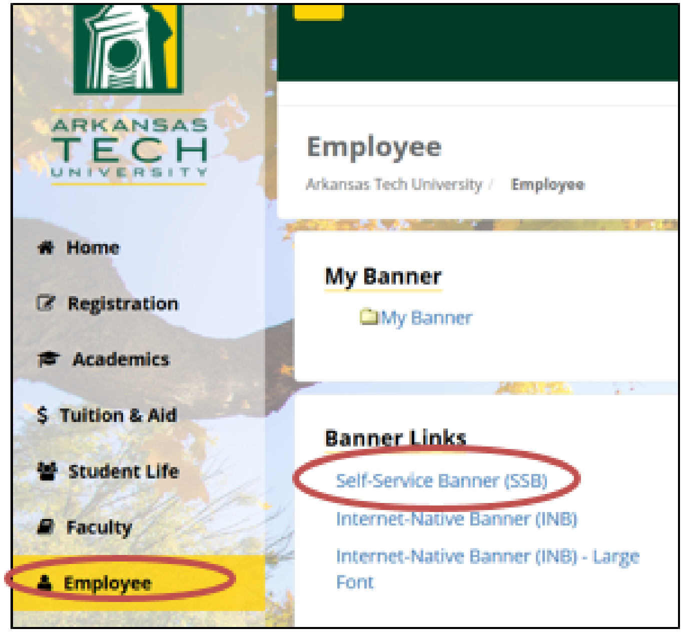
Add’l Access Point for Req. Approval


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

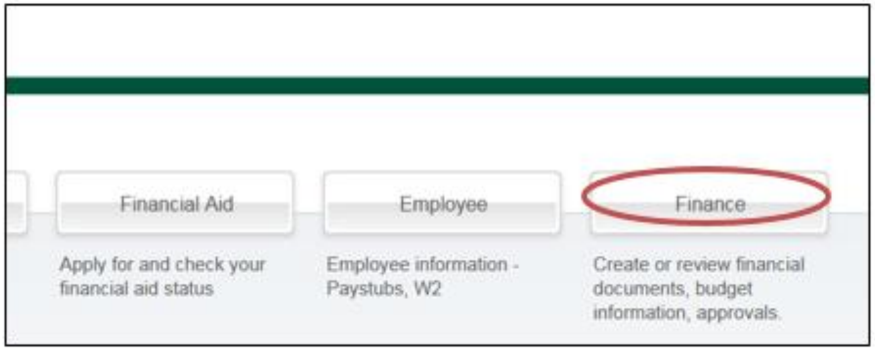
Click **Next Approver**. This will take you to the Approve Documents section of Banner Self Service where requisitions requiring your approval are listed.

Viewing Requisition Approval Status

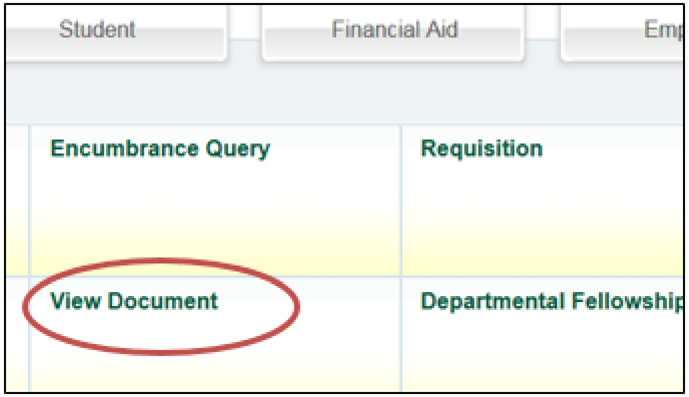
1. While logged into One Tech and click on the Employee link then Self Service Banner SSB.


ARKANSAS TECH UNIVERSITY
Employee
Arkansas Tech University / Employee
Home
Registration
Academics
Tuition & Aid
Student Life
Faculty
Employee
My Banner
My Banner
Banner Links
Self-Service Banner (SSB)
Internet-Native Banner (INB)
Internet-Native Banner (INB) - Large Font

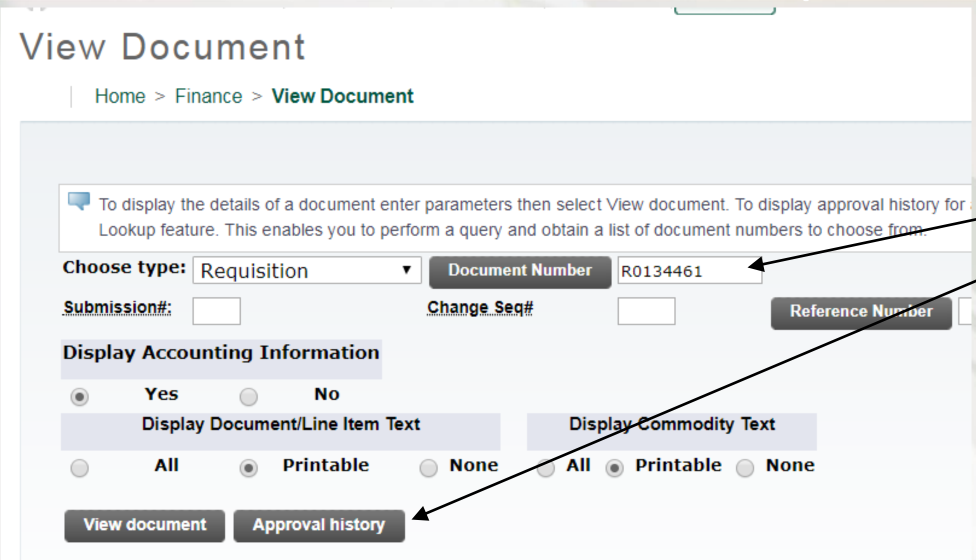
2. Click the Finance tab.


Financial Aid
Apply for and check your financial aid status
Employee
Employee information - Paystubs, W2
Finance
Create or review financial documents, budget information, approvals.

3. Click the View Document tab to display the View Document page.


Student
Financial Aid
Emp
Encumbrance Query
Requisition
View Document
Departmental Fellowship

Viewing Requisition Approval Status (cont.)



View Document

Home > Finance > View Document

To display the details of a document enter parameters then select View document. To display approval history for

Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type: Requisition ▼ Document Number R0134461

Submission#: Change Seq# Reference Number

Display Accounting Information

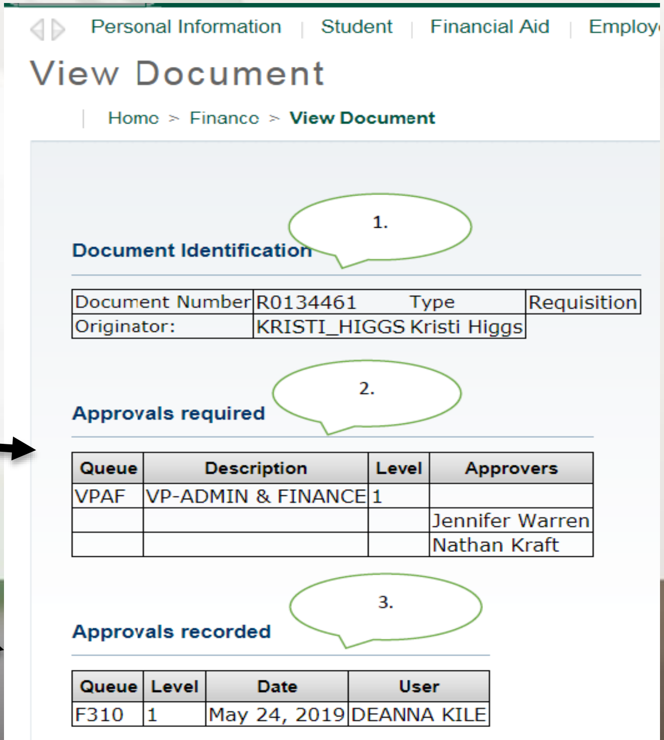
● Yes ○ No

Display Document/Line Item Text: ○ All ● Printable ○ None

Display Commodity Text: ○ All ● Printable ○ None

4. Key in the requisition number in the Document Number box and click Approval history.

This page will display
1. Document ID
2. The Approvals required (the queues that have not approved the requisition yet)
3. The Approvals recorded (the queues that have approved the requisition.)



View Document

Home > Finance > View Document

Document Identification

Document Number	R0134461	Type	Requisition
Originator:	KRISTI_HIGGS Kristi Higgs		

Approvals required

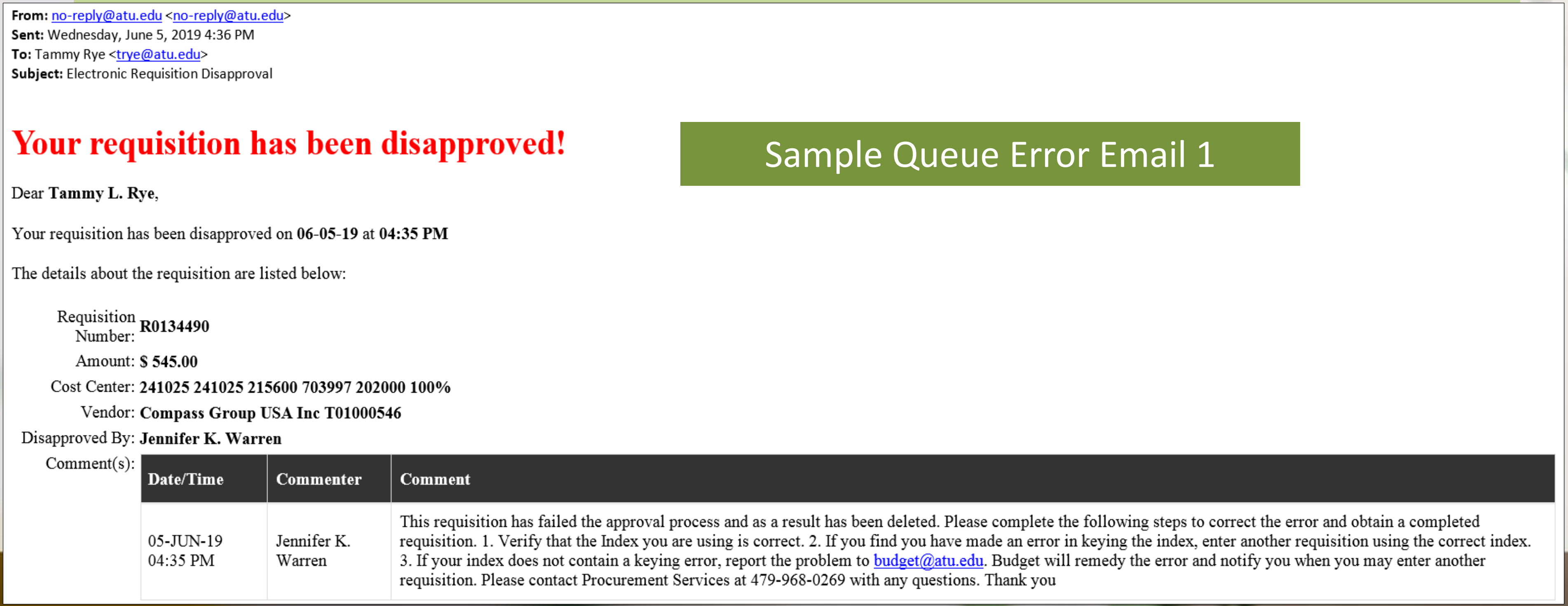
Queue	Description	Level	Approvers
VPAF	VP-ADMIN & FINANCE	1	
			Jennifer Warren
			Nathan Kraft

Approvals recorded

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

Approval Queue Errors

Occasionally a requisition may encounter an error while traveling through the approval process. Should this happen you as 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**,

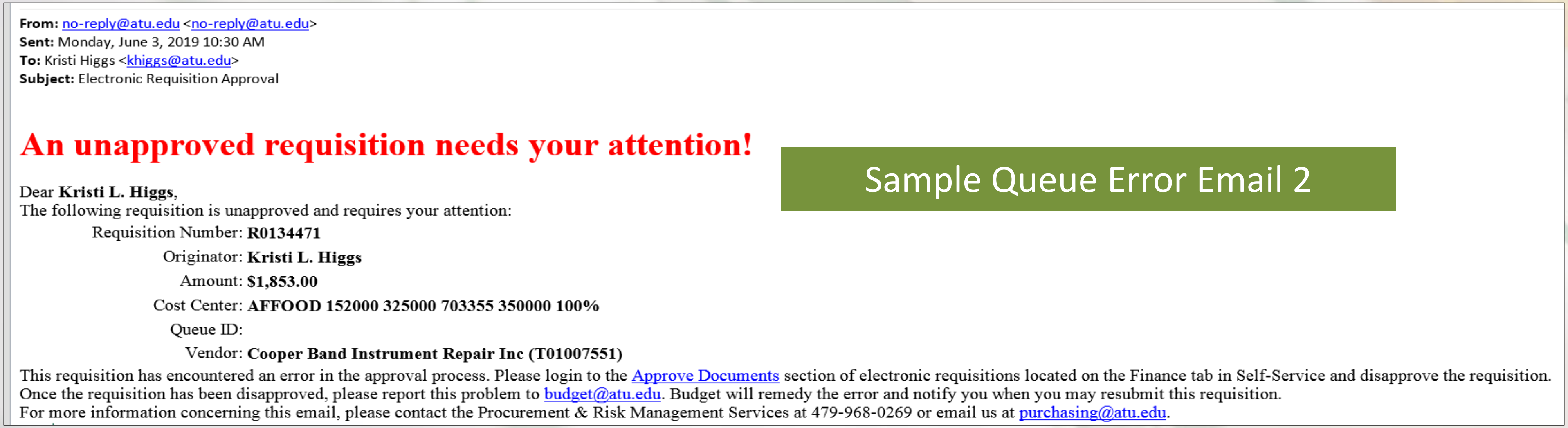
Your requisition has been disapproved on **06-05-19** at **04:35 PM**

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

Take Away

- All purchasing and travel requisitions will flow through the electronic approval process. Items requiring bidding will still be entered on requisition with vendor blank and a solid estimate for cost.
- Clear and concise commodity descriptions, item and document text are required.
- Tracking of requisition approvals is available via View Documents.
- You may need to reach out to the next approver or proxy to facilitate approval.
- Procurement and Travel cannot access requisitions until all approvals are obtained or requisition is disapproved.
- If you need to remove your requisition from the approval process, you must disapprove it.
- Contingency plan is in place for approval queue errors. Pay attention to these notices they require action on your part.
- Outlook rule can be created to manage incoming 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.