

Electronic Requisition Approval Training Manual



Procurement and Risk Management Services

479-968-0269

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www.atu.edu/purchasing

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Table of Contents

Introduction	1
Approval Limits	2
Approval Process	3
Requisition Approval History	8
Approving a Requisition	9
Disapproving a Requisition	11
Additional Way to Access Approvals.....	13
Viewing Status of Approvals	13
Approval Process Errors.....	14
Helpful Hints	17

Electronic Requisition Approval Process

The Electronic requisition approval process allows for procurement and travel requisitions to be approved efficiently using Banner Self Service. This manual details the steps necessary for approving and tracking requisitions through this process. Screenshots included were produced for testing purposes only and do not reflect actual personnel assignments. Proxy approvers are selected by approvers to complete approvals/disapprovals when the primary approver is unavailable. It is up to the approver and proxy to coordinate their work as both will receive notifications of requisitions waiting for approval. Please contact Procurement and Risk Management Services at 479.968.069 or purchasing@atu.edu with any questions. The steps below detail the process.

1. Requestor enters requisition.
2. Automatically forwarded to first approval queue. Approvers 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. Proxies are backup approvers.
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.

Approval Limits

The approval limits listed below have been approved by the Executive Council and serve as the basis for approval routing

Approval Limits				
Approved by the Executive Council and serve as basis for approval routing				
Division	\$1-\$2,499.99	>\$2,500-\$4,999.99	>\$5000-\$49,999.99	>\$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

Once a requisition is entered into Banner it is automatically forwarded to the first approval queue and once approved, from there it goes onto any additional queues required. The approval route it follows is determined by the dollar amount and FOAP (Fund Organization Account Program) information of the requisition. The approver listed on the first approval queue receives an email like the one below. If the requisition must travel through additional queues before final approval, notifications will be sent to those queue approvers when the requisition enters their specific queue.

Note to Requestors: Steps in requisition entry remain the same. No changes have been made to the SSB screen used for requisition entry.

Reminder notifications will be sent out twice daily at 7 a.m. and Noon (12 p.m.). Reminders will continue as long as there are requisitions awaiting approval/disapproval. It is not necessary to wait for the notification to approve/disapprove a requisition. Below is an example of one of these notifications.

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

Step 1: Log into Self Service either via the Approve Documents link included in the email, or at <https://onetech.atu.edu/cp/home/displaylogin>. There are two ways you can access requisitions awaiting approval. The most reliable way is featured below. The other access option is detailed on page 12.

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)**

Sample Email

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

Step 2: Click on the Banner Tools card SSB link Tab

Campus Tools

Banner Tools

- Application Navigator
- Self-Service Banner (SSB)

Step 3: Click on the Finance

Financial Aid Employee **Finance**

View and check your financial aid status Employee information - Paystubs, W2 **Create or review financial documents, budget information, approvals**

Step 4: Click on Approve Documents



Approve Documents

View list of documents pending approval. Approve or deny.

Step 5: Click on Submit

The radio buttons related to next approver apply when a User ID is present.

User ID

JENNIFER_WARREN

Document Number

Submit

☒ User ID is next approver ☐ All documents User may approve

Note to Approvers: It's important to ensure that you select the **Next Approver** link rather than the All Documents link. Selecting the All Documents link will display requisitions that may not have received approval from lower level queues. Should a requisition be missing from your approval queue, please contact the requestor to inquire about the status of the requisition.

This screen will display upon clicking **Submit**.

My.Finance » Approve Documents

Approve Documents

Queried Parameters

Another Query

Approve Documents List 2

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Docu	Change Sequence	Submission	1.	2.	NSF	Queue Type	4.	5.
R0161778	REQ	-	CARY	2,78	-	NSF	History	Disapprove Approve
R0161887	REQ	-	KRISTL HIGGS	54.50	Yes	-	History	Disapprove Approve

From here you can see an overview of the requisition such as the

1. Person who entered the requisition.
2. Total dollar amount.
3. Requisition Number-Click on the **requisition number** to display the requisition contents. An example of this information is pictured on the following page.
4. Approval History Link-Click on the **History** arrow to display (1) who has already approved this document, (2) who is required to approve this document or (3) who is able to approve this document (if multiple approvers are assigned.)
5. Links to Approve/Disapprove

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

This is an example of a Procurement requisition. Travel requisitions may vary slightly.

Requestor	Kristi Higgs	Requisition Number	R0161887
Phone	479- 9680269 Ext	Transaction Date	07/18/2023
Email	khiggs@atu.edu	Delivery Date	07/18/2023
Organization	Purchasing (370000)	Status	In Approval
Accounting Type	Document Level	Currency	USD

Ship To	PURC	Vendor	Community Action Program for Central Arkansas (T01353301)
Address	Procurement and Risk Management Services	Address	dba CAPCA, Inc
	404 N El Paso Avenue		707 Robins St, Suite 118
	Russellville AR 72801		Conway AR 72034
Attention To	Kristi Higgs - Ext	Phone	501- 3293891 Fax 501- 32992497
		Email	

Requisition Comments	TEST
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Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	TEST (membership)	EA	1.00	50.0000	4.50	54.50
Total Commodities						54.50

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Loen-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	T- - 110000- 370000- 703850- 250000- - -	No	No	No	100.0000	54.50
Total Accounting Distributions						54.50

DISCLAIMER - A Purchase Requisition does not represent a valid Purchase Order to provide to a vendor. This PDF of the Purchase Requisition is restricted to internal use only.

This section details each item listed on the requisition along with the unit price, extension amount, tax and total cost.

To access the Approve Documents section again, **click the browser back button**. Clicking any other button will result in being directed to the menu screen and you will have to navigate to the Approve Documents screen from there.

Step 7: Clicking the blue **History** link displays the history of approvals for the requisition.

The screenshot shows the 'Approve Documents List' table with columns: Document, Document Type, Change Sequence, Submission, Originating User, Amount, Next Approver, NSF, Queue Type, History, Disapprove, and Approve. Two rows are visible: R0161778 (REQ, 2,791.71) and R0161887 (REQ, 54.50). The 'History' link for R0161887 is circled in red.

The 'History' page for document R0161887 is shown below, with three numbered callouts:

- Document Identification:** Shows Document Number R0161887, Document Type Requisition, Originator KRISTI_HIGGS, and Originator Name Kristi Higgs.
- Approvals Required:** A table showing required approvals:

Queue	Description	Level	Approvers
F370	DIRECTOR-BUSINESS SERVICES	1	DEANNA KILE JESSICA HOLLOWAY
- Approvals Recorded:** A message stating 'No approvals have been recorded for this document'.

Three blue arrows on the right point to the 'Requisition number', 'Approvals Needed', and 'Approvals Given' sections, with a red circle highlighting the 'Approvals Needed' section.

Requisition Approval History

1. Document Identification lists the requisition number and requestor
2. Approvals required list any approval queues that have not approved the requisition.
3. Approvals recorded list any approvals queues that have approved the requisition. In our example this requisition is awaiting approval from the VP Admin and Finance queue, and has received approval from the Area Supervisor.

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

Approving a Requisition

Step 8: Click on the **Approve** hyperlink.

The screenshot shows the 'Approve Documents' interface. At the top, there's a 'Queried Parameters' section with a button labeled 'Another Query'. Below this is the 'Approve Documents List' section, which contains a table of requisitions. The table has columns for Document, Document Type, Change Sequence, Submission, Originating User, Amount, Next Approver, NSF, Queue Type, History, Disapprove, and Approve. Two requisitions are listed: R0161778 and R0161887. The 'Approve' button for R0161887 is circled in red.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	History	Disapprove	Approve
R0161778	REQ	-	-	CARY_WILLS	2,791.71	Yes	-	NSF	🕒	Disapprove	Approve
R0161887	REQ	-	-	KRISTI_HOGGS	54.50	Yes	-	DOC	🕒	Disapprove	Approve

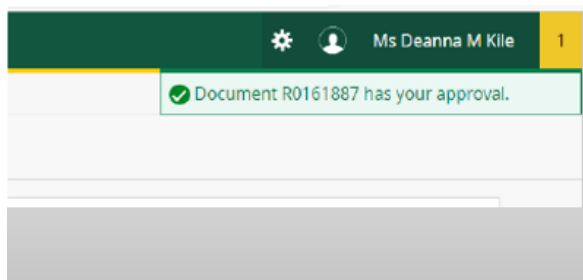
The screen below is displayed.

The screenshot shows the 'Approve Document' modal window. It displays the document details for R0161887, including the document type (REQ), change sequence (-), and amount (54.50). A comment field is present with a standard message: 'This document has been approved.' A blue arrow points to the comment field with the text 'Standard message displays, but can be customized by approver.' Below the comment field are three buttons: 'Cancel', 'Approve', and 'Click to return to requisitions'. A blue arrow points to the 'Approve' button with the text 'Click to approve requisition'.

From here you can:

1. The **Comment** field will automatically be populated with the text shown above, but you are welcome to supplement or replace that standard text with a customized message.
2. Click **Approve Document** to approve the requisition. Once approved it will be removed from your list awaiting approval and you will no longer receive reminder notifications for this requisition.
3. Click **Cancel** to return to the requisition list awaiting approvals without approving this requisition.

Once approved the screen below will be displayed and the requisition will advance to the next queue, if applicable. Clicking **Continue** will take you back to the Approve Documents screen where you may review other waiting requisitions.



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.

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

Sample Email

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.

Denotes 50/50 split of requisition total between the indexes.

Approvals received prior to moving to this approval queue.

Disapprove

The only way to remove a requisition from the approval process is by approval or disapproval. Should a requestor wish to remove his/her own requisition from the process he/she must disapprove the requisition. (See Page 12)

Step 9: Click the blue **Disapprove** link.

Approve Documents List 1

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related document attachments if more than one, otherwise a new tab is opened to view a single attachment....

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	History	Disapprove	Appr
R0157035	REQ	-	-	JENNIFER_WARREN	654.00	-	-	DOC		Disapprove	Ap

Disapprove Document

Document Number

R0157035

Document Type

REQ

Change Sequence

-

Submission

-

Amount

654.00

Comment *

Approval has been denied.

1.

3.

Cancel

2.

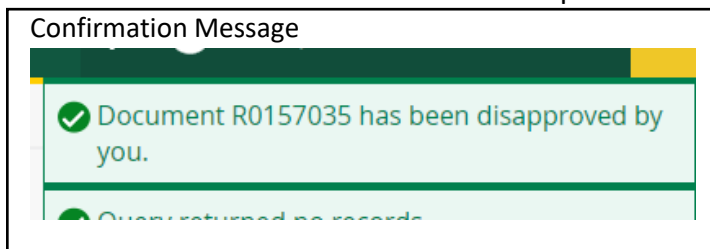
Disapprove

See next page for details.

From here you can:

1. Enter a message for the requestor. The **Comment** field will automatically be populated with the text shown above, but you are welcome to supplement or replace that standard text with a customized message.
2. Click **Disapprove Document** to disapprove the requisition. Once disapproved it will be removed from your list awaiting approval and you will no longer receive a reminder notification for this requisition.

3. Click **Cancel** to return to the requisition list awaiting approvals. Once disapproved, the requestor and Procurement will receive an email notification (pictured next page) and Procurement or Travel will delete the requisition.



A Requestor may disapprove his/her own requisition. This would be used in cases where a requisition needs to be redone due to error or a decision has been made to not proceed with the purchase or travel. (See queue errors page 13) Should it be cancelled due to a decision change, the requestor should contact the next approver to notify of the removal of the requisition from the approval process.

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

Sample Email

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.

Additional Way to Access Approvals

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

Viewing Status of Requisition through View Documents

The View Documents link in Self Service Banner may be used to view the details of a specific requisition and its approval history. In this example all approvals have been obtained. Should that not be the case, any required approvals will be listed in Approval History. (See page 8)

My Finance Query
Create, view and share budget availability, encumbrance and payroll queries.

My Journals
Create and view draft, pending and completed journals and supporting documentation.

Approve Documents
View list of documents pending approval. Approve, disapprove, or deny.

View Document
View draft, pending and completed documents with related information and approval history.

Budget Development
Create and review development p...

My Finance - View Document

View Document

Document Type: Requisition

Document Search: Choose Document Number

Document Number *: R0161778

VIEW DOCUMENT **APPROVALS & RELATED DOCUMENTS**

PURCHASE REQUISITION
(Non-responsible; not a valid Purchase Order)

Requester	Coryell	Requisition Number	08161778
Phone	425-508214-34	Transaction Date	03/14/2022
Email	coryell@u.wa.edu	Delivery Date	03/14/2022
Organization	Plant Administration (00000)	Status	In Approval
Accounting Type	Document Line	Category	030

Address

Address	10000 University	Address	10000 University
Address	10000 University	Address	10000 University
Address	10000 University	Address	10000 University

Requisition Comments

Provide a brief description of the requisition. This field is required for all requisitions. The requisition must be approved by the appropriate authority before it can be processed. The requisition must be approved by the appropriate authority before it can be processed. The requisition must be approved by the appropriate authority before it can be processed.

Commodities

Line	Description	Unit	Quantity	Unit Price	Other	Total
1	CHARLES C. CALDWELL QUARTERS 1 OF 2	LOT	2.00	10.0000	10.00	20.00
2	CHARLES C. CALDWELL QUARTERS 2 OF 2	LOT	2.00	10.0000	10.00	20.00
3	CHARLES C. CALDWELL QUARTERS 3 OF 2	LOT	2.00	10.0000	10.00	20.00
4	CHARLES C. CALDWELL QUARTERS 4 OF 2	LOT	2.00	10.0000	10.00	20.00
5	CHARLES C. CALDWELL QUARTERS 5 OF 2	LOT	2.00	10.0000	10.00	20.00

Approval & Related Documents - Requisition

Related Documents

No Related Documents information available for R0161778

Approval History

STUDENT ENGAGEMENT (5415) (1)
Chelsea Neal 07/17/2023

OZ CHIEF FINANCIAL OFFICER (ZAFIC) (1)
Daniel Smith 07/17/2023

OZ BUILDING MAINTENANCE (6330) (1)
David Spicer 07/18/2023

(DENY) (0)
Jennifer Warren 07/18/2023

ASSOC DEAN RES LIFE (5470) (1)
Jessica Crabbaugh 07/17/2023

DIRECTOR BUSINESS SERVICES (F370) (1)
JESSICA HOLLOWAY 07/17/2023

DIRECTOR PHYSICAL PLANT (F355) (1)
Joel Annett 07/17/2023

Approvals Required

OZ BUILDING MAINTENANCE (6330) (1)

Approval Process 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 three 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. Examples of these emails are on the following pages.

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

Sample Queue Error Email 1

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

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

Your requisition has been disapproved!

Dear **Kristi L. Higgs**,

Your requisition has been disapproved on **02-24-20 at 09:26 AM**

The details about the requisition are listed below:

Requisition
Number: **R0134567**

Amount: **\$ 2,725.00**

Cost Center:

Index	Fund	Org	Account	Program	Amount	Percent
AFFOOD	152000	325000	703997	350000	2,725.00	100

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

Disapproved By: **Deanna M. Kile**

Comment(s):

Date/Time	Commenter	Comment
24-FEB-20 08:42 AM	Nathan L. Kraft	This document has been approved. Hello, NSF queue. NLK
24-FEB-20 09:26 AM	Deanna M. Kile	Approval has been denied. This requisition has failed the approval process due to insufficient funds in the selected index and corresponding budget and as a result has been deleted. Please complete one of the following steps to correct the error and obtain a completed requisition. 1. Select another index with enough available funds in the budget and complete the requisition using that index, or 2. Request a budget transfer into the original index and after you have verified that the transfer is complete, complete a requisition. For information on how to view available funds in budgets that are assigned to your department please contact the Budget Office at budget@atu.edu or 479-964-0821. Please contact Procurement Services at 479-968-0269 with any other questions. Thank you

Sample Queue Error Email 3

Helpful Hints

For Requestors

1. Use clear and concise commodity descriptions, item and document text to allow for the approver to evaluate your requisition.
2. Track your requisition approvals via View Documents.
3. Reach out to the next approver or proxy to facilitate the approval if necessary.
4. Remember-Procurement and Travel cannot access requisitions until all approvals are obtained or requisition is disapproved.
5. If you need to remove your requisition from the approval process, you must disapprove it.
6. Read your notification emails closely as there is a contingency plan in place for approval queue errors and your action may be necessary.
7. You can set an Outlook rule up to manage the incoming notification emails.

For Approvers

1. Monitor your email inbox for approval notifications.
2. Respond to approval requests promptly. Failure to do so will hinder efficiency of the procurement process.
3. Coordinate with your proxy to facilitate approval duties.
4. Select Documents for which you are next approver on Approve Documents screen.
5. You can set an Outlook rule up to manage the incoming notification emails.
6. Give the requestor a call if a requisition you have received notice to approve a requisition that does not exist in your queue. It may have been removed by the requestor.