

# Electronic Requisition Approval Training Manual



Procurement and Risk Management Services

479-968-0269

[purchasing@atu.edu](mailto:purchasing@atu.edu)

[www.atu.edu/purchasing](http://www.atu.edu/purchasing)

Updated February 2020

## 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](mailto: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

<b>Division</b>	<b>\$1-\$2,499.99</b>	<b>&gt;\$2,500-\$4,999.99</b>	<b>&gt;\$5000-\$49,999.99</b>	<b>&gt;\$50,000</b>
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 SI 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) [<mailto:no-reply@atu.edu>]  
**Sent:** Friday, June 07, 2019 8:56 AM  
**To:** Deanna Kile <[dkile@atu.edu](mailto: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**

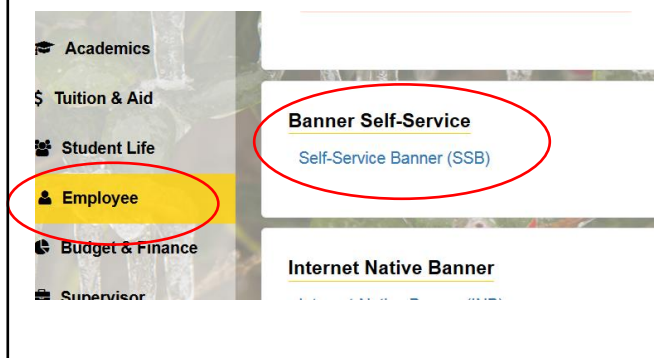
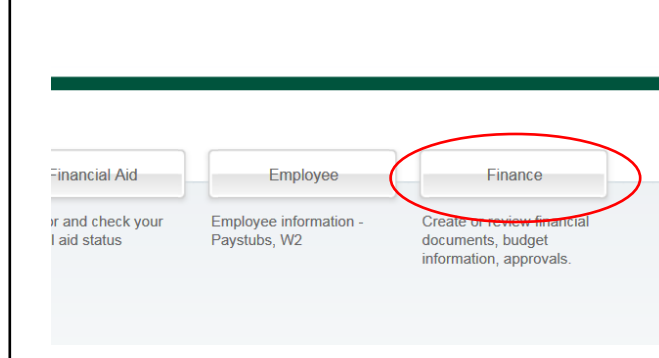
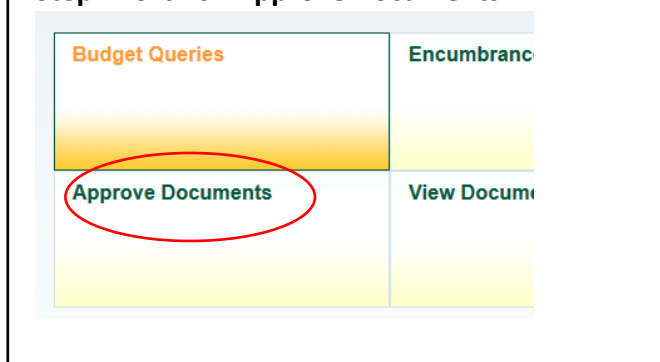
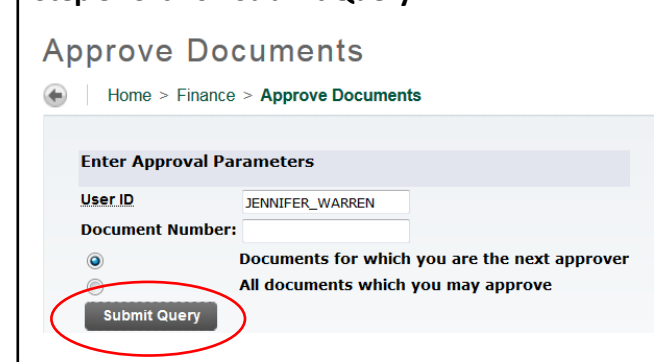
Cost Center:

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 Employee link****Step 3: Click on the Finance Tab****Step 4: Click on Approve Documents****Step 5: Click on Submit Query**

**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 Query**.

## 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	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>

Another Query

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 **blue requisition number hyperlink** to display the requisition contents. An example of this information is pictured on the following page.
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 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.

#### 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		Cost
					Disc	Addl	Tax		
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		

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

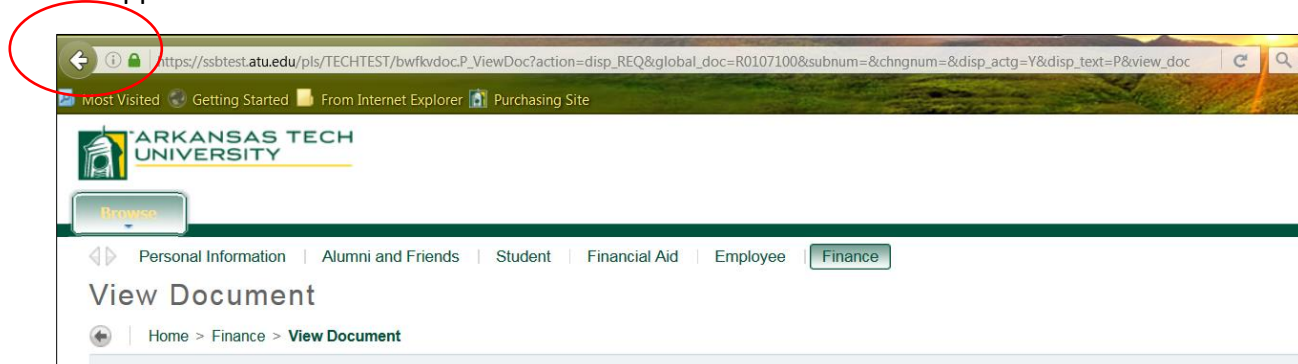
#### Requisition Accounting

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



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.

## 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 to display the details of a document.

### 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	<a href="#">R0134461</a>	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>

**Another Query**

## Requisition Approval History

Personal Information | Student | Financial Aid | Employee | Finance

## View Document

Home > Finance > View Document

**1.**

### Document Identification

Document Number	R0134461	Type	Requisition
Originator:	KRISTI_HIGGS	Kristi Higgs	

**2.**

### Approvals required

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

**3.**

### Approvals recorded

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

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.

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				KRISTL_HIGGS	5,385.96	DOC	R0134461	History	Approve	Disapprove

Another Query

The screen below is displayed.

## Approve Document

Home > Approve Document

**Document Information**

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

**Comment:**

This document has been approved.

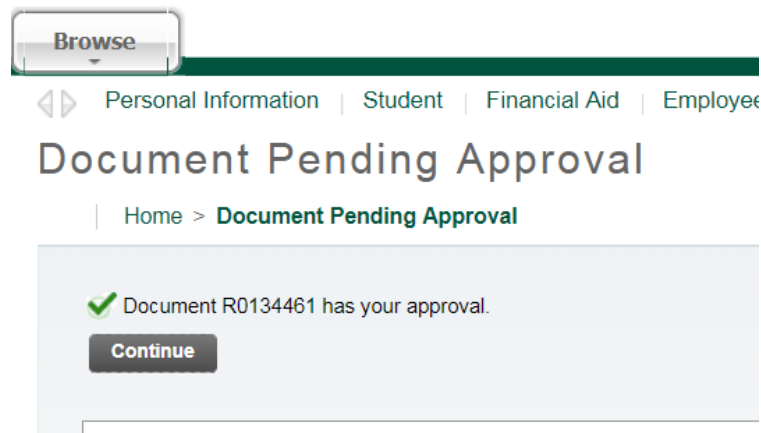
2. Approve Document

3. Cancel

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.



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 (T0100546)**  
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.

## Disapproving a Requisition

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

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

## Disapprove Document

Home > **Disapprove Document**

**Document Information**

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

Confirmation: approval has been denied.

2.

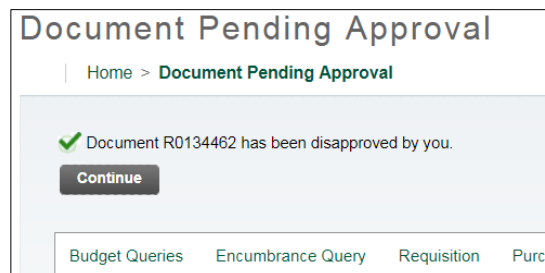
3.

1.

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 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](mailto:no-reply@atu.edu) <[no-reply@atu.edu](mailto:no-reply@atu.edu)>  
**Sent:** Friday, June 7, 2019 8:57 AM  
**To:** Tammy Rye <[trye@atu.edu](mailto: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)**

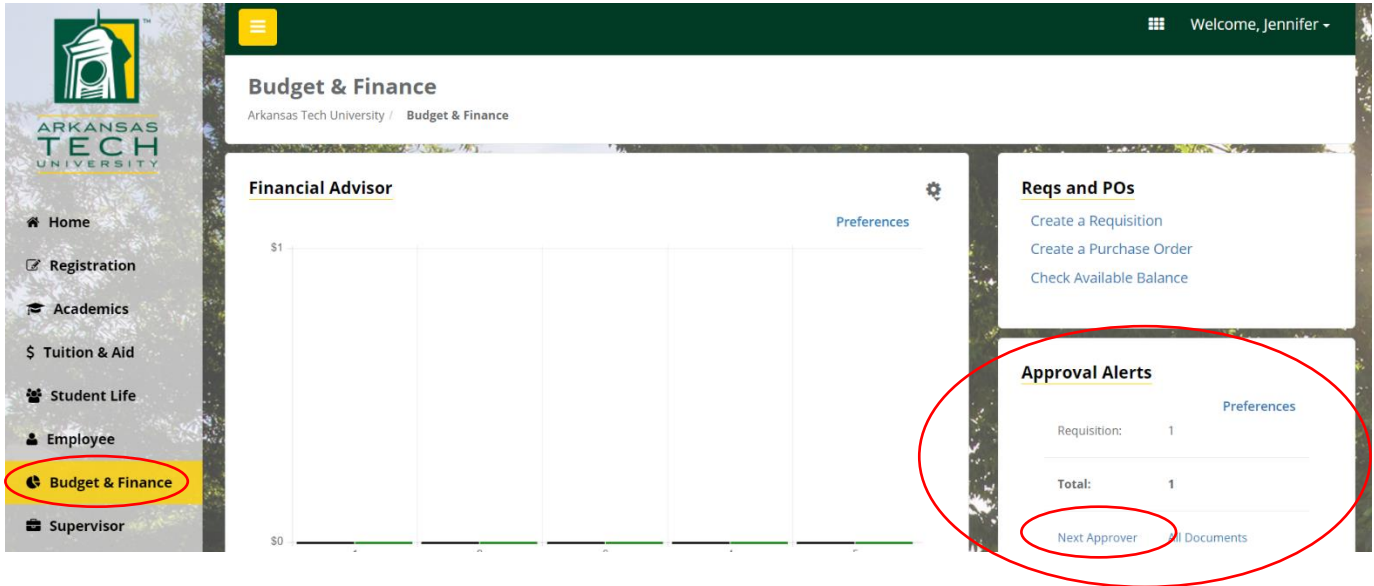
Disapproved By: **Tammy L. Rye**

Comment(s):

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

## Additional Way to Access Approvals

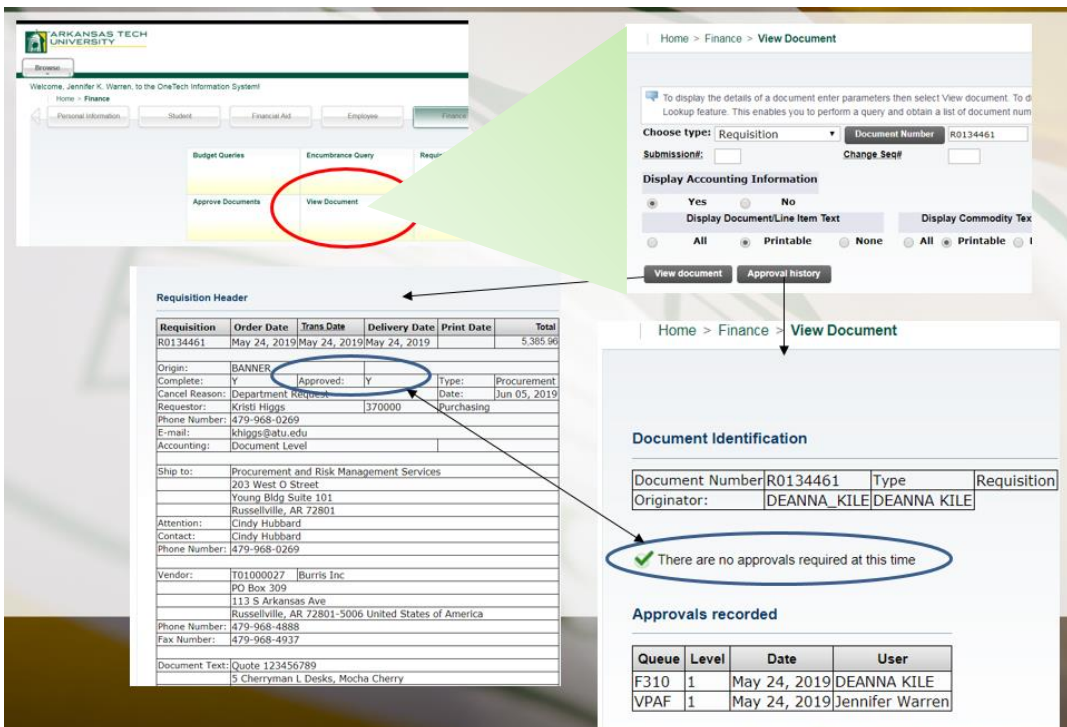
From OneTech select Budget & Finance. Click **Next Approver**. This will take you to the Approve Documents section of Banner Self Service where requisitions requiring your approval are listed.



## 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)



## 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](mailto:no-reply@atu.edu) <[no-reply@atu.edu](mailto:no-reply@atu.edu)>  
**Sent:** Wednesday, June 5, 2019 4:36 PM  
**To:** Tammy Rye <[trye@atu.edu](mailto: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 <a href="mailto:budget@atu.edu">budget@atu.edu</a> . 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

## Sample Queue Error Email 1

**From:** [no-reply@atu.edu](mailto:no-reply@atu.edu) <[no-reply@atu.edu](mailto:no-reply@atu.edu)>  
**Sent:** Monday, June 3, 2019 10:30 AM  
**To:** Kristi Higgs <[khiggs@atu.edu](mailto: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](mailto: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](mailto:purchasing@atu.edu).

## Sample Queue Error Email 2

**Your requisition has been disapproved!**

Sample Queue Error Email 3

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 <a href="mailto:budget@atu.edu">budget@atu.edu</a> or 479-964-0821. Please contact Procurement Services at 479-968-0269 with any other questions. Thank you

## 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.

## Additional Resources

---

Online Training Videos and Materials are available at  
<https://www.atu.edu/purchasing/facultystaff.php#Training>.