



Completing the Mississippi State University Approval Queue Request Form - Requisition/Invoice

This factsheet provides step-by-step instructions on completing each section of the **Mississippi State University Approval Queue Request Form - Requisition/Invoice**. This form is used by departments to set up and/or change an approval queue structure for BANNER finance documents and specify the levels and approvers. Only the users listed on this form will have approval authority in Administrative BANNER to approve or disapprove documents based on the organization code(s). Each department is set up with two approval queues: one for Requisitions and one Invoice documents (regular, direct pay, and procurement card). Thus, only ONE form should be completed if all documents should follow the same queue structure. For example, the department, Administrative Banner Services, will have two approval queues: RABS and IABS. A sample of the *MSU Approval Queue Request Form - Requisition/Invoice* is attached at the end of this factsheet to use as a reference when following the step-by-step instructions on completing the form. In addition, a sample **Approval Queue Report** is attached to show what the queue structure will look like based on the requested changes on the queue form. **The Banner process, FWGQRPT, can be used to print off queue reports based on Queue ID or Org Code.**

The *MSU Approval Queue Request Form - Requisition/Invoice* is a PDF that can be accessed electronically, filled-in and/or saved or printed from the ITS website at <https://www.its.msstate.edu/files/approve.pdf>. Viewing the form requires Adobe Acrobat Reader which can be downloaded at www.adobe.com.

HEADER SECTION

Department: Specify the official name of the requesting department/unit.

Date: Specify the effective date (or current date) for the approval queue setup or changes.

Requisition: Check to setup or change an approval queue structure and approvers for BANNER Requisition documents.

Direct Pay (A06) & Invoice: Check both boxes to setup or change an approval queue structure and approvers for BANNER INVOICE documents which includes regular and direct pay invoices and procurement card entries.

QUEUE DEFINITION

Use this section to specify the organization code(s), fund(s) and/or fund type(s) to be set up, changed, or deleted on the approval queues (REQ and INV):

Org Code: List up to five (5) organization code(s). Additional codes can be listed if needed.

Owner (Yes/No): Specify 'Y' if the organization code(s) is owned by the requesting department. Specify 'N' if the organization code(s) is owned by another department.

Fund/Fund Type: If needed, the queue can be restricted by a specific fund(s) and/or fund type(s) for the organization code(s) listed. If left blank, the approval queue will route all funds for the requesting department.



DATA ENTRY* (For Information Purposes Only)

Use this section to list up to four (4) authorized users who have been officially trained and granted access to key requisitions, invoices and/or procurement card documents for the requesting department. Additional users can be listed if needed.

Login: Specify the Administrative Banner login for each user.

Name: Specify each user's full name.

**Each department should have a backup user for keying documents. This user may be an employee in another department within the college or division.*

APPROVERS AND APPROVAL LEVELS

Each department must decide the number of levels needed for authorization of BANNER finance documents, the maximum dollar amount for each level and the approvers for each level. Departments can have one level with a maximum dollar amount **OR** request up to three (3) different levels each with a specified maximum dollar amount. Additional levels can be setup if desired by the requesting department.

At each level, ALL approvers will receive the same documents in their approval queue up to the maximum amount set for that level. However, approval is required by only one approver at that level. Documents do not route to EACH level for approval. Once a document is approved out of the department's approval queue at the designated level, it moves to the next appropriate unit (Procurement & Contracts or Accounts Payable).

Each level must have at least two approvers designated (one main and one backup) but can list up to four (4). Additional approvers can be listed if needed.

Specify the following information for at least one level of approval (Level One). However, the requesting department can also set up approvals for Level Two and/or Level Three if needed.

Maximum \$ Amount: Specify the desired maximum dollar amount for this level.
If more than one level of approval is specified, the final level default Maximum \$ Amount can be \$999,999,999.99 or a lower amount as designated by the requesting department.

Login: Specify the Administrative Banner Login for each user.

Name: Specify each user's full name and specify the appropriate access option in parentheses:
(A) Add to Queue or **(R)** Remove from Queue.

SIGNATURES

The completed Approval Queue Request Form must have signature approval before it can be processed. The three (3) signatures required are: Department Head, Dean/Director, and Vice President.

SUBMISSION

The original completed, signed form should be mailed to:
Tamara Gibson, User Services
Mailstop 9697
326 Etheredge Hall

CONTACT INFORMATION

Voice: 662-325-0631

Email: servicedesk@msstate.edu

Web: www.its.msstate.edu

**MISSISSIPPI STATE UNIVERSITY
APPROVAL QUEUE REQUEST FORM
REQUISITION/INVOICE**

Department: _____ Date: _____
 Requisition: _____ Direct Pay (A06): _____ Invoice: _____

QUEUE DEFINITION:

Org Code					
Owner (Yes/No)					
Fund Type (if necessary)					

***DATA ENTRY:**

Login ID	Name	Login ID	Name

***LEVEL ONE APPROVERS:**

Maximum \$ Amount: _____

Login ID	Name	Login ID	Name

***LEVEL TWO APPROVERS:**

Maximum \$ Amount: _____

Login ID	Name	Login ID	Name

***LEVEL THREE APPROVERS:**

Maximum \$ Amount: _____

Login ID	Name	Login ID	Name

*Each level is required to have at least one back-up person (two users) listed.

Approved by: **Signature**

 Department Head
Signature

 Dean/Director
Signature

 Vice President

For internal use only:

Approval Queue Report

Mississippi State University

Current as of: 24-SEP-09

QUEUE	DESCRIPTION	DTYPE	RULE GRP	ORGN	FUND	FTYPE
RABS	REQ-ADMIN BANNER SERV	REQ	REQG	000112		
		REQ	REQG	000222		
		REQ	REQG	333999	221119	

LEVEL	LIMIT	APPROVER	USERNAME	DATA ENTRY AUDIT
1	\$25,000.00	Gibson Tamara	TG9	
		Haute Samantha	SH103	
2	\$500,000.00	Smith John L.	JSMITH	
		Tanner Betsy	BT57	
3	\$999,999,999.99	Smith John L.	JSMITH	
		Younger Shirley A.	SAY82	

NEXT QUEUE ID: NO NEXT QUEUE

EXAMPLE

Approval Queue Report

Mississippi State University

Current as of: 24-SEP-09

QUEUE	DESCRIPTION	DTYPE	RULE GRP	ORGN	FUND	FTYPE
IABS	INV-ADMIN BANNER SERV	INV	INVG	000112		
		JV	INVG	000112		
		INV	INVG	000222		
		JV	INVG	000222		
		INV	INVG	333999	221119	
		JV	INVG	333999	221119	

LEVEL	LIMIT	APPROVER	USERNAME	DATA ENTRY	AUDIT
1	\$25,000.00	Gibson Tamara	TG9		
		Haute Samantha	SH103		
2	\$500,000.00	Smith John L.	JSMITH		
		Tanner Betsy	BT57		
3	\$999,999,999.99	Smith John L.	JSMITH		
		Younger Shirley A.	SAY82		

NEXT QUEUE ID: INVA

