

MISSISSIPPI STATE UNIVERSITY

Administrative Banner Approval Queue Request Form for ONLINE JOURNAL VOUCHERS

INSTRUCTIONS

This form is used to request changes for approval queues that route online journal vouchers, *not regular invoices, direct pay invoices or procard documents.*

SAMPLE FORM INCLUDED

Online journal vouchers enable departmental personnel to enter directly into the general ledger via the journal voucher entry page, *FGAJVCD (Journal Voucher Entry)*, accessed through Administrative Banner. Departments or units must have an online journal voucher (JV) approval queue in place before entries can be processed. Originators must acquire keying access to BAN_OLJV for this process. **For more information, visit the Controller/Treasurer's Reporting, Planning and Analysis Resource page at <https://www.rpa.msstate.edu/training-resources>**

Approval queues force financial transactions to filter through management-defined levels of approvers prior to posting to the ledgers. Each department, unit and/or division determines the approvers responsible for authorizing journal voucher transactions. **Departments or units are responsible for submitting an approval queue request when current approvers need to be REMOVED due to transfer, termination, or changes in job responsibility.**

BEFORE YOU BEGIN: Print the Banner approval queue report for EACH current approval queue to be updated on this request by running the process, FWGQRPT, in Banner. Disregard for NEW queue setup.

SECTION 1: REQUESTOR INFORMATION

1. Type the name of the requestor (departmental contact), phone number, and email in case there are questions or clarifications needed for the request.
2. Type the unit or department that owns the approval queue and that is submitting the request.
3. What date should the change to this approval queue begin? Current or future date only, do not backdate
4. Is this request for a new approval queue, a change to an existing queue, or is the Online JV queue inactive and needs to be deleted? **Check the appropriate box**
5. Provide a brief overview for the actions needed on the request. For example:
 - Add a new approver and remove a current approver
 - Change a level's maximum approval dollar amount

SECTION 2: QUEUE DEFINITION

Online Journal Voucher (JV) approval queues are setup based on a Rule Group, not Organization Codes, Funds or Fund Types. **DO NOT LIST ORGANIZATION CODES IN THIS SECTION.** However, you can specify if this queue is setup for a specific unit (University, MAFES, or Extension) by checking the appropriate Funding Source box on this form.

This section specifies the queue to be setup for a new rule group/rule class, updated and/or deleted. Space is provided to list up to three (3) JV queues **IF the levels, limit max amounts, and approvers are all the same.** If they are not, submit a separate request form to update each JV queue.

1. Enter the **Queue ID** for the JV Queue (ex. JVRR)
 - Leave the Queue ID field blank if setting up a NEW queue. It will be assigned at setup.
2. Enter the **Rule Group** which is the same as the Queue ID.
 - Leave the Rule Group field blank if setting up a NEW queue. It will be assigned at setup.
3. Enter the **Rule Class** which was assigned by the Controller/Treasurer Records staff.
 - It should begin with "FT" and generally correspond to the document prefix assigned (ex. FTRR).
 - Leave the Rule Class blank if setting up a NEW queue. It will be assigned at setup.
4. Check the **FUNDING SOURCE** if applicable.

SECTION 3: DATA ENTRY USERS

This section is for information purposes only. Therefore, if there are new data entry users in the department but no changes are needed on the approval queue, this form should not be submitted. When queue requests are needed, use this section to specify the Banner user(s) who will KEY the online journal voucher documents for the department/unit.

1. Enter the Banner **Login (NetID)** and **Name** for each data entry Banner user.
 - a. Up to four (4) users can be listed on one form. Additional users can be listed if needed (*see note in Section 4*).
 - b. Requests to **Add/Revoke** access on accounts for users listed in this section cannot be requested on this form.
 - All changes to a user's Banner account must be submitted on the **Administrative Banner Access Request eForm** located in the eForms portal at <https://eforms.msstate.edu/>

SECTION 4: APPROVERS, LEVELS AND LIMITS

This section defines the approval queue levels, limits and approver setup per the department, unit or division. Level limit maximum dollar amounts can range from \$0.00 to \$999,999,999.99.

Each approver listed in this section must have a current **Administrative Banner Production** account and approval access (**BAN_APPR**) (organization code access is not needed for this process).

- Check for a Banner account and approval access using the Banner page, **GZIUUSER (MSU User Inquiry Form)**.
 - If the new approver has an Administrative Banner Production account but does not have BAN-APPR access, the **Administrative Banner Access Request eForm** must be submitted from the eForms portal at <https://eforms.msstate.edu/> to request access.
 - If a new approver is being added and does not have an Administrative Banner Production account with BAN-APPR access, the **Administrative Banner Access Request eForm** must be submitted from the eForms portal at <https://eforms.msstate.edu/> to setup the account and access. Refer to this Knowledge Base article for more information, <https://servicedesk.msstate.edu/TDClient/45/Portal/Requests/ServiceDet?ID=1364>
 - **DO NOT SUBMIT THE ADMIN BANNER ACCESS REQUEST EFORM FOR THE APPROVER UNTIL THE COMPLETED QUEUE REQUEST FORM IS SUBMITTED AND APPROVED (see Section 5).**
1. Enter the **Level Max Amount Limit** and check **Current Limit** or **New Limit**.
 2. **Each LEVEL must have at least TWO approvers listed (main approver & backup) but more can be added if needed.**
 3. Up to four (4) approvers can be listed on one form. Additional approvers can be listed if needed (*see note below*).
 4. Whether this is a request for a new queue or a request for changes to an existing queue, please insert the names of all individuals currently on the queue and add the names of any new approvers you'd like to add and/or remove. When requesting that a queue be deleted, list all current approvers.
 - a. Enter the Banner **Login (NetID)** and **Name** for each approver for that level.
 - b. Check the queue access needed for each approver: **(R) Remain on Queue, (A) Add to Queue, or (T) Terminate from Queue**

NOTE: If the number of data entry users, approval levels and/or list of approvers exceeds the number of blank form fields, fill in as much information as you can. Access a new queue form and complete the REQUESTOR INFORMATION section and enter "Page 2 of 2" in the Instructions field. Use the fields in Section 2 and/or Section 4 to list the additional data entry users and/or approvers not already provided on Page 1 of your submission.

SECTION 5: FORM APPROVAL AND ROUTING in EFORMS

This section specifies the approvers and routing for this request. It must be approved at all levels as applicable.

1. Enter the name of each approver at the specified level: **Department Head, Dean/Director, Vice President**.
2. Before submitting the request, please save and/or print a copy for your files.
3. When completed, upload the PDF of the form(s) and the approval queue report(s) to a **Generic Routing Slip eForm** to be routed to the approvers listed on the form to electronically approve the request in eForms.
 - The Vice President level will be the last level to approve and submit the eForm to the **ITS Banner Access Group to Handle**.
4. All data entry users and approvers listed on the form will receive an email after the request is processed.

If you have questions or issues concerning the request form, please contact Tamara Gibson at gibson@its.msstate.edu or email the Service Desk at servicedesk@msstate.edu.