

MISSISSIPPI STATE UNIVERSITY
Administrative Banner Approval Queue Request Form
REQUISITIONS / INVOICES (regular, direct pay) / PROCARD

INSTRUCTIONS

This form is used to request changes for queues that route requisition, invoice (regular and direct pay), and procard documents.

SAMPLE FORM INCLUDED

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 encumbrance, disbursement, and 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 ORGANIZATION CODE inactive and the approval queue(s) need 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

Organization Codes are setup with two (2) approval queues (referred to as a "queue set"):

- Requisition Queue (ex. RCAD) – routes requisition documents
- Invoice Queue (ex. ICAD) – routes regular invoice, direct pay, and procard (JV) documents
- Queues are mainly setup by ORG code(s) with no restrictions. However, queues can be setup with certain restrictions:
 - Queues can be restricted by ORG and Fund Type(s) and/or ORG and a specific Fund Number(s)
 - Multiple queues can be setup for the same organization code with different funding sources for **University (Fund Type A), MAFES (Fund Type B), and/or Extension (Fund Type C)** funds.

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

1. Enter the queue or queue set:
 - **Queue ID** for the Requisition Queue (ex. RADS for requisitions)
 - **Queue ID** for the Invoice Queue (ex. IADS for invoices and procards)
 - *Leave the Queue ID fields blank if setting up a NEW queue. This will be assigned at setup.*
2. Enter the **Organization Code** for the queue set – multiple codes can be entered
3. Are there queue restrictions? If so, enter the **Fund Type(s)** and/or specific **Fund Number(s)** setup on the queues.
 - Leave blank if there are no restrictions.
4. Check the **FUNDING SOURCE FOR QUEUES LISTED** 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 queues, this form should not be submitted. When queue requests are needed, use this section to specify the Banner user(s) who will KEY the requisition, invoice and/or procard documents for the department/unit listed.

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).

- **Approvers cannot have keying access to requisition, invoice and/or procard documents.**
- Check for a Banner account and approval access using the Banner page, **GZIUSER (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).**
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.