Missouri State

Finance Dashboard – Approve Requisition User Guide

Part I - Gaining Access

1. Make sure you have authorized Fund/Organization (FOAPAL) access in Banner.

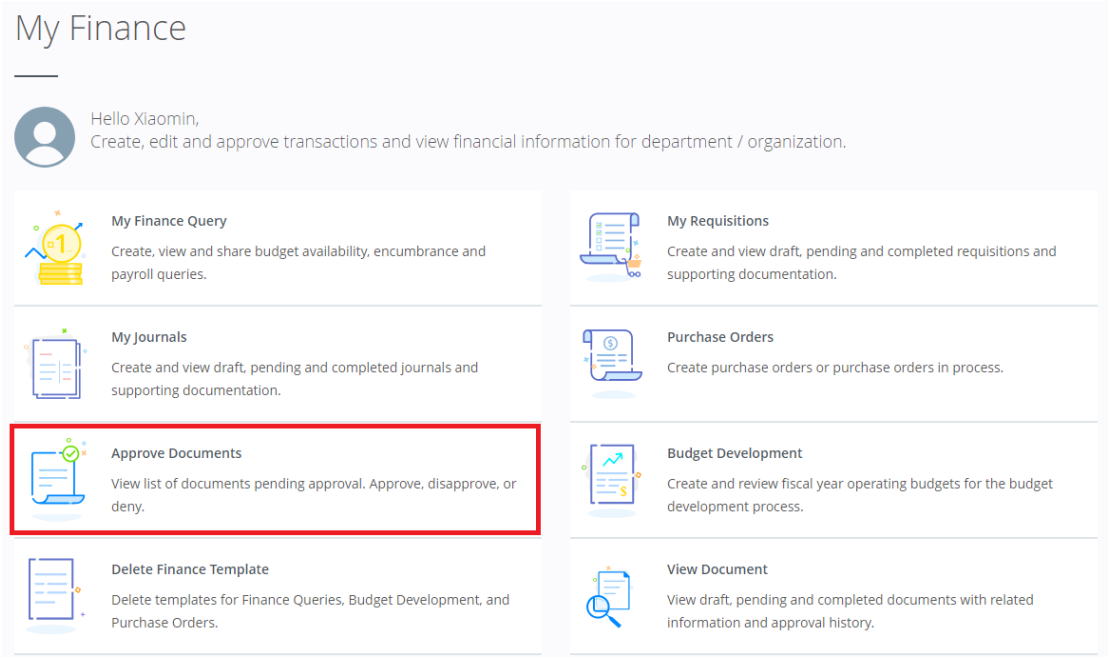
   FOAPAL stands for six accounting elements of finance data in Banner: Fund, Organization, Account, Program, Activity and Location. FOAPAL authorization can also be called Fund-Organization Access. In Banner, all access to the (University and Foundation) Finance data is based on the Fund/Organization Access that has been authorized/established for an individual. You must have **Approver** access over Fund/Organization before you can approve requisition.

   To request "Approver" access, submit a FOAPAL Authorization - Approver Request. This form can be used to replace approver access. To request "Originator" or "View Only" access, submit a FOAPAL Authorization - Originator/View Request.

   If necessary, you may run Fund & Organization Access Report report to check access for you or others. What does Approver, Originator or View Access mean?

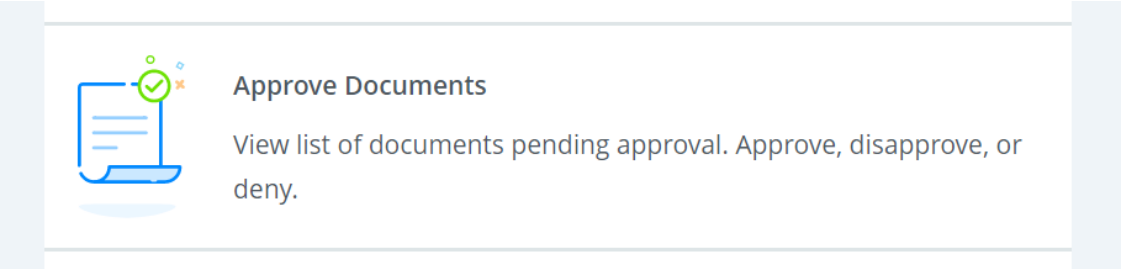
2. Access Finance Dashboard **Approver Document** Options.

   From My Missouri State portal, use the **Discover** tool from the main menu and search "Finance", select **Finance Resources** card and click on **Finance Dashboard** to start.

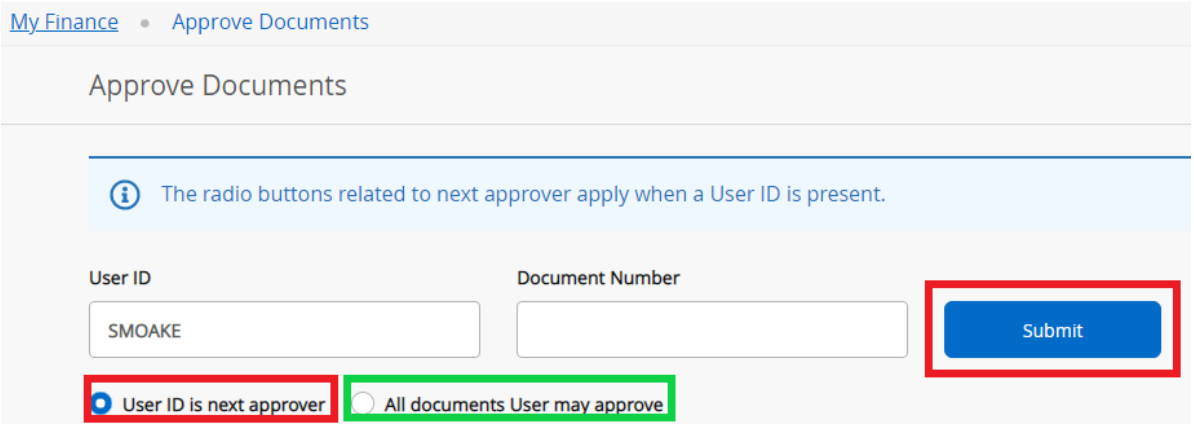


Part II - Approving or Disapproving a Document (Requisition)

1. Click **Approve Document** from My Finance Dashboard



2. **Submit a Query** to view documents awaiting your approval



- By default, system will have your user ID auto-filled and '**User ID is the next approver**" checked, by clicking on Submit button, system shows all the requisitions that are waiting for your approval. You may enter the requisition number under Document Number field to query for specific requisition to approve.

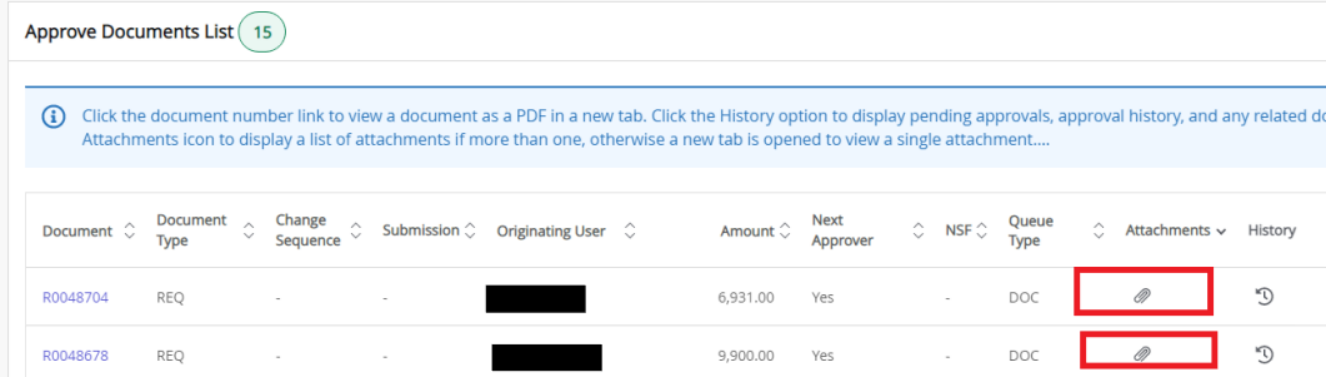
- If a requisition has mixed funding (for example, shared funding by multiple departments) where approvers are from different departments, you must check the box of **"All documents User may approve"** to submit to see them.

- "%" sign can be used as **wildcard** to query for specific requisitions. For example, you may search for any requisitions starting with R0048 by using 'R0048%' under document number field.

- You may change the User ID to see what is waiting for other people to approve.
  For example, you may change it to your department approver's user ID and submit a query to see what requisition are waiting for your department approver to approve.

  If for any reason that you do not see what you are expecting to see from the query, you may reach out to BannerFinandce@MissouriState.edu for help.

3. **View Query Results**



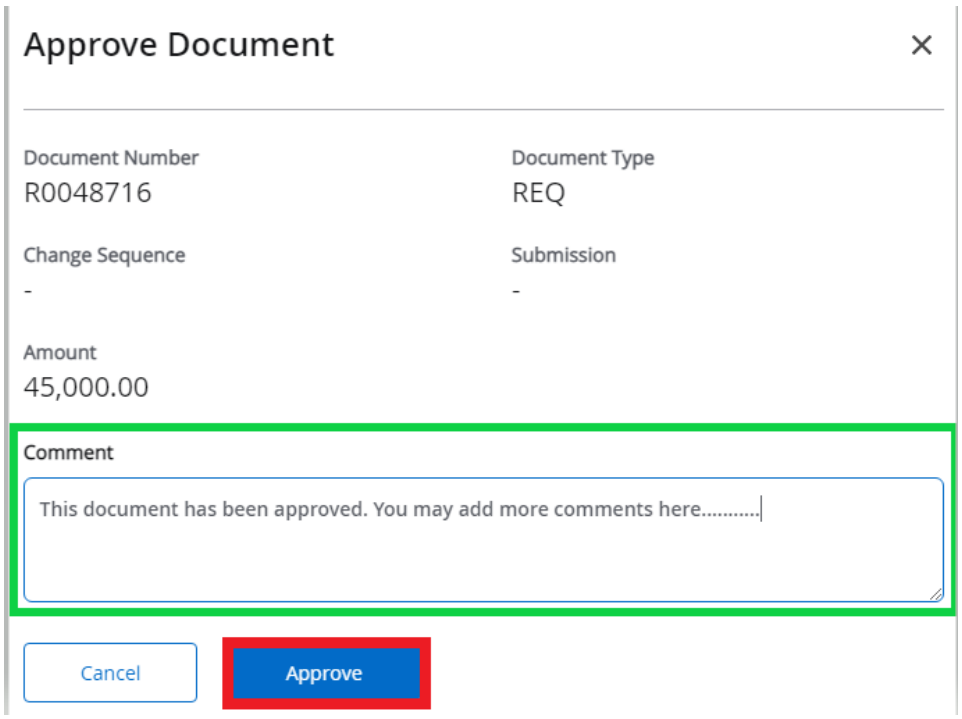
- You may click on the requisition number link to View Details or the History link to View requisition approval information that has been recorded for the selected document.

- You may also click on the **Attachment button to review the supporting document**.

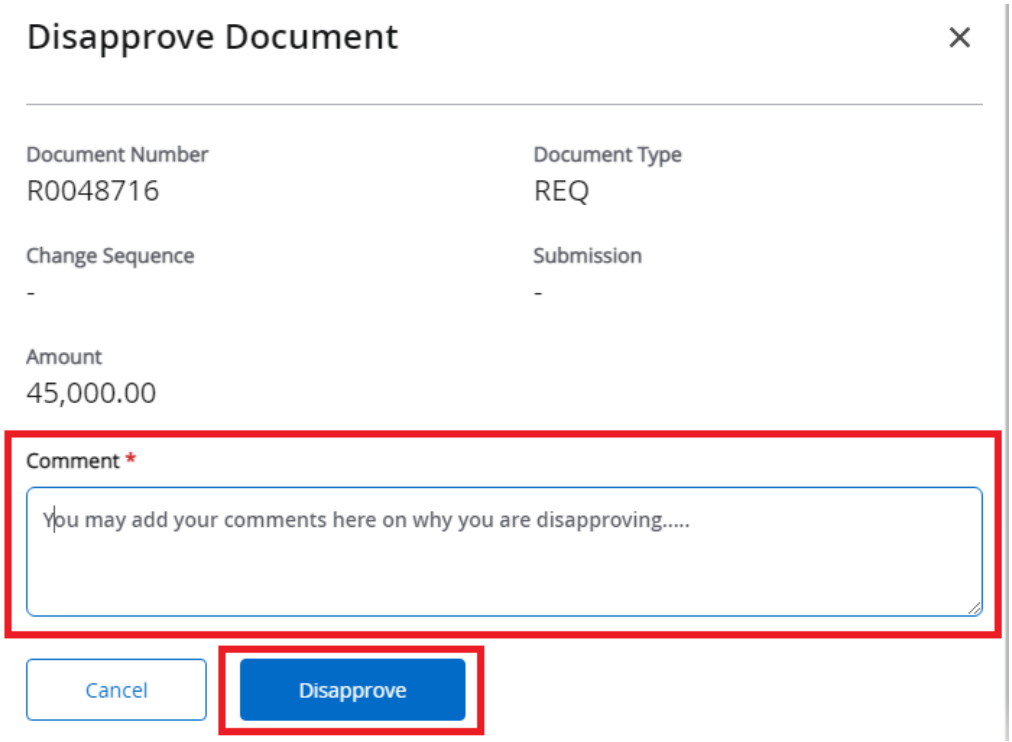
- Only if you are the Authorized Approver over the requisition listed, the Approve and Disapprove links will be available for you to take the desired action.

4. **Approve or Disapprove the Requisition (Document)**

If you selected to **Approve** the document, you will have the opportunity to enter additional comments before clicking the Approve Document button. Click the Cancel button to take no action and return to your Query Results.



If you selected to **Disapprove** the document, you will also have the opportunity to enter additional comments as to why the requisition is being denied before clicking the Disapprove button. Click Cancel button to take no action and return to your Query Results.



- If a requisition is disapproved, an email notification containing your comments will automatically be sent to the originator of the requisition. If the requisition is being disapproved for additional updates, the originator may access the original requisition from Draft Requisition under My Requisition Dashboard. Originator can either re-complete with any required updates or simply delete such requisition from Draft Requisition if not needed.

- Be aware that disapproved requisitions affect the balance available used when checking for non-sufficient funds (NSF) in your budget until they have been removed/deleted. Disapproved requisition is under Draft Requisition queue.

- Refer to Part III – Checking Requisitions Approval of My Requisitions Processing User Guide for additional information regarding how requisition approval works in Banner.