Approving a FOAPAL Request

Approving FOAPAL’s in Workflow automates the approval and notification process making it more efficient than sending paper forms around campus to receive the appropriate signatures.
Workflow Main Menu

What is Workflow?
Workflow is a program that initiates and directs the flow of information across the campus automatically routing documents to the appropriate personnel for review and decision making.

Things to Know About Setting Up a Proxy
Although it is easy to set up a proxy for a specific role, this does not remove you from the process, it just allows someone else to act in a similar role as yourself. So instead of you being the only one to approve the process, you or your proxy can approve the process.

If you do set a proxy, you will still see the open processes in your Worklist. If you select the process the proxy will no longer see the process (only one person can access and take responsibility for a process). So make sure you do not select processes from your Worklist that you have set a proxy for (even if you get an email) or else the proxy will not be able to access the process. Setting a proxy will NOT re-route an email.
Approving a Request

You will receive an e-mail from erpfinance@bsu.edu that will include a link to the Banner Links page where you can log into Banner Workflow.

Your Worklist will include the process you are responsible for approving and a description in the Activity column to distinguish which approver you are.

CONFIDENTIALITY: This email (including any attachments) may contain confidential, proprietary and privileged information, and unauthorized disclosure or use is prohibited. If you received this email in error, please notify the sender and delete this email from your system. Thank you.

This automated email was sent via the test Workflow System at Ball State University.
Approving a Request - Review the form

3. Scroll through the form to make sure all the information is correct.

4. As the approver you need to select the process and review the form.

At the end of the form you will have three options:

If you are selecting the radio button next to...

Approve - the document will be sent to the next approver.

Return - the document will be sent to the requester and request changes to be made. Make a note in the comments box indicating what changes need to be made.

Disapprove - the document ends the request and will not allow the requester to make changes and a whole new process request must be created and submitted.

After the approvals have been completed the form is routed to either the Budget Office or Grant Office for additional approval and then to the Assistant Controller’s office for final approval.

The Controller’s office will enter the approved FOAPAL into the system. An e-mail is sent including the FOAPAL information and a summary view of the FOAPAL Request form.