FOAPAL Authorization Quick-Guide
For <u>Originator or View Access</u> Only

FOAPAL Authorization Request is a web application for requesting **Originator or View** access to an employee's fund/org security in Banner Finance. This is an **automated system** where fund-organization approver (s) will get emailed notification of your requests and **approver must take action to approve your originator/view access request for you to get access**. Approvers can expedite requests for "View Only" or "Originator" access by initiating the request themselves and this will grant access automatically and will not require additional approvals.

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. This affects the documents and budget information that they can see or originate through Finance Dashboard, Admin Banner, BDM, Argos, and other Banner-related applications.

This is a quick guide for using the application to initiate originator or view access to fund and organization, please **make sure the approver access has been established before using this system**.

Access FOAPAL – Originator/View Access Request:

- From <u>FOAPAL Authorization Request</u> page and locate <u>FOAPAL – Originator/View Access Request</u>.
- Or in the New Missouri State portal, use the Discover tool from the main menu and search 'Finance', select Finance Forms, then select <u>FOAPAL – Originator/View Access Request</u>.
- From the Work Resources tab of My Missouri State, find Finance Assistance and select <u>FOAPAL – Originator/View Access Request</u>.
- You can also browse directly there by visiting <u>https://mis.missouristate.edu/Finance/foapAuth/create</u>.You can log in with your BearPass Login and password, just as you would to My Missouri State.

⚠️ If you are requesting Approver-level access, please submit a <u>FOAPAL Authorization - Approver Request Form</u>. Approver access must be granted manually by Banner Finance office and users will be notified when access is granted.
The Banner Finance Office does not make changes to an individual's access without authorization from departments, so it is department's responsibility to authorize us to make the change when people move to different departments or leave university.
If you need to remove current access, or have other questions, please send the email to <u>BannerFinance@MissouriState.edu</u>

Initiating a Request

On the Initiate Request page, enter the BearPass Number (aka M Number) or name of the person you want to request access for in the BearPass Number blank, and then click the **Add to List** button. This can be yourself or another user. You can add multiple users to the list, and remove users from the list by clicking "Remove" next to their name.

Search using employee's full name or M-Number number:

Boomer Bear – M12345678

Add to List

⚠ Each person's request will be processed separately. So, an approver can reject the request for one person's access and accept the request for another.

Next, specify the following information for each Funds/Organization that you want the subject(s) of the request to have access to:

- The type of access that they should receive.
  - ➢ **View** allows an individual to run finance queries as well as generate Bear Finance Report (if granted with Argos access) for budgets associated with those specific Fund and Organization codes.
    Originator access includes View access and provides the ability to originate (but not approve) requisition for the specified Fund and Organization.
- The Chart on which that fund/organization pair is valid (U - University or F - Foundation).
- The Fund code (such as A02000)
- The 6-digit Organization Code (such as 132007)

When you've entered a valid chart/fund/organization combination, you should see two green check marks: one for the fund, another for the organization. Additionally, you should see a 'Yes" to indicate that the combination is valid.

Access Type	COA	Fund	Organization	Valid Approver
Originat ⌄	U ⌄	A02000 ✔	052000 ✔	Yes

If the combination is invalid, you should see a <u>No</u> under Valid Approver column.

Below are two situations of getting a No.

Org 052001 does not pair with fund A02000 because 052001 is not an operating org code.

You will get a No when using the correct Fund-Org combination, this happens because this fund-org has not been setup in any approval queue yet by Banner Finance office, you will need to submit a <u>FOAPAL - Approver Access Request</u> to have approver setup first before you can request any originator or view access.

If you need to request more than 5 fund/organization pairs in one go, click the **Add Five New Rows** button to add another 5 rows.

✅ You can quickly fill in the Fund/Organization table with all the funds and organizations that you are an approver for by clicking the **Add my FOAPs** button. **When you enter requests for FOAPs that you are already an approver for, the request is automatically marked as approved by you.**

Finally, add some text to the Notes field. This is where you can enter some helpful text for the approvers who will see this request later, such as "The subject is our new Administrative Assistant and needs access to see this budget information." The note text will be visible to everyone associated with the request: the subject, the approvers, and you, the requester.
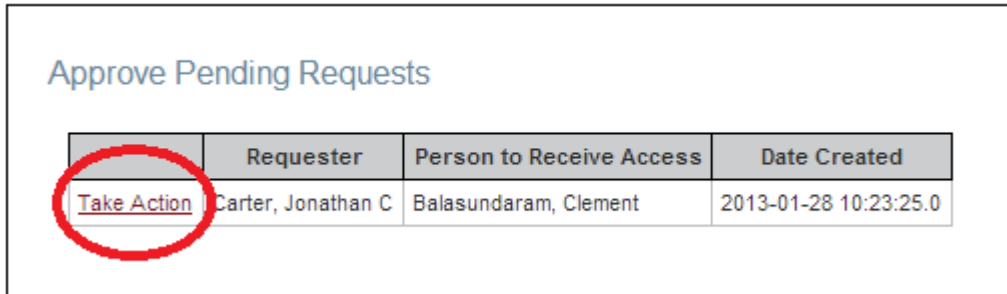
Review the information you've entered one last time, and when you're finished, click **Submit FOAP Requests**. You should be redirected back to the list of requests that are active for you.

⚠️ The page will check for any glaring errors (invalid chart/fund/organization combinations, etc.), but it won't stop you from entering requests for valid funds and organizations.

Remember that these requests will be routed to the actual approvers for those fund/organizations. You may run **Budget Access by Fund-Organization** report under [Fund-Organization Access Report](#) page to check who will be approving your request.

Approving Requests

If you are an approver for a fund/organization, you should receive an email notification whenever a request is entered for that fund/org. To approve it, log in to the FOAPAL Authorization application and visit the **My Active Requests** page (this should be the default page when you log in). You should see a list of all requests pending your approval at the top of the page. Click the **Take Action** link to begin approving or denying a request.

You'll see a page summarizing the request, including notes from the requester and previous approvers. You can selectively approve and deny specific fund/organization combinations using the "Approve/Deny" radio buttons.

> ⚠ If you Deny any of the fund/org pairs, you will be required to leave note explaining the rationale for denial. This is just a quick message back to the requester and subject so that they understand what's going on.

Once you've filled out the request, click **Submit**.

If you approved any part of the request, then the request for the FOAPs you approved will be processed. If your department uses a multi-step approval chain (aka "AND Approvers"), then the request will be routed to the next approvers in the chain. If you are the final approver, then one of two things will happen. Either

- ...the request will be routed to Computer Services for the subject to have a PROD account created (if they do not have one).
  OR
- ...the access will be automatically granted (if the subject already has the necessary PROD account).