

FOAPAL Authorization Quick-Guide

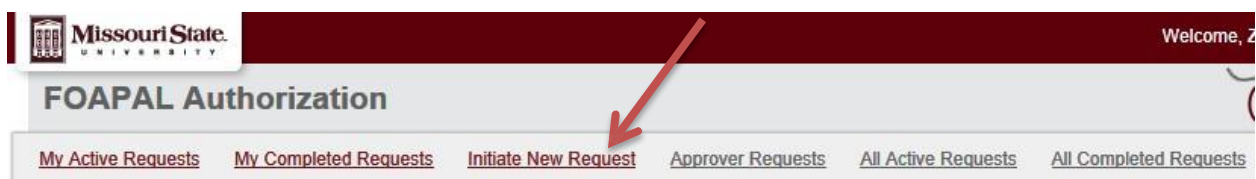
FOAPAL Authorization is a web application for requesting access to an employee's fund/org security in Banner. This affects the documents and budget information that they can see or originate through Self-Service Banner, Internet Native Banner, and other Banner-related applications. This is a quick-guide for using the application to initiate and approve requests.

You can find links to the FOAPAL Authorization application on the Banner Finance page, and from the Finance Channel in the Work Resources tab of My Missouri State. You can also browse directly there by visiting <https://mis.missouristate.edu/FOAPauth/create>. 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 complete and submit a signed [FOAPAL Authorization Form](#) to Financial Services, Carrington 113. If you need to remove current access, or have other questions, please send the email to BannerFinance@MissouriState.edu

Initiating a Request

After logging in, click the **Initiate Request** link in the navigation at the top of the page to start a new request for Fund/Org access.



On the Initiate Request page, enter the BearPass Number (aka M Number) of the person you want to request access for in the BearPass Number blank, and then click the **Add** button. This can be yourself or another user. If you aren't sure what someone's BearPass Number is, use the **Lookup BearPass Number** link to find them.

Specify person(s) to receive Fund/Organization access

BearPass Number: [Lookup BearPass Number](#)

You can add multiple users to the list, and remove users from the list by clicking "Remove" next to their name.

⚠ 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 users to see budget information for the selected funds and organizations.
 - **Originate** access includes View access, and provides the ability to originate (but not approve) requisitions for the specified Fund and Organization.
- The Chart on which that fund/organization pair is valid (U or F).
- 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 three green check marks: one for the fund, one for the organization, and one to indicate that the combination is valid. If the combination is invalid, you should see a red X.

For example, in the request table below, the first pair is valid. In the second pair, the fund can't be found on the chart chosen; the chart should be 'F', not 'U'. In the third pair, the fund and the organization both exist on chart U, but the combination doesn't work; that is, the organization chosen doesn't draw from that fund.

Access Type	COA	Fund	Organization
View	U	A02000	132007
View	U	FN2715	132001
View	U	X06019	132007
View	U		
View	U		

No active approver for this Fund-Organization combination.

If you need to request more than 5 fund/organization pairs in one go, click the **Add More 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 **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.

My FOAPs Automatically fill in the boxes below with all the Fund/Organizations for which you are an approver.

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**. 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.

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.

Approve Pending Requests			
	Requester	Person to Receive Access	Date Created
Take Action	Carter, Jonathan C	Balasundaram, Clement	2013-01-28 10:23:25.0

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).