A. Create New FOAPAL

1. Login to: [https://castle.eiu.edu/busoffapps/foap/foap_login.php](https://castle.eiu.edu/busoffapps/foap/foap_login.php) using your Network ID & Password.

2. Click on: ‘Start New FOAPAL Request’.

3. Enter information about the new fund/org FOAPAL that is to be built. The ‘Requested By’ will be automatically populated from your login information.
3. Continued.

   a. Click in the ‘Today’s Date’ and ‘Date Needed’ textboxes then select the required dates from the date pickers for the new FOAPAL. Use the arrows at the top of the date picker to scroll through various months.

   ![Date Picker](image1)

   b. Click on textboxes and type to enter: “Proposed Title” (limited to 35 characters), “Requesting Dept.”, and “Purpose of FOAPAL” (State the purpose and activities of the proposed FOAPAL. What will it be used for or why do you need a new FOAPAL? Please be as specific as you can, provide enough information to clearly define the fund or organization).

   ![Proposed Title](image2)

   c. Choose the type of FOAPAL from the drop-down listing ‘How will the FOAPAL be Funded’ to complete each FOAPAL type.

   ![How will the FOAPAL be Funded?](image3)

   d. Begin typing to ‘Select Financial Manager’. Then choose from populated list. (Each letter typed will narrow down the list to choose from). Repeat to populate ‘Select Dept. Head’, ‘Select Dean/Director’, and ‘Select Pres/Vice Pres’.

   ![Select Financial Manager](image4)
e. If you wish to be the only person with authority for this fund/org click ‘Submit’. Otherwise click ‘Add Users’ to delegate authority for the new fund/org.

*** FINANCIAL MANAGER RESPONSIBILITIES: *** The Financial Manager assumes responsibility of all aspects of the fund or organization. The Financial Manager may delegate authority to others by completing the next section. Check as many boxes that apply to each person.

**Delegated Signature:** Individuals authorized to sign in place of the Financial Manager on purchasing documents, budget transfers and invoices.

**Invoice Approver:** Authorized to receive approval notices and to verify purchases and approve payments electronically.

**Create On---Line Documents:** Individuals authorized to create Requisitions on the Banner system.

**Sign Payroll Documents:** Individuals authorized to approve web time entries for student and faculty/A&P.

**Order OfficeMax Supplies:** Individuals authorized to order OfficeMax supplies via the web.

**Prepare On---line UPS Labels:** Authorized to create and print on---line UPS labels.

**P--Card:** Individuals authorized to buy items with department procurement card.

**Inquiry:** Authorized to only perform inquiries on a fund or organization.

For example, if the Department Chair wanted the assistant to enter documents on Banner, Order OfficeMax supplies and sign approve Web time entries, the Chair would check “Create On---Line Documents, Order OfficeMax Supplies, and Sign Payroll Documents”. The assistant would NOT be able to sign other documents, approve invoices, or purchase with a P--card.

4. When adding authorized users you are now presented with a screen summary of the process to this point. By clicking ‘Edit’ you are directed back to a screen where the previous information entered can be modified. (If you finished editing and are the only person authorized for this FOAPAL you proceed to section **B. New FOAPAL Approval Process** of this document.)
a. Here you can modify information that may have been entered incorrectly.

b. The bottom portion of the ‘Add Users’ screen is where you can enter authorized users of the new FOAPAL. Begin typing the ‘Name’ or Net ID of the authorized user, then choose the user-name from populated list. Next click to mark each task the user will be authorized to perform. Then click ‘Add’.

c. If a mistake has been made or an authorization needs change click ‘Edit’.
d. You can now make corrections or delete the authorized user. Then click ‘Save’.

![FOAPAL User Profile: Edit/Delete](image)

You can now view the user’s profile by clicking on ‘Edit’. You can then make corrections or delete the authorized user. Then click ‘Save’.

e. Once all authorized users have been added you can electronically submit the FOAPAL request form and it is then sent to each person in the approval process.

![Submit FOAPAL Request Form](image)

B. New FOAPAL Approval Process

1. Mike Hutchinson (or Lauren Clapp for Grants) is now informed by email that a new FOAPAL is being requested. (Each email received within the system also contains a summary .pdf document showing information that is currently contained in the request).

![New FOAPAL Request Form for your Approval](image)

This email notification is to inform you that you have a new FOAPAL Request Form waiting for your approval. Please **Log In** to the Online Approval process to Approve/Disapprove the new FOAPAL request. Please **do not reply to this email**. Contact Carla Higginbotham at 581-7827 with any questions or concerns.
2. To start the approve/disapprove process click ‘Review’ for the FOAPAL request.

3. The reviewer is presented with a screen summary with all recorded information to this point.
   a. At this point all previously submitted information can be changed by clicking ‘Edit’ for the section where changes are required as previously discussed in this tutorial.
b. The reviewer now must check the option to ‘Approve’ or ‘Reject’ and then ‘Submit’ the New FOAPAL request.

c. If the reviewer does not check the option to electronically sign the New FOAPAL request, an error message will be displayed.

d. If the FOAPAL request is rejected the approver can determine if the same FOAPAL can be re-submitted after changes are made and give feedback reasons for the FOAPAL being rejected.
4. The next approver in the process is now informed by email that a new FOAPAL is being requested.

5. To start the approve/disapprove process click ‘Review’ for the FOAPAL request.

6. At this point in the process no previously entered information can be changed for the FOAPAL request. The current reviewer now must check the option to electronically sign and ‘Approve’ or ‘Reject’ and then ‘Submit’ the New FOAPAL request. The new FOAPAL request is now sent to each approver that an electronic signature is required from.
a. If the reviewer does not check the option to electronically sign the New FOAPAL request an error message will be displayed.

b. If the FOAPAL request is rejected the approver can determine if the same FOAPAL can be re-submitted after changes are made and give feedback reasons for the FOAPAL being rejected.

C. Create New FOAPAL Process

At this point the New FOAPAL request has now been approved and all signatures have been gathered. Mike Hutchinson or Lauren Clapp now receives an email asking him or her to enter accounting information for the new FOAPAL. (A summary .pdf is attached to the email).

1. On the next screen Mike or Lauren will receive a summary of all information that has been previously entered for the new FOAPAL request.
a. At the bottom of the summary screen is where all accounting information will be entered and saved for the new FOAPAL request. The request will be further routed if a Deposit Slip is required.

b. For the next step in the process Dave Watson will be notified by email to create the FOAPAL in the Banner system. After completing this task he will approve and submit his work.

Once Dave submits the FOAPAL as completed an email is sent to the requester, the financial manager, all authorized users, Bruce Duzan, and Penny Walk. This email will inform them that the FOAPAL set-up process is complete and the FOAPAL is ready for use.
c. If a Deposit Slip is required, Linda Coffey will become the next person in the email queue and she will receive an email asking her to go to the next screen to enter the information for the Deposit Slip. There she will enter the necessary codes, then approve and submit the FOAPAL to continue the process.

d. After Linda submits this information the request is then directed back to Mike Hutchinson who will use the deposit information to create the new Deposit Slip for the New FOAPAL. He then electronically signs and submits his work to continue the process.

e. If a Ramp code is required the request is now sent to Heidi Hawkins in the Budget office where she will enter the Ramp code then electronically sign and submit her work.

f. Dave Watson now receives a summary of the completed process. Before electronically signing the request as completed, he will check the information it contains and create a permanent file copy of the New FOAPAL.