

EIO Tips and Tricks

Entering/Editing

- You cannot use the EIO for Agency funds (8xxxx) as buyer or seller.
- You cannot use the EIO for State funds (10000) as the seller.
- “Preauthorization” is required for Bear Logic and Warehouse purchases over \$2000 before they will order.
- An EIO number is assigned after you “Save Changes”.
- All FOAPAL information will be validated against Banner when the “Save Changes” button is activated.
- The EIO webpage also validates if an Approval Queue exists for each Fund and Org combination. You cannot save an EIO if the queue does not exist in Banner.
- You can add as many rows as necessary with the “Add Rows” button. If you add a row then don’t need it, just leave blank or blank out all fields.
- When editing an EIO you must tab out of a field to have the “Save Changes” button appear.
- “Reset Form” will reset all fields to the last saved version.
- Date “Submitted to Banner” will be the date used for posting in Banner not the date created.
- You may print your EIO but this is not necessary because the documents are stored electronically for retrieval.
- Emails are used to route the documents back and forth between departments. This is not automatic, you must push the “Route to Ordering” or Route to Supplying” buttons. Please be sure to provide an email address for contact purposes.
- The supplying department will not order items until “Route to Supplying” button is pushed. This will change the status from blank to “Waiting on Supplying”.
- Once the “Route to Supplying” button is pushed you are committing to purchase the items. If this is a special order you may be charged a restocking fee if you change your mind.
- Email addresses are validated against Banner. Be sure to check the listing of preferred email addresses on the Help link.
- Many fields in the EIO webpage will assist you by auto-populating values. You can delete these or clear your cookies to eliminate the auto-populate feature.
- All changes and entries made to the EIO are logged at the bottom of the document.
- When an EIO is completed by both Buyer and Seller it needs to be “Submitted to Banner”.
- It will then require both sides to approve the document through the Approval Queues, even if preauthorized in the web page.

Searching

- The “Search” function will search all text fields except document description.

- “Advanced Search” allows for filtering data on criteria like dates, status and FOAPAL.
- “Search” dates look at date created fields.
- You can sort on any column when viewing active or archived documents.
- The “Information” section at the top can be hidden by clicking the bar. The message will stay hidden for 30 days, or you can click to show again.

Other

- Preauthorizing must be done by person authorized on the queue for the Buyer Fund/Org (this will be validated)
- EIO’s for official functions must have the official function form submitted to Financial Services, Campus Box 44 by the end of each month with the EIO number written on it, or you may attach the document in electronic format by pushing the “Document” button.
- Be sure to read all Pop Up Boxes
- If a document sits in Banner awaiting approvals and the accounting period closes, you will be contacted by your Fund Accountant with procedures.
- Watch the status of the EIO’s until they are “Submitted to Banner”. There are icons to assist you at a glance or this also appears in the Notes section.
- Check junk mail for stray EIO notices.
- Actively watch Approval Alerts and approve documents as soon as possible. Ordering departments may not be aware that there may be several suppliers that need to approve an EIO, based on the supplying side FOAPs. There is an alternative method to use in approving if documents do not appear in the Channel. See approving help sheet.