

Approving Online Purchase Requisitions Reference Guide

Depending on the approval process determined by the department, some requisition creators may also be authorized to submit requisitions without requiring approval from department management. Once the requisition is saved by the creator, it is processed and transmitted to the Purchasing department. Once saved, the requisition *cannot* be retrieved by the creator, nor sent back to the creator by the Purchasing department.

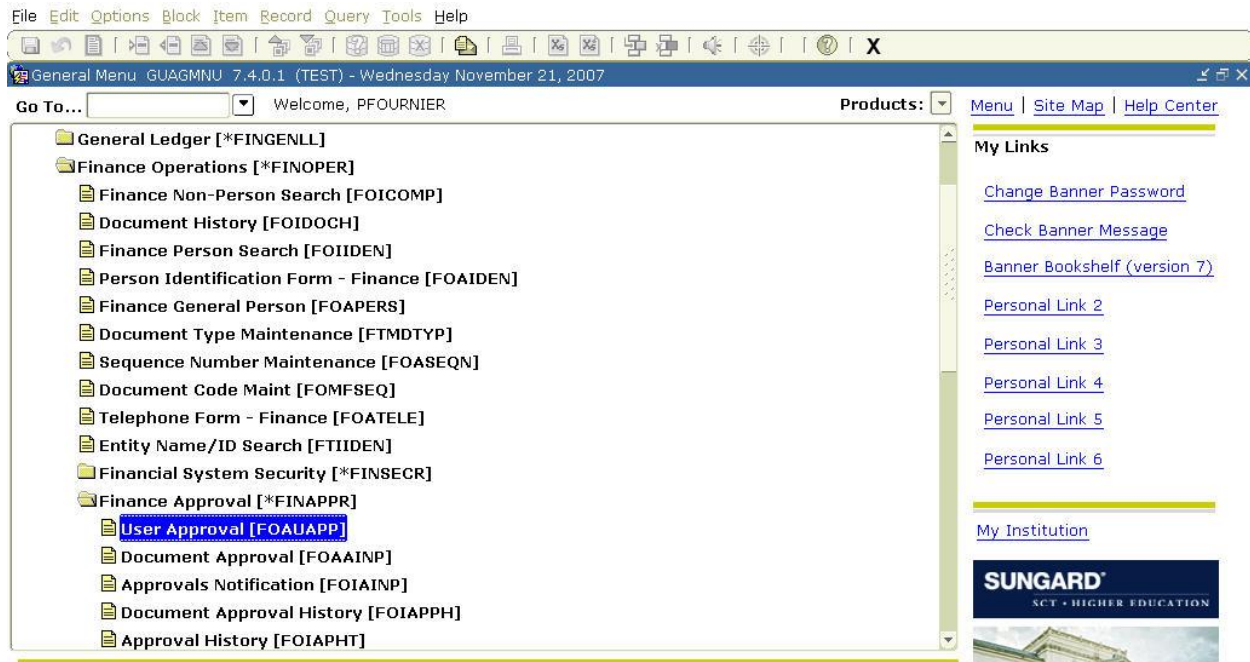
For other departments, the purchase requisition creator is not authorized to purchase without approval. For these departments, an authorized approver must access Banner and approve the requisition before it is sent to the Purchasing department for conversion to a purchase order. The authorized approver may decide not to approve the transaction and return it to the creator unapproved.

Refer to the *Banner 202 - Creating Online Purchase Requisitions User's Guide* for additional information on the requisition process, requisition and purchase order tracking, and general purchasing guidelines.

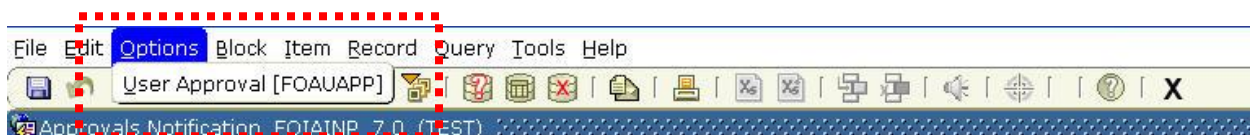
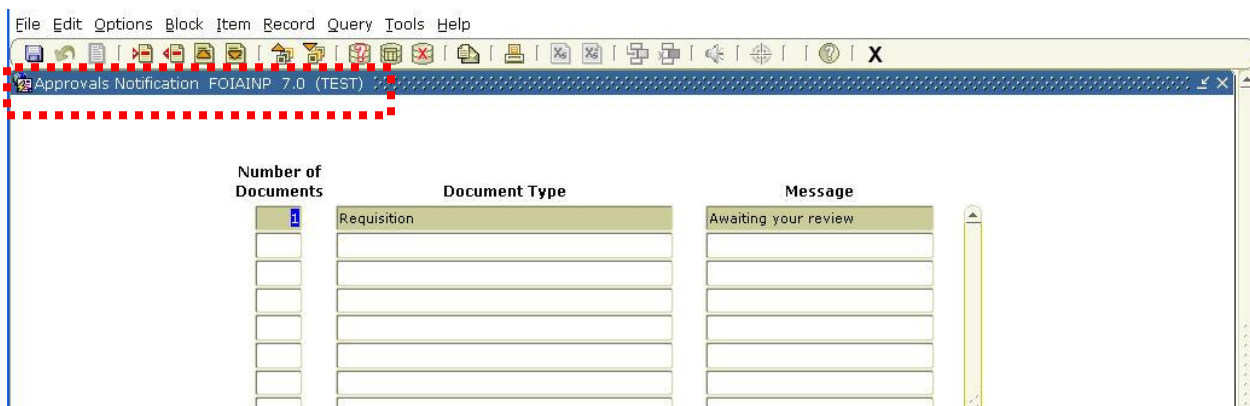
Approving Requisitions

The following provides instructions on approving (or disapproving) purchase requisitions in Banner.

1. Log into Banner INB.
2. From the Banner Main Menu, enter **FOAUAPP – User Approval** in the **Go To** field and press Enter.
 - To navigate using the menu select: Financial > Finance Operations > Finance Approval > User Approval (FOAUAPP)



Note: Upon initial login, if any other form, report, or query is selected, the **Approvals Notification (FOIAINP)** form automatically displays notifying the user that there are documents (requisitions) in queue waiting for approval. Click on **Options** in the menu bar and select **User Approval** from the drop down list to access the **User Approval (FOAUAPP)** form.



3. The **User Approval** form displays. Click on **Next Block** to view all requisitions requiring approval.

File Edit Options Block Item Record Query Tools Help

User Approval FOAUAPP 7.0 (TEST)

User ID: PFOURNIER Patrice Fournier Document: ☒ Next Approver

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
<input type="checkbox"/>	REQ	R0000025	<input type="checkbox"/>	<input type="checkbox"/>	PFOURNIER	2,500.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve: <input type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			

4. Select the desired option (Approve, Disapprove, Detail or Queue).

Note: It is recommended that approvers select the **Detail** option prior to approving or disapproving a requisition. The **Detail** option provides information on what is being purchased, the selected vendor (if applicable), and how the expense will be charged. Refer to Step 7 for instructions on viewing requisitions in the approval queue.

5. **Approve** – This approves the requisition and routes it to the Purchasing department for conversion to a purchase order. Click on the **OK** button in the **Document Approval** dialog box. If desired, notes can be added in the **Document Approval** dialog box.

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
<input type="checkbox"/>	REQ	R0000025	<input type="checkbox"/>	<input type="checkbox"/>	PFOURNIER	2,500.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve: <input type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve: <input type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve: <input type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			

Document Approval FOAUAPP 7.0 (TEST)

Type: REQ Number: R0000025 Submission:

Change Sequence:

DOCUMENT IS APPROVED

OK Cancel

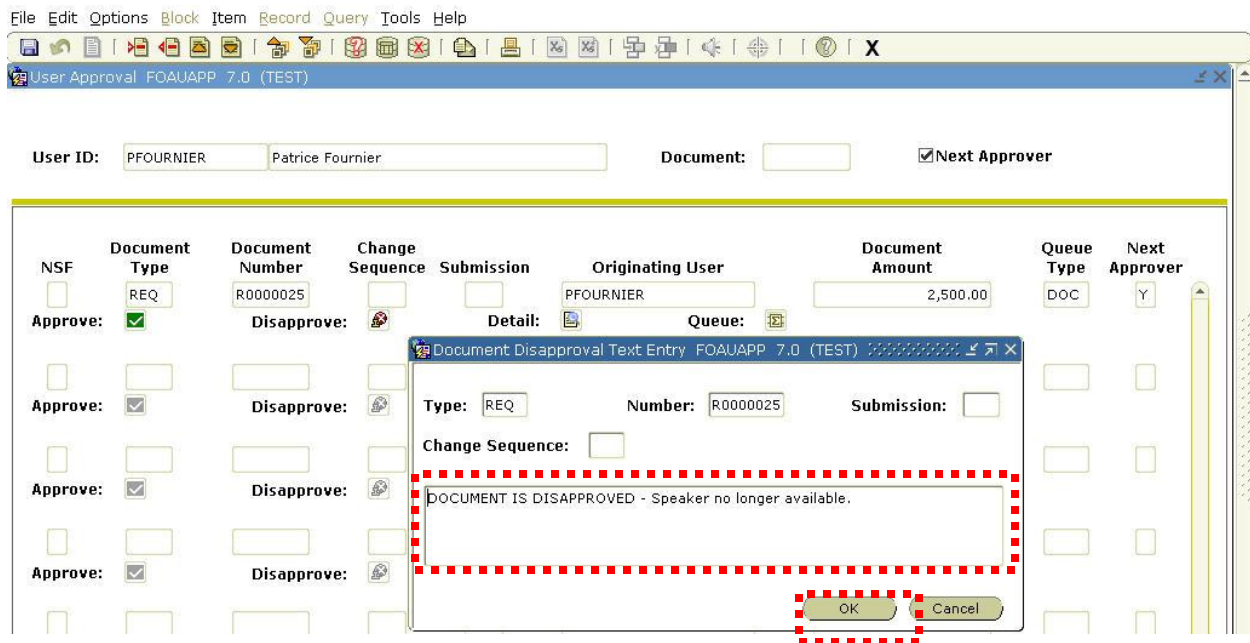
- A confirmation dialog box displays. Click **OK** to complete the approval.



6. **Disapprove** – To disapprove the requisition is to return the requisition to the requisition creator. This process *does not* cancel the requisition. There is an option to enter notes (why the requisition is being returned, corrections to make, instructions to cancel, etc.) on disapproved requisitions.

Note: If a requisition approver disapproves a requisition, the requisition creator is notified and can view any comments (if entered) made by the approver.

- If desired enter any comments in the **Document Disapproval Text Entry** dialog box. Click on the **OK** button to process the disapproval.



- A confirmation dialog box displays. Click **OK** to complete the disapproval.



7. **Detail** - The **Detail** option provides information on what is being purchased, the selected vendor (if applicable), and how the expense will be charged. After viewing the information (using the scroll bars if necessary), click on the **Close** icon (X) to return to the **User Approval** form.

Request: R0000007 Patrice Fournier Number of Items: 2

Line Item Information

Item: Commodity: Document Acctg Distribution Net: 919.98

Vendor: 00513343 Gateway Companies Inc

Accounting Information

Sequence Number	COA	Fiscal Year	Index	Fund	Organization	Account	Program	Activity	Location
1	E	08	100161	120149	71000	71601	30041		
Project:					NSF: N	NSF Override		Amount: 459.99	
2	E	08	200193	135023	43200	71601	50083		
Project:					NSF: N	NSF Override		Amount: 459.99	
3	E	08	100161	120149	71000	71400	30041		
Project:					NSF: N	NSF Override		Amount: .00	

8. **Queue** – This option provides a description of the approval queue the requisition was sent to. Some approvers may have multiple queues. After viewing the information (using the scroll bars if necessary), click on the **Close** icon (X) to return to the **User Approval** form.

File Edit Options Block Item Record Query Tools Help



Document: R0000025

Type: REQ

Change Sequence:

Submission:

Queue ID	Queue Description	Queue Level	Approval Level
710A	INFORMATION RESOURCES	1	+

Queue	Level	User
710A	1	Patrice Fournier

+ Indicates what will be approved

In suspense:

Detail:

Approve:

Disapprove: