

## 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.

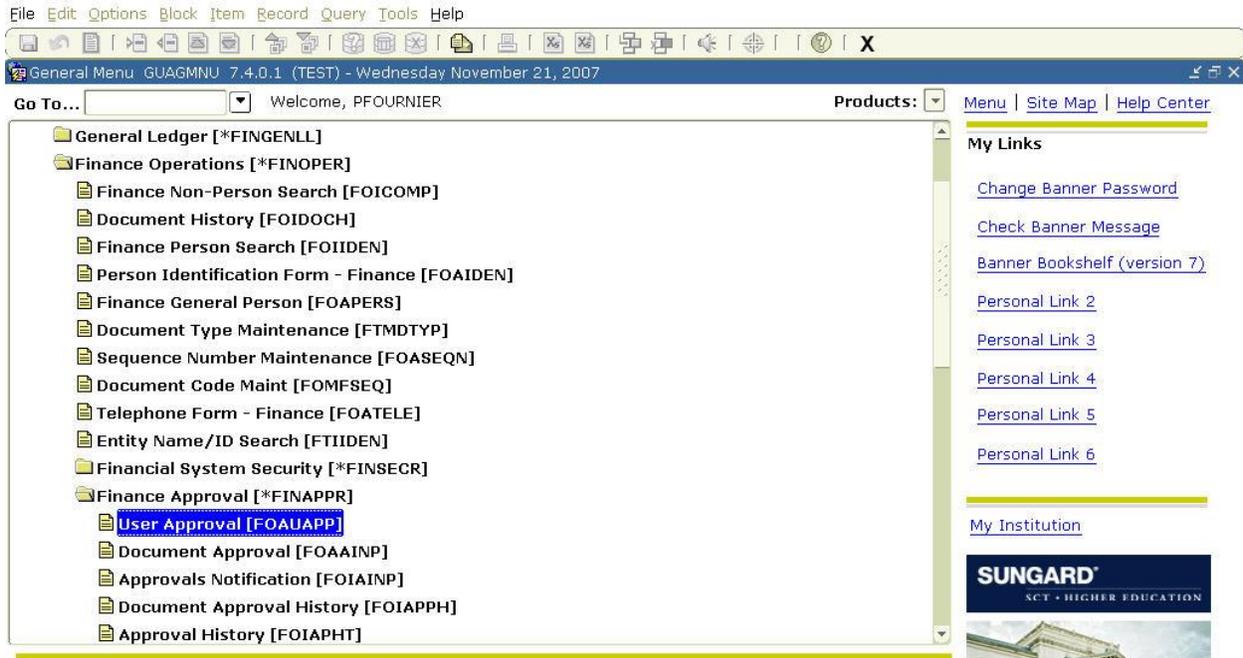
For other departments, the purchase requisition creator is not authorized to purchase without approval. For these departments, an authorized approver must access Banner and approve the requisition before it is sent to the Purchasing department for conversion to a purchase order. The authorized approver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

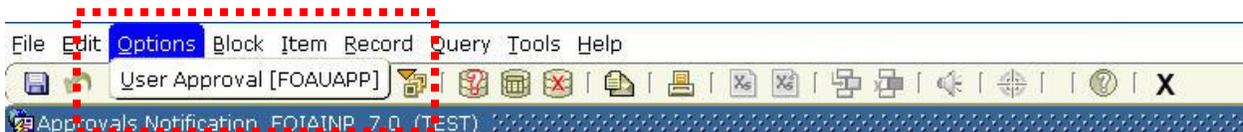
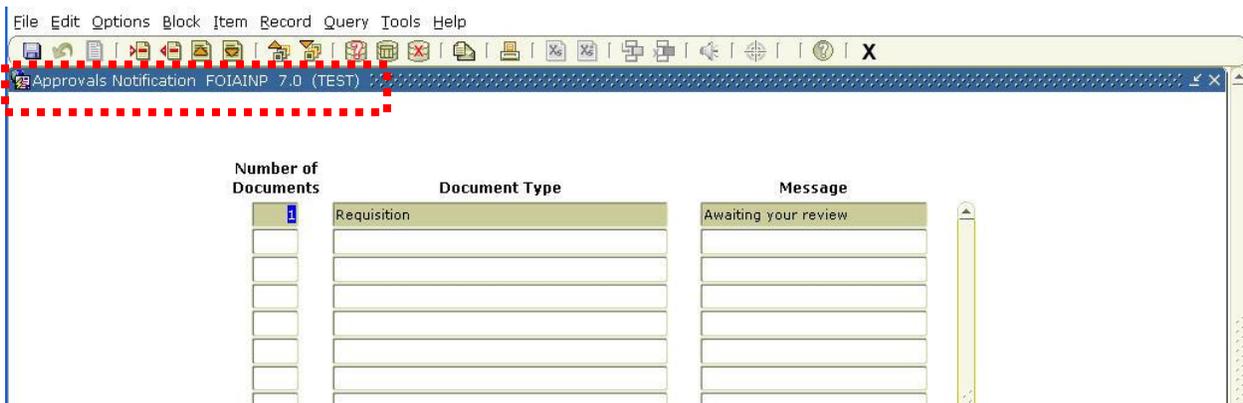
### ***Approving Requisitions***

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

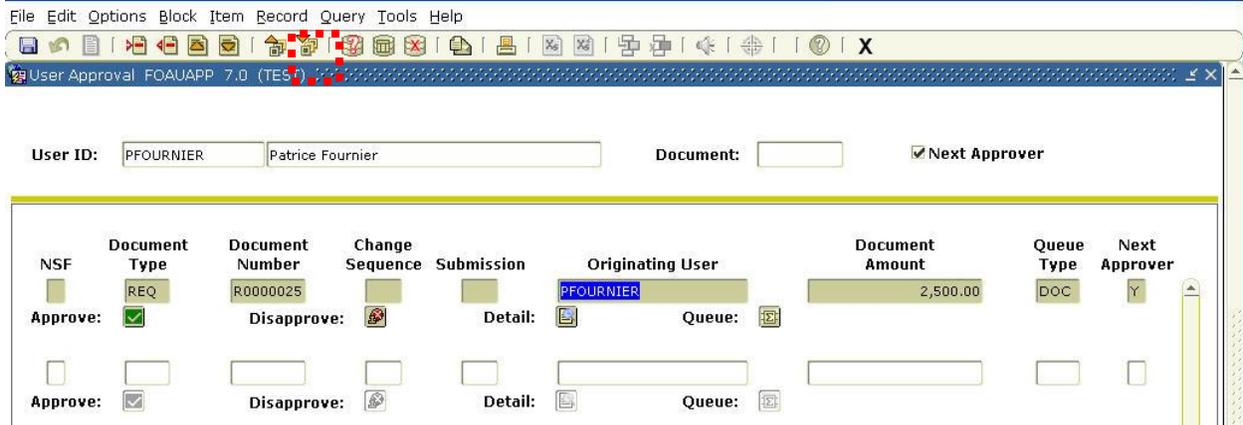
1. Log into Banner INB.
2. From the Banner Main Menu, enter **FOAUAPP – User Approval** in the **Go To** field and press Enter.
  - To navigate using the menu select: Financial > Finance Operations > Finance Approval > User Approval (FOAUAPP)



**Note:** Upon initial login, if any other form, report, or query is selected, the **Approvals Notification (FOAIINP)** 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.



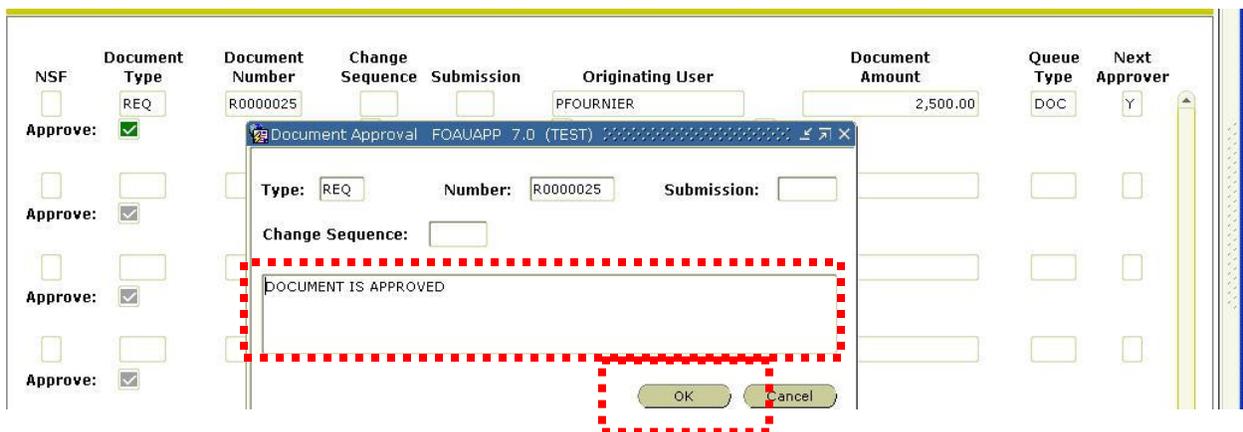
3. The **User Approval** for displays. Click on **Next Block** to view all requisitions requiring approval.



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.



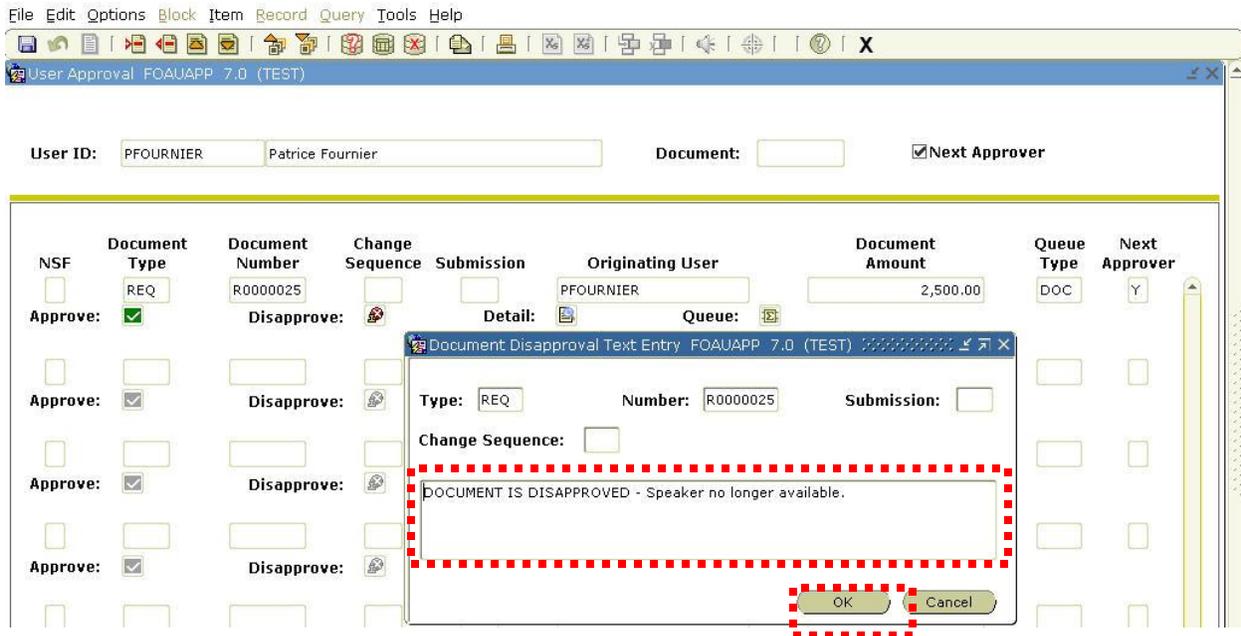
- A confirmation dialog box displays. Click **OK** to complete the approval.



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.

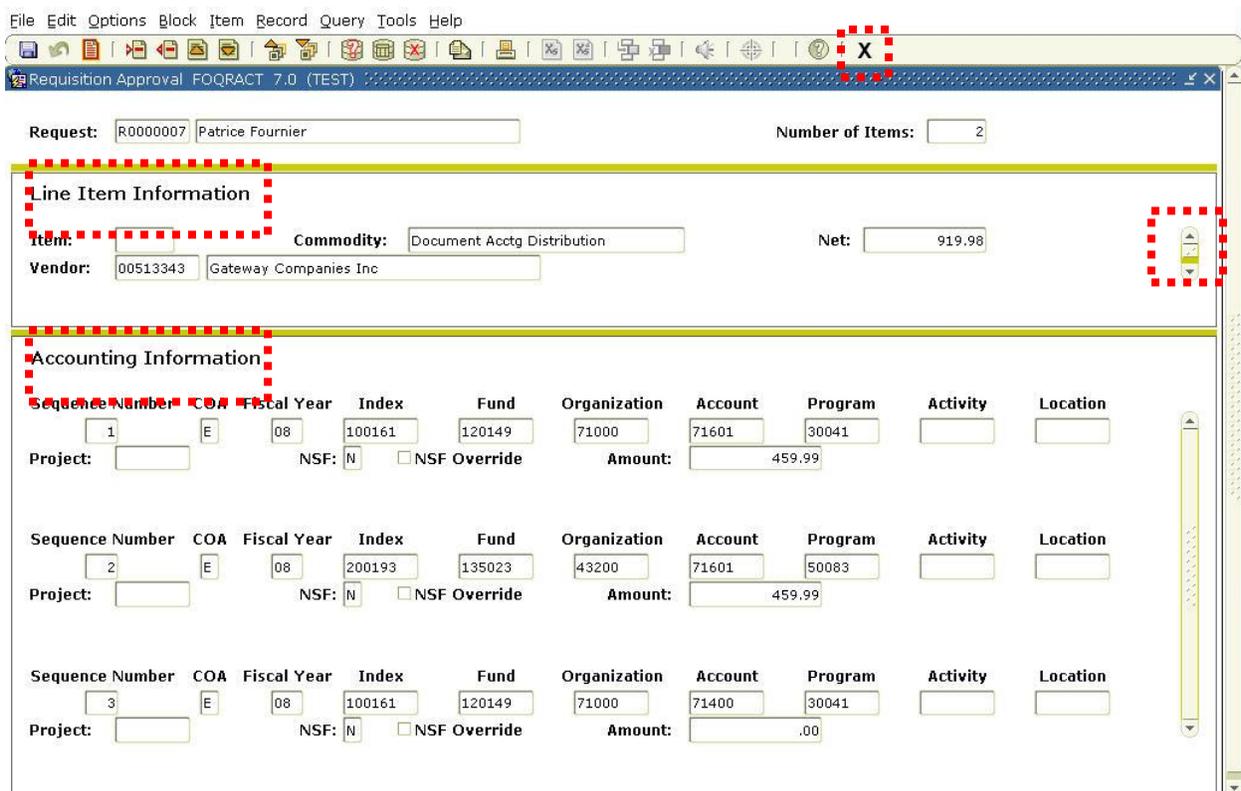
- If desired enter any comments in the **Document Disapproval Text Entry** dialog box. Click on the **OK** button to process the disapproval.



- 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.



- 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.

