

Business Rules

- Completion and approval of a requisition does not authorize a purchase. A purchase order is the official procurement document for the university and must be issued and signed by the President, Vice President for Business Affairs, Purchasing Director or Senior Buyer before an order can be placed. Orders placed in violation of this rule are considered non-compliant.
- Requisitions with Insufficient Funds (NSF) should not be approved by the account manager.
- All requisitions must be approved by the appropriate account manager unless specific delegations have been granted by the Purchasing Director.
- Requisitions with a total cost of \$1,000 or more for furniture, equipment and/or software must be approved by the appropriate vice president after approved by the account manager.

Rio Grande College only

- All requisitions totaling \$1,000 or more must be approved by the Vice President for Rio Grande College after approved by the account manager.

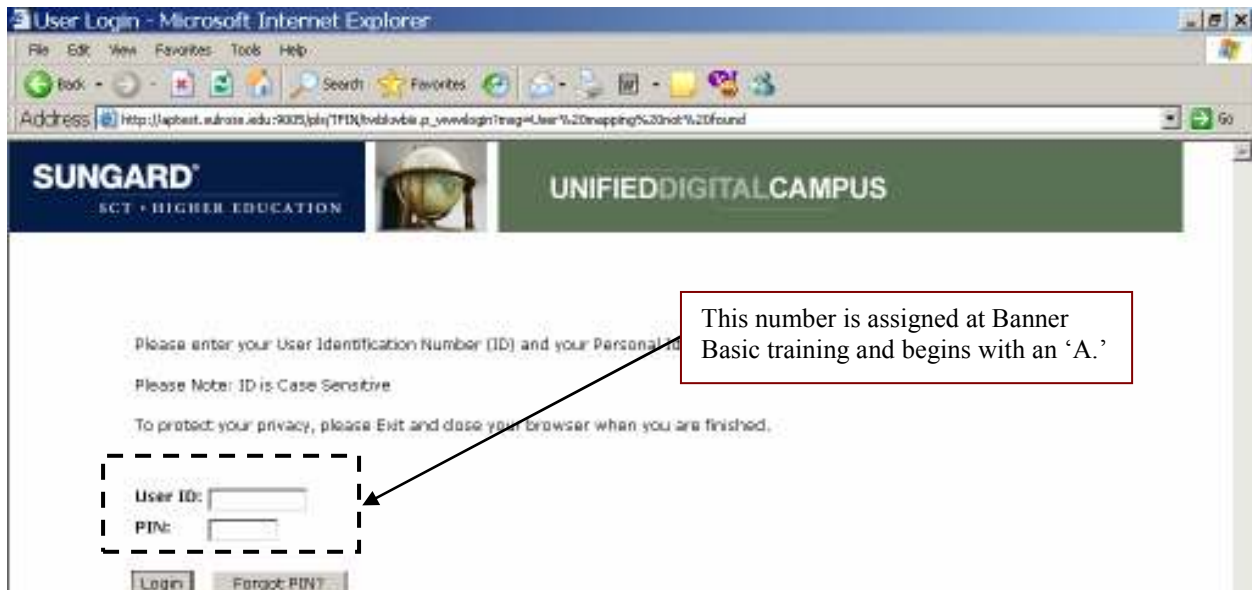
Approving a Requisition

Approving through Self-Service

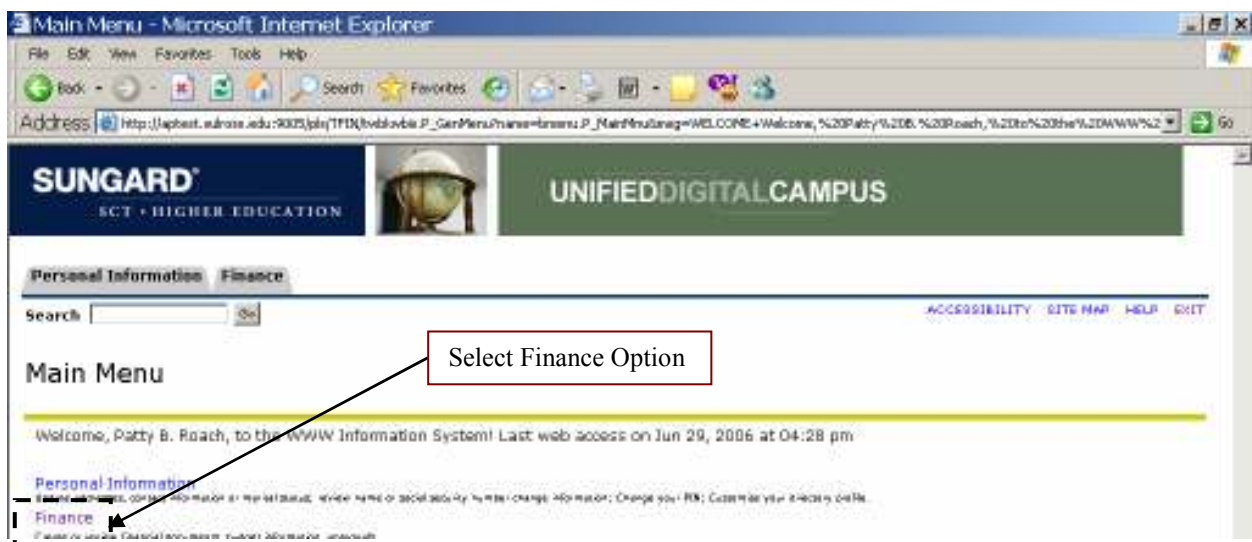
All requisitions must be approved by the appropriate person before a purchase order can be created. Completion and approval of a requisition does not authorize a purchase. A purchase order is the official procurement document for the university and must be issued before an order can be placed.

Requisitions may be approved through Banner Self-Service.

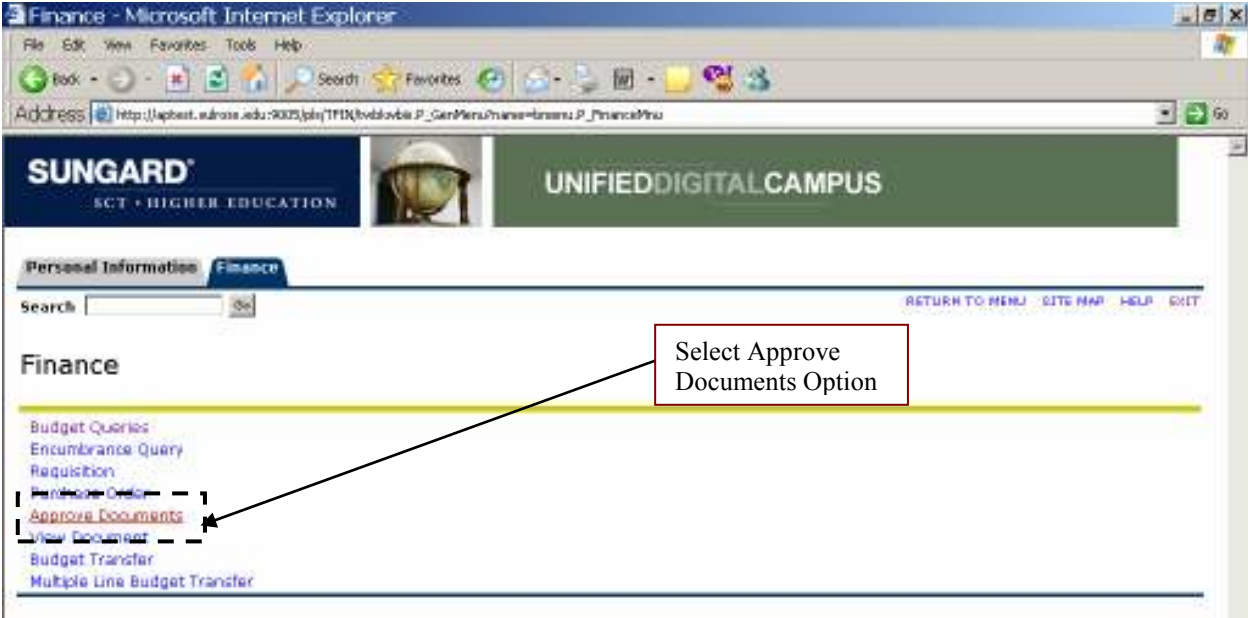
1. Log on to Banner Self-Service using your user ID and PIN.



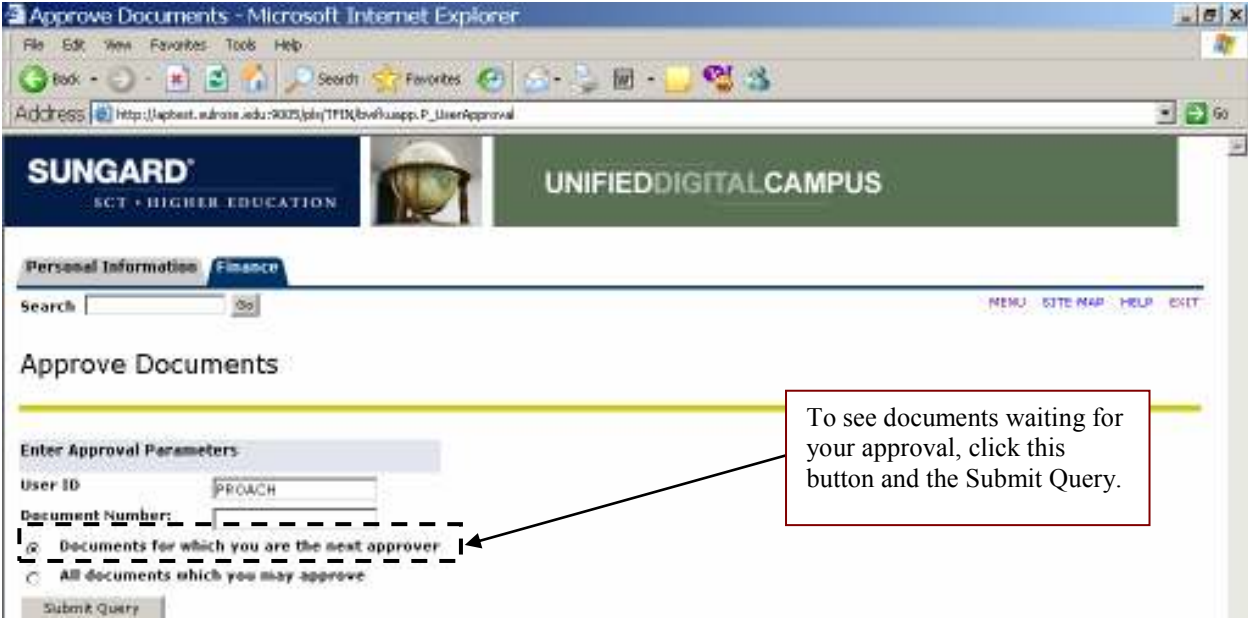
2. Select Finance from the Main Menu



3. Select 'Approve Documents' from the Finance Menu.



4. Select 'Documents for which you are the next approver' and hit the Submit Query button.



Approving a Requisition

- Banner will display a list of documents for you to approve. The list will show if you are the next approver, NSF status, originator and amount.

NSF Status:
Documents with a 'Y' should not be approved.

Document Number

Approve Documents List

Next Approver	Type	NSF	Change	Seq#	Sub#	Originating User	Amount	Queue Type	Document Number	History	Approve	Disapprove
Y	REQ					JWOLF	39.66	DOC	R0000077	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	NSF	R0000089	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	NSF	R0000090	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	NSF	R0000091	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	DOC	R0000099	History	Approve	Disapprove
Y	REQ	Y				JWOLF	138.00	DOC	R0000103	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	DOC	R0000121	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	DOC	R0000122	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	DOC	R0000171	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	DOC	R0000172	History	Approve	Disapprove
Y	REQ	Y				SNEVILLE	1,100.00	DOC	R0000173	History	Approve	Disapprove

- Review the document by clicking on the document number link.

7. Banner will display a screen that provides more information about the requisition.

The screenshot shows the SUNGARD UNIFIED DIGITAL CAMPUS interface. The page title is "View Document". The requisition number is R0000099. The origin is BANNER. The requisition is marked as "Complete: Y" and "Approved: N". The vendor is IBM Corporation. The requisition commodities table shows one item: "Test approval process:EA" with a quantity of 1 and a unit price of 1100. The requisition accounting table shows one sequence with a total amount of 1,100.00. The NSF flag is set to N.

Annotations:

- Requisition Number: R0000099
- Complete/Approved Flags: Complete: Y, Approved: N
- Vendor: IBM Corporation
- Description, Qty, Cost: Test approval process:EA, 1, 1100
- FOAPA: NSF
- NSF Flag – Do not approve document if flag is set to Y.

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0000099	May 15, 2006	May 15, 2006	May 15, 2006		1,100.00

Item	Commodity Description	U/M	Qty	Unit Price	Ext Amount	Tax	Cost
1	Test approval process:EA		1	1100	1,100.00		1,100.00
				.00	.00	.00	1,100.00
					Total:	1,100.00	

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prg	Actv	Locn	Prj	NSF	Susp	NSF	Over	Susp	Amount
1	S	06		232421	120271	73780	50				Y		N			1,100.00

Approving a Requisition

- Return to the list by clicking your browser's Back button. You may want to select the **History link** prior to approving or disapproving the requisition. This will display the approval history of the document.

Document Identification
 Document Number: R0000072 Type: Requisition
 Originator: PROACH Patty Roach

Approvals required

Queue Description	Level	Approvers
0150 PATTY ROACH CAP 2		Cesario Valenzuela

Approvals recorded

Queue	Level	Date	User
0150	1	May 16, 2006	Patty Roach

- Select either approve or disapprove next to the requisition number.

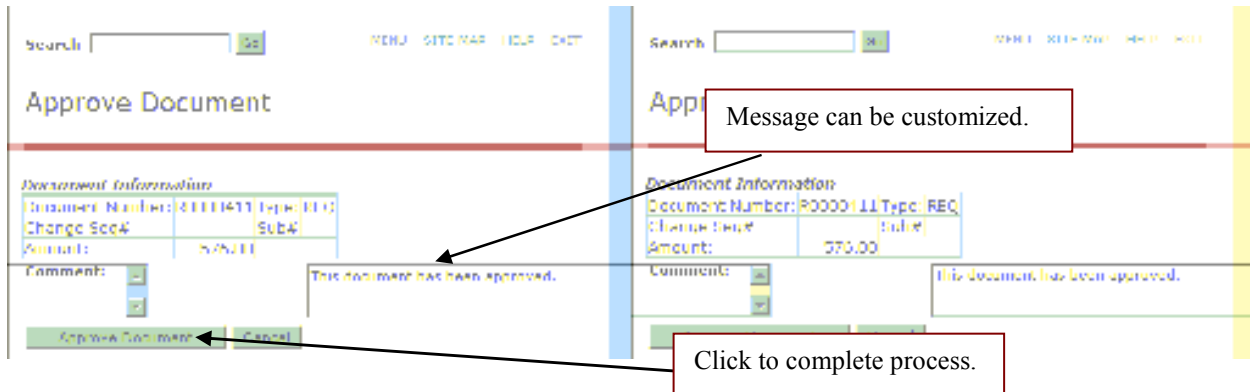
Select the Document Number link to display the details of a document. Select the History link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters
 User ID: PROACH Patty Roach
 Document Number:
 Documents Shown: Next Approver

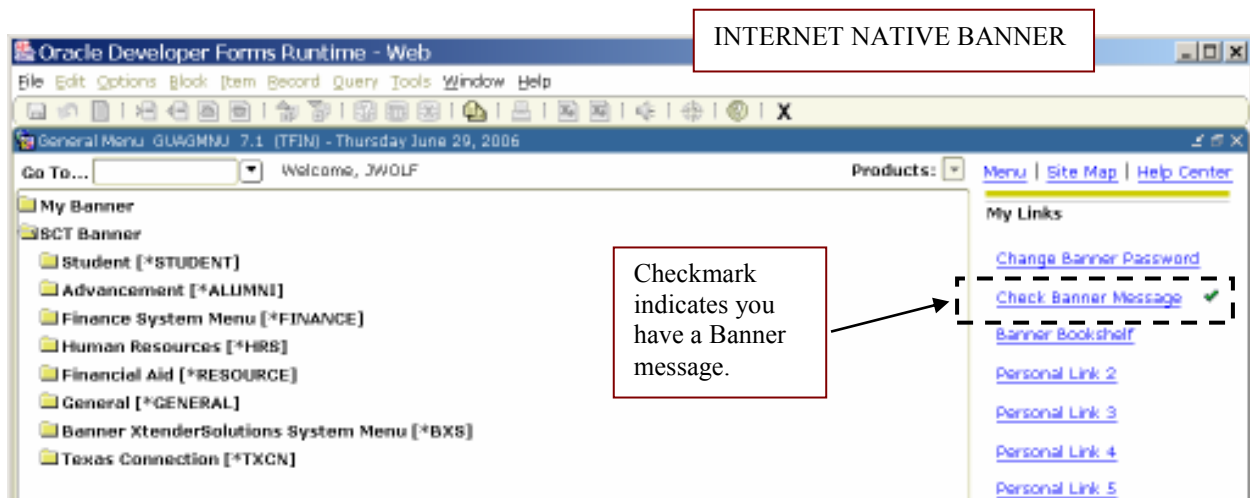
Approve Documents List

Next Approver	Type	NSF Change	Seq#	Sub#	Originating User	Amount	Queue	Type	Document	History	Approve	Disapprove
Y	REQ				JWOLF	39.66	DOC	R0000077	History	Approve	Disapprove	
Y	REQ	Y			SNEVILLE	1,100.00	NSF	R0000089	History	Approve	Disapprove	
Y	REQ	Y			SNEVILLE	1,100.00	NSF	R0000090	History	Approve	Disapprove	
Y	REQ	Y			SNEVILLE	1,100.00	NSF	R0000091	History	Approve	Disapprove	
Y	REQ	Y			SNEVILLE	1,100.00	DOC	R0000099	History	Approve	Disapprove	
Y	REQ	Y			JWOLF	138.00	DOC	R0000103	History	Approve	Disapprove	

10. Banner will display a default message that you may modify.
11. Select the Approve/Disapprove button to complete the process.



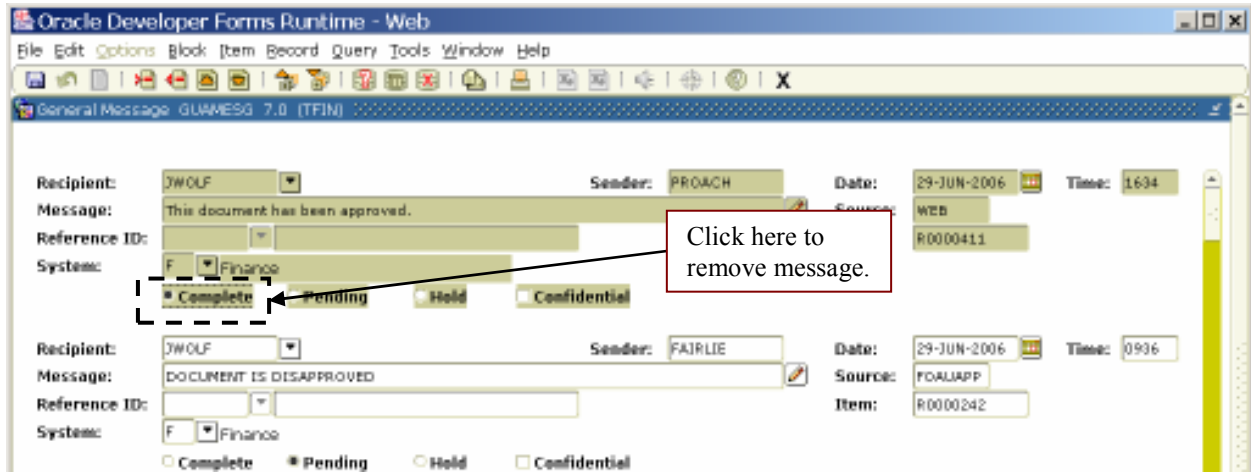
12. Banner sends a message to the requisitioner's originator in **Internet Native Banner**. The 'Check Banner Message' link will be flagged.



13. Click on this link to view messages.

Approving a Requisition

14. After document has been handled, select the **Complete** button to remove the message.

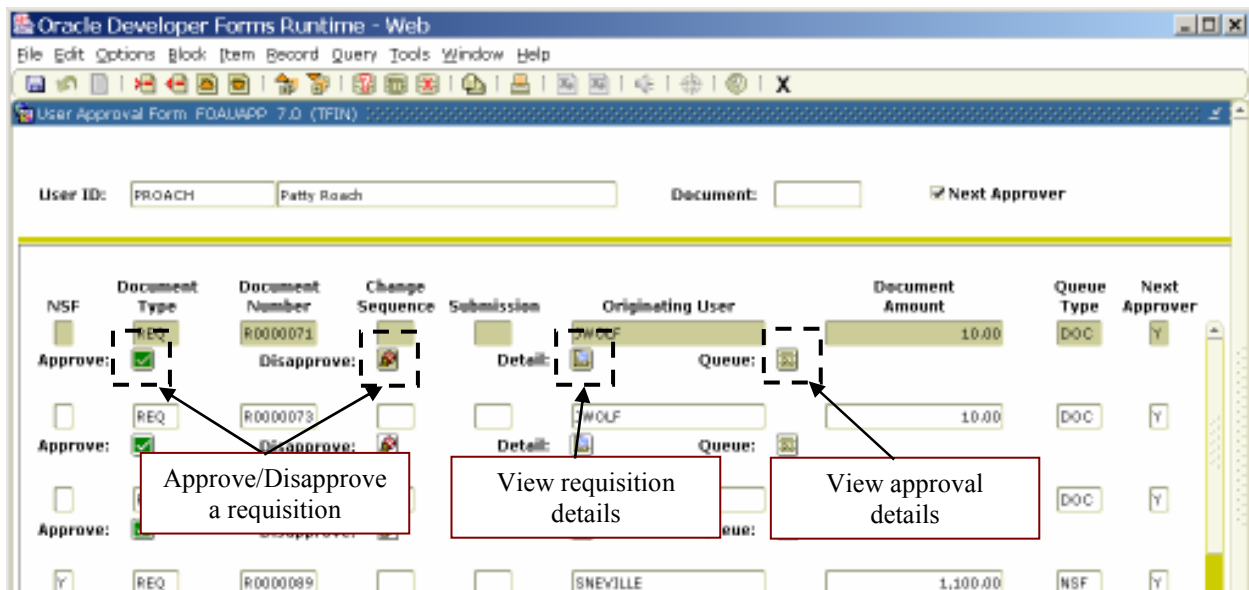


Once you have approved or disapproved a document, Banner will send a message to the requisition's originator. If the requisition requires an additional approval, send an email to the next approver that tells them there is a requisition awaiting their approval. Most users will not access Banner on a daily basis and may not see Banner messages in a timely manner.

Approving through Internet Native Banner

Requisitions can also be approved in Internet Native Banner on the User Approval Form (FOAUAPP). When you navigate to this form, your user ID will automatically default and the Next Approver box will be checked. Select Next Block. This will bring up a list of requisitions for which you are the next approver. (To see all requisitions you must eventually approve, uncheck the next approver box.)

From this screen, you can approve or disapprove a document. You can also choose to view details about the requisition and its approval history.



Once you have approved or disapproved a document, Banner will send a message to the requisition's originator. If the requisition requires an additional approval, send an email to the next approver that tells them there is a requisition awaiting their approval. Again, most users will not access Banner on a daily basis and may not see Banner messages in a timely manner.