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Overview

Banner is the administrative software system for Stephen F. Austin State University. Banner is an integrated system for Finance, Human Resources, Financial Aid, and Student. Information is shared between the various systems, eliminating the need to duplicate data entry.

Accessing Banner

Banner Admin is the current version of the Banner software system used by SFA. It is supported by all browsers and utilizes Single Sign On (SSO).

Log in to Banner Admin by using your mySFA user name and domain password by going to the Banner white pages.

Banner White Page at http://banner.sfasu.edu/, or

Faculty-Staff webpage http://www.sfasu.edu/info-for/faculty-staff
Banner Production

Banner Admin (Banner 9)

Note: Chrome or Fire Fox Recommended. Banner Admin (Banner 9) supports all browsers.

Off-campus users must run the SFASU VPN for access. Click here for more information.

For technical support issues, please contact the Help Desk at 936-468-1212.

Online Services (Self-Service Banner)

This link will take you to mySFA where you will login, click the myServices Tab, and click on Online Services.

Internet Native Banner (INB) Limited functionality

Internet Native Banner (INB Displays Larger Font Size) Limited functionality

Note: Not supported after Jan 1, 2019. When using Banner INB you will need to use IE.

Other software products for use with Banner [PROD]

You must have separate login access to use these products.

Application Manager Scheduling Link

WebFOCUS 8 Reporting Login

WebFOCUS 8 Instructions Document

Banner Documentation

Banner 8 Bookshelf

Guidelines for Data Standards, Data Integrity and Security

ONLINE SERVICES (Self-Service Banner, or SSB) is used for front-end viewing and approving Requisitions and view purchase orders
Definitions

Procurement Related Definitions

**Cancel** - leaves document in Banner but produces an audit trail showing when and why a document was cancelled

**Complete Requisition** – a requisition that has been completed and is submitted to the approval process

**Delete** – completely removes document from Banner as if it never existed

**Encumbrance** – funds are encumbered (set aside) for payment of a purchase after a requisition is completed. The encumbrance transfers from the requisition to the purchase order when the purchase order is complete and approved, at which time the requisition is closed

**Error/Action Messages** – appear in the top right hand corner to provide information about the success or failure of the action attempted.
Green = success. Yellow = warning. Red = error

**FOAP** – Fund = identifies the source of funds (E&G, HEF, O&M, etc.)
  - Organization = identified the department
  - Account = defaults from the commodity code; do not change
  - Program = identifies general use (instruction, institutional support, etc.)

**Incomplete Requisition** – a requisition that has been started but not completed, or has been disapproved and returned for correction by an approver

**Online Services** – known as Self Service Banner (SSB) and used for friendly front-end viewing and approving of requisitions and viewing purchase orders

Banner Related Definitions

**GO** – activates the page

**Next Section/ Previous Section** – moves between sections or tabs on a page

**Related** – contains access to Item text or Document text

**Search/Lookup** – quickly search for a value for a field (use basic or advanced filters)

**Start Over** – roll back feature to return to initial page header

**Tools** – contains access to Expanded or Compact mode, and other Banner functions
Banner Admin Navigation

1) **Menu icon:** Provides access to Banner and my Banner Menu. Click the icon to open or close the menu. See section on *Setting up My Banner Menu*.

2) **Search icon:** Find pages using key words or the seven letter identifier. *Results display after entering three letters*

3) **Recently Opened icon:** View a list of recently opened pages and forms. The number on the folder shows a count of opened pages.

4) **Dashboard:** Click to return to the Landing Page from any page

5) **Sign Out icon:** Click to log out of the application.

6) **Help icon:** View online help for Banner Admin applications. Only *active when a page is open*.

7) **Search for pages using key words or the seven letter identifier.**

8) **Keyboard Shortcuts:** Click the link to see a list of keyboard shortcuts used to navigate the landing page. With the exception of **Sign Out**, use these keyboard shortcuts like a toggle switch to open and close the specific page element.
Creating a Requisition

- Access Banner Admin from the Banner white pages, http://banner.sfasu.edu/
- Open the Banner page FPAREQN from the Search bar
  - enter the page name FPAREQN and hit Enter on your keyboard, or
  - begin typing requisition and choose Requisition (FPAREQN) from the drop down list

There are 4 sections of information within FPAREQN. Each section will be covered below.
- Requestor/Delivery Information
- Vendor Information
- Commodity/Accounting
- Balancing/Completion
**Requestor/Delivery Information**

- **Order Date**: defaults to the current date; do not change
- **Transaction Date**: defaults to the current date
  - do not change this date unless creating a requisition for the NEXT fiscal year
  - Procurement will advise departments when the next fiscal year is open
- **Delivery Date**: click the calendar to choose the desired or anticipated delivery date
- **Requestor**: field will auto populate with the information of the person entering the requisition; if needed, change to the person who should be contacted for any questions regarding the requisition or purchase
- **Ship To**: address listed is the default ship to address for the person entering the requisition; use the Search icon to change as needed
- **Attention To**: default information from the selected Ship To address; this name may be typed over and updated if needed

- **Click Next Section** or click the tab name to advance to Vendor Information
**Vendor Information**

- **Vendor**: Select vendor or leave blank if vendor is not set up in Banner
  - Click the **Search** icon if vendor is known, or to recommend a vendor
  - Select **Entity Name/ID Search**

- Search proper names in the Last Name and/or First Name fields
- Search company names in the Last Name field
- Basic filter is the default setting; click to use Advanced filter
  - Basic filter uses % as the wildcard operator
  - Advanced filter uses drop down menus to choose the operator
- Case Insensitive Query is the default setting for all searches
OR

- Click **GO** to return the results of the search
- Click once on the desired Vendor and click SELECT, or double click to choose
- Terminated vendors can’t be chosen

Add **Document Text** to give the Procurement purchaser additional information about the selected vendor, if needed (see section titled **Document Text**).
DOCUMENT TEXT

✓ Used to provide additional information to Procurement about the entire purchase:
  - recommended vendor name, address, phone, etc., if vendor isn’t in Banner
  - deadline dates, specific contact person, funding information, etc.
  - lines can’t be blank; use dashes (----) if separation is needed
  - click RELATED
  - choose Document Text

  - click GO to populate the entry field
  - begin typing desired text
    - for additional lines, use down arrow key on keyboard, or Insert
    - use Delete to remove unwanted lines
  - Click SAVE and then EXIT the text form

✓ Click Next Section or click the tab name to advance to Commodity/Accounting
COMMODITY/ACCOUNTING

Commodity

- Commodities are chosen for each item to be purchased
- **Only** select commodities that begin with '000P'
- **DO NOT** choose commodities that begin with '000Z' (for Procurement use only)
- **DO NOT** choose commodities that are all numeric (for Central Store use only)
- **Always** search using the **Description field** search tool
  - tab into the Description field
  - click on the Search icon
  - type the search criteria in the Search Value field
  - click GO

- review the displayed results; you may click **Start Over** to try again
- click **Select** or double click to choose the desired commodity
  - choose only commodity codes that begin with '000P'
  - if the desired commodity is not found choose the closest matched commodity; adjustments will be made by Procurement
The Commodity Code, Description and Unit of Measure are returned to the line item of the requisition. Tab to enter subsequent fields.

- **U/M** – defaults from the commodity; change if needed by using the Search icon to select from a list
- **Quantity** – enter the desired quantity
- **Unit Price** – enter the desired unit price (must be a value greater than $0)
- **Extended Amount** – this amount will automatically calculate
- **Discount** – enter a discount amount associated with this line, if applicable and known, such as a trade-in amount, etc.
- **Additional** – this field is no longer used for freight charges
  - use the last line of a requisition to enter freight charges
  - use the appropriate FREIGHT commodity code for the freight cost

Tab again to return to the commodity field.

Item Text must be added for each line item on the requisition to provide specific information about the item you want to purchase. Item text is entered in the same manner as Document Text.

- click **RELATED**
- choose **Item Text**
- click **GO** to populate the entry field
- begin typing desired brand and model, color, sizes, the 5 W’s for food purchases, trade-in information, or any specific information about the item
- add additional lines with down arrow key or **Insert; Delete** lines if needed
- click **SAVE** and then **EXIT** the form
COMMODITY/ACCOUNTING

Accounting

✓ IMPORTANT NOTE: Accounting for each commodity line item must be entered BEFORE adding a new line item
✓ Click Next Section to navigate to the Accounting section from the Commodity section
✓ Fund, Orgn, Acct, and Prog fields populate from the user’s default information
  o Fund, Orgn, and Prog may be changed, if needed
  o Acct – DO NOT CHANGE the account code; it will populate based on the commodity selected
    ▪ additional approvals are required for certain account codes
    ▪ changing the account code could delay the purchasing process until the additional approvals are acquired or a new requisition is entered

✓ Accounting information may be entered in one of three ways: Single FOAP, Multiple FOAPs with a designated Amount for each FOAP, and Multiple FOAPs with a designated Percentage for each FOAP
  o IMPORTANT NOTE: Multiple FOAP entry with designated amounts cannot be mixed with multiple FOAP entry with designated percentage amounts

1) Single FOAP – the line item is to be charged to the entered FOAP
   ▪ tab through all fields until the cursor returns to the COA field
   ▪ click Previous Section to return the Commodity section to add additional commodity lines by using Insert or the down arrow key on your keyboard
   ▪ or, click Next Section to navigate to Balancing/Completion
2) **Multiple FOAPs with a designated Amount** for each FOAP

- tab to the Extended Amount USD field on the first FOP sequence
- enter the designated amount to be charged to that FOP
- tab through the fields until the cursor returns to the COA field
- add an additional FOP sequence by using the Insert icon, or down arrow key on your keyboard
- enter the next unique FOP and its designated amount in the Extended Amount USD field
- Extended Amount on the last FOP sequence will automatically calculate when tabbing through the fields
- a red error will populate in the top right corner if accounting amounts are not equal to the commodity amount
- click Previous Section to return the Commodity section to add additional commodity lines (use Insert or down arrow key)
- or, click Next Section to navigate to Balancing/Completion

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<th>Field</th>
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<th>Acct</th>
<th>Org</th>
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<td>Commodity Total</td>
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</tr>
<tr>
<td>Remaining Commodity</td>
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**Sequence 3** $35

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**DO NOT CHANGE ACCOUNT CODE**
3) **Multiple FOAPs with a designated Percentage for each FOAP**
   - tab to the Extended Amount % field on the first FOP sequence
   - click to check the box to indicate a percentage will be entered
   - enter the **percentage** to be charged to that FOP, i.e., 20, 25, 50, etc. in the Extended Amount USD field
   - tab through the fields until the cursor returns to the COA field
     - tabbing through populates the Extended Amount calculated from the commodity amount and the percentage entered
   - use Insert or down arrow key to add an additional FOP sequence
   - enter the next unique FOP, check the % box, and enter the designated percentage in the Extended Amount USD field
   - **Extended Amount** on the last FOP sequence will automatically calculate when tabbing through the fields
   - click Previous Section to return the Commodity section to add additional commodity lines (use Insert or down arrow key)
   - or, click Next Section to navigate to Balancing/Completion

![Image of spreadsheets showing accounting entries and calculations]
BALANCING/COMPLETION

When all commodity lines and all accounting information have been entered:

✔ Click **Next Section** from the Commodity/Accounting page

✔ If everything is in balance, this form will display the same dollar amount in the **Input**, **Commodity** and **Accounting** fields listed on the bottom part of the form, and the **Status** field will indicate BALANCED.

✔ When all amounts match and the Status is BALANCED, click the **Complete** icon.
  o **NOTE**: No changes can be made once the requisition has been completed. The requisition must be disapproved by an approver to return for correction.

✔ If the Status is not balanced, return to the Commodity/Accounting section to review the entered amounts. Make corrections as needed.
  o It may be necessary to tab through all fields in the Accounting section for the requisition to balance.

✔ The requisition can be viewed by accessing Online Services (Self Service Banner) while entering the requisition, or any time after completion. The completed requisition may be viewed from a Banner Admin page, FPIREQN. See section on **Viewing A Requisition**
Viewing A Requisition

Requisitions can be viewed by accessing Online Services (Self Service Banner), or from a Banner page, FPIREQN. Also see section Viewing Documents in Online Services.

Accessing Online Services (Self Service Banner)

- Log into mySFA
- Click on the Budget & Finance tab
- Choose View Document

- Enter the Requisition number
  - click View document to view the requisition
  - click Approval history to view the status of approvals for the requisition
Viewing a Requisition in Banner Admin

- **FPIREQN** is a query only Banner Admin page
- Enter **FPIREQN** from the landing page in Banner Admin

1. Type the requisition number to be viewed
2. Click **GO**
3. Use Next Section or Previous Section icons to navigate the sections within FPIREQN

- Document Text and Item Text can be viewed by utilizing the **RELATED** icon

Users will most likely prefer to view requisitions in Online Services to view the entire document at one time.
Copying A Requisition

A new requisition may be created by copying an existing requisition that has been completed, approved, and posted.

 vej Open Banner Admin
 vej Type FPAREQN and enter
 vej Click Copy

✓ Enter the number of the requisition to be copied
✓ Tab to display the Vendor to verify the correct requisition number was entered

✓ Click OK to continue
✓ All information, except the dates, will populate from the copied requisition (including Document Text and Item Text)
✓ The Order Date and Transaction Date will be the current date. Update the Transaction Date ONLY IF you are creating a requisition for the next fiscal year.
✓ Enter a Delivery Date
✓ Navigate the remainder of the requisition reviewing all fields for accuracy.
✓ Update information accordingly
✓ Refer to the Creating a Requisition section for assistance regarding FPAREQN
Changing A Requisition

Changes to a requisition can only be made if the requisition is incomplete, or has been disapproved by the creator of the requisition or an Approver in the approval queue.

No changes can be made if all approvals have been made. Contact your purchaser in Procurement to discuss changes that need to be incorporated into the Purchase Order. The requisition can also be cancelled. See section on Canceling/Deleting a Requisition.

- **Accessing an Incomplete requisition from FPAREQN**
  - Enter the requisition number to be changed, ex: R0067500
    - the exact number must be entered or a new requisition will be created, or the wrong requisition will opened if it is not complete
  - Make necessary changes to the requisition
  - Complete the requisition

- **Disapproval of a requisition by the creator**
  Disapproval by the creator may only be done if the requisition has not been approved by an Approver. The creator can disapprove the requisition via Online Services or Banner Admin page FOADOCU.

  **Disapproving via Online Services (Self Service Banner)**
  - Log into mySFA
  - Click on the **Budget & Finance** tab
  - Choose **Approve Document**
  - Click the radio button next to **All documents which you may approve**
  - Click **Submit Query**
  - Only requisitions that you created will be displayed
  - Click **Disapprove**
  - Return to Banner Admin
  - Go to FPAREQN
  - Enter the requisition number
  - Make necessary changes to the requisition
  - Complete the requisition
Disapproving via Banner Admin page FOADOCU

✓ Go to Banner Admin
✓ Type FOADOCU and enter
✓ Enter the requisition number in the Document field, or leave blank to see all documents
✓ Click GO

✓ Click on the icon below Deny Document
✓ Requisition will be denied and changes made in FPAREQN

✓ Return to Banner Admin
✓ Go to FPAREQN
✓ Enter the requisition number
✓ Make necessary changes to the requisition
✓ Complete the requisition

❖ Disapproval of a requisition by an Approver in the approval queue
Determine if the requisition has been approved through Online Services or by viewing pending approvers in Banner Admin page FOAAINP.

Online Services
  o Log into mySFA
  o Click on the Budget & Finance tab
  o Choose View Document
  o Enter the requisition number
  o Click on Approval history
If no approvals have been recorded for the requisition, then the creator may deny the requisition (see Disapproval of a requisition by the creator) make the necessary changes to the requisition.

If approvals have been recorded for the requisition, contact a pending approver to request that they disapprove the requisition.

Disapproval of a requisition by the creator:

No approvals have been recorded for this document.

If approvals have been recorded for the requisition, contact a pending approver to request that they disapprove the requisition.
View Pending Approvals in FOAAINP

- Go to Banner Admin
- Type FOAAINP and enter
- Enter the requisition number in the Document field
- Click GO

- Use the down arrow key to navigate the approval levels in the Queue and Level List section
- Approvers for each level are listed in the Approver List section
- Contact any approver who has not yet approved and request that the requisition be disapproved.
  - An Approver may disapprove a requisition via Online Services or Banner Admin page FOAAINP. (Refer to section on APPROVING REQUISITIONS)
- Return to Banner Admin to make changes to the requisition
- Go to FPAREQN
- Enter the requisition number
- Make necessary changes to the requisition
- Complete the requisition
Deleting/Canceling A Requisition

A requisition will need to be deleted or canceled if it is no longer needed. Refer to the information below to determine which action is required for removing a requisition.

**Deleting** a requisition will completely remove it from Banner, leaving no record.
- A requisition can be deleted IF:
  - It has never been completed, OR
  - It has been completed and not approved, OR
  - It has been completed and approved, and then disapproved

**Canceling** a requisition will leave a record in Banner, documenting the cancelation and the reason for it. All associated accounting records will reflect the cancelation as well.
- A requisition cannot be deleted, but must be canceled IF:
  - It has been completed and approved
  - It has been completed, approved, and assigned to a purchaser

- A requisition cannot be canceled if it has been assigned a Purchase Order number
  - If the Purchase Order has not been completed, the Purchase Order can be deleted, and the requisition can then be canceled.
  - If the Purchase Order has been completed, a Change Order would need to be issued and the vendor contacted to see if the purchase could be stopped. The requisition could then be canceled. This should be a very rare instance.

**DELETING A REQUISITION**
- Go to Banner Admin
- Access page FPAREQN
- Type the requisition number to be deleted
- Click GO
- Click the Delete icon
- A warning message will appear to prompt you to press Delete again
- Click the Delete icon again to make the deletion of the requisition permanent
**CANCELING A REQUISITION**

- Go to **Banner Admin**
- Access page **FPARDEL**
- Type the requisition number
- **Tab** to validate the requisition creator
- Click **GO**

**PLEASE VERIFY CAREFULLY** This Banner page will allow cancelation of a document that you may not have created.

- Click the **Cancel Date** tab when the requisition to be canceled has been verified
- **Cancel Date**: Do **Not** Change
- **Reason Code**: Click the Search icon to select reason for the cancelation
  - click **OK** or double click to select
  - contact your Procurement purchaser prior to making the cancelation permanent if the desired reason does not exist
- **Make Cancellation Permanent**: Click to permanently cancel the requisition
Receiving For Requisitions

Receiving information is to be submitted to Procurement via electronic submission of the ‘Receiving Form for Purchase Orders’. The Receiving Form is used to report goods and services received by your department. Submitting the receiving form attests that the goods or services were received and it is okay for Accounts Payable to make payment. Quantities reported as received on the Receiving Form will be verified and entered into Banner by the Receiving Department.

- The receiving form is located in Online Services (Self Service Banner)
  mysFA → Resources tab → Procurement Services → Receiving Form for Purchase Orders

Only employees with security to submit receiving will have access to the Receiving Form.
✓ Enter the Purchase Order (PO) number to begin the receiving process
✓ Click NEXT

✓ The Receiving Form will open in a new window and will display PO information from the Banner tables for reference to assist in the receiving form submission
Enter quantities in the **QTY Received** field by using one of the following methods:

- **RECEIVE only certain quantities** for specific PO items
  - **PO’s with a few line items**
    - Enter **QTY Received** for each item to be received
  - **PO’s with many line items**
    - Click the **Receive All** box to auto-populate the **QTY Received** field with the quantities remaining
    - Un-click the **Receive All** box to allow the prefilled quantities to be edited
    - Make the necessary changes to reflect the actual quantities to be received
    - **Verify** carefully that the quantities marked as received are accurate

- **NOTE:**
  - Items with 0 (zero) QTY Remaining cannot be received
  - A negative quantity can be entered to un-receive an item
    - an explanation **must** be entered in ‘Additional Information’
    - quantities un-received may not exceed **QTY Received to Date**

- **RECEIVE all items on PO**: Indicates that **everything**, or everything remaining, on the PO has been received by the department and is OK to pay
  - Do not use for standing orders
    - Click the ‘**Receive All remaining items below**’ box
      - **QTY Received** will auto-populate with the QTY Remaining value

- **UN-RECEIVE** items on a PO
  - Click the ‘**Un-Receive items below**’ box
    - Un-receiving allows updates to 0 (zero) QTY Remaining field
    - Quantity entered must be a negative number (ex. -2)
    - Consult the Receiving Department before submitting un-receiving
    - An explanation **must** be entered in the ‘Additional Information’ box
    - Quantities un-received may not exceed **QTY Received to Date**

**ADDITIONAL INFORMATION:** Use this field to enter package conditions, invoice numbers, or other information needed for reference

- Detailed information regarding damaged goods or wrong items should be emailed to the Receiving Department
- The Receiving Department can assist with resolving issues with the vendor receiving@sfasu.edu

**RESET FORM:** If needed, use to clear the inputs from the form for quantities that may have been entered in error
✓ SUBMIT FORM TO PURCHASING
  o Click Submit Form
    ▪ A summary of the submitted receiving form is emailed to the person submitting the form
    ▪ The form is submitted to the Receiving Department
      • the information submitted is verified
      • the Receiving Department makes the receiving entry in Banner
      • Accounts Payable is notified when Banner has been updated

  o Department Responsibilities after submitting the form
    ▪ Invoices, reimbursement receipts, payment instructions, or other payment information should be emailed directly to Accounts Payable accounts payable@sfasu.edu
    ▪ Forward the summary email to the PI/PD (Principal Investigator/Project Director) if a grant funded contract is involved

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Receiving Form Submitted

The Receiving Form for PO# P1900013 has been successfully submitted to the Receiving Department.

Quantities reported as received on the Receiving Form will be verified and entered into Banner by the Receiving Department.

A summary of your submission with additional instructions has been emailed to suziesmith@sfasu.edu.

Additional options:
  Submit additional Receiving Form for a different Purchase Order
  Logout

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View Current Quantities Remaining

The Receiving Form can be utilized to view quantities that are remaining to be received on a PO.
  o Access the Receiving Form
  o Enter the PO number
  o View QTY Remaining
  o Exit the form without submitting

Quantities will reflect the current QTY Received To Date and QTY Remaining, and will only reflect a recently submitted Receiving Form once it has been verified and entered into Banner by the Receiving Department.
Approvals for Requisitions

Approval Notes

End-users with requisition approval authority should be aware that it is very important to post approvals or denials in a timely manner to ensure that the process is completed efficiently.

Requisitions that do not have sufficient funds available will be routed to an Insufficient Funds approval queue (NSF) for review and approval/disapproval by the Budget Office.

Special approvals are set up for the types of commodities or funding sources listed below.

Approval Categories

- **Computer Replacement Funds**
  - Requisitions using computer replacement funds require approval of ITS and the Procurement Office

- **Grants**
  - Requisitions using grant accounts for food, vehicles, computers, federal pass-thru, state pass-thru, and all capital account codes will require approval of the Office of Research and Graduate Studies

- **Insurance and Hazardous Materials**
  - Requisitions for insurance, radioactive or radiation producing equipment, hazardous chemicals and gases, or carpet removal (potential for asbestos) will require approval of Environmental Health, Safety, and Risk Management

- **Memberships**
  - Requisitions for memberships purchased with state funds will require approval by the division Vice President, excluding the Library

- **Printing, Advertising, and Web Design**
  - Commodities for these types of purchases, unless otherwise exempted, will require approval by University Marketing Communications

- **Requisitions $100,000 or greater**
  - Requisitions of this value will require approval by the Director of Procurement and Property Services

- **Research Enhancement Funds, Research Development Funds, or ARRA Funds**
  - Requisitions using these funds will require approval by the Office of Research and Graduate Studies

- **Vehicles**
  - Requisitions for vehicles will require approval of Environmental Health, Safety, and Risk Management, and the Transportation Department
Identifying Requisitions for Approval

The primary approver is notified via email when there is a document(s) to approve.

Back-up approvers do not receive automated email notifications. The person completing the requisition must notify the back-up approver(s) if the primary approver is unavailable. The back-up approver should use caution to only approve those requisitions that have been requested to be approved.

Approval Process for Approvers

Approvals are made in Online Services (Self-Service Banner)

- Log into mySFA
- Click on the Budget & Finance tab
- Choose Approve Document

- Make selection based on approver role
  - ‘Documents for which you are the next approver’ (default selection)
    - Used by Primary Approvers
    - Displays only the requisitions where you are the NEXT approver
  - ‘All documents which you may approve’
    - Used by Primary Approvers to display ALL requisitions they are in line to approve, but which may need other approval before theirs
    - Used by Back-Up Approvers to display ALL requisitions for which they are in the back-up approver role
    - use with CAUTION to prevent override of any lower level approvals that may be required
    - Check History before proceeding with approval

- Click Submit Query
Click the **Document** hyperlink to view the entire requisition document, including accounting associated for each item
- Review the document carefully
- Click the browser BACK button to return to the Approval screen

Click the **History** hyperlink to view recorded or required approvals, if needed
- **This step is very important if NEXT approver was not selected**
- Approval levels increase in increments of 5, with 10 being the lowest
- If your name is duplicated in two sequential levels, you are the primary approver, and the other name(s) is your back-up approver
- If your name is duplicated in two levels, only one approval posting is necessary
- **Be careful when using this process**, if a higher level approval is invoked it will override any lower level approvals not yet posted
- Click the browser Back button to return to the approvals list

Choose **Approve** (or **Disapprove**) 

Type notes to the requisitioner in the **Comment** section, if needed, for further instructions or reasons for disapproval
- Click **Cancel** to return to the Approve documents list without taking action on the document

**✓** Click **Approve Document** (or **Disapprove**)

**Approve Document**

<table>
<thead>
<tr>
<th>Document Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Number: R0067479</td>
</tr>
<tr>
<td>Change Req.:</td>
</tr>
<tr>
<td>Amount: 1,970.00</td>
</tr>
</tbody>
</table>

**Comment:** This document has been approved.

- Approve Document  
  Cancel

**✓** Click **Continue** to approve the document **(do not skip this step)**
  - Click **Cancel** on this screen to return to the Approve documents list

**Document Pending Approval**

✓ Document R0067479 has your approval.

Continue

**✓** Review additional requisitions or exit
Viewing Documents in Online Services

Documents of all types are available to view in Online Services (Self-Service Banner), i.e., Requisition, Purchase Order, Invoice, Journal Voucher, Encumbrance, and Direct Cash Receipt. For this training we will focus on Requisitions and Purchase Orders.

- Log into mySFA
- Click on the Budget & Finance tab
- Choose View Document
- Make a selection from the Choose type: drop down menu
- Enter a requisition or purchase order number in the Document Number field
- Click View Document
- The complete document will display
  - See the Related Documents section to see a list of related documents
  - A Document Code listed in blue may be clicked to view the related document
- Click the browser BACK button to be returned to the View Document form

View Document
Document Lookup

A Document Lookup may be conducted if a **requisition** Document Number is not known. The purchase order document lookup function is only available for Procurement purchasers.

- Choose **Requisition** from the **Choose type:** drop down menu
- Click on the words **Document Number**

A Document Lookup form will be displayed

- The User ID of the person logged in will be populated
- Click **Execute Query** to display a list of all documents created by the User ID
- Options for different results
  - the search field can be narrowed by selecting or entering additional criteria in the fields provided
  - change the User ID if the person who created the requisition is different than the person logged in
  - leave the User ID blank to return documents meeting other criteria selected
Select the Document Number to view
- The requisition number will be populated on the View Document screen
- Click View document or Approval history to display the results
- Click the browser BACK button once to return the View Document screen
- Click the browser BACK button again to return to the lookup results
Setting up My Banner

Use Banner page GUAPMNU to create a personal menu tied to your User ID. The menu can be created with Banner pages that are most important to your daily work. The menu is accessed on the Banner Admin landing page by clicking the Menu icon.

✓ Go to Banner Admin
✓ Type in GUAPMNU in the Search bar to access My Banner Maintenance
✓ Option 1: Add Object Types into the left pane
   o Double click the Object or the Description of the Banner pages for your menu from the
   o Tips for finding the desired Banner pages
     • Use the page selection arrows to move to other screens
     • Click on the word Object* or Description* to sort that field; click again to change sort from ascending to descending order
     • Increase the number of Objects Per Page to view more options per page
     • Filter may be used to select individual pages from the left pane
✓ Option 2: Add Object Types directly into the right pane
   o Type the name of the Object name or Object Description to be added, and tab
   o To add an additional page
     • click on a line
     • click the INSERT icon (inserted line will insert below the line selected)
     • type in the Object name or Object Description, and tab
✓ Click Insert Selection to add the pages to your personal menu
✓ Object and the Description can be renamed once they are in the Object Selection pane
✓ SAVE
✓ You will need to completely sign out of Banner Admin and then re-enter to see your newly created Banner menu.

Recommended Pages
✓ FPAREQN Requisition (create or edit an incomplete/disapproved requisition)
✓ FPIREQN Requisition Query (review a requisition)
✓ FOADOCU Document by User (disapprove a document that you created)
✓ FOAAINP Document Approval (see who has approved a requisition)
✓ FPARDEL Requisition Cancel (cancel a requisition)
✓ FPIRCVD Receiving Goods Query (review items received)
✓ GUAPMNU My Banner Maintenance (create or edit your My Banner Menu)
Procurement Email List

✓ Subscribe to the Procurement email list to receive updated purchasing information
  o Send an email to: mailserv@titan.sfasu.edu
  o In the body of the email type SUBSCRIBE PURCHASING-L followed by a space and your email address (ex. SUBSCRIBE PURCHASING-L suzy.smith@sfasu.edu)
  o Delete all other text
  o Change the formatting to Plain Text
  o The subject line should be left blank

Contact Information

✓ Contact Procurement with any questions or if you need further assistance
  o 936-468-2206
  o purchase@sfasu.edu
  o 2124 Wilson Dr., Purchasing & Inventory Building

✓ Visit Procurement & Property Services for additional resources
  o http://www.sfasu.edu/purchasing/
Purchasing Cycle

1. Department Enters Requisition in Banner
2. Requisition goes through departmental approval process
3. Purchasing receives Requisition
4. Purchasing creates Purchase Order
5. Vendor & Department Receive copy of Purchase Order
6. Vendor Delivers goods or services
7. Department completes Receiving form
8. Accounts Payable receives invoice and pays vendor