



STEPHEN F. AUSTIN STATE UNIVERSITY

Banner Finance

APPROVALS ONLY MANUAL

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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.

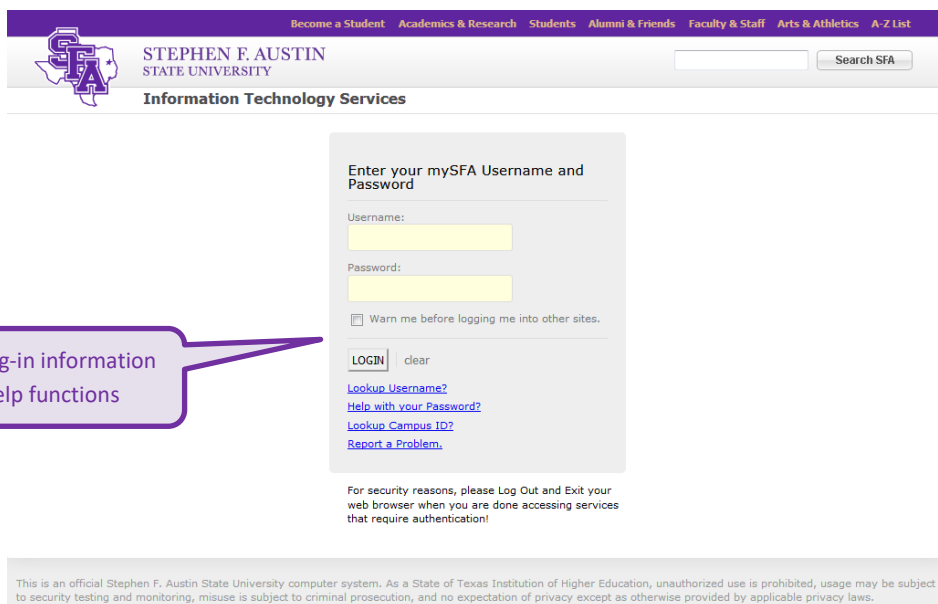
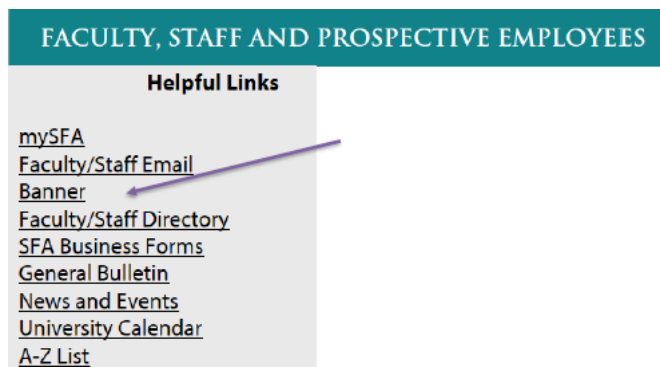
Accessing Banner

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>



Enter domain log-in information
Use other help functions

Banner White Page

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 logon, 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 approving or viewing requisitions.

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

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

STEPHEN F. AUSTIN
STATE UNIVERSITY

Personal Information Student Employee **Finance** Travel

Search Go

Approve Documents

Enter Approval Parameters

User ID

Document Number:

Documents for which you are the next approver

All documents which you may approve

[[Budget Queries](#) | [Encumbrance Query](#) | [Approve Documents](#) | [View Document](#)]

- ✓ Click **Submit Query**

Approve Documents

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

Queried Parameters

User ID	JONESBW 2	Bob Jones
Document Number:		
Documents Shown:	Next Approver	

NEXT APPROVER

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				SMITHSUZY	4,149.00	DOC	R0067455	History	Approve	Disapprove
Y	REQ				SMITHSUZY	2,995.00	DOC	R0067460	History	Approve	Disapprove

Another Query

Approve Documents

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

Queried Parameters

User ID	FOUNTAINCW	Carol Fountain
Document Number:		
Documents Shown:	All	

ALL Documents
View **History** to see if you are in-line as an approver or a back-up approver

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
	REQ				MATHENYDR	968.00	DOC	R0067575	History	Approve	Disapprove
	REQ				DEVINEMELIS	1,642.00	DOC	R0067579	History	Approve	Disapprove
	REQ				DEVINEMELIS	1,774.00	DOC	R0067601	History	Approve	Disapprove

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

Approve Document

Document Information

Document Number:	R0067479	Type:	REQ
Change Seq#		Sub#	
Amount:	1,070.00		

Comment:

This document has been approved.

Approve Document

Cancel

- or, click **Cancel** to return to the Approve documents list without taking action on the document
- ✓ 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

To display the details of a document enter parameters then select View document. To display a not know the document number, select Document Number to access the Code Lookup feature. from.

Choose type:	<input type="text" value="Requisition"/>	<input type="text" value="Document Number"/>	<input type="text" value="R0067200"/>
Submission#:	<input type="text"/>	Change Seq#	<input type="text"/>
			<input type="button" value="Reference Number"/>

Display Accounting Information

Yes **No**

<input type="button" value="Display Document/Line Item Text"/>	<input type="button" value="Display Commodity Text"/>
<input type="radio"/> All <input checked="" type="radio"/> Printable <input type="radio"/> None	<input type="radio"/> All <input checked="" type="radio"/> Printable <input type="radio"/> None

<input type="button" value="View document"/>	<input type="button" value="Approval history"/>
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❖ 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**

View Document

To display the details of a document enter parameters then select View document. To display a not know the document number, select Document Number to access the Code Lookup feature. from.

Choose type:

Submission#: Change Seq# Reference Number

Display Accounting Information

Yes No

Display Document/Line Item Text **Display Commodity Text**

All Printable None All Printable None

- ✓ A **Document Look** form will be displayed

Document Lookup

* - at least one of these fields required.

Requisition Code Lookup

Document Number*

User ID*

Activity Date*

Transaction Date*

Vendor ID*

Requestor

Approved

Completed

Reference Number*

- ✓ 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

Document Lookup

Press the document number link to return the value to the View Document page. Press the Exit without Value button to return without a value to the View Document page.

7 documents selected.

Requisition Lookup Results

Document Number	User I D	Activity Date	Trans Date	Vendor ID	Vendor	Requestor	Approved	Completed	Reference Number
R0067110	SMITHSUZY	Feb 19, 2019	Jan 15, 2019	20370320	Wood-Mizer LLC	SUZY SMITH	Yes	Yes	
R0067267	SMITHSUZY	Feb 04, 2019	Feb 04, 2019	20005633	Angelina Beef and Forage Committee	SUZY SMITH	Yes	Yes	
R0067345	SMITHSUZY	Feb 12, 2019	Feb 12, 2019	10388318	Hung, I-Kual	SUZY SMITH	Yes	Yes	
R0067458	SMITHSUZY	Feb 25, 2019	Feb 25, 2019	20004006	Water Monitoring Solutions Inc	SUZY SMITH	Yes	Yes	
R0067473	SMITHSUZY	Feb 27, 2019	Feb 25, 2019	20299792	Delgado-Rangel, Elizabeth	SUZY SMITH	Yes	Yes	
R0067475	SMITHSUZY	Feb 27, 2019	Feb 25, 2019	20373212	Rimstone Lab Instruments	SUZY SMITH	Yes	Yes	
R0067479	SMITHSUZY	Feb 26, 2019	Feb 25, 2019	20003345	GTS Technology Solutions, Inc.	SUZY SMITH	Yes	Yes	

7 documents selected.

Exit Without Value

- ✓ 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
 - **Double click** the Object or the Description of the Banner pages for your menu from the
 - 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
 - Type the name of the Object name or Object Description to be added, and tab
 - 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
 - Send an email to: mailserv@titan.sfasu.edu
 - 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)
 - Delete all other text
 - Change the formatting to Plain Text
 - The subject line should be left blank

Contact Information

- ✓ Contact Procurement with any questions or if you need further assistance
 - 936-468-2206
 - purchase@sfasu.edu
 - 2124 Wilson Dr., Purchasing & Inventory Building
- ✓ Visit Procurement & Property Services for additional resources
 - <http://www.sfasu.edu/purchasing/>