



# STEPHEN F. AUSTIN STATE UNIVERSITY

## Banner Finance

### Requisitions, Receiving, and Approvals

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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.

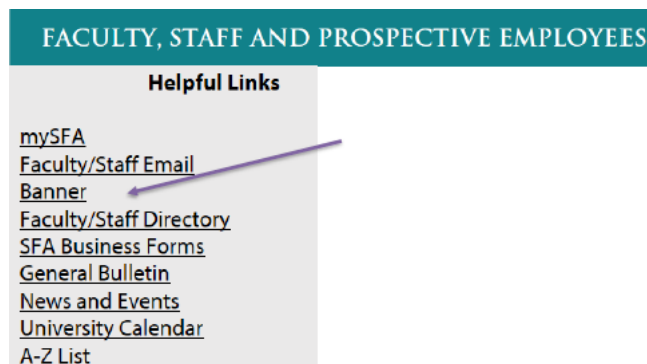
## Accessing Banner

**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 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

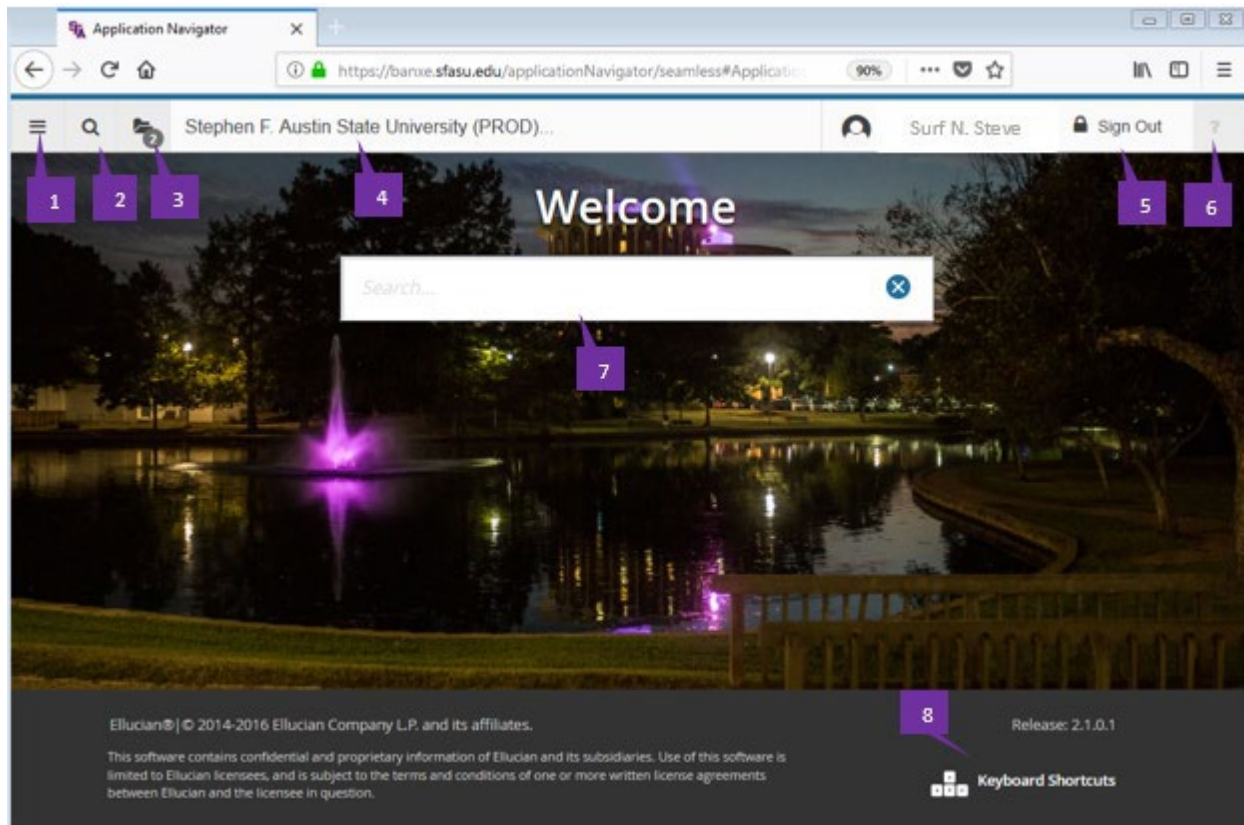
**Related** – contains access to Item text or Document text

**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.

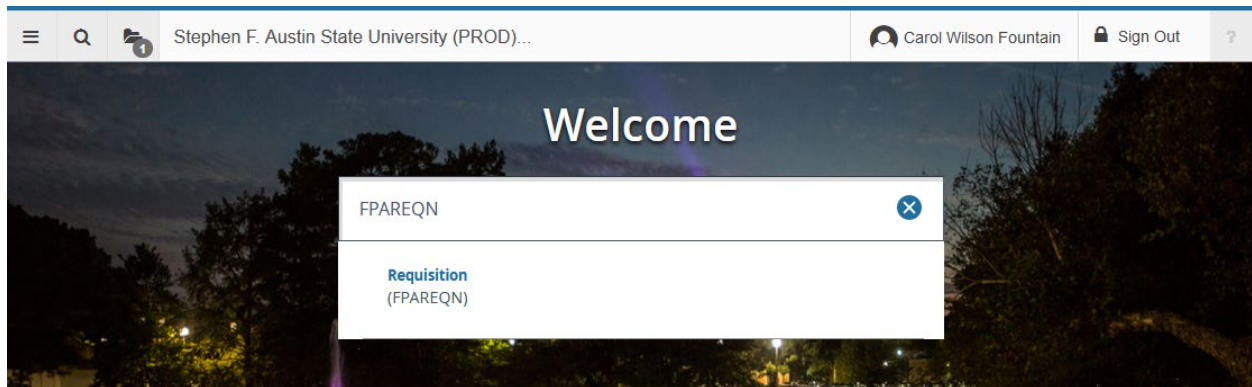
**6) Help** icon: View online help for Banner Admin applications. *Only active when a page is open.*

**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.

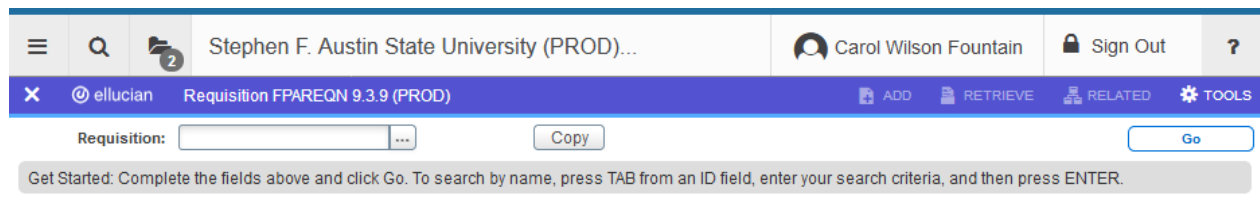
## Requisition Entry

- ✓ 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



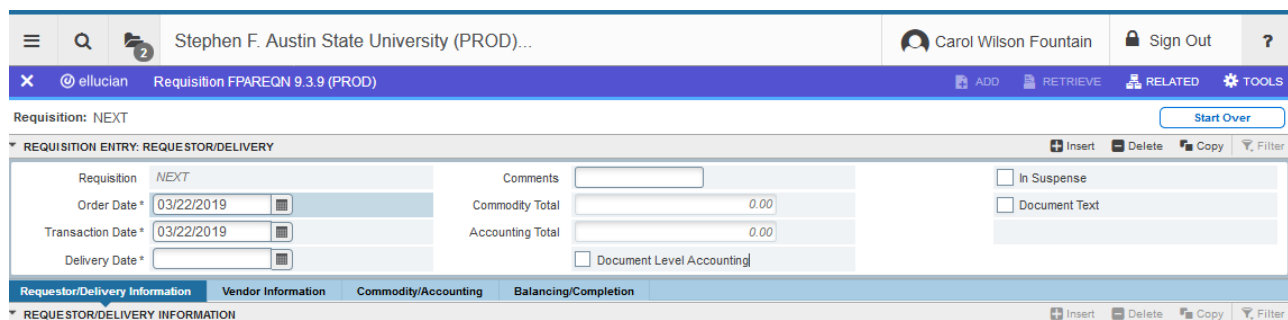
## FPAREQN

- ✓ To create a **new requisition**: leave the requisition field blank and click **GO**
- ✓ To continue working on an **incomplete requisition**, type the exact requisition # in the Requisition field and click **GO**



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

Exit

Stephen F. Austin State University (PROD)...

Carol Wilson Fountain Sign Out ?

ellucian Requisition FPAREQN 9.3.9 (PROD) ADD RETRIEVE RELATED TOOLS

Requisition: NEXT Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY Insert Delete Copy Filter

Requisition NEXT

Order Date \* 03/19/2019

Transaction Date \* 03/19/2019

Delivery Date \*

Comments

Commodity Total 0.00

Accounting Total 0.00

☐ In Suspense

☐ Document Text

☐ Document Level Accounting

Start Over / Rollback

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

REQUESTOR/DELIVERY INFORMATION Insert Delete Copy Filter

Requestor \* Carol Fountain

Organization \* 30401 Procurement Services

COA \* S Stephen F. Austin State University

Email fountaincw@sfasu.edu

Phone Area Code 936

Phone Number 4686495

Phone Extension

Fax Area Code

Fax Number

Fax Extension

Ship To \* PROC Search icon

Street Line 1 Procurement and Property Svcs

Street Line 2 2124 Wilson Dr N

Street Line 3 SFA Box 13030

Contact Donna Shelton

Attention To \* Donna Shelton

Building Procurement

Floor

City Nacogdoches

State or Province TX

Zip or Postal Code 75962

Nation

Area Code 936

Phone Number 4684157

Extension

Previous Section / Next Section Save

SAVE

E... Record: 1/1 FPBREQH.FPBREQH\_SHIP\_COD... ©2000 - 2018 Ellucian. All rights reserved. ellucian.



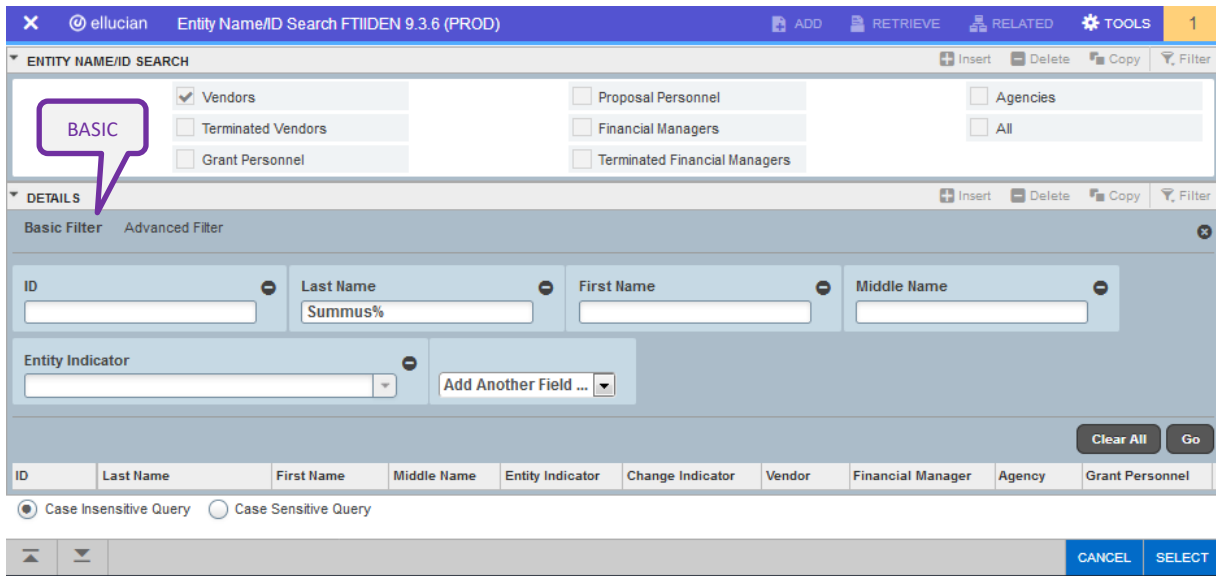
## ❖ Vendor Information

- ✓ **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

Basic Operator	Advanced Operator
%D%	Contains
D%	Starts with
%D	Ends with





Entity Name/ID Search FTIIDEN 9.3.6 (PROD)

ENTITY NAME/ID SEARCH

☒ Vendors ☐ Proposal Personnel ☐ Agencies  
☐ Terminated Vendors ☐ Financial Managers ☐ All  
☐ Grant Personnel ☐ Terminated Financial Managers

DETAILS

Basic Filter Advanced Filter

ID Last Name First Name Middle Name  
 Summus%

Entity Indicator  Add Another Field ...

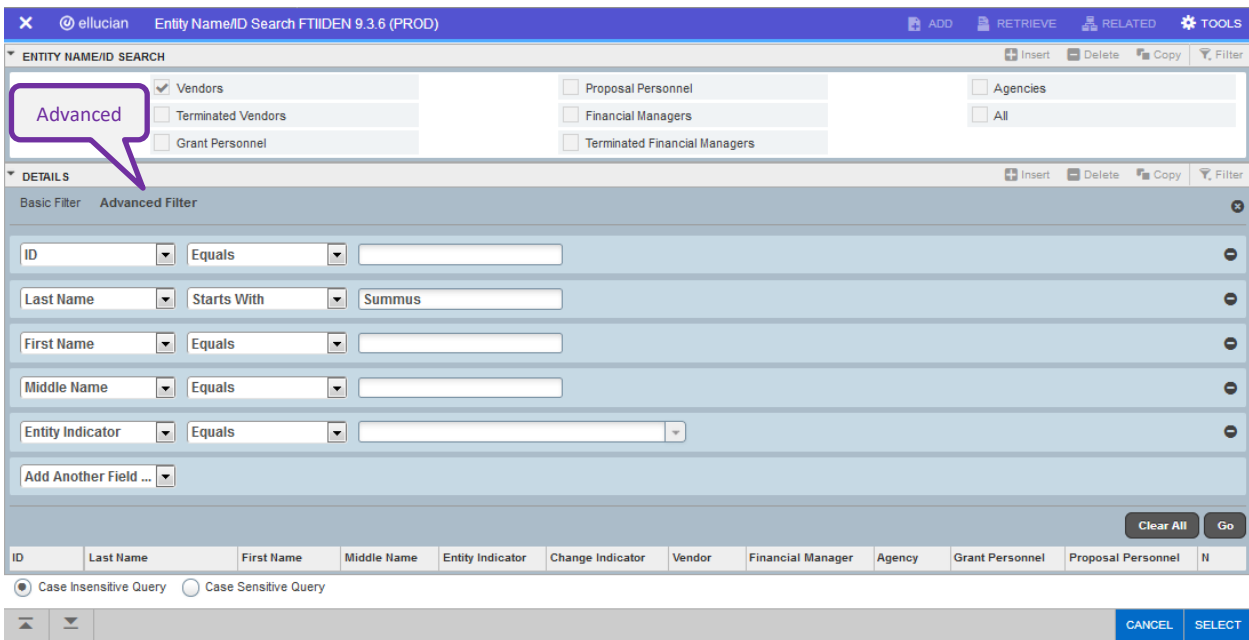
Clear All Go

ID Last Name First Name Middle Name Entity Indicator Change Indicator Vendor Financial Manager Agency Grant Personnel

☒ Case Insensitive Query ☐ Case Sensitive Query

CANCEL SELECT

OR



Entity Name/ID Search FTIIDEN 9.3.6 (PROD)

ENTITY NAME/ID SEARCH

☒ Vendors ☐ Proposal Personnel ☐ Agencies  
☐ Terminated Vendors ☐ Financial Managers ☐ All  
☐ Grant Personnel ☐ Terminated Financial Managers

DETAILS

Basic Filter Advanced Filter

ID Last Name First Name Middle Name Entity Indicator  
 Equals  Summus

Entity Indicator  Add Another Field ...

Clear All Go

ID Last Name First Name Middle Name Entity Indicator Change Indicator Vendor Financial Manager Agency Grant Personnel Proposal Personnel N

☒ Case Insensitive Query ☐ Case Sensitive Query

CANCEL SELECT

- 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**

Requisition: R0067665

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: R0067665  
Order Date: 03/19/2019  
Transaction Date: 03/19/2019  
Delivery Date: 04/04/2019

Comments:   
Commodity Total: 0.00  
Accounting Total: 0.00  
☐ Document Level Accounting

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

VENDOR INFORMATION

Vendor: 20036367 Summus Industries Inc  
Address Type: VP  
Sequence: 2  
Street Line 1: 77 Sugar Creek Center Blvd  
Street Line 2: Ste 420  
Street Line 3:   
City: Sugar Land  
State or Province: TX  
Zip or Postal Code: 77478-3688  
Nation:

Contact:   
Email:   
Phone Area Code:   
Phone Number:   
Phone Extension:   
Fax Area Code:   
Fax Number:   
Fax Extension:   
Discount: ☐  
Tax Group:   
Currency:

SAVE

EDIT Record: 1/1 FPBREQH.VENDOR\_SPRIDEN\_NAM... ©2000 - 2018 Ellucian. All rights reserved. ellucian.

- 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

Procurement Text Entry FOAPOXT 9.3.6 (PROD)

Text Type: REQ Code: R0067665 Change Sequence: Item Number: Vendor: 20036367 Summus Industries Inc Commodity Description:

Modify Clause: Copy Commodity Text: ☐ Default Increment: 10

PROCUREMENT TEXT ENTRY

Text	Clause Number	Print *	Line
Enter desired document text here		<input checked="" type="checkbox"/>	10
use down arrow or Insert for additional lines		<input checked="" type="checkbox"/>	20
Delete will remove unwanted lines		<input checked="" type="checkbox"/>	30

10 of 1 Per Page Record 1 of 3

SAVE

- ✓ 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 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

Requisition: R0067665

Order Date: 03/19/2019

Transaction Date: 03/19/2019

Delivery Date: 04/04/2019

Commodity Total: 0.00

Accounting Total: 0.00

Search icon

- type the search criteria in the Search Value field
- click **GO**

Search Value: training

Commodity Code	Stock	Description	U/M	Effective Date
000P93885A	N	M & R, MEDICAL TESTING AND TRAINING APPARATUS	YRS	07/12/2011
000P68067A	N	POLICE TRAINING/INSTRUCTIONAL AIDS, MIRANDA CARDS	EA	11/11/2009
000P80320C		SPEECH TRAINING EQPT (SOUND SYS)	EA	09/01/2000
2859560049	N	TERMINAL, FEMALE, 16-14, BLUE	PKG	08/14/2017
2859560048	N	TERMINAL, MALE, 16-14, BLUE	PKG	08/14/2017
4852110113		TERMINATOR, HEAVY DUTY CLEANER/DISINFECTANT,	CS	09/01/2000
000P96341A		TOURNAMENT FEES	SRV	09/01/2000
000P92435A	N	TRAINING SERVICES FOR EMPLOYEES	EA	10/15/2009
000P92435B	N	TRAINING SERVICES FOR NON-EMPLOYEES	SRV	02/24/2015
000P98888A		TRIMMING, TREE	SRV	09/01/2000

Record 1 of 10

Activity Date: 07/12/2011 12:00:00 AM

CANCEL SELECT

- 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
  - **Fund, Orgn, and Prog** may be changed, if needed
  - **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
  - **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

**COMMODITY**

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1	000P92435A	TRAINING SERVICES F...	EA		5.00	25.0000			

Record 1 of 1

Extended Amount: 125.00, Tax: 0.00, Distribute: ☒

Discount: 0.00, Commodity Total: 125.00, Additional: 0.00

**ACCOUNTING**

Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Loon	Proj	NSF Override	NSF Suspense
1	S	19	150002	30401	772430	350					

Record 1 of 1

Extended Amount: ☐ % ☐ USD 125.00

Discount: ☐ 0.00

Additional: ☐ 0.00

Tax: ☐ 0.00

FOAPAL Total: 125.00

Commodity Total: 125.00

Remaining Commodity Amount: 0.00

**Single FOAP**

**DO NOT CHANGE ACCOUNT CODE**

SAVE

EDIT Record: 1/1 FPRREQA.FPRREQA\_COAS\_CODE [1] ©2000 - 2018 Ellucian. All rights reserved. ellucian.

## 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

DO NOT CHANGE  
ACCOUNT CODE

Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
1	S	19	150002	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>

	%	USD
Extended Amount	<input type="checkbox"/>	50.00
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		50.00
Commodity Total		50.00
Remaining Commodity Amount		75.00

Sequence 1  
\$50

Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
1	S	19	150002	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>
	S	19	150002	30402	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>

	%	USD
Extended Amount	<input type="checkbox"/>	40.00
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		40.00
Commodity Total		50.00
Remaining Commodity Amount		75.00

Sequence 2  
\$40

Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
1	S	19	150002	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	S	19	150002	30402	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>
	S	19	150010	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>

	%	USD
Extended Amount	<input type="checkbox"/>	35.00
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		35.00
Commodity Total		90.00
Remaining Commodity Amount		35.00

Sequence 3  
\$35

### 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

DO NOT CHANGE  
ACCOUNT CODE

ACCOUNTING											
Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Loon	Proj	NSF Override	NSF Suspense
	S	19	150002	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>

Record 1 of 1

	%	USD
Extended Amount	<input checked="" type="checkbox"/>	25
Discount	<input type="checkbox"/>	

Sequence 1  
Percentage entered  
(before tabbing)

ACCOUNTING											
Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Loon	Proj	NSF Override	NSF Suspense
1	S	19	150002	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>
	S	19	150002	30402	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>

Record 2 of 2

	%	USD
Extended Amount	<input checked="" type="checkbox"/>	93.75
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		
Commodity Total		31.25
Remaining Commodity Amount		93.75

Calculated % amount  
(after tabbing)

ACCOUNTING											
Sequence	COA	Year	Fund	Orgn	Acct	Prog	Actv	Loon	Proj	NSF Override	NSF Suspense
	S	19	150002	30401	772430	350				<input type="checkbox"/>	<input checked="" type="checkbox"/>

Record 1 of 1

	%	USD
Extended Amount	<input type="checkbox"/>	31.25
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		31.25
Commodity Total		
Remaining Commodity Amount		125.00

Sequence 2  
% amount automatically calculated  
(after tabbing)



## 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.
  - 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.
  - 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**

Requestor/Delivery Information		Vendor Information		Commodity/Accounting		Balancing/Completion	
<b>BALANCING/COMPLETION</b>							
Vendor	20036367	Summus Industries Inc		Currency			
	<input type="checkbox"/> Vendor Hold			Exchange Rate			
COA	S	Stephen F. Austin State University		Commodity Record	1		
Requestor	Carol Fountain			Count			
Organization	30401	Procurement Services		Input Amount	125.00		
				Converted Amount			
<b>AMOUNTS</b>							
	Input	Commodity	Accounting	Status			
Approved Amount	125.00	125.00	125.00	BALANCED			
Discount Amount	0.00	0.00	0.00	BALANCED			
Additional Amount	0.00	0.00	0.00	BALANCED			
Tax Amount	0.00	0.00	0.00	BALANCED			
<input type="button" value="Complete"/> <input type="button" value="In Process"/>							

## 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

The screenshot shows the Banner Admin 'Welcome' screen. At the top, there is a navigation bar with the university name 'Stephen F. Austin State University (PROD)....', a user profile 'Carol Wilson Fountain', and a 'Sign Out' link. Below the navigation bar is a large 'Welcome' banner. In the center of the banner is a search bar containing the text 'fpireqn'. Below the search bar is a button labeled 'Requisition Query (FPIREQN)'.

- ✓ Type the requisition number to be viewed
- ✓ Click **GO**
- ✓ Use Next Section or Previous Section icons to navigate the sections within FPIREQN

The screenshot shows the 'Requisition Query FPIREQN 9.0 (PROD)' screen. The top navigation bar is the same as the previous screen. Below it is a search bar with the text 'Requisition: R0067665'. To the right of the search bar is a 'Go' button. Below the search bar is a message: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

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

The screenshot shows the 'Requisition Inquiry: Document Information' screen for Requisition R0067665. The top navigation bar is the same as the previous screens. Below it is a search bar with the text 'Requisition: R0067665' and a 'Start Over' button. The main content area is divided into two sections. The first section, 'REQUISITION INQUIRY: DOCUMENT INFORMATION', contains a table with the following data:

Requisition	R0067665	<input type="checkbox"/> In Suspense	<input checked="" type="checkbox"/> Document Text
Order Date	03/19/2019	Delivery Date	04/04/2019
Transaction Date	03/19/2019	Comments	
		Commodity Total	125.00
		Accounting Total	125.00

The second section, 'REQUISITION INQUIRY: DOCUMENT INFORMATION', contains a table with the following data:

<input type="checkbox"/> Complete	Cancel Reason	
<input type="checkbox"/> Approved	Document Type	P PROCUREMENT
Print Date	<input checked="" type="checkbox"/> NSF Checking	
Cancel Date	<input type="checkbox"/> Deferred Editing	
Closed Date	Requisition Copied	
Activity Date	From	
User ID	Origin	BANNER
	Reference Number	

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.

- ✓ Open Banner Admin
- ✓ Type FPAREQN and enter
- ✓ Click **Copy**

The screenshot shows the Banner Admin interface for 'Requisition FPAREQN 9.3.9 (PROD)'. At the top, there is a navigation bar with icons for ADD, RETRIEVE, RELATED, and TOOLS. Below this, there is a 'Requisition:' label followed by a text input field containing 'R0067500' and a 'Copy' button. To the right of the input field is a 'Go' button. Below the input field, there is a small text box that says: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

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

The screenshot shows a dialog box titled 'Copy FPAREQN 9.3.9 (PROD)'. Inside the dialog, there are two fields: 'Requisition' and 'Vendor'. The 'Requisition' field contains the value 'R0067500'. The 'Vendor' field contains the value '20004942' and the text 'Apple Computer Inc'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

- ✓ 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

#### 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

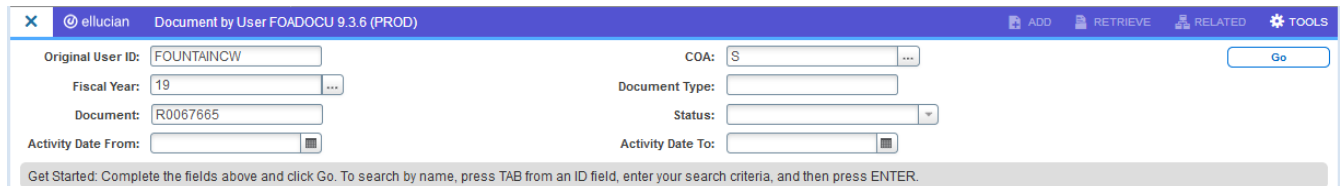
User ID	FOUNTAINCW	Carol Fountain
Document Number:		
Documents Shown:	All	

##### Approve Documents List

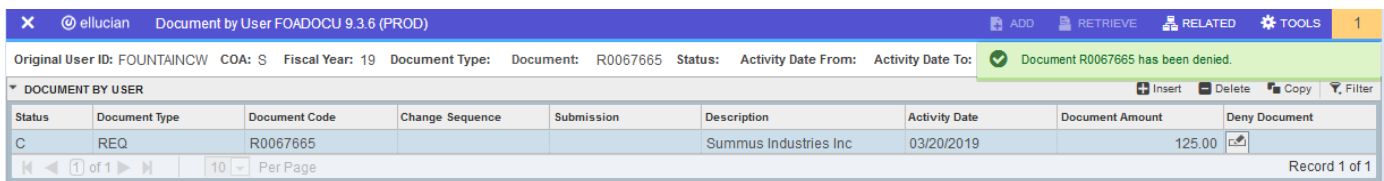
Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
	REQ				FOUNTAINCW	125.00	DOC	R0067665	History	Approve	Disapprove

**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



Status	Document Type	Document Code	Change Sequence	Submission	Description	Activity Date	Document Amount	Deny Document
C	REQ	R0067665			Summus Industries Inc	03/20/2019	125.00	

- ✓ 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**

- Log into **mySFA**
- Click on the **Budget & Finance** tab
- Choose **View Document**
- Enter the requisition number
- Click on **Approval history**

## View Document

To display the details of a document enter parameters then select View document. To display a the document number, select Document Number to access the Code Lookup feature. This enabl

Choose type: Requisition Document Number R0067656

Submission#: Change Seq#: Reference Number

**Display Accounting Information**

☒ Yes ☐ No

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

☐ All ☒ Printable ☐ None ☐ All ☒ Printable ☐ None

- ✓ 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

### Document Identification

Document Number	R0067656	Type	Requisition
Originator:	MEYERSROBER	Rob Meyers	

### Approvals required

Queue	Description	Level	Approvers
P100	ATHLETICS	10	
			Ryan Ivey
P100	ATHLETICS	15	
			Kara Carpenter
			Ryan Ivey

✓ 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

### Document Identification

Document Number	R0067610	Type	Requisition
Originator:	DEVINEMELIS	Missy Devine	

### Approvals required

Queue	Description	Level	Approvers
Z001	COMPUTER REPLACE REVIEW	10	
			Mike Coffee
			Jim Egner
Z001	COMPUTER REPLACE REVIEW	15	
			Carol Fountain
			Kay Johnson

### Approvals recorded

Queue	Level	Date	User
A202	10	Mar 13, 2019	Gary Wurtz
A202	10	Mar 13, 2019	Gary Wurtz
A202	15	Mar 13, 2019	Gary Wurtz



**View Pending Approvals in FOAAINP**

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

Document: R0067610 Type: REQ Change Sequence: Submission: Start Over

QUEUE AND LEVEL LIST			
Queue ID	Queue Description	Queue Level	Approval Level
Z001	COMPUTER REPLACE REVIEW		10 +
Z001	COMPUTER REPLACE REVIEW		15 +

10 of 1
10 Per Page
Record 1 of 2

+ Indicates what will be approved

APPROVER LIST		
Queue	Level	User
Z001	10	Mike Coffee
Z001	10	Jim Egner

10 of 1
10 Per Page
Record 1 of 2

- 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

Requisition: R0067665

**REQUISITION ENTRY: REQUESTOR/DELIVERY**

Requisition	R0067665	Comments		<input type="checkbox"/> In Suspense
Order Date*	03/19/2019	Commodity Total	125.00	<input checked="" type="checkbox"/> Document Text
Transaction Date*	03/19/2019	Accounting Total	125.00	
Delivery Date*	04/04/2019			<input type="checkbox"/> Document Level Accounting

Requestor/Delivery Information | Vendor Information | Commodity/Accounting | Balancing/Completion

**REQUESTOR/DELIVERY INFORMATION**

Requestor\* Carol Fountain

Street Line 2 2124 Wilson Dr N

## ❖ 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.

The screenshot shows the 'Requisition Cancel FPARDEL 9.0 (PROD)' window. The 'Request Code' is R0067598 and the user is Ashley Scott. The 'Requisition' tab is selected, and the 'Cancel Date' sub-tab is active. The 'REQUISITION DETAIL' section shows the following information:

<input checked="" type="checkbox"/> NSF Checking	Origin	BANNER
Request Date: 03/12/2019	Request Type	P
Transaction Date: 03/12/2019	Vendor	20101700 Otis Elevator Company
Delivery Date: 03/12/2019		

Below the details is a 'Net Amount' summary table:

Extended Amount	Discount Amount	Tax Amount	Additional Charges	Net Amount
196.52	0.00	0.00	0.00	196.52

- ✓ 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 cancellation
  - click **OK** or double click to select
  - contact your Procurement purchaser prior to making the cancellation permanent if the desired reason does not exist
- ✓ **Make Cancellation Permanent:** Click to permanently cancel the requisition

The screenshot shows the 'Requisition Cancel FPARDEL 9.0 (PROD)' window with the 'Cancellation Detail' tab selected. The 'Cancel Date' is 03/20/2019. The 'Reason Code' is DEL, with a description 'Vendor did not deliver'. There is a 'Make Cancellation Permanent' button. The 'Record Count' section shows 1 Accounting and 1 Commodity.

## Purchase Order Receiving

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.

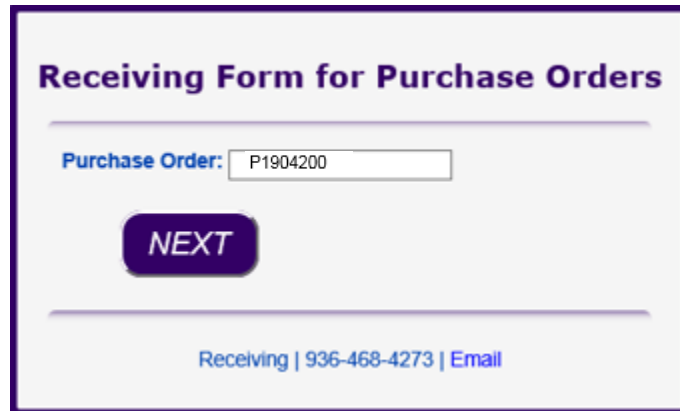
- ❖ The receiving form is located in Online Services (Self Service Banner)  
**mySFA → Resources tab → Procurement Services → Receiving Form for Purchase Orders**

Only employees with security to submit receiving will have access to the Receiving Form.

The screenshot shows the mySFA website interface. At the top is a purple header with the Stephen F. Austin State University logo and name on the left, and the mySFA logo on the right. Below the header is a navigation bar with tabs: HOME, EMPLOYEE, RESOURCES (selected), WORKFLOW, BUDGET & FINANCE, and RESEARCH. Under the RESOURCES tab, there is a sub-header 'Resources'. The main content area is a grid of service categories, each with a list of links:

COURSE EVALUATIONS AND SURVEYS	DINING SERVICES	TECHNICAL SERVICES AND EMAIL LISTS
	<a href="#">Faculty/Staff Meal Plans – Signup or Change</a> <a href="#">View Meal Plan Balance &amp; Purchase History</a> <a href="#">Purchase Additional Dining Dollars</a> <a href="#">View Dining Dollars Balance &amp; Purchase History</a>	<a href="#">Technical Support Portal</a> <a href="#">Self-Service Banner</a> <a href="#">Standard Email Lists</a> <a href="#">Emails Sent to Admitted Students</a> <a href="#">Faculty/Staff Directory</a>
	<b>INSTITUTIONAL EFFECTIVENESS AND ASSESSMENT</b> <a href="#">Nuventive Improve</a>	<b>TRAVEL</b> <a href="#">Travel</a> <a href="#">Travel Guidelines</a>
	<b>SPACE SCHEDULING AND UTILIZATION</b> <a href="#">Astra Schedule</a> <a href="#">Platinum Analytics</a>	<b>PROCUREMENT SERVICES</b> <a href="#">P-Card Records Portal</a> <a href="#">Receiving Form for Purchase Orders</a>
	<b>PRINTING SERVICES</b> Online ordering and delivery for your printing and graphic design needs <a href="#">Printing Services</a>	

- ✓ Enter the Purchase Order (PO) number to begin the receiving process
- ✓ Click **NEXT**



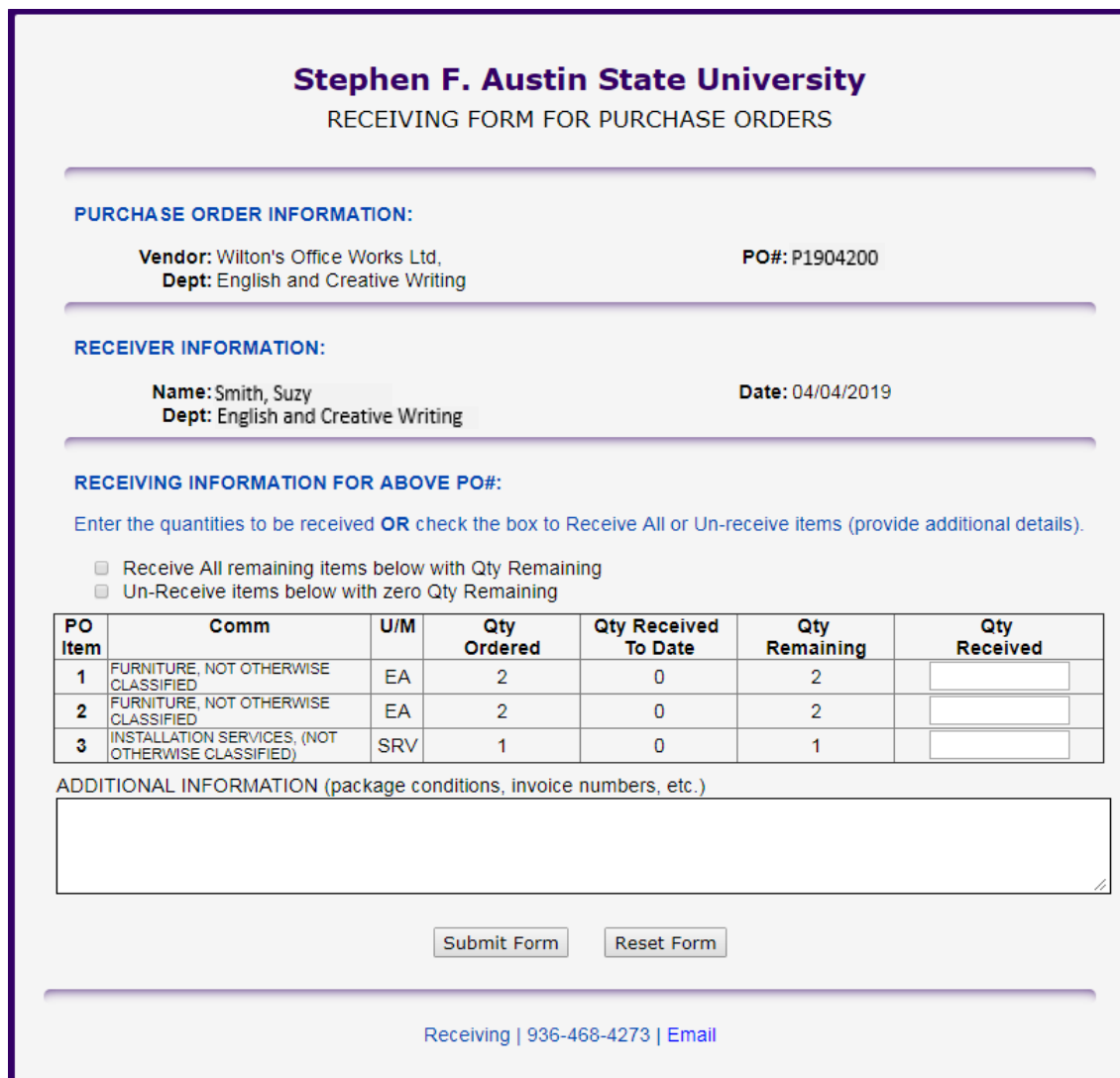
**Receiving Form for Purchase Orders**

Purchase Order:

**NEXT**

[Receiving | 936-468-4273 | Email](#)

- ✓ 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



**Stephen F. Austin State University**  
RECEIVING FORM FOR PURCHASE ORDERS

---

**PURCHASE ORDER INFORMATION:**

**Vendor:** Wilton's Office Works Ltd, **PO#:** P1904200  
**Dept:** English and Creative Writing

---

**RECEIVER INFORMATION:**

**Name:** Smith, Suzy **Date:** 04/04/2019  
**Dept:** English and Creative Writing

---

**RECEIVING INFORMATION FOR ABOVE PO#:**

Enter the quantities to be received **OR** check the box to Receive All or Un-receive items (provide additional details).

☐ Receive All remaining items below with Qty Remaining  
☐ Un-Receive items below with zero Qty Remaining

PO Item	Comm	U/M	Qty Ordered	Qty Received To Date	Qty Remaining	Qty Received
1	FURNITURE, NOT OTHERWISE CLASSIFIED	EA	2	0	2	<input type="text"/>
2	FURNITURE, NOT OTHERWISE CLASSIFIED	EA	2	0	2	<input type="text"/>
3	INSTALLATION SERVICES, (NOT OTHERWISE CLASSIFIED)	SRV	1	0	1	<input type="text"/>

ADDITIONAL INFORMATION (package conditions, invoice numbers, etc.)

[Receiving | 936-468-4273 | Email](#)

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](mailto: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**

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

### 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](mailto:suziesmith@sfasu.edu).

*Additional options:*

*[Submit additional Receiving Form for a different Purchase Order](#)*

*[Logout](#)*

### View Current Quantities Remaining

The Receiving Form can be utilized to view quantities that are remaining to be received on a PO.

- Access the Receiving Form
- Enter the PO number
- View QTY Remaining
- 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.



## Approval Process 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

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

- ✓ 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	<a href="#">R0067455</a>	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>
Y	REQ				SMITHSUZY	2,995.00	DOC	<a href="#">R0067460</a>	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>

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	<a href="#">R0067575</a>	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>
	REQ				DEVINEMELIS	1,642.00	DOC	<a href="#">R0067579</a>	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>
	REQ				DEVINEMELIS	1,774.00	DOC	<a href="#">R0067601</a>	<a href="#">History</a>	<a href="#">Approve</a>	<a href="#">Disapprove</a>

- ✓ 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

### Document Information

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

**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

 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.

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

**Display Accounting Information**

☒ **Yes**
☐ **No**

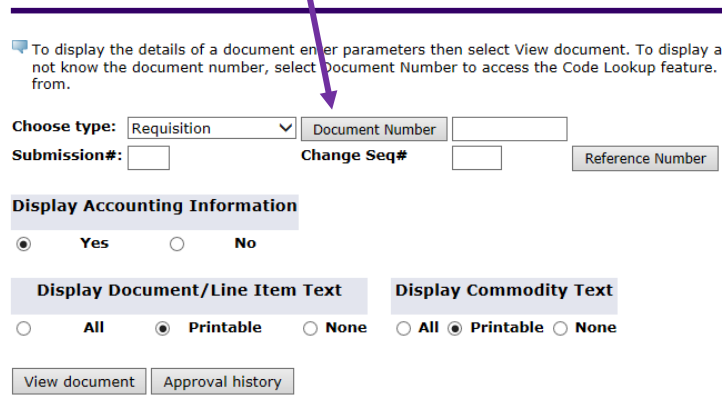
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Display Document/Line Item Text</b> </div> <p> <input type="radio"/> <b>All</b> <input checked="" type="radio"/> <b>Printable</b> <input type="radio"/> <b>None</b> </p>	<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Display Commodity Text</b> </div> <p> <input type="radio"/> <b>All</b> <input checked="" type="radio"/> <b>Printable</b> <input type="radio"/> <b>None</b> </p>
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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:  Document Number

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
<a href="#">R0067110</a>	SMITHSUZY	Feb 19, 2019	Jan 15, 2019	20370320	Wood-Mizer LLC	SUZY SMITH	Yes	Yes	
<a href="#">R0067267</a>	SMITHSUZY	Feb 04, 2019	Feb 04, 2019	20005633	Angelina Beef and Forage Committee	SUZY SMITH	Yes	Yes	
<a href="#">R0067345</a>	SMITHSUZY	Feb 12, 2019	Feb 12, 2019	10388318	Hung, I-Kual	SUZY SMITH	Yes	Yes	
<a href="#">R0067458</a>	SMITHSUZY	Feb 25, 2019	Feb 25, 2019	20004006	Water Monitoring Solutions Inc	SUZY SMITH	Yes	Yes	
<a href="#">R0067473</a>	SMITHSUZY	Feb 27, 2019	Feb 25, 2019	20299792	Delgado-Rangel, Elizabeth	SUZY SMITH	Yes	Yes	
<a href="#">R0067475</a>	SMITHSUZY	Feb 27, 2019	Feb 25, 2019	20373212	Rimstone Lab Instruments	SUZY SMITH	Yes	Yes	
<a href="#">R0067479</a>	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](mailto: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](mailto:purchase@sfasu.edu)
  - 2124 Wilson Dr., Purchasing & Inventory Building
- ✓ Visit Procurement & Property Services for additional resources
  - <http://www.sfasu.edu/purchasing/>

## Purchasing Cycle

