

# Approving Purchase Orders and Purchase Requests

Banner Finance Training 2011

M Hudson Revised 8/9/11

After a purchase request, purchase order or change order is completed, the document is forwarded to Banner's Approval Queues. The Approval Queues are a *holding zone* for PRs, POs and Change Orders until a user with the appropriate security approves the document. The approvals act as an electronic signature. Until a document has been approved and processed through the approval queues, it may not be printed or continued on to be paid in Banner.

A daily email alerts approvers that there are documents waiting their approval. The notification will indicate the number of documents, the document type and a message.



**Number of Documents**

**Document Type**

**Message**

Number of Documents	Document Type	Message
57	Requisition	Awaiting your review
5	Purchase Order	Awaiting your review



## Short Cut to Approvals

- At General Menu Screen GUAGMNU in the Go to Box enter: FOAUAPP
- Next you will be on Screen FOIAINP. This will show you:
  - The number of documents you have to approve
  - The type of document: PO/PR
  - A message

“X” out of this document



**Number of Documents**

**Document Type**

**Message**

Number of Documents	Document Type	Message
57	Requisition	Awaiting your review
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# Screen Access from General Menu- GUAGMNU

- Double click Financial *FINANCE*
- Double click Finance Operation *FINOPER*
- Double Click Finance Approval *FINAPPR*
- Double click User Approval *FOAUAPP*

## User Approval Form-FOAUAPP

- In The User Approval Form Choose the **Next Block** function to access the document waiting for your approval.
- Highlight the PO/PR or Change Order to be approved by using the up and down arrows on your keyboard.
- Click the Detail Button to review the document for awaiting your approval.
- You will see the some of the details on *FOQRACT*
  - If this information is sufficient for your approval “X” out to return to the approval form
  - If more detail is need choose *Options* on Tool Bar and then choose Document Query *FPIREQN*

## Short Cut Using *Options* on Tool Bar

- **NEXT BLOCK** to the Document Information Form
- Choose *Options*. You will see a list of the forms on the document you are approving. Choose the form you want to view. *Eg: Commodity/Accounting* will bring you to the form with the description and FOAPAL Information and you would have by-passed all the previous forms.
- When you are ready to approve or disapprove this document click “X” to return to the approval form.



## Additional Review Options

- To review the Queues to which the document will be forwarded after your approval:
  - Press the *Queue Button* and choose the **Next Block** function.

Here you will see any other approvals that are needed to process this document. You will always see a Purchasing Person's name in the queue.

Click the “X” to return to approval form

To approve a document, click the *Approval Button*.

The approved document will proceed to the next approved in the queue. If all approvals are complete, the document will print in the Purchasing Department.

To disapprove a document, click the *Disapprove Button*.

Add text to the dialog box explaining the reason. The creator will receive a message in Banner indicating that the document has been disapproved. A disapproved document is incomplete. The creator or approver may access the document to make the changes or delete.



User ID:  Maureen Hudson

Document:

Next Approver

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
<input type="checkbox"/>	REQ	R0000113	<input type="text"/>	<input type="text"/>	DONOVANK	1,000.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	REQ	R0000117	<input type="text"/>	<input type="text"/>		490.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>						
<input type="checkbox"/>	REQ	R0000120	<input type="text"/>	<input type="text"/>		450.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>						
<input type="checkbox"/>	REQ	R0000121	<input type="text"/>	<input type="text"/>		350.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>						
Y	REQ	R0000123	<input type="text"/>	<input type="text"/>	MURPHYJU	240.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
Y	REQ	R0000124	<input type="text"/>	<input type="text"/>	RICCHK	4,200.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			

Document Approval FOAUAPP 7.0 (FROST)

Type:  Number:  Submission:

Change Sequence:

**DOCUMENT IS APPROVED**

OK Cancel



User ID: HUDSONM Maureen Hudson

Document:

Next Approver

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
<input type="checkbox"/>	REQ	R0000094	<input type="text"/>	<input type="text"/>	LINDSEYC	276.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove:		Detail:	Queue:			
<input type="checkbox"/>	REQ	R0000095	<input type="text"/>	<input type="text"/>		25.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove:						
<input type="checkbox"/>	REQ	R0000096	<input type="text"/>	<input type="text"/>		299.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove:						
<input type="checkbox"/>	REQ	R0000097	<input type="text"/>	<input type="text"/>		75.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove:						
<input type="checkbox"/>	REQ	R0000098	<input type="text"/>	<input type="text"/>	DONOVANK	100.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove:		Detail:	Queue:			
<input type="checkbox"/>	REQ	R0000099	<input type="text"/>	<input type="text"/>	DONOVANK	260.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove:		Detail:	Queue:			

Document Disapproval Text Entry FOAUAPP 7.0 (FROST)

Type: REQ Number: R0000095 Submission:

Change Sequence:

**DOCUMENT IS DISAPPROVED**

OK Cancel



Document: R0000096

Type: REQ

Change Sequence:

Submission:

Queue ID	Queue Description	Queue Level	Approval Level
0032	PROVOST NON-IT	1	+
PURC	PURCHASING	1	+

Queue	Level	User
0032	1	Maureen Hudson
0032	1	Mary Jane McCarthy

- Indicates what will be approved

In suspense:

Detail:

Approve:

Disapprove: