

# **PURCHASE REQUISITION APPROVAL FOAUAPP**

## **Quick Reference Guide to On-Line Requisition Approval**

1. When you initially sign on to Banner and try to access a form, the Approvals Notification Form (FOIAINP) will display if you have documents awaiting your approval.
2. Click Options in the menu bar and choose User Approval (FOAUAPP)
3. If you do not wish to look at approvals immediately, click Exit. When you wish to view these documents later you will need to type FOAUAPP at the main menu and press Enter.
4. Next Block
5. A list of documents requiring your approval will appear
6. NSF – you should not approve documents with a “Y” in the NSF box. There is not enough money in the budget to cover this request or an incorrect FOAPAL has been used. Disapprove and send a message to the document creator to correct or delete the document.)
7. “Next Approver” – you should approve/disapprove only documents that have a “Y” in this box. All people in the document approval chain will see the document simultaneously. If there is no “Y” in this box that means that some one needs to approve/disapprove the document before you.
8. “Approve” – select this button to approve the document
9. “Disapprove” – select this button to disapprove the document. A dialog box will display allowing you to send a message to the document creator.
10. “Detail” – selecting this button allows you to view the document (view only – no changes allowed)
11. FOQRACT will display when you select Detail. You will see limited item information; vendor name and the FOAPAL(S) used.
12. Click Options in the menu bar and chose View Commodities to see a more detailed listing of items requested or choose Document Query to see the Requisition.
13. Exit
14. Exit
15. “Queue” – select this button and then Next Block to see the other approvers who are in line to approve this document (You may also approve/disapprove for this form.)
16. Click Options in the menu bar and choose Approval History to see a list of people who have already approved this document.
17. Exit
18. Exit
19. Approve or disapprove the document

### **NOTES:**

- Disapproved documents –The document returns to the document creator for correction/recompletion or deletion.
- **IMPORTANT** – Disapproval of a document does not release the funds reserved by the document. The document creator must delete the

document in order to return the funds to your budget.

- A disapproved document, if corrected and recompleted, must be reapproved by all approvers as if it were a new document. You may think you are approving the same document again when you may only be approving a resubmitted or corrected document.
- Alternate approvers are set up in nearly all approval queues in case the primary approver is out of the office for any reason.
- Alternate approvers will also be automatically notified of documents to be approved but should not approve/disapprove unless the primary approver has instructed them to do so.
- Please call Mike Shepherd, Purchasing 569-3137 if you have questions or problems with approvals.

#### OTHER HEPLFUL BANNER FORMS:

- FPIREQS – used to look for incomplete problem requisitions
- FPIORQF – used to review requisitions by FOAPAL (or organization) that have been completed and approved but not transferred to a PO
- FOIDOCH – used to review the status of requisitions and its corresponding PO, receiving, invoice and checks.
- FOAAINP – check whose approval queue your requisition is in. This form also takes you to
- FOIAPPH which shows you who has approved and when.