

Login to the MyWord Portal

Under the Launch Pad select the
Banner 9 Admin Pages (INB) link.

Automated Purchase Approval Process

Sam Wages

wages@

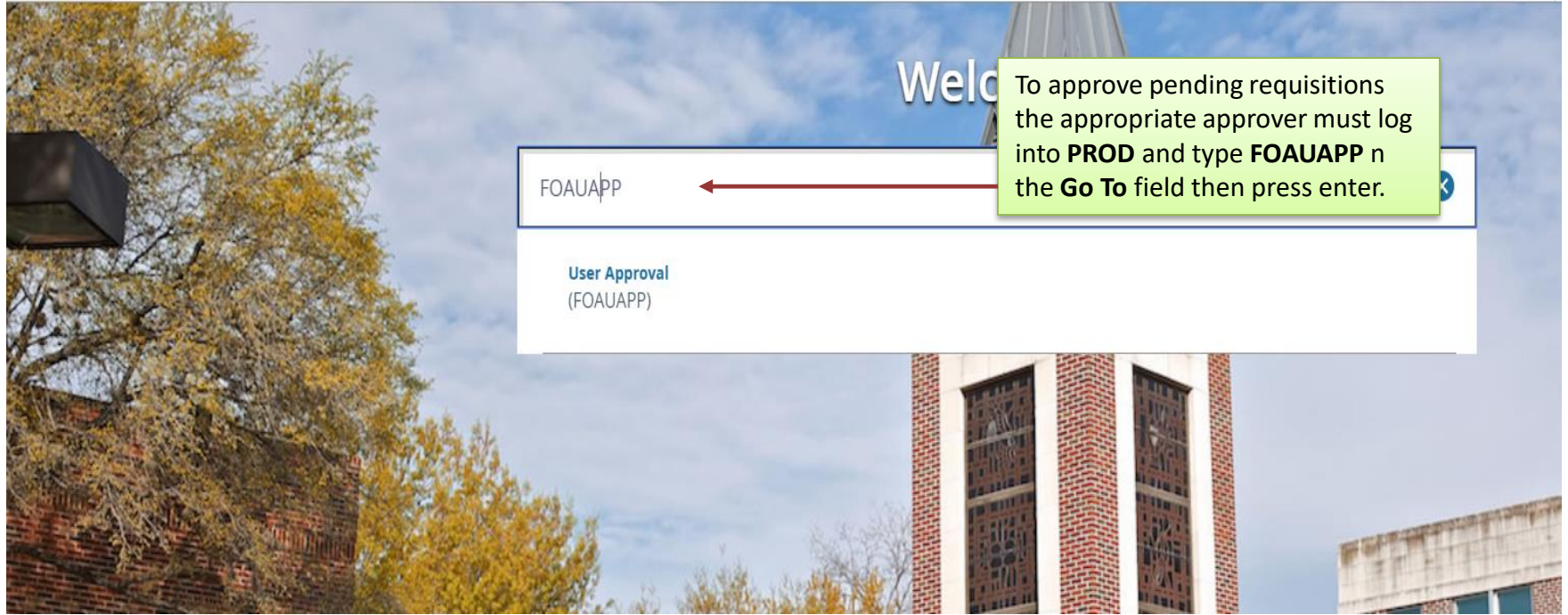
Laura Gonzales x1236

lathomas@

Carmen Rivera x5837 Marisa Vasquez x3999

rivera@

mfvasque@



This screen appears first when you have requisitions awaiting your review. Click the X to proceed.

X Approvals Notification FOIAINP 9.0 (PROD)

ADD RETRIEVE RELATED TOOLS

APPROVALS NOTIFICATION

Insert Delete Copy Filter

Number of Documents	Document Type	Message
	Purchase Order	Awaiting your review

10 Per Page

Record 1 of 1

User ID: Angela Mazzara
 Next Approver:

Document:

Click on "GO" and then a list of requisitions will appear.

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.

User ID: ISOLCHER Iris Solcher Document: Next Approver:

To review any added documents, click on the Detail button. (see next slide)

USER APPROVAL Insert Delete Copy Filter

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
	REQ	R0044370			JACK	14,356.43	DOC	Y
	REQ	R0044402			WILLIAMS	4.00	DOC	Y
	REQ	R0044406			WILLIAMS	1.00	DOC	Y
	REQ	R0044408			WILLIAMS	203.00	DOC	Y
	REQ	R0044409			WILLIAMS	270.15	DOC	Y
	REQ	R0044411			WILLIAMS	0.59	DOC	Y
	REQ	R0044413			WILLIAMS	2.00	DOC	Y
	REQ	R0044416			WILLIAMS	2.50	DOC	Y
	REQ	R0044430			WILLIAMS	8.00	DOC	Y
	REQ	R0044433			WILLIAMS	2.00	DOC	Y

Exit to return to approval screen.

REQUISITION APPROVAL

Request R0044402 Angela Mazzara Number of Items 1

LINE ITEM INFORMATION

Item
Commodity Document Acctg Distribution Office Supply

Place your cursor in the Request box and click Related button and Document Query (FPIREQN)

1 of 1 Per Page Record 1 of 1

ACCOUNTING INFORMATION

Sequence Number	1	Location	
COA	1	Extended Amount	4.00
Fiscal Year	18	Discount Amount	0.00
Index		Tax Amount	0.00
Fund	10010	Additional Amount	0.00
Organization	6306	Total	4.00
Account	6584	Project	
Program	6250	NSF	N
Activity		<input type="checkbox"/> NSF Override	

1 of 1 Per Page Record 1 of 1

Search

- Document Query [FPIREQN]
- View Commodities [FOICOMM]

Click on FPIREQN



Requisition: R0044402

Click "GO" to get into requisition.

Go



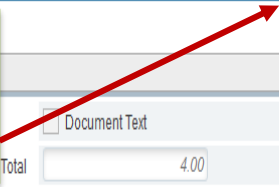
Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Requisition: R0044402 Start Over

REQUISITION INQUIRY: DOCUMENT INFORMATION

Requisition	R0044402	Delivery Date		Total	4.00
Order Date	01/31/2018	Comments		Accounting Total	4.00
Transaction Date	01/31/2018				

While your requisition # is highlighted, click on the Retrieve button to view back up documentation if further clarification is needed.



REQUISITION INQUIRY: DOCUMENT INFORMATION

<input checked="" 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	

Page 1 / 1

Scanner Rotate Zoom 34%

Annotation Format Actions

Heights Office Products
Detailed Order Report
UNIVERSITY OF INCARNATE WORD

Order #: 80.0122025 Order Status: Awaiting Approval Order Date: 4/30/2018 4:52:03 PM

Bill To **Ship To -** 6306

UNIVERSITY OF INCARNATE WORD UNIVERSITY OF INCARNATE WORD
CARMEN 8308 - BANNER ADMIN. SYSTEM
4301 BIRCHCROWAY 4301 BIRCHCROWAY

SAN ANTONIO TX 78209 SAN ANTONIO TX 78209
Phone : (214) 800 6507 Fax: (214) 528 8083 Phone : (214) 800 6506 Fax: ()

SNo.	Item	Description	Cost Center/Comment	Qty	Price UOH	Ext	
1	LOG	0100026 MYLIST FOR VENDOR SYSTEMS, 01		1	\$34.26 EA	\$34.26	
D Authorization: N/A						Sub Total	\$ 34.26
Order No: 82						Sub	\$ 0.00
						Total	\$ 34.26

DOCUMENT ID * R0044430

BANNER DOC TYPE REQUISITION

DOCUMENT TYPE * REQUISITION

TRANSACTION DATE * 30-Apr-2018

VENDOR ID 60462

VENDOR NAME HEIGHTS OFFICE SUPPLY

FIRST NAME

PIDM 60462

ROUTING STATUS

ACTIVITY DATE 2018-04-30 10:24:35

VPDL_CODE

DISPOSITION DATE

DOCUMENT NAME

CREATE NAME

MODIFY

Document Page

Page 1 / 15

Page 1

Page 2

You can view all page/pages in BDMS. At the top you can see how many pages are attached, click on arrows to go through pages. The thumb nail will display to the pages on the side as well



When finished viewing, click on X to get out. May have to click on the X more than once to return to approving/deny screen.

Requisition: R0044402

Start Over

REQUISITION INQUIRY: DOCUMENT INFORMATION

Insert Delete Copy Filter

Requisition	R0044402	<input type="checkbox"/> In Suspense	<input type="checkbox"/> Document Text
Order Date	01/31/2018	Delivery Date	02/01/2018
Transaction Date	01/31/2018	Comments	
		Commodity Total	4.00
		Accounting Total	4.00

REQUISITION INQUIRY: DOCUMENT INFORMATION

Insert Delete Copy Filter

<input checked="" 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	

USER APPROVAL Insert Delete Copy Filter

Approve Disapprove Detail Queues

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
	REQ	R0044370			JACK	14,356.43	DOC	Y
					WILLIAMS	4.00	DOC	Y
					WILLIAMS	1.00	DOC	Y
					WILLIAMS	203.00	DOC	Y
					WILLIAMS	270.15	DOC	Y
	REQ	R0044411			WILLIAMS	0.59	DOC	Y
	REQ	R0044413			WILLIAMS	2.00	DOC	Y
	REQ	R0044416			WILLIAMS	2.50	DOC	Y
	REQ	R0044430			WILLIAMS	8.00	DOC	Y
	REQ	R0044431			WILLIAMS	75.00	DOC	Y

10 Per Page Record 10 of 13

Click on icon to **Approve** requisition or click **Disapprove** to return to initiator for revision.

Document Approval FOAUAPP 9.3.2 (SITH)

Type: REQ
 Number: R0044423
 Submission:
 Change Sequence:

DOCUMENT IS APPROVED

OK Cancel

If disapproving, notes can be made in this box, to initiator for their review.

Click **OK** to confirm approval.

Document Approval FOAUAPP 9.3.2 (SITH)

Type	REQ
Number	R0044423
Submission	
Change Sequence	

DOCUMENT IS APPROVED

OK Cancel

ADD RETRIEVE RELATED TOOLS 2

- ✓ Document has your approval.
- ✓ Saved successfully (1 rows saved)

You will receive two messages in the upper right corner when your approval/disapproval is complete.

Document Disapproval Text Entry FOAUAPP 9.3.2 (SITH)

Type	REQ
Number	R0044422
Submission	
Change Sequence	

DOCUMENT IS DISAPPROVED

OK Cancel

ADD RETRIEVE RELATED TOOLS 2

- ✓ Document has been disapproved by you.
- ✓ Saved successfully (1 rows saved)



User Appro

Screen will return to pending requisitions . Click on the X button to return to **General Menu**.

User ID: ISOLCHER Iris Solcher Document: Next Approver:

▼ USER APPROVAL

Approve

Disapprove

Detail

Queues

NSF	Document Type	Document Number	Change Sequence	Submission
	REQ	R0044370		
	REQ	R0044402		
	REQ	R0044406		
	REQ	R0044408		
	REQ	R0044409		
	REQ	R0044411		
	REQ	R0044413		
	REQ	R0044416		
	REQ	R0044430		
	REQ	R0044435		

⏪ ⏩ 1 of 2

10 Per Page

FOAAINP to see who needs to approve a requisition before Purchasing can assign a P.O. number.

University of the Incarnate Word

Ms. Iris Dalinda Solcher Sign Out

Document Approval FOAAINP 9.3.3 (SITH)

Document: Type: ...

Change Sequence: Submission:

Go

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.

Type in the Document number and click "GO"

QUEUE AND LEVEL LIST

Queue ID	Queue Description	Queue Level	Approval Level
6306	BANNER ADMINISTRATIVE SYSTEMS		100 +

+ Indicates what will be approved

APPROVER LIST

Queue	Level	User
6306	100	Iris Solcher
6306	100	requis_approv

In suspense

FOIAPPH will show you who has approved a requisition. Click on Related and select FOIAPPH. Type in the Requisition number and the type (REQ) and press ALT Page Down. You can use the **Filter** option in the upper right corner to search for requisitions.

ADD RETRIEVE RELATED TOOLS

Search

Approval History [FOIAPPH]

Document Approval History FOIAPPH 9.0 (SITH)

Document Code	Type	Change Sequence	Submission Number
R0044370	REQ		

1 of 1 Per Page Record 1 of 1

DETAILS

Queue ID	Level	Approver's Name	Approved Date
DENY		0 Iris Solcher	01/11/2018

1 of 1 Per Page Record 1 of 1

USER INFORMATION

Originating User	JACK	Name	Jack Rogers
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Screen FOADOCU is where you can see all purchase requisitions entered by a user. Click on "GO" to see a list of requisitions. A requisition can be denied (to return to requestor's queue) from here as well if icon is red in color.

Document by User FOADOCU 9.0 (SITH)

Original User ID: COA: ...

Fiscal Year: ... Document Type:

Document: Status:

Activity Date From: Activity Date To:

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.

Go

Click the X to return to the Application Navigation page.

Document by User FOADOCU 9.0 (SITH)

Original User ID: COA: ... Fiscal Year: ... Document Type: Document: Status:

Activity Date From: Activity Date To:

DOCUMENT BY USER

Status	Document Type	Document Code	Change Sequence	Submission	Description	Activity Date	Document Amount	Deny Document
	REQ	R0039794			Corporate Travel Planners	07/05/2017	1,091.88	
A	REQ	R0041447			Sodexo, Inc. & Affiliates	08/31/2017	245.25	
A	REQ	R0041619			Heights Office Supply	09/08/2017	222.26	
I	REQ	R0042322			Lone Star Bloom	10/04/2017	84.95	
A	REQ	R0042336			Corporate Travel Planners	10/04/2017	559.96	
A	REQ	R0042491			Corporate Travel Planners	10/12/2017	559.96	
A	REQ	R0043141			Heights Office Supply	11/04/2017	170.15	
I	REQ	R0044236			Heights Office Supply	01/05/2018	1.00	
C	REQ	R0044402			Heights Office Supply	01/31/2018	4.00	
C	REQ	R0044406			Heights Office Supply	03/05/2018	1.00	
I	REQ	R0044407			Heights Office Supply	03/12/2018	17.00	
C	REQ	R0044408			Heights Office Supply	03/14/2018	203.00	
C	REQ	R0044409			Heights Office Supply	03/14/2018	270.15	
C	REQ	R0044410			Angela Mazzara	03/14/2018	350.00	
C	REQ	R0044411			Heights Office Supply	03/14/2018	0.59	
I	REQ	R0044412			Heights Office Supply	03/27/2018	2.00	
C	REQ	R0044413			Angela Mazzara	03/27/2018	2.00	
C	REQ	R0044414			Corporate Travel Planners	03/27/2018	250.00	
C	REQ	R0044415			Heights Office Supply	03/27/2018	5.00	
C	REQ	R0044416			Heights Office Supply	03/27/2018	2.50	

1 of 2 Per Page Record 1 of 29

Requisition Query FPIREQN 9.0 (SITH)

Requisition:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your

You can also check the status of a requisition from the requisition itself in the viewing screen. FPIREQN is the screen, type in the Requisition #, click "GO"

Requisition Query FPIREQN 9.0 (SITH)

Requisition: R0039545

REQUISITION INQUIRY: DOCUMENT INFORMATION

Requisition	<input type="text" value="R0039545"/>	<input type="checkbox"/> In Suspense	<input type="checkbox"/> Document Text
Order Date	06/21/2017	Delivery Date	06/21/2017
Transaction Date	06/21/2017	Comments	
		Commodity Total	<input type="text" value="2,500.00"/>
		Accounting Total	<input type="text" value="2,500.00"/>

REQUISITION INQUIRY: DOCUMENT INFORMATION

<input checked="" type="checkbox"/> Complete	Cancel Reason
<input checked="" type="checkbox"/> Approved	
Print Date	
Cancel Date	
Closed Date	06/27/2017
Activity Date	06/22/2017
User ID	BIJLANI
	Reference Number

Notice under the dates are COMPLETE and APPROVED. The box under them will indicate wither it's been completed by the end user and then approved by the department approver.

How To Delete a requisition you entered by mistake or to pull back a requisition to make corrections to for any reason. Must be done before approved by budgetary authority:

**Go to screen, FOADOCU, click next block. Once your requisitions come up, click on the number and on the right side is the Deny Document icon, it should be red. Click that and it returns it to the incomplete status. Then you can go back into the req. to make any changes you need to or to delete it under FPAREQN, type in the number (R0004222 ex.) and click Next Block.*

**To delete a requisition, do so while you're in the requisition. From the first screen, (Requestor/Delivery Information) click *Record* and *Remove* (twice) to delete requisition completely. It will tell you at the bottom when you have done this successfully.*

How To *Look* at a Purchase Order or Requisition to see details of it:

**Go to FPIREQN (requisitions) or FPIPURR (purchase orders) (if you have the access) and type in number (R0017658/P0167596), click "next block" and it shows you the details of the order.*

**You can also add your backup if you failed to do so before completing your requisition. Process is the same as if you were attaching from FPAREQN*

Purchase Order: P0168432

Blanket Order:

Go

Change Sequence:

Number

Enter the PO# and Click on "GO"

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.

Purchase Order: P0168432 Blanket Order: Change Sequence Number:

Start Over

PURCHASE/BLANKET ORDER INQUIRY: DOCUMENT INFORMATION

Purchase Order	P0168432	Deliver Date	08/29/2014
Blanket Order		Change Sequence Number	
Order Date	07/29/2014	Community Total	17,490.22
Transaction Date	07/29/2014	Accounting Total	17,490.22

ADD RETRIEVE RELATED TOOLS

Search

Click on the Related button to select FOAPOXT (Document Text)

ADD RETRIEVE RELATED TOOLS

Search

Document Text [FOAPOXT]

PURCHASE/BLANKET ORDER INQUIRY: DOCUMENT INFORMATION

<input checked="" type="checkbox"/> Complete	Requisition
<input checked="" type="checkbox"/> Approved	Document Text
Print Date 07/30/2014	Buyer Code SIV
Cancel Date	Sam Wages
Closed Date 08/29/2014	Blanket Order
Activity Date 07/29/2014	Termination Date
User ID RIVERA	<input type="checkbox"/> Rush Order
Type Regular	<input checked="" type="checkbox"/> NSF Checking
Cancel Reason	
<input checked="" type="checkbox"/> Purchase Order Created from Requisition	

When using account 7640 in the 3rd set of your budget. Please put your item under the Description section of your requisition. Any other items would go under "Related", "Item Text" instead of additional line items under Description section.

Requisition FPAREQW 9.3.5 (SITH) ADD RETRIEVE RELATED TOOLS

Requisition: R0044467 [Start Over](#)

* REQUISITION ENTRY REQUESTOR/DELIVERY

Requisition: R0044467 Comments: In Suspense
 Order Date: 06/08/2018 Commodity Total: 2,600.00 Document Text
 Transaction Date: 06/08/2018 Accounting Total: 0.00
 Delivery Date: 06/08/2018 Document Level Accounting

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

* COMMODITY

Item	Commodity	Description	UM	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1		Airfare	EA			2.00	1,300.0000	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount: 2,600.00 Tax: Distribute
 Discount: 0.00 Commodity Total: 2,600.00
 Additional: 0.00 Document Total: 2,600.00

* ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Loon	Proj	NSF Override	NSF Expense
1				10010	6306	1751	6250				<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount: USD:
 Discount:
 Additional:
 Tax:
 FOAPAL Total:
 Document Total: 0.00
 Remaining:
 Commodity Amount: 2,600.00

Pre-Paid expenses are items/services being purchased out of the next fiscal years budget but received or paid while in the current fiscal year. Ex: Airfare being taken in the next FY but booked in current FY are considered pre-paid.

* Enter in the budget as you would a regular requisition but using account 1751 for pre-paid. **Account number must be 1751.**
 * Under Related select FOAPOXT, put the budget to charge so Journal Entry's can be made by accounting.

* **June 1st** is used on requisitions as we draw nearer to the end of the month in April. If you do not require expenses to be paid from the current fiscal year than you would date your requisition 6/1st under Order Date, Transaction Date and Delivery Date, so that those expenses get paid out of next fiscal year.

ADD RETRIEVE RELATED TOOLS

Search

[View Budget Availability \[FGIBAVL\]](#)

[Review Accounting Information \[FOICACT\]](#)

[Document Text \[FOAPOXT\]](#)

Document Text [FOAPOXT]

Text Type: REQ

Change Sequence:

Vendor: 60462 Heights Office Supply

Modify Clause:

Default Increment:

Item Number:

Commodity:

Description:

Copy Commodity:

Text

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.

Insert Delete

Insert (F6)

In the Document Text type the description and then skip a line by entering : and then list the FY and GL account number for the Journal Entry. Use the insert button or F6 to add additional lines. Click Save in the lower right corner to save your work.

Procurement Text Entry FOAPOXT 9.3.5 (SITH)

Text Type: REQ Code: R004467 Change Sequence: Item Number: Vendor: 60462 Heights Office Supply Commodity Description: Modify Clause: Copy Commodity Text: Default Increment: 10

Start Over

Text	Clause Number	Print *	Line
June 17 -25 to attend conference		<input checked="" type="checkbox"/>	10
:		<input checked="" type="checkbox"/>	20
FY 18/19 ****10010-6306-7202-6250****		<input checked="" type="checkbox"/>	

Record 3 of 3