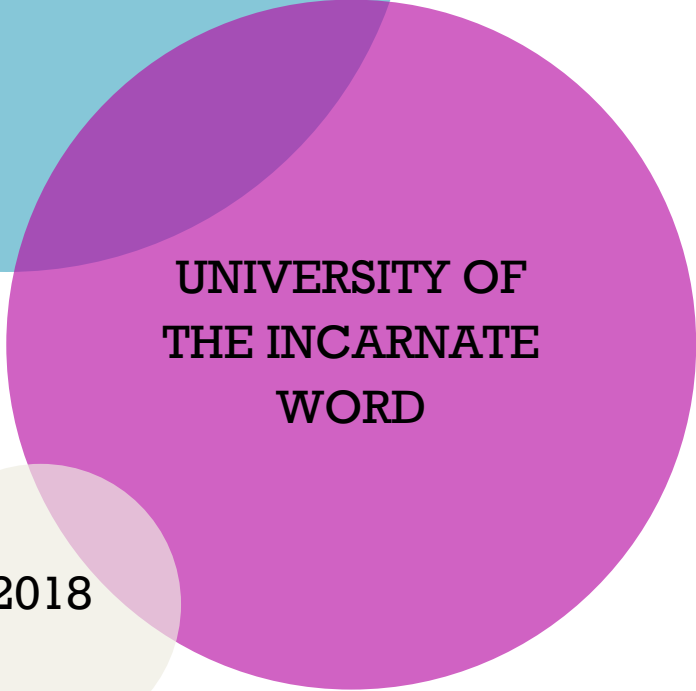


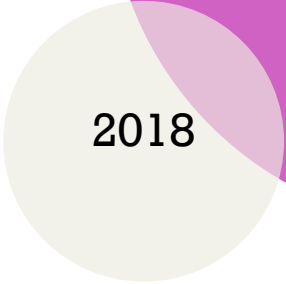


**BANNER 9**

Requisition  
Approval




**UNIVERSITY OF  
THE INCARNATE  
WORD**



**2018**

If you need additional assistance with this process contact the Purchasing department.

**Step 1** Login to the MyWord Portal








Sign In

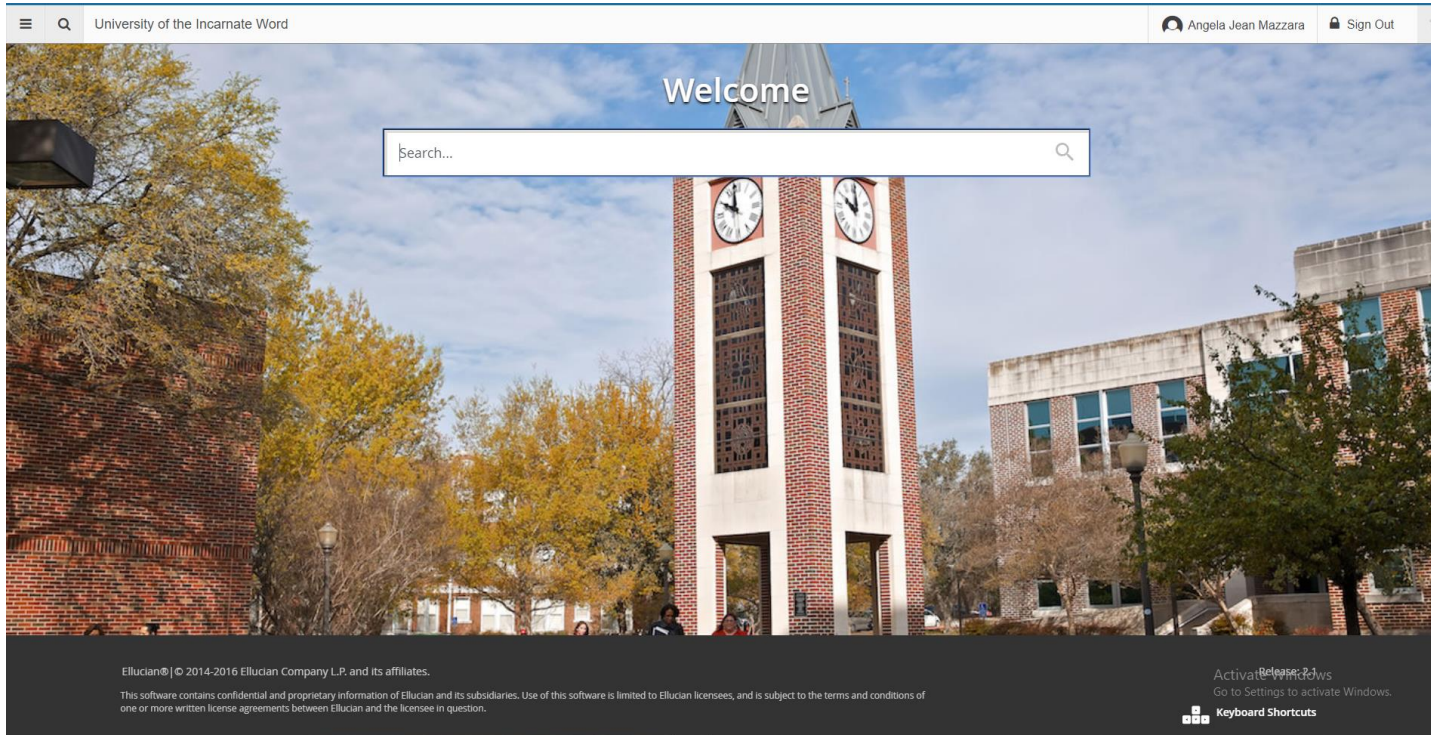
**LOGIN**

[Reset Password](#) | [Need Help?](#)

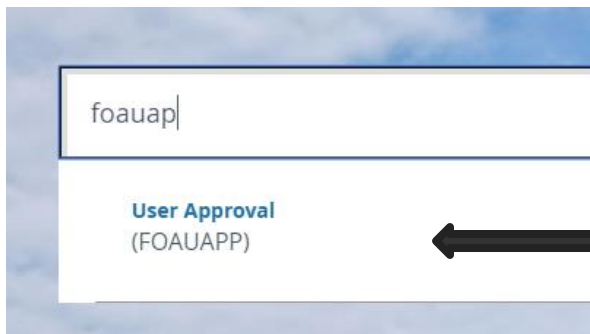
Under the Launch Pad select the Banner 9 Admin Pages (INB) link.

-  Banner 9 Admin Pages (SITH) ←
-  Student Self-Service
-  Banner 9 Self-Service Registration
-  Banner 9 Finance Self-Service
-  BannerCut

## This is the Application Navigation page in Banner 9



In the search bar type **FOAUAPP** or User Approval, press Enter or click on the name of the page in the dropdown



The Approval Notification screen will display if you have Requisitions awaiting review

Approvals Notification FOIAINP 9.0 (SITH)

APPROVALS NOTIFICATION

Number of Documents	Document Type	Message
15	Requisition	Awaiting your review

Record 1 of 1

Double click in the number of awaiting requisitions to approve.

User Approval FOAUAPP 9.3.2 (SITH)

User ID: ISOLCHER Iris Solcher Document:

Next Approver:

Go

Click on the **GO** button to display the waiting requisitions

A list of all the documents will display

User Approval FOAUAPP 9.3.2 (SITH)

User ID: ISOLCHER Iris Solcher Document: Next Approver:

Start Over

USER APPROVAL

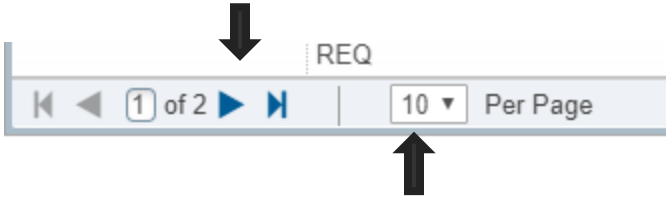
NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
	REQ	R0044370			JACK	14,356.43	DOC	Y
	REQ	R0044402			WILLIAMS	4.00	DOC	Y
	REQ	R0044406			WILLIAMS	1.00	DOC	Y
	REQ	R0044408			WILLIAMS	203.00	DOC	Y
	REQ	R0044409			WILLIAMS	270.15	DOC	Y
	REQ	R0044411			WILLIAMS	0.59	DOC	Y
	REQ	R0044413			WILLIAMS	2.00	DOC	Y
	REQ	R0044416			WILLIAMS	2.50	DOC	Y
	REQ	R0044422			WILLIAMS	5.00	DOC	Y
	REQ	R0044423			WILLIAMS	32.00	DOC	Y

Record 1 of 15

You can click on the **Start Over** button to return to the previous page.



If your waiting document is greater than 10 you will need to use the toggle arrow to move to the next page or increase the number of pages to be displayed up to 50



Highlight the document you want to review

REQ	R0044430	WILLIAMS	8.00	DOC	Y
REQ	R0044431	WILLIAMS	75.00	DOC	Y

Navigation: 1 of 2 | 10 Per Page Record 10 of 13

Press the **Detail** button to review the requisition and any documents added.

Detail

REQUISITION APPROVAL Insert Delete Copy Filter

Request: R0044423 Angela Mazzara Number of Items: 2

---

LINE ITEM INFORMATION Insert Delete Copy Filter

Item	Net	32.00
Commodity: Document Acctg Distribution	Vendor: 60462	Heights Office Supply

Navigation: 1 of 2 | 1 Per Page Record 1 of 2


---

ACCOUNTING INFORMATION Insert Delete Copy Filter

Sequence Number: 1	Location
COA: 1	Extended Amount: 32.00
Fiscal Year: 18	Discount Amount: 0.00
Index	Tax Amount: 0.00
Fund: 10010	Additional Amount: 0.00
Organization: 6306	Total: 32.00
Account: 6584	Project
Program: 6250	NSF: N
Activity	<input type="checkbox"/> NSF Override

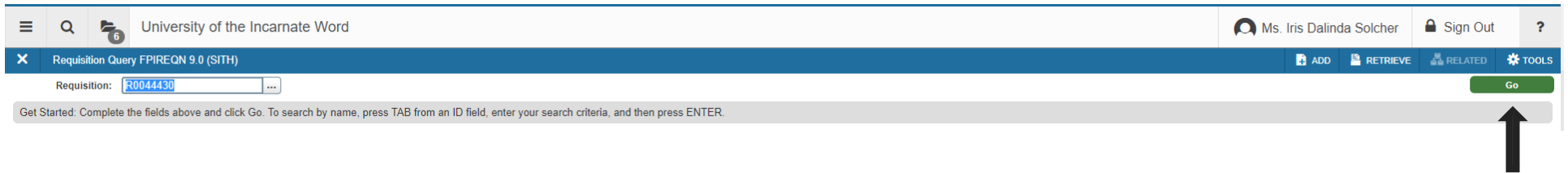
Navigation: 1 of 1 | 1 Per Page Record 1 of 1

Click on **Related** in the upper right corner, then click on Document Query (FPIREQN)



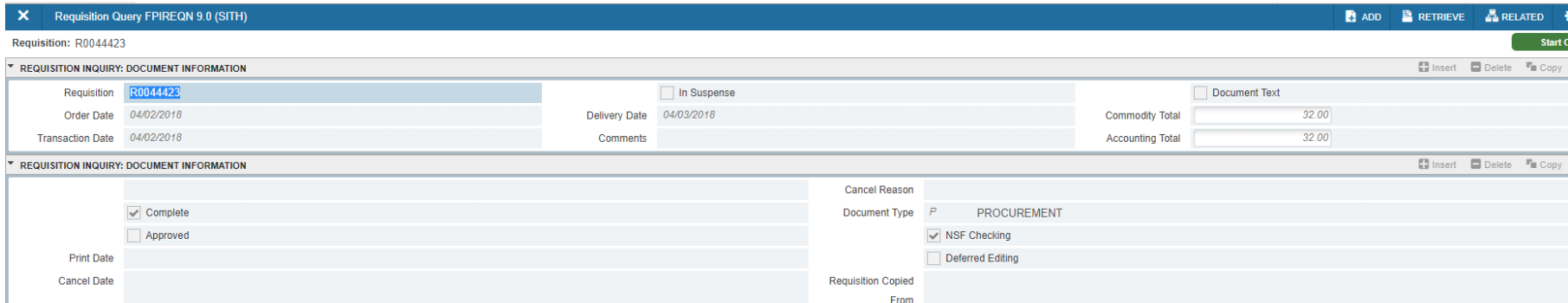
The screenshot shows a navigation bar with four buttons: 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. An arrow points to the 'RELATED' button. Below the navigation bar is a search bar with the text 'Search'. Underneath the search bar are two menu items: 'Document Query [FPIREQN]' and 'View Commodities [FOICOMM]'. An arrow points to the 'Document Query [FPIREQN]' item.

Click on **GO** to open the requisition to be reviewed.



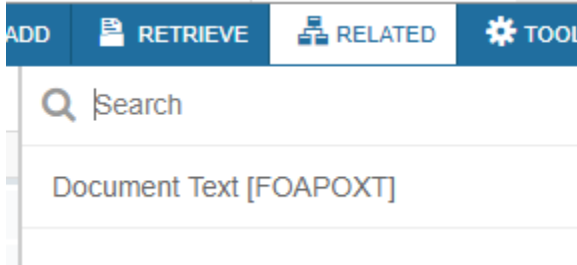
The screenshot shows a search interface for 'University of the Incarnate Word'. The search bar contains 'Requisition Query FPIREQN 9.0 (SITH)'. Below the search bar is a text input field with 'R0044430' and a 'Go' button. An arrow points to the 'Go' button. Below the search bar is a message: 'Get Started: 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.'

The requisition details will open

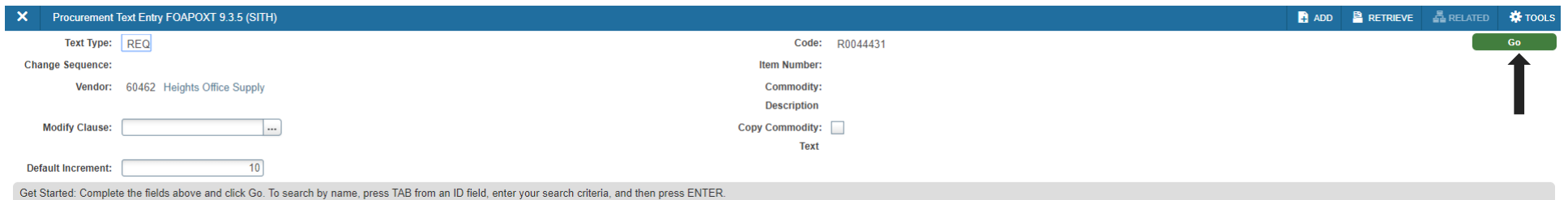


The screenshot shows the requisition details page for 'Requisition: R0044423'. The page is divided into two sections: 'REQUISITION INQUIRY: DOCUMENT INFORMATION' and 'REQUISITION INQUIRY: DOCUMENT INFORMATION'. The first section contains fields for Requisition (R0044423), Order Date (04/02/2018), Transaction Date (04/02/2018), Delivery Date (04/03/2018), In Suspense (checkbox), Commodity Total (32.00), and Accounting Total (32.00). The second section contains fields for Complete (checkbox), Approved (checkbox), Print Date, Cancel Date, Cancel Reason, Document Type (P PROCUREMENT), NSF Checking (checkbox), Deferred Editing (checkbox), and Requisition Copied From.

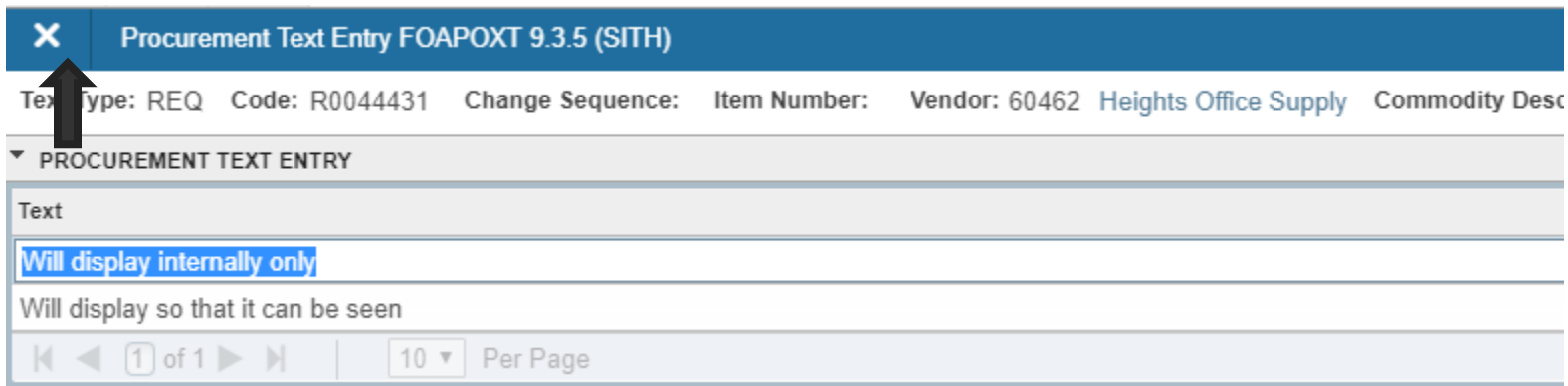
Click on the **Related** button to view Document Text added in the requisition.



Press the **GO** button to display text



Use the **X** to close the text and return Back to the Requisition detail





To see documents added to the requisition click on the **Retrieve** button in the upper right corner



You will be taken to the Application Xtender 16.3 sign in ( this is a temporary step until singal sign on is implemented June 2018) Sign in using your Banner credentials.

A dark blue sign-in screen for Application Xtender. At the top left, it says "opentext™ | ApplicationXtender". Below this is a dropdown menu with "SITH" selected. Underneath are two text input fields: the first is labeled "Enter User Name" and the second is labeled "Enter Password". At the bottom left, there is a checkbox labeled "Request Full Text Search Support". At the bottom center, there is a rounded rectangular button labeled "SIGN IN".

Documents attached to the requisition will display. If there is more then one page use the page toggle arrows or click on the thumbnail pictures of the documents.

opentext ApplicationXtender - SITH

B-F-DOCS > New Search > Query Results > R004423

Document Page

1 / 2

Scanner Rotate 34% Zoom Annotation Format Actions

Page 1

Page 2

### Heights Office Products

#### Detailed Order Report

UNIVERSITY OF INCARNATE WORD

Order #: 90-0115355 Order Status: Unconfirmed Order Date: 12/15/2016 12:05:38 PM

**Bill To:** UNIVERSITY OF INCARNATE WORD  
CARMEN  
4301 BROADWAY  
SAN ANTONIO TX 78209  
Phone: (210) 805-6837 Fax: (210) 829-6080

**Ship To:** 6306  
UNIVERSITY OF INCARNATE WORD  
6306 - BANNER ADMIN. SYSTEM  
4301 BROADWAY  
SAN ANTONIO TX 78209  
Phone: (210) 805-5836 Fax: ( ) -

SNo.	Item	Description	Cost Center/Comment	Qty	Price	UOM	Ext
1	PIL 32001	PEN/EASYTOUCH/BP/FINE/BLK Varies		1	\$10.01	OZ	\$10.01
2	PIL 32002	PEN/EASYTOUCH/BP/FINE/BLK Varies		1	\$10.01	OZ	\$10.01
3	KMW 72392	MOUSE/WIRELESS/3-BUTTON Varies		1	\$22.49	EA	\$22.49
4	VER 96871	CARD/MEM/SDHC/PREMIUM Varies		1	\$19.24	EA	\$19.24
5	SPR 81001	PUSH PIN/ASSORTED/100/BX Lisa L.		1	\$0.86	BX	\$0.86
6	MEA 06074	NOTEBOOK/BUSINESS/WIRE Lisa L.		1	\$7.23	EA	\$7.23
7	JDK CE7009	NOTEBOOK/WIRELESS/4. Lisa L.		1	\$7.14	EA	\$7.14
8	MMM 654	NOTES/POST- Lisa L. and Michael		2	\$9.54	PK	\$19.08

To exit Application Xtender click on the Log Out button



To exit FPIREQN click the X in the upper left corner

Requisition Query FPIREQN 9.0 (SITH)

ADD RETRIEVE RELATED

Requisition: R004423

REQUISITION INQUIRY: DOCUMENT INFORMATION

Requisition: R004423  In Suspense  Document Text

Order Date: 04/02/2018 Delivery Date: 04/03/2018 Commodity Total: 32.00

Transaction Date: 04/02/2018 Accounting Total: 32.00

REQUISITION INQUIRY: DOCUMENT INFORMATION

Complete  Approved

Print Date

Cancel Date

Cancel Reason

Document Type: P PROCUREMENT

NSF Checking  Deferred Editing

Requisition Copied From

To exit FOQRACT click the X in the upper left corner

**X** Requisition Approval FOQRACT 9.0 (SITH)

REQUISITION APPROVAL

Request R0044431 *Angela Mazzara*

LINE ITEM INFORMATION

Item  
Commodity Document Acctg Distribution

1 of 2 | 1 Per Page

ACCOUNTING INFORMATION

Sequence Number 1  
COA 1

Highlight the requisition you want to approve and click the Approve button

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
	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	R0044431			WILLIAMS	75.00	DOC	Y

1 of 2 | 10 Per Page Record 10 of 13

The approval box will display, add text if necessary. Click **OK** to confirm approval.

**Document Approval FOAUAPP 9.3.2 (SITH)**

Type	REQ
Number	R0044423
Submission	
Change Sequence	

DOCUMENT IS APPROVED

OK Cancel

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

ADD RETRIEVE RELATED TOOLS 2

✓ Document has your approval.

✓ Saved successfully (1 rows saved)

To disapprove the requisition click the **Disapprove** button, add text to the initiator for their review. Click **OK** to confirm your disapproval of the requisition.

Disapprove

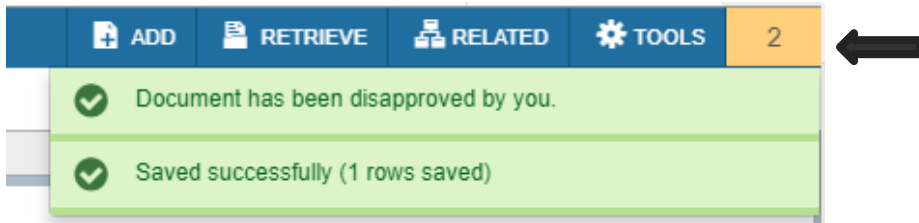
**Document Disapproval Text Entry FOAUAPP 9.3.2 (SITH)**

Type	REQ
Number	R0044422
Submission	
Change Sequence	

DOCUMENT IS DISAPPROVED

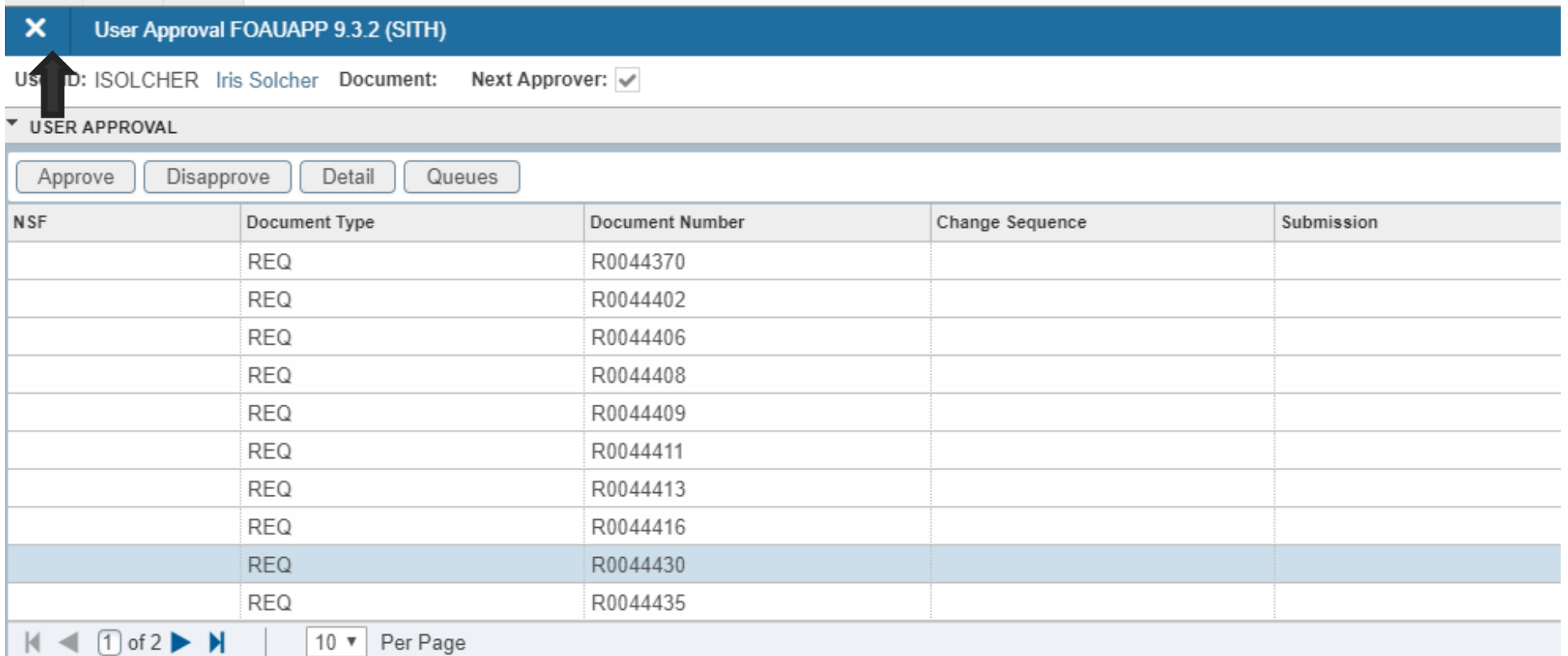
OK Cancel

You will receive two messages in the upper right corner when your disapproval is complete. Click the yellow box to hide the messages.



The screenshot shows a navigation bar with buttons for ADD, RETRIEVE, RELATED, and TOOLS. A yellow box with the number 2 is highlighted, with an arrow pointing to it. Below the navigation bar are two green messages: "Document has been disapproved by you." and "Saved successfully (1 rows saved)".

Screen will return to the pending requisitions. Continue reviewing if you have additional documents or click the **X** to return to the Application Navigation page.



The screenshot shows a 'User Approval' screen for 'User Approval FOAUAPP 9.3.2 (SITH)'. The user is 'ISOLCHER Iris Solcher' and the document is 'Next Approver: [checked]'. The screen displays a table of requisitions with columns for NSF, Document Type, Document Number, Change Sequence, and Submission. The table contains 10 rows of requisitions, with the 9th row (R0044430) highlighted. Navigation buttons for 'Approve', 'Disapprove', 'Detail', and 'Queues' are visible. The footer shows '1 of 2' pages and '10 Per Page'.

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		

You can click the **Queues** button to view who needs to review the requisition before it goes to Purchasing to become a PO.

Queues

Click the **GO** button to display the queues.

University of the Incarnate Word

Ms. Iris Dalinda Solcher Sign Out ?

Document Approval FOAAINP 9.3.3 (SITH) ADD RETRIEVE RELATED TOOLS

Document: \* R0044423 Type: REQ

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.

QUEUE AND LEVEL LIST

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

Record 1 of 1

APPROVER LIST

Queue	Level	User
6306	100	Iris Solcher
6306	100	requis_approv

Record 1 of 2

Approve Disapprove Detail

**FOIAPPH** will show you who has approved or disapproved a requisition. 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)

ADD RETRIEVE RELATED TOOLS

DOCUMENT APPROVAL HISTORY

Document Code: R0044370 Type: REQ Change Sequence: Submission Number:

1 of 1 Per Page

DETAILS

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

1 of 1 Per Page

USER INFORMATION

Originating User: JACK Name: Jack Rogers

Use the screen **Document by User (FOADOCU)** to see all the requisitions entered by a user. If it is not yourself type the username in the Original User ID field. Click the **GO** button.

Document by User FOADOCU 9.0 (SITH)

ADD RETRIEVE RELATED TOOLS

Original User ID: WILLIAMS COA: 1

Fiscal Year: 18 Document Type: Status: Activity Date From: Activity Date To:

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.

Click the **X** to return to the Application Navigation page.

Document by User FOADOCU 9.0 (SITH)

ADD RETRIEVE RELATED TOOLS

Original User ID: WILLIAMS COA: 1 Fiscal Year: 18 Document Type: Document: Status: Start Over

Activity Date From: Activity Date To:

Status	Document Type	Document Code	Change Sequence	Submission	Description	Activity Date	Document Amount	Deny Document
A	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