Welcome! This tutorial will guide you step-by-step through the process of approving a Banner requisition. After completing this simulated practice, you'll be ready to begin doing the real thing.

To get started, log in to BengalWeb, and go to the Approval Alerts channel. For your convenience, two copies of this channel have been provided - one on the Finance tab and another on the Purchasing tab. They're both the same, and you can use either one.

Notice that your channel displays the total number of requisitions waiting for you to approve. At the bottom of the channel, you'll find two links - one that says “Next Approver,” and another that says “All Documents.”

Clicking the “Next Approver” link will take you to a list of the documents you are next in line to approve. Normally, this is the link you will select.

The “All Documents” link takes you to a list of all documents which you are next in line to approve PLUS any documents that will require your approval AFTER they are approved by their next approver. You'll never need to select this link unless you're one of the few people, generally UBO's, designated to review requisitions after they've been initially approved.

Now, here's our first bit of simulated practice. Click the “Next Approver” link to continue.

Notice the Approve Documents page that has appeared. Instructions are found near the top of the screen. You may “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 Approve link, if enabled, to approve the document, or select the Disapprove link to disapprove the document.”

To review and approve a requisition, start by selecting a document number link.

Notice the link for requisition number R0002267. The “Y” means that you are the next approver on the document. We also see the ID of “Originating User,” the ReqMaster who created the requisition, and the total dollar amount. Click on the document number to proceed.
The View Document page appears. Here you'll see all the details of the requisition awaiting your approval. First, there's the Requisition Header section. Notice the requested delivery date, and make sure it's reasonable and within the desired timeframe. Also notice the total dollar amount.

Before approving a requisition, you should make sure you have sufficient funds on hand to cover the expense. If you have any doubt, you can quickly find out by performing a Budget Query. This is easy to do.

Farther down in the Requisition Header section you'll find the Ship To address. For most deliveries to Pocatello, the default Central Receiving address should be used, and most of the address fields contain default information. However, look at the Attention line. The name of the person who has asked for the request to be placed and who will be receiving the items should be filled in here.

Finally we find the Vendor information. This does not have to be filled in. If the Vendor is left blank, Purchasing will locate an appropriate source. Remember that requests over $5,000 (or over $4,000 in the case of certain items) must be put out to bid. Requests over $50,000 will be forwarded to the State of Idaho for processing. Expect these to take additional time.

Now, let's return to our review of requisition details.
For complete information on purchasing policies and procedures, consult the Purchasing Services website: www.isu.edu/purch.

Now, back again to requisition details. After examining the information in the Requisition Header, you scroll down the page, and you’ll find one or more sections titled Requisition Commodities and Requisition Accounting. You’ll find one of each displaying the details of all the items that have been ordered. For each commodity line, there is a corresponding accounting line. For example, here is all the information about the first item ordered, and here is all the information about the next.

The Commodity Code designates the type of item being purchased. Getting it correct is very important. ReqMasters have been instructed to choose these codes carefully. A complete list is available on the Tigeri Training website. Go to www.isu.edu/tigeri/training, and click on “Finance & Purchasing” to see the list.

However, notice that near the bottom of the screen, we see the words “No Related Documents Available.” If we were to look up this requisition again after a purchase order had been created, instead of these words we’d find a link to the Purchase order, and clicking on it would bring up its details.

At the very bottom of the screen, you’ll see links to other functions that may be available for you in Banner Finance.

These can also be accessed by scrolling back up to the top of the page and clicking on the Banner Finance tab. And, you can click on the Personal Information or Employee tabs to go to other sections of Banner. But for now, let’s continue approving this requisition.

You do this by clicking the back button on your browser. It’s OK to click the back button while in Banner Finance although you should never click it while performing Banner Employee functions, such as completing and approving Time Sheets. The two parts of the system operate differently.

Click the back button now.
You are returned to the list of documents awaiting your approval. If you’re satisfied that everything on the requisition you’ve just reviewed is correct, click Approve. Do this now.

The approval screen appears. If you’ve selected the wrong document, or if you’ve changed your mind, you can click Cancel. If you’re sure you want to approve, click Approve Document. Do this now.

Notice that your approval has been confirmed. Click Continue.

See that the document is no longer in your approval queue. You’re at the Approve Documents page once more, and you can continue to approve any additional requisitions that might be waiting.

However, if you found any errors or problems during your review, you should disapprove the requisition. After it’s been disapproved, a Banner message will be sent to the ReqMaster who created it, who can then make changes and submit it again for your approval. But note that the message will NOT be sent by email. The ReqMaster will see the message only after next logging in to their behind-the-scenes version of Banner - Internet Native Banner - where requisitions are created. If timely revision and resubmission is important, you may wish to contact the ReqMaster directly.

Let’s see how this works. For example, we’ll pick requisition number R0002269. Let’s say that the delivery date has been set two months in the future when you really need the item next week. When reviewing the requisition, you noticed this, and so you clicked the back button on your browser. Now click “Disapprove.”

Notice that a default comment has been generated, “Approval has been denied.” You must add your reason for disapproval.
Be very specific so that the ReqMaster will know exactly what to do. Now click "Disapprove Document."

Notice that your disapproval has been confirmed. Click Continue.

See that the document is no longer in your approval queue.

You’ll notice that there is also a “History” link for each document. Clicking here will display a list of all approvals required, and, if you are a second-level approver, any approvals that have already been granted before the document has come into your queue.

That’s pretty much all there is to know in order to be able to approve or disapprove requisitions, but there is one more feature that can come in handy.

At the bottom of the list of documents waiting for your approval, you’ll find a button marked Another Query. Click here.

You’ll see that you can select between "Documents for which you are the next approver" and “All documents which you may approve.” You can also select a specific document number to review, and then view and approve (or disapprove) it. Generally, though, your approval queue should be short enough that you won’t need to query by document number.

The screen you see here is the same one you’d be taken to if you had been performing another task in Banner Finance - a Budget Query, for instance - and had clicked the “Approve Documents” link at the bottom of the screen because you next wanted to review the documents waiting for your approval. In that case, you’d most likely just select “Documents for which you are the next approver,” and the list of all documents waiting for you to approve would appear.

Well, that’s about it. You’ll have noticed that you didn’t really have to do too much in our simulated practice. That’s because the mechanics of requisition approval
are very simple indeed. The only challenge is examining the requisition detail very closely and making sure that all is in order.

Next click on the "More Advice on Requisitions" link at the left-hand side of your screen to look over some additional information on specific requisition types such as Standing Orders, and to see a quick list of Purchasing Policies & How-To’s. This will acquaint you with some of the important changes in practices that have taken place in conjunction with Banner Finance Go-Live.

If you experience any problems completing your Requisition Approvals, please contact the IT Service Desk at 282-4357 (help).

To view the complete interactive tutorial on “Practicing Requisition Approvals” go to: www.isu.edu/tigeri/training/reqapproval.