

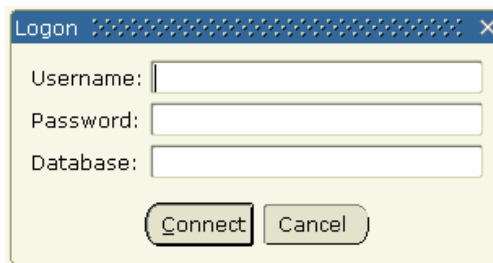
Requisition Approval Procedures

Logging On

Open your web browser to Internet Explorer and enter the following URL: <http://ban.uaex.edu>. Select **ACES WebForms INB** at the right of the screen. When the Logon box appears, enter your Banner ID (first initial and last name) and password. On the Database line, leave blank. The database will automatically default to the correct base. Select Connect at the bottom of the logon box to connect to Banner. If you have forgotten your password or it has expired, return to <http://ban.uaex.edu> and choose **Reset Your Banner Password** and follow the instructions.



Banner passwords are valid for 90 days. The first time you log on to Banner Webforms, you will need to change your password. Then, you will be required to change your Banner password every 90 days. To log on to Banner:

- In the **Go to** block, enter GUAPSWD and press Enter; or double click on the letters toward the bottom of the screen.
- Enter your Banner used ID and your current password.
- Leave the Database block blank.
- Select Connect to connect to Banner.



Navigation/Notes

On any form you can use either the Enter or Tab key to move between fields. You can also use Shift-Tab keys together to move backward. **Any fields that are not specifically mentioned in these instructions do not require any entry on your part.** To leave any form, press Exit **X**

Next Block  and Previous Block  or Next and Previous in the Block menu will move you between different sections of the forms.

Checking for requisitions to approve (Exhibit 1)


- In the **Go to** block, enter FOAUAPP and press Enter; or double click on these letters below the Go to block.
- Your user ID will default in the User ID block, along with your name. Press Next Block .
- Any requisitions requiring your approval will be listed.

Exhibit 1

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

User Approval Form FOAUAPP 7.0 (ACES)

User ID: LMEEKS Linda Meeks Document: Next Approver

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
<input checked="" type="checkbox"/>	REQ	R0016318	<input type="checkbox"/>	<input type="checkbox"/>	PFERRILL	17.20	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	REQ	R0016319	<input type="checkbox"/>	<input type="checkbox"/>	PFERRILL	97.83	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	PO	P0023093	<input type="checkbox"/>	<input type="checkbox"/>	JLIPSEY	185.30	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	PO	P0023096	<input type="checkbox"/>	<input type="checkbox"/>	DKNUTESON	139.54	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	PO	P0023097	<input type="checkbox"/>	<input type="checkbox"/>	DKNUTESON	400.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			
<input type="checkbox"/>	PO	P0023098	<input type="checkbox"/>	<input type="checkbox"/>	DKNUTESON	400.00	DOC	Y
Approve: <input checked="" type="checkbox"/>		Disapprove: <input type="checkbox"/>		Detail: <input type="checkbox"/>	Queue: <input type="checkbox"/>			

Record: 1/?

Multiple Approvers

- Some requisitions may have more than one approver. The approval chain is set up for various approval levels, depending on the fund and organization codes and the dollar amount on a specific document. A document will not appear in an approver's queue until the lower level approver has approved the document. The Purchasing Section cannot approve requisitions. If a user needs a requisition approved, they will need to call the next correct approver to approve it.

Review/Approve Requisitions


- Press the Detail button  beneath any requisition in your approval queue.
- The requisition approval form will list the amount of the requisition, the recommended vendor, the fund being charged and other details (Exhibit 2).

Exhibit 2

Request: R0016318 Pam Ferrill **Number of Items:** 1

Line Item Information

Item: **Commodity:** Document Acctg Distribution **Net:** 16.00

Vendor: @00000493 Printing Papers Inc

Accounting Information

Sequence Number	COA	Fiscal Year	Index	Fund	Organization	Account	Program	Activity	Location
1	Z	07		13304	3202	769999	PL		
Project:		NSF: N	<input type="checkbox"/> NSF Override		Amount: 16.00				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project:		NSF: <input type="checkbox"/>	<input type="checkbox"/> NSF Override		Amount: <input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project:		NSF: <input type="checkbox"/>	<input type="checkbox"/> NSF Override		Amount: <input type="text"/>				

Check to override a non-sufficient Funds Condition.
Record: 1/1 | ... | <OSC>


- To review the document, select Options above the Banner tool bar, then View Commodities, to review individual items requested (Exhibit 3). Press the Exit **X** to return to the document. To review the entire requisition, select Options above the tool bar, then View Document. Use Next Block  to navigate through the document. Press Exit **X** to return to the document, then press Exit **X** to return to the User Approval Form screen.

Exhibit 4

The screenshot displays the Oracle Developer Forms Runtime - Web interface. The main window is titled "User Approval Form FOAUAPP 7.0 (ACES)". At the top, there are fields for "User ID: LMEEKS", "Linda Meeks", "Document:", and a checked "Next Approver" checkbox. Below this is a table with columns: NSF, Document Type, Document Number, Change Sequence, Submission, Originating User, Document Amount, Queue Type, and Next Approver. A modal dialog box titled "Document Approval FOAUAPP 7.0 (ACES)" is open over the table, showing fields for "Type: INV", "Number: I0127050", "Submission: 0", and "Change Sequence:". The dialog also contains a text area with "DOCUMENT IS APPROVED" and "OK" and "Cancel" buttons. The table below the dialog shows several rows of data, including document numbers 10127029 and 10127050, with "Approve" checkboxes checked.

NSF	Document Type	Document Number	Change Sequence	Submission	Originating User	Document Amount	Queue Type	Next Approver
<input type="checkbox"/>	INV	10127029		0	JFISH	238.42	DOC	Y
<input checked="" type="checkbox"/>	INV	10127050				33.21	DOC	Y
<input type="checkbox"/>								
<input checked="" type="checkbox"/>								
<input type="checkbox"/>								
<input checked="" type="checkbox"/>								
<input type="checkbox"/>								
<input checked="" type="checkbox"/>								
<input type="checkbox"/>								
<input checked="" type="checkbox"/>								

- Continue the steps above until all requisitions have been approved or disapproved.
- When you have finished, press **X** to exit.

Requisitions Not in Your Queue

If there is a completed requisition that you believe should appear in your approval queue but does not, you can view the approval process to see where that requisition has stopped.


In the **Go to** block, enter FOAINP and press Enter. Enter the requisition number in the Document box, press tab and press Next Block . This form will list the approval queue that the requisition is in along with the person(s) who must approve it before it is forwarded to you. An example appears in Exhibit 5.

Exhibit 5

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

Document Approval Form FOAAINP 7.0 (ACES)

Document: Type: Change Sequence: Submission:

Queue ID	Queue Description	Queue Level	Approval Level
<input type="text" value="PRNT"/>	<input type="text" value="PRINT SHOP OPERATIONS"/>	<input type="text" value="1"/>	<input type="checkbox"/>
<input type="text" value="PRNT"/>	<input type="text" value="PRINT SHOP OPERATIONS"/>	<input type="text" value="2"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Queue	Level	User
<input type="text" value="PRNT"/>	<input type="text" value="1"/>	<input type="text" value="Bernadette Hinkle"/>
<input type="text" value="PRNT"/>	<input type="text" value="1"/>	<input type="text" value="Linda Meeks"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

+ Indicates what will be approved

In suspense: Detail: Approve: Disapprove:

Record: 1/2 | ... | <OSC>

Exiting Banner Webforms

Press Exit **X** to exit the program.