

*University of Alabama in Huntsville
Procurement Services*



**UAHUNTSVILLE
BANNER SELF-SERVICE
REQUISITION APPROVAL
WORKBOOK**

SCT Banner

www.uah.edu/admin/bussvcs/procurement

Revised January 2010

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UAH Banner Self-Service Requisition Approval Workbook

Logging On

STEP	ACTION
1	From Internet Explorer, type the following web address: http://register.uah.edu .
2	Click on Enter Banner Self Service.
3	Click on Enter Secure Area to access the Login Page.
4	Enter your user ID and PIN and click Log On. This will take you to the Main Menu.
5	Click on Finance.
6	Click on Approve Documents or View Document, according to your objective for this session.

Navigating Note: Use the Tab key to advance throughout the form. Do not use the Enter key. To delete a field on a form, Tab to the area and use the delete button. Do not use the space bar. You can also use the mouse buttons to select, copy, paste, etc.

Approve Documents

Only an authorized person can approve a Requisition after it has been entered. Depending on your department or funding, the Requisition may require several different levels of approval.

No change may be made to a Requisition in Self-Service Banner. If the Requisition requires a change that does not increase the monetary amount, notify Purchasing by email of the change to be made. To cancel an item on a Requisition, notify Purchasing by email of the change to be made. To cancel a Requisition, the Requisition must be "Disapproved." Then notify Purchasing to remove the record once the document has been disapproved.

After all electronic approvals are complete; the Requisition is ready for further processing by Purchasing.

From the Finance Menu, click on Approve Documents. Your User ID will default when accessing this screen. The Approve Documents Form allows a user to approve or disapprove a Requisition online. Enter parameters; then select Submit Query to obtain a list of all documents satisfying the query.

The screenshot shows the 'Enter Approval Parameters' form. The 'User ID' field contains 'TOWNLEYC'. The 'Document Number' field is empty. Below the form are two radio button options: 'Documents for which you are the next approver' and 'All documents which you may approve'. A 'Submit Query' button is at the bottom. Two callout boxes provide instructions: one for entering a known document number and another for selecting a radio button if the number is unknown. Red circles with numbers 1 and 2 highlight the Document Number field and the Submit Query button, respectively.

Step	Action
1	Enter the Document Number or click one of the following: Documents for which you are the next approver — To view a list of all documents in a queue for which the User ID has authority and that are waiting for approval before proceeding to the next approval queue. All documents which you may approve — To view a list of all documents in the approval queues for which the User has authority and that are waiting for approval.
2	Click <input type="button" value="Submit Query"/>

APPROVE DOCUMENTS QUERY RESULTS

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. Select the Disapprove link, if enabled, to disapprove the document. You may print the document by clicking on File and then Print from the toolbar.

Queried Parameters

User ID	TOWNLEYC	Candace Townley
Document Number:		
Documents shown:	Next Approver:	Amount

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User
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Cancel or Change a Requisition

CANCEL A REQUISITION

To cancel a Requisition, the Requisition must be disapproved. Notify Purchasing to remove the record once the document has been disapproved.

CHANGE TO A REQUISITION

No change may be made to a Requisition after completion in Self-Service Banner. Changes may be made to a Requisition in Internet Native Banner after the document has been "Disapproved."

If the required change does not increase the monetary amount, notify Purchasing by email of the change to be made.

To cancel an item on a Requisition, notify Purchasing by email of the change to be made prior to a Purchase Order being issued. If a Purchase Order has been issued a Change Order Requisition must be submitted.

No increases may be made to a Requisition after co

View Document

From the Finance Menu, click on View Document. To display the details of a document enter parameters; then select View document. To display approval history for a document, enter parameters; then select Approval history.

Departmental copies of Requisitions and Purchase Orders may be printed from the toolbar.

To view the Purchase Order number associated with the Requisition submitted, perform a Budget Query. Training on Budget Queries will be offered by the Budget Office.

Choose type:	Requisition	Document Number	
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VIEW DOCUMENT

Step	Field	Action
1	Choose Type	Choose "Requisition" or "Purchase Order." Submission # is used for journal vouchers and invoices.
2	Document Number	Enter the document number.
3	Change Seq#	Used only for Purchase Orders. Specify the change sequence number for the document. Blank Purchase Order as it currently stands 0 Original Purchase Order number Change Order number to the original Purchase Order
4	Display Accounting Information	Choose Yes to display Accounting distribution information. Choose No to suppress Accounting distribution information.
5	Display Document Text	Choose All , Printable , or None to display Document Text. Choosing All will display both printing and non-printing text. Printable is the default value and will display all header and line item text that will be printed on the Requisition.
6	View Document	Click <input style="width: 100px; height: 20px; border: 1px solid black;" type="text"/>

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