HOW TO APPROVE REQUISITIONS

Log into Banner Web

You will see this screen:

Click on the "Finance" tab

Then "Approve Documents" > "Submit Query"

This will bring up a list of documents for you to approve. Anything in blue is clickable and you can drill down into the document to review it. Click on Document so you can see the requisition, who the vendor is, the amount, the budget code charged etc.

On this screen (see below) you can see in the "NSF" column those marked "Y" are in NSF condition, there are not enough funds in that particular budget line to purchase the items for this Requisition.

At this point, you can fill out the Budget Transfer form if you have funds in another budget line that you can move into the NSF budget line, providing you will not need the funds in the first line in the future.

Or if you cannot transfer funds, you can request a variance through Financial Affairs which will be brought to the President's Cabinet for a final decision.

Approve Documents List

Next Approver	Type	NSF	Change	Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ					LMUDRIE	279.83	DOC	R0073404	History	Approve	Disapprove
Y	REQ					FLUCIA	942.60	DOC	R0073419	History	Approve	Disapprove
Y	REQ	Y				SHUMPHREY	20,000.00	NSF	R0073423	History	Approve	Disapprove
Y	REQ	Y				SHUMPHREY	50,000.00	NSF	R0073424	History	Approve	Disapprove
Y	REQ	Y				BERICCI	10.56	DOC	R0073430	History	Approve	Disapprove
Y	REQ	Y				BERICCI	2,031.00	DOC	R0073438	History	Approve	Disapprove
Y	PO					SDELLECHAIE	4,386.00	NSF	P0072256	History	Approve	Disapprove
Y	PO					BSMOROL	3,288.00	NSF	P0082894	History	Approve	Disapprove
Y	PO					AMBIELBY	365.00	NSF	P0084990	History	Approve	Disapprove
Y	JV				0	PEBOCHNI	6,987.88	NSF	J0031845	History	Approve	Disapprove
Y	JV				0	PEBOCHNI	74.00	DOC	J0032101	History	Approve	Disapprove
Y	JV				0	PEBOCHNI	1,500.00	DOC	J0032102	History	Approve	Disapprove
Y	REQ	Y				BSMOROL	10,000.00	DOC	R0073460	History	Approve	Disapprove

Another Query

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer |

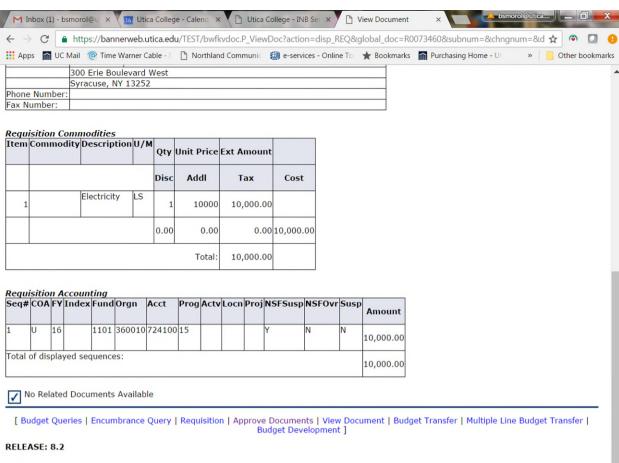Once you click on the Requisition # to view the details you will see the screen below.

Again, at the bottom of the requisition detail, you will see a "Y" in the NSF Susp (NSF suspended) column. You must make the appropriate provisions prior to approving at this point, either a budget transfer or variance request.

If you have the funds and want to approve/disapprove the requisition you go back to the previous screen and click Approve/Disapprove.

If you approve the document and it is NSF, it will go to Financial Affairs and they will contact you. If you approve the document and there are appropriate funds, it will be approved and routed to Purchasing to create a Purchase Order for you to place the order with the vendor.

If you disapprove the requisition, please let the person know who entered the req. why you disapproved it so they can remove it or make corrections as necessary.

After you Approve/Disapprove the document, click "CONTINUE". **Important** Do not use the "BACK" button or you will undo your approval/disapproval.

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▦ Apps   🏛 UC Mail   ◉ Time Warner Cable -   🗋 Northland Communic   🔅 e-services - Online To   ★ Bookmarks   🏛 Purchasing Home - U   »   🗀 Other bookmarks

	300 Erie Boulevard West
	Syracuse, NY 13252
Phone Number:	
Fax Number:	

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount	
					Disc	Addl	Tax	Cost
1		Electricity	LS	1	10000	10,000.00	
				0.00	0.00	0.00	10,000.00
					Total:	10,000.00	

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	U	16		1101	360010	724100	15				Y	N	N	10,000.00
Total of displayed sequences:														10,000.00

☑ No Related Documents Available

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Budget Development]

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