Business Rules

- Completion and approval of a requisition does not authorize a purchase. A purchase order is the official procurement document for the university and must be issued and signed by the President, Vice President for Business Affairs, Purchasing Director or Senior Buyer before an order can be placed. Orders placed in violation of this rule are considered non-compliant.

- Requisitions with Insufficient Funds (NSF) should not be approved by the account manager.

- All requisitions must be approved by the appropriate account manager unless specific delegations have been granted by the Purchasing Director.

- Requisitions with a total cost of $1,000 or more for furniture, equipment and/or software must be approved by the appropriate vice president after approved by the account manager.

Rio Grande College only

- All requisitions totaling $1,000 or more must be approved by the Vice President for Rio Grande College after approved by the account manager.
Approving a Requisition

Approving through Self-Service

All requisitions must be approved by the appropriate person before a purchase order can be created. Completion and approval of a requisition does not authorize a purchase. A purchase order is the official procurement document for the university and must be issued before an order can be placed.

Requisitions may be approved through Banner Self-Service.

1. Log on to Banner Self-Service using your user ID and PIN.

2. Select Finance from the Main Menu

4. Select ‘Documents for which you are the next approver’ and hit the Submit Query button.
5. Banner will display a list of documents for you to approve. The list will show if you are the next approver, NSF status, originator and amount.

6. Review the document by clicking on the document number link.
7. Banner will display a screen that provides more information about the requisition.
8. Return to the list by clicking your browser’s Back button. You may want to select the **History link** prior to approving or disapproving the requisition. This will display the approval history of the document.

9. Select either approve or disapprove next to the requisition number.
10. Banner will display a default message that you may modify.

11. Select the Approve/Disapprove button to complete the process.

12. Banner sends a message to the requisition’s originator in **Internet Native Banner**. The ‘Check Banner Message’ link will be flagged.

13. Click on this link to view messages.
14. After document has been handled, select the **Complete button** to remove the message.

Once you have approved or disapproved a document, Banner will send a message to the requisition’s originator. If the requisition requires an additional approval, send an email to the next approver that tells them there is a requisition awaiting their approval. Most users will not access Banner on a daily basis and may not see Banner messages in a timely manner.
Approving through Internet Native Banner

Requisitions can also be approved in Internet Native Banner on the User Approval Form (FOAUAPP). When you navigate to this form, your user ID will automatically default and the Next Approver box will be checked. Select Next Block. This will bring up a list of requisitions for which you are the next approver. (To see all requisitions you must eventually approve, uncheck the next approver box.)

From this screen, you can approve or disapprove a document. You can also choose to view details about the requisition and its approval history.

Once you have approved or disapproved a document, Banner will send a message to the requisition’s originator. If the requisition requires an additional approval, send an email to the next approver that tells them there is a requisition awaiting their approval. Again, most users will not access Banner on a daily basis and may not see Banner messages in a timely manner.