

# Online Requisitions and Direct Pay - FAQs

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## Online Requisitions and Direct Pay - FAQs -(con't)

I approved the document, why did I get an email the next day saying that it still needs to be approved?

In the Purchasing “Approving Requisitions Online” training guide, Steps 1-4 in the “Approving a Requisition” section are required to query either a specific document, or all documents, that you are going to approve. When the query results are returned, the links for “History”, “Approve” and “Disapprove” are all available, and Step 6 states that you will click on the “Approve” link. This gets you to the approval form. **You must still click on the “Approve Document” button to submit the document for approval.** At this point you will see a message on your screen that says “Document Rxxxxxxx has your approval”.

The image contains two screenshots of the Banner system interface, both enclosed in dashed black boxes. The top screenshot is titled "Approve Document" and shows a form with the following fields: "Document Number: R0001089 Type: REQ", "Change Seq#" and "Sub#" (both empty), and "Amount: 26,000.00". Below these is a "Comment:" field containing the text "This document has been approved." At the bottom of the form are two buttons: "Approve Document" and "Cancel". A dashed oval highlights the "Approve Document" button. The bottom screenshot is titled "Document Pending Approval" and shows a checkmark icon followed by the text "Document R0001089 has your approval." Below this is a "Continue" button.

Why did the approval email get sent out to me and also to my proxy?

The approval hierarchy within Banner does not allow for differentiating between primary and proxy for an approval level. The proxy (a second approver at each level) was required during approval queue setup so that documents do not get stuck waiting for approval if an approver is unable to log in and move the requisition along. Because the emails “read” the approval queue structure within Banner, they are generated for all approvers at the approval level. Within your department, if the primary is available, the proxy can disregard the approval email with no action required.

## Online Requisitions and Direct Pay - FAQs -(con't)

If I am an approver, and I submit a requisition below my limitation, will I still have to approve it?

No, approvals for requisitions are set up to be implicit. If you submit a requisition with a dollar value at or below your approval limit, it is automatically approved by Banner and will move along to the next level in the approval hierarchy.

A requisition shows up as completed, but is not yet available to be approved or disapproved - why?

The approval process that moves requisitions along in Banner may have stopped. Call the support desk at 529-7900, go through the options for Banner issues, and ask them to check on the FORAPPL process in the job scheduler.

Or – the timing of the requisition completion may have been such that it will have to wait for the next approval/notification process cycle

For instance, a requisition completed in Bannerweb at 8:15 AM would be picked up by the approval process (FORAPPL) running at 8:30 AM. After FORAPPL runs, the requisition would appear in BannerWeb as ready to be approved, but the email notification to the first level approver would not be generated until the 9:15 AM run of the email notification process.

The delay between approval-ready status and email notification begins again for each level of approval required for the requisition before it hits final approval.

FORAPPL process run times	EMAIL NOTIFY program run times	FORAPPL process run times	EMAIL NOTIFY program run times
7:30 AM	7:45 AM	2:45 PM	3:15 PM
8:00 AM	8:30 AM	3:15 PM	
8:30 AM		3:45 PM	4:00 PM
9:00 AM	9:15 AM	4:15 PM	4:45 PM
9:30 AM	10:00 AM	4:45 PM	
10:00 AM		5:15 PM	5:30 PM
10:30 AM	10:45 AM	5:45 PM	6:15 PM
11:00 AM	11:30 AM	6:15 PM	
11:30 AM		6:45 PM	7:00 PM
12:00 PM	12:15 PM	7:15 PM	7:45 PM
12:30 PM	1:00 PM	7:45 PM	
1:00 PM		8:15 PM	8:30 PM
1:30 PM	1:45 PM	8:45 PM	9:15 PM
2:15 PM	2:30 PM		

## Online Requisitions and Direct Pay - FAQs -(con't)

Why did my requisition go to another department's approval queue?

The upper-level parent organization (usually ends with "99", for instance ITS99 or PUR99) of the lower-level organization that is on the requisition will determine the approval queue to which the requisition is routed. The organization hierarchies can be found on a word document published in MInE\Budget and Finance\Hierarchies.

You can open the document, do a "Find" on the organization from the requisition, and then look above that point in the document to find the parent organization (ending with 99). Normally the first three characters of the parent organization will match the first three characters of the index code and the approvals will route as expected.

However, in cases of departmental restructuring, there is potential for a mismatch of index code organization with department parent organization. This would occur if the departmental changes were not also requested to be reflected in new index codes assigned to the departments.

I put document/item text in my online requisition but I don't see it on the screen, how do I make sure it prints?

When you click on the View Document link, make sure that you select the "Printable" option for document/item text.

Display Accounting Information  
 Yes  No

Display Document/Line Item Text  
 All  Printable  None

Display Commodity Text  
 All  Printable  None

View document Approval history

Requisition Header						
Requisition	Order Date	Trans Date	Delivery Date	Print Date		Total
R0006222	Aug 14, 2007	Aug 14, 2007	Aug 14, 2007			2,500.00

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Document Text: this is in the "Print" box of the document text

Requisition Commodities						
Item	Commodity Description	U/M	Qty	Unit Price	Ext	Amount
				Disc	Addl	Tax
1	BLANKET PO - MISC PARTS EA	EA	1	2500	2,500.00	
			.00	.00	.00	2,500.00
	this is item text in the "Print" box					
				Total:	2,500.00	

## Online Requisitions and Direct Pay - FAQs -(con't)

If you put text in the "No Print" text boxes under either the document text link, or the item link, you will still be able to view it if you choose the "All" option in the View Document link instead of the "Printable".

Requisition Header						
Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total	
R0006222	Aug 14, 2007	Aug 14, 2007	Aug 14, 2007		2,500.00	

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Germantown, OH 45327-9663

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Document Text: this is in the "Print" box of the document text  
 this is in the "No Print" box of the document text

Requisition Commodities							
Item	Commodity Description	U/M	Qty	Unit Price Ext			Amount
				Disc	Addl	Tax	
1	BLANKET PO - MISC PARTS EA		1	2500			2,500.00
				.00	.00	.00	2,500.00
	this is item text in the "Print" box						
	This is item text in the "No Print" box						
Total:							2,500.00

The requisition information is not in my monthly reports for a fiscal period, but when I query in Banner FGITRND for that period it shows up. Why is this?

The requisition is assigned to the fiscal period that it was created in and subsequent action on the requisition in a later period will cause an encumbrance entry to be placed in the earlier fiscal period. Monthly reports are a static vehicle, and if the entry into the period occurs after the monthly reports are created and published to MInE, the reports for that period will not reflect the later activity.

My name has changed but the requisitions still show my old name - how do I correct this?

Send an email to Amy Kidwell ([boehmeal@muohio.edu](mailto:boehmeal@muohio.edu)) in the Controllers Office and request that she change the FOMPROF record for your uniqueid to match your new name.

## Online Requisitions and Direct Pay - FAQs -(con't)

How do I request access to enter an Online Requisition or a Direct Pay document in Bannerweb?

- **Obtaining access to Bannerweb for Initiating Online Requisitions and/or Direct Pay requests**

Any employee who will be entering Online Requisitions (Purchasing Department) and/or Direct Pay Requests (Accounts Payable Department) in Bannerweb will need to follow the steps outlined below:

- 1.) Attend one of the monthly training sessions hosted by the Purchasing Department - at the completion of the training session, Purchasing will forward your name to Amy Kidwell in the Controller's Office for establishing your access to the Finance portion of Bannerweb
- 2.) Accounts Payable will contact you for the specialized Direct Pay training necessary

How do I request access to approve an Online Requisition or a Direct Pay document in Bannerweb?

- **Obtaining access to Bannerweb for Approving Online Requisitions and/or Direct Pay requests**

Contact Purchasing for any changes to approval queues where employees need to be added to the approval queue for a department - if the employee has not previously been granted access to Bannerweb then the access will be established by Amy Kidwell in the Controller's Office

Optional training for approvers is available by either the Purchasing or Accounts Payable Departments