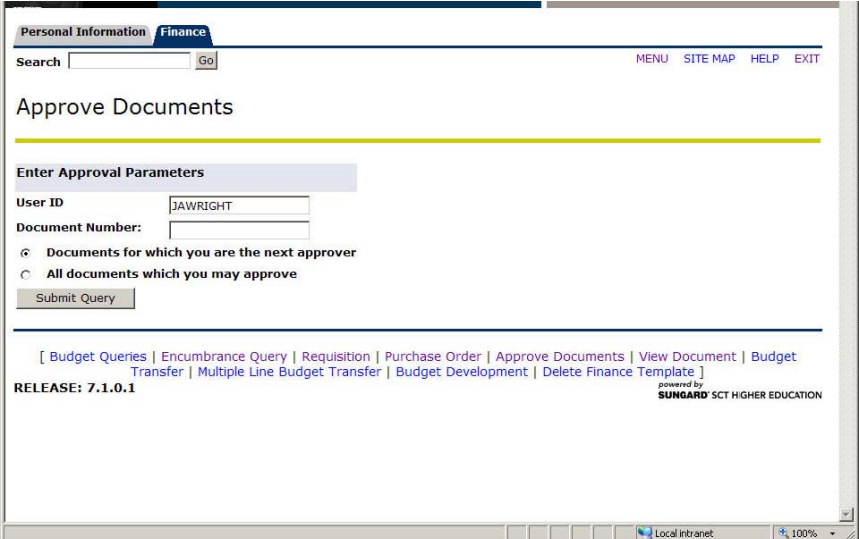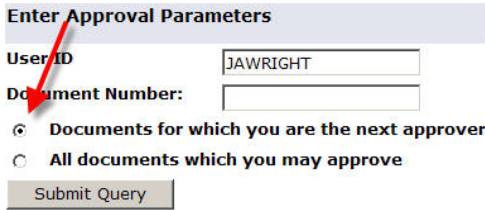# Approvals Using SSB

Important Notes About Approvals

- You can have Requisitions (REQ) and Invoices (INV) in your approval Queue.
  - If you have approval authority you will see the invoice in your approval queue along with the requisitions.
- Direct Pay/IAF invoices do not go through Approvals
- If you approve a NSF (Not Sufficient Fund) document it will go to a NSF queue, only Budget or DSPA will have access to the document.

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	Criteria/Function	Values/Results
1.	**Log into Banner**	From the main menu, select **Finance**. From the Finance menu, click **Approve Document**
2.	**Approving**	This will bring you the Approve Document screen. Your username will default in the User ID field.
3.	**Query**	If you know the document number type the document number in the Document Number field. If you do not know the document number you have two options. Select the radio button that suites your query. NOTE: By selecting "*All documents which you may approve*" this will allow you to force an approval on a document where you are not the next approver.
4.	**Submit Query**	Click the Submit Query button.
5.	**Query Results**	Your documents to be approved will appear. If there are no documents to

| | | be approved it will show no results.

Approve Documents

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.

Queried Parameters

User ID	JAWRIGHT Janel Wright
Document Number:	
Documents Shown:	Next Approver

Approve Documents List

Next Approver	Type	NSF	Change	Seq#	Sub#	Originating User	Amount	Queue	Type	Document	History	Approve	Disapprove
	REQ					JAWRIGHT	200.00	DOC		R0000023	History	Approve	Disapprove
	REQ					JAWRIGHT	500.00	DOC		R0000024	History	Approve	Disapprove

[Another Query]

NOTE: To determine if the document is NSF a "Y" will be in the NSF column. If the document is in the NSF queue and you approve it it will go to a queue in the budget Office. Budget will have to either approve or disapprove the document.

Approve Documents List

Next Approver	Type	NSF	Cha...
Y	REQ	Y	
Y	INV	Y	

<table>
<tr><td>6.</td><td>Viewing Documents</td><td>

To view the document click on the hyperlink of the document number you want to view. If you do not need to review the document go to step 12.

Approve Documents List

Next Approver	Type	NSF	Change	Seq#	Sub#	Originating User	Amount	Queue	Type	Document	History	Approve	Disapprove
Y	REQ	Y				JKECHES	19,536.00	NSF		R0000042	History	Approve	Disapprove
Y	INV	Y			0	N000148935	1,500.00	NSF		I0000071	History	Approve	Disapprove
Y	INV	Y			0	JKECHES	1,500.00	NSF		I0000094	History	Approve	Disapprove
Y	INV	Y			0	JKECHES	8,888.00	NSF		I0000095	History	Approve	Disapprove

[Another Query]

</td></tr>
<tr><td>7.</td><td>Reviewing Documents</td><td>

All the detail of the document will display.

View Document

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0000023	Feb 27, 2008	Feb 27, 2008	Feb 27, 2008		200.00

Origin:	SELF_SERVICE			
Complete:	Y	Approved:	N	Type: Procurement
Cancel Reason:				Date:
Requestor:	Janel Wright	100040	Commencement	
Accounting:	Document Level			

Ship to:	360 Huntington Ave
	Boston, MA 02115
Attention:	Janel Wright
Contact:	

Vendor:	A00010009 Cintas Corporation
	25 Darren St
	Suite 203
	Boston, MA 02115
Phone:	617-373-0000 Fax: 617-373-0001

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount			
					Disc	Addl	Tax	Cost	
1		stuff	EA	20	10	200.00			
					.00	.00	.00	200.00	
						Total:	200.00		

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	N	08		310013	131800	73003	1010				N	N	N	200.00
Total of displayed sequences:														200.00

☑ No Related Documents Available

</td></tr>
</table>
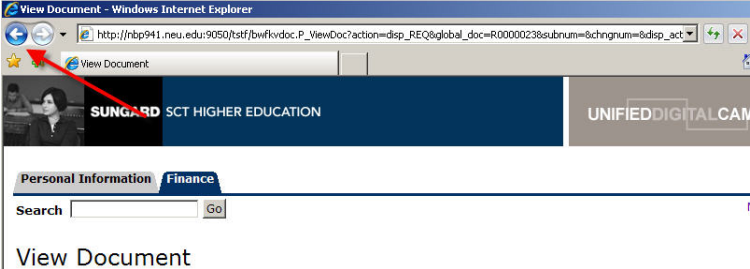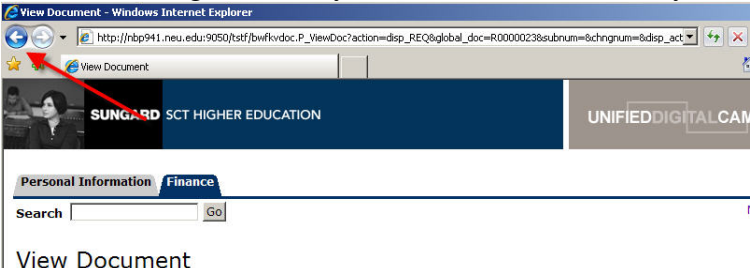
		If there were other documents associated to the document they would display at the bottom of the screen. You can also view these documents by clicking on the hyperlink. For example if you are approving an invoice you can view the Purchase Order.
8.		After reviewing the documents click the back button on your web browser. This will bring you back to the list of documents to be approved.
9.	**Approval History**	To view the approval history of the document click on the History Hyper link
10.	**Reviewing Approval History**	The approval history will be shown .
11.		After reviewing the history click the back button on your web browser. This will bring you back to the list of documents to be approved.

12.	**Approve or Disapprove**	At this point you can either approve, disapprove or do both at a later date. NOTE: If the document is NSF you have 2 options
		    1. Do a budget transfer to cover the funds needed.
		    2. Approve the document knowing it is going to Budget for approval. When approving write a reason for approving without funds.

13.	**Approve**	To approve the document click on the Approve hyperlink

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ	Y			N000135381	2,250.00	NSF	R0000022	History	Approve	Disapprove
Y	REQ				JAWRIGHT	500.00	DOC	R0000024	History	Approve	Disapprove
Y	INV	Y		0	N000148935	5.00	NSF	I0000036	History	Approve	Disapprove
Y	INV	Y		0	N000148935	15.00	NSF	I0000039	History	Approve	Disapprove
Y	INV	Y		0	N000148935	50.00	NSF	I0000044	History	Approve	Disapprove

Another Query

It will display a screen where you can type in a message if applicable.

Approve Document

Document Information

Document Number: R0000022	Type: REQ
Change Seq#	Sub#
Amount: 2,250.00	

Comment: This document has been approved.

Approve Document   Cancel

Click the Approve Document button. A message will display that your document has been approved.

Document Pending Approval

☑ Document R0000022 has your approval

Continue

To approve other documents click continue and follow steps steps 5-13 to approve or 5-14 to disapprove or EXIT.   MENU   SITE MAP   HELP   EXIT

| 14. | **Disapprove**

NOTE: If you disapprove a Requisition you will have to contact Purchasing to re-instate the req. | To disapprove click on the Disapprove hyperlink

ng User Amount Queue Type Document History Approve Disapprove
T 200.00 DOC R0000023 History Approve Disapprove
T 500.00 DOC R0000024 History Approve Disapprove

It will display a screen where you can type in the reason why you are disapproving.

Disapprove Document

Document Information
Document Number: R0000023 Type: REQ
Change Seq# Sub#
Amount: 200.00

Type in reason for disapproval

Comment: Approval has been denied.

Disapprove Document   Cancel

RELEASE: 7.3

Once you type the reason for disapproval click the Disapprove Document button. A message will display that your document has been disapproved. |

		Document Pending Approval
		✓ Document R0000023 has been disapproved by you.
		Continue
		To approve other documents click continue and follow steps 5-13 to approve or 5-14 to disapprove or EXIT. MENU SITE MAP HELP EXIT