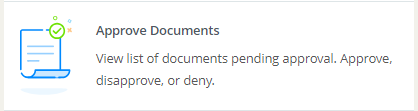
Banner 9SS Guide – Approve Documents



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**Approve Documents Pages**

Access the Approve Documents page to review a list of documents pending approval.

**Approve Documents Parameter Page**

On the Approve Documents parameters page, you can populate the **Document Number** field to view information about a specific document to be approved; use % or \_ as a wildcard.

* Select the **User ID is next approver** option to view all the documents that are waiting for the specified user's approval before they can proceed to the next approval queue.
* Select the **All documents User may approve** option to view all the documents the specified user can approve even if they are not the next approver.

**Approve Documents List page**

The Approve Documents list provides the following information for each document pending approval.

|  |  |
| --- | --- |
| **Field** | **Description** |
| Document | Click the document number to display detailed information about the document in PDF format. |
| Document Type | Document type:  • ENC (Encumbrance)  • INV (Invoice)  • JV (Journal Voucher)  • REQ (Requisition)  • PO (Purchase Order)  • DCR (Direct Cash Receipt) |
| Change Sequence | Number used only for purchase orders to display the corresponding change sequence number. |
| Submission | Number used only for journal vouchers and invoices to display the submission number. |
| Originating User | User ID of the person who created the document. |
| Amount | Amount specified for the document. |
| Next Approver | This column displays a *Yes* if you are in the next approval queue which must approve the document. |
| NSF | This column displays a *Y* if there is not enough budget for this document. |
| Queue Type | Displays the following queue types:   * *DOC* if the document is in the document queue * *NSF* if there is not enough budget for the document and the document is in the NSF queue. |
| Attachments | Click the attachments icon to view a list of attachments if more than one; otherwise, a new tab opens to view a single attachment. |
| History | Click the clock icon to view approval history information and related documents. |

**Approve Documents tasks**

An authorized user can choose to approve or disapprove a document (requisition, purchase order, invoice, journal voucher, encumbrance, or direct cash receipt).

All users can recall unapproved documents they have created that were sent to the approvals system.

**Approve a document**

The **Approve** button enables an authorized user to approve the document.

**About this task**

The **Approve** button is only enabled if the person who logged in is authorized to approve the document.

**Procedure**

1. In the **Approve Documents** list, review the document detail and supporting information related to a document.
2. Click **Approve**.

Result: The **Approve Document** window appears with the **Approve** and the **Cancel** buttons.

1. Optional: Enter a comment that explains the reason for approving the document.

This goes through the Banner messaging system and the default approval comment can be edited or removed.

1. Click **Approve** to complete the approval process.
2. Click **Cancel** if you need to return from the **Approve Document** window without approving.

**Approve a document in NSF status**

After a document is complete and sent to the approval process, the document is distributed to the appropriate document queues during the first run of the approval process (FORAPPL).

While in the DOC queues, there is no way to override the NSF condition for individual accounting distributions through self-service. After all the required approvers have approved the document, the system sends a document in NSF status to the NSF queue.

When the document is in the NSF queue, it requires approval by a user with authority in the NSF queue and with NSF Override authority on the User Profile Maintenance (FOMPROF) page. The Approve function automatically sets the override for all NSF sequences in the document.

**Disapprove a document**

The **Disapprove** button enables a user to disapprove the document or recall the document to make changes before approval.

**About this task**

The **Disapprove** button is only enabled if the person who logged in is either authorized to disapprove the document or is the originator of the document.

**Procedure**

1. In the **Approve Documents** list, review the document detail and supporting information related to a document.
2. Click **Disapprove**.

Result: The **Disapprove Document** window appears with the **Disapprove** and the **Cancel** buttons.

1. Required: Enter a comment that explains the reason for disapproving the document.

This goes through the Banner messaging system and is a mandatory field.

1. Click **Disapprove** to complete the disapproval process.
2. Click **Cancel** if you need to return from the **Disapprove Document** window without disapproving.

If you disapprove an eProcurement requisition or purchase order in self-service, the document is canceled in Banner with a cancellation reason code of EPCN and an update synchronization message is published along with the disapproved reason.

If you disapprove a document that is not an eProcurement document, the document is marked incomplete and ready for correction or deletion.