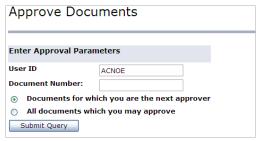## *Approve Documents- ASIST*

The Approve Documents link on Banner Finance Self Service (ASIST) is where users can approve or disapprove Banner documents; *requisitions, change orders, encumbrances and journal vouchers (budget transfers).* Banner documents will route through approvals based on the document type and FOAPAL information. Once a document is approved, it will be routed to the appropriate Finance department for processing.

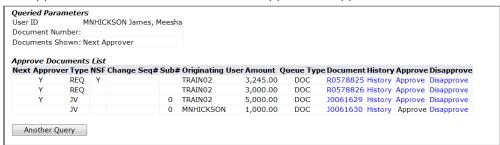- Navigate to the Approve Documents Link on the Finance menu

Finance

- Budget Queries
- Encumbrance Query
- Requisition
- Approve Documents
- View Document
- Budget Transfer
- Multiple Line Budget Transfer
- Delete Finance Template

- Select appropriate view and click Submit Query
  - ○ "Documents for which you are next approver" displays all documents that are ready for your review. *(Recommended View)*
  - ○ "All documents which you may approve" will also display documents that still need to be reviewed by other individuals on the approval chain.

Approve Documents

Enter Approval Parameters

| User ID | ACNOE |
| Document Number: | |

- ◉ Documents for which you are the next approver
- ○ All documents which you may approve

Submit Query

Please note that if you approve a document before it is ready for your action, it will bypass all approvals that occur before your review.

- Use Approve Documents List to review and approve/disapprove documents.

Queried Parameters
User ID   MNHICKSON James, Meesha
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
Y	REQ	Y				TRAIN02	3,245.00	DOC	R0578825	History	Approve	Disapprove
Y	REQ					TRAIN02	3,000.00	DOC	R0578826	History	Approve	Disapprove
Y	JV			0		TRAIN02	5,000.00	DOC	J0061629	History	Approve	Disapprove
	JV			0		MNHICKSON	1,000.00	DOC	J0061630	History	Approve	Disapprove

Another Query

o Each column gives general information about the document:

Column	Description
Next Approver	If the next approver column is marked with a "Y", then the document is awaiting your action.
Type	The type indicates the document type; requisition (REQ), purchase order (PO), invoice (INV), or journal voucher/budget transfer (JV).
NSF	If this column is marked with a "Y", then the document has insufficient funds and will need to be denied.
Change Seq#	This column is used for Change Orders to indicate which change document is being reviewed.
Sub#	This column is used for Invoices to indicate that a previous invoice was issued, canceled and is now being resubmitted.
Originating User	Displays the username of the individual who submitted the document.
Amount	Displays the total amount of the document.
Queue Type	Indicates the type of approval queue for the document; generally it will be Document (DOC).
Document	Displays the document number with a link to view the document when selected.
History	This link will display approvals required as well as approvals that have already been recorded.
Approve	Select this link to make comments and approve the document.
Disapprove	Select this link to make comments and deny the document.

- View Document- Before approving a document, it must first be viewed to ensure that the purchase adheres to University procurement policies & procedures, is a justifiable expense for the requesting organization and is filled out completely and accurately.
  - o Select the document number to view the request.
  - o After reviewing the document use the back button on the web browser to return to the Approve Documents List.

- Approve or Disapprove- Once the document has been reviewed, the appropriate action will need to be taken. If the document needs to be sent back to the originating user for corrections, it will have to be disapproved so that it can be corrected and resubmitted.
  - o Select Approve or Disapprove next to appropriate document number.
  - o Make comments regarding the approval/disapproval of the document in the Comment box:

Document Information
Document Number: R0578825 Type: REQ
Change Seq#   Sub#
Amount: 3,245.00
Comment: Approval has been denied due to insufficient funds. A budget amendment will need to be submitted for this purchase.

[Disapprove Document] [Cancel]

- o When typing comments, they will be stored in Banner Messages but will not be visible directly on the document.
- o When denying requisitions, an automated email will be sent to originator.
    - Comments will be visible in the e-mail; however, the space is limited so anything more than 2-3 sentences will need to be sent via e-mail or through a phone call.
    - When other document types are denied, an automated e-mail will **not** be sent so please notify the originator by another method.
- o Select the Approve or Disapprove Button

- o Select Continue to return to the Approve Documents list.

Note: After this point, the approval status of the document cannot be changed.

Do NOT use the back browser to go back and change the approval status. Although the option will be available to select, this will cause a system error that will not allow the document to continue to the next step in the process.

If a document was approved or denied in error, please contact your Budget Analyst.

At anytime during the approval process, documents can be denied by the submitter by following the above procedures. If a document is denied and then resubmitted, it will go back through the entire approval process.