To approve a document in Self-Service Banner (SSB) Finance
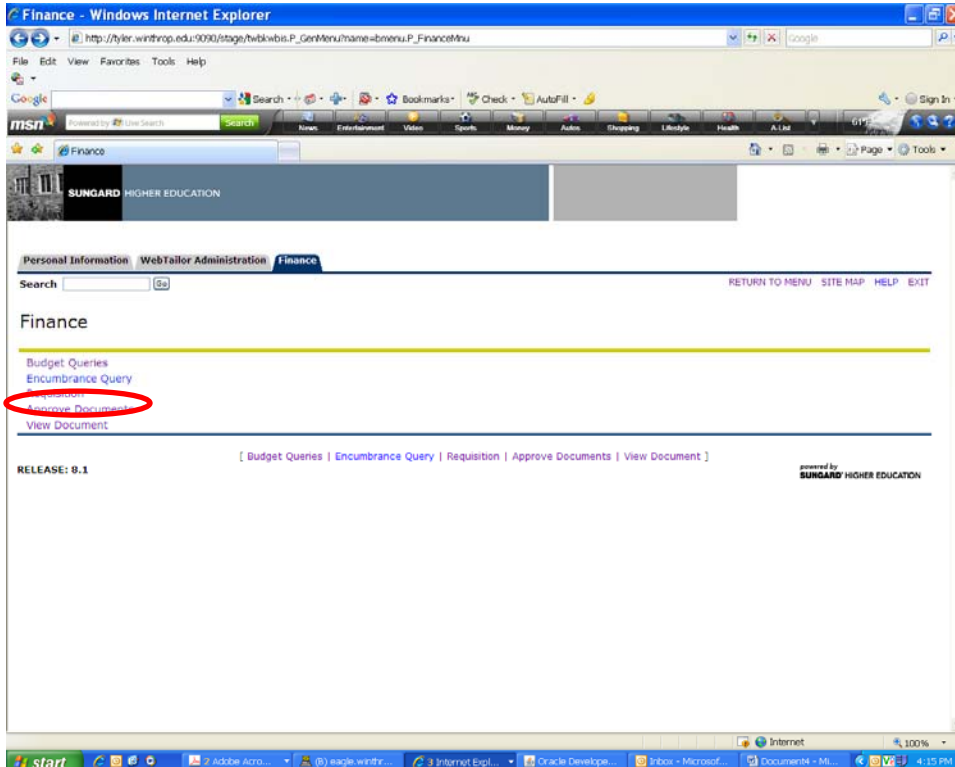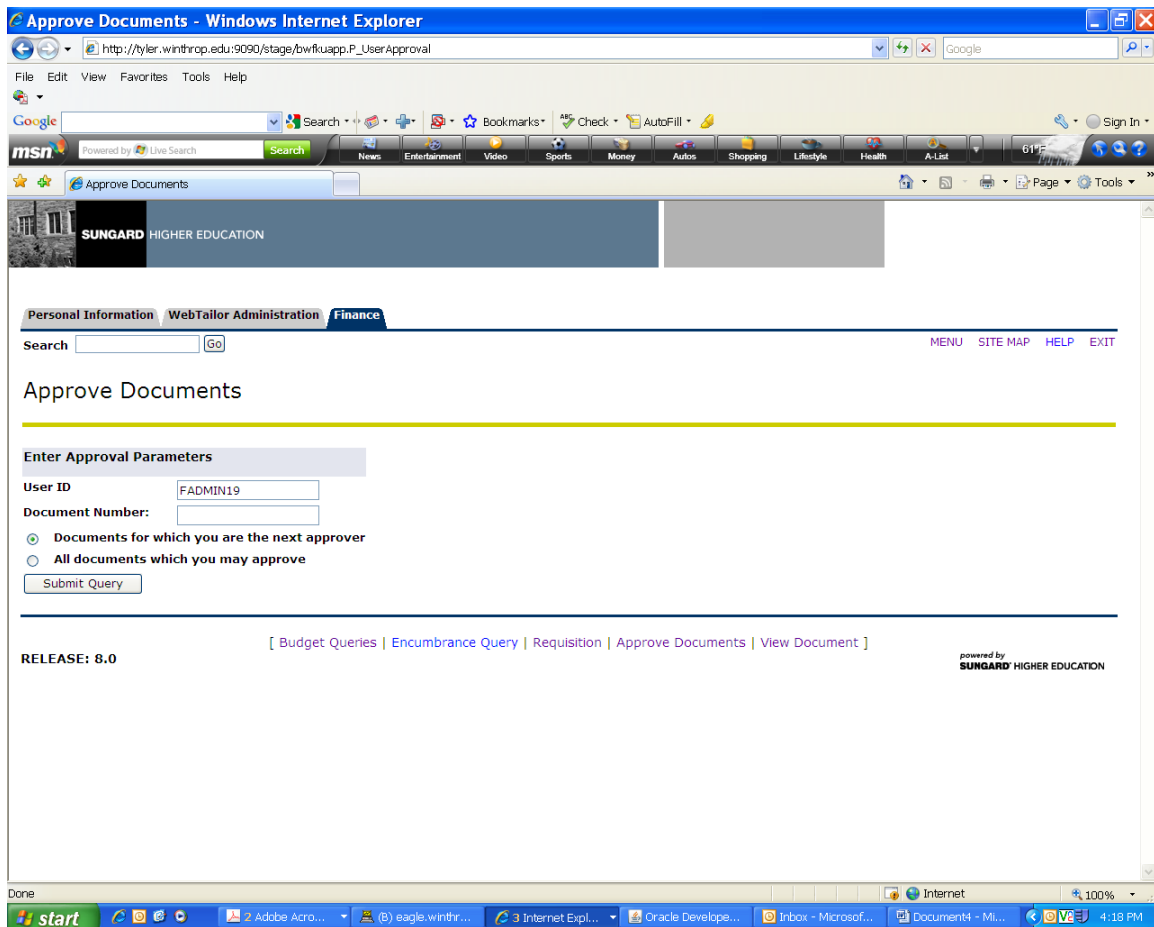
1. From the Self-Service Banner (SSB) Finance *Main Menu*, select **Finance, then Approve Documents**.

> ✅ **NOTE:**
> You must have Approver authority in Banner Finance to use the Approve Documents function. If you need Approver authority, your supervisor will need to contact the Budget Office to get this authority set up.

Enter Approval Parameters

The *User ID* will be pre-populated with your Banner ID.

Document Number

The **Document Number** field is blank by default. If you know a specific document number, you may enter it here; otherwise, leave this field blank.

Document Selection

There are two radio buttons below the **Document Number** field. These are labeled:

Documents for which you are the next approver (recommended) — The default selection, this option will list all documents for which you are the next approver, including documents that have been approved by any approvers that give approval before the document is submitted to your Approval queue.

All documents which you may approve — This option will list all documents for which you are an approver, including those that are awaiting approval from any approvers that give approval before the document is submitted to your Approval queue.

Query Results

The resulting screen displays all documents which are returned when you submit your document selection query. The screen displays information about the query itself and then lists information about the returned documents.

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 documen enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

User ID	UTRAIN01	UTrain One
Document Number:		
Documents Shown:	All	

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	REQ				UTRAIN16	200.00	DOC	R0000224	History	Approve	Disapprove
Y	REQ				UTRAIN22	99.99	DOC	R0000225	History	Approve	Disapprove
Y	REQ				UTRAIN05	10.00	DOC	R0000226	History	Approve	Disapprove
Y	REQ				UTRAIN04	2,150.00	DOC	R0000227	History	Approve	Disapprove
Y	REQ				UTRAIN08	950.00	DOC	R0000228	History	Approve	Disapprove
Y	REQ				UTRAIN01	955.50	DOC	R0000229	History	Approve	Disapprove
Y	REQ				UTRAIN03	20.00	DOC	R0000231	History	Approve	Disapprove
Y	REQ				UTRAIN01	1,250.00	DOC	R0000232	History	Approve	Disapprove
Y	REQ				UTRAIN10	1,250.00	DOC	R0000234	History	Approve	Disapprove
Y	REQ				UTRAIN07	311.80	DOC	R0000235	History	Approve	Disapprove
Y	REQ				UTRAIN08	3,150.00	DOC	R0000236	History	Approve	Disapprove
Y	REQ				UTRAIN05	100.00	DOC	R0000237	History	Approve	Disapprove

Next Approver — Indicates that you are the next Approver in the queue.

Type — Indicates the type of document (usually this is populated with "REQ" for Requisition).

Originating User — Indicates who submitted the document to the Approval queue.

Amount — Indicates the total dollar amount of the document (in a Requisition, this is the total purchase price).

Document — Lists the document number (in a Requisition, this begins with a "R") and provides a link to the document details.

History — Provides a link to details regarding previous approvals for the document.

Approve — Links to the Approve function.

Disapprove — Links to the Disapprove function.

Approve

Clicking the **Approve** link for a particular document takes you to the *Approve Document* screen, which displays a summary of the document and gives you a text area for entering a **Comment**. By default, this field contains **This document has been approved**; you can enter additional text that will be stored in the document's *History*.

To approve the document and send it on to the next approver, click the **Approve** document button. Upon successful approval, you will see a message that the document has your approval.

Approve

Disapprove

Clicking the **Disapprove** link for a particular document takes you to the *Disapprove Document* screen, which displays a summary of the document and gives you a text area for entering a **Comment**. By default, this field contains T**his document has been denied**; you can enter additional text that will be stored in the document's *History*. If you disapprove the requisition, the original version will not be saved – the document will be deleted from Banner.

To disapprove the document and delete it from the system, click the **Disapprove** document button. Upon successful completion, you will see a message that you have disapproved the document.

Disapprove

Notes

At this time, Banner Finance does not notify the Document Originator that a document has been disapproved. The Talons Steering Committee is working on a Work-Flow notification system; until the system is ready, it will be necessary to contact the originator if you disapprove the document to let the originator know that he or she will need to re-enter the document.