

## Step by Step: Self Service Approval Queue

1. Log on to Banner Finance self-service
2. Navigate to Financial Information Menu
3. Navigate to “Approve Documents”
4. Your user ID will automatically populate in the USER ID
5. Make sure that “Documents for which you are the next approver” is checked
6. Press “Submit Query”
7. The following is a sample of what will appear if you have documents to approve

### **Queried Parameters**

User ID	MJONES	Mary Jones
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				Bob Smith	1000.00	DOC	R0000020	History	Approve	Disapprove

8. To review the document, navigate your mouse to the document number and the details of the requisition will be displayed.
9. If you are satisfied with the requisition, press **approve**. If the item is approved, it advances either to the next approval queue, or to posting (if your approval is the last approval required).
10. If you are not satisfied with the requisition, press **disapprove**. You need to enter a brief description detailing why the transaction was disapproved. Once you finalize the description, the document will be disapproved. Communicate (via phone, email, person) to the requestor that this requisition was disapproved.
11. To view the approved or disapproved document, go to View Documents and enter the Requisition number. Use the ‘Approval History’ button to view history of this Requisition.
12. **NOTE:** If you do not approve or disapprove the requisition, the order/request will not be submitted to Purchasing.

### **APPROVAL QUEUE LEVELS**

<b>President, EVP, SVP and VP’s</b>	<b>\$50,000 and over</b>
<b>Assoc VP and Deans</b>	<b>Up to \$49,999</b>
<b>Budget Mgr</b>	<b>Up to \$24,999</b>
<b>Delegates</b>	<b>Up to \$3,000</b>