

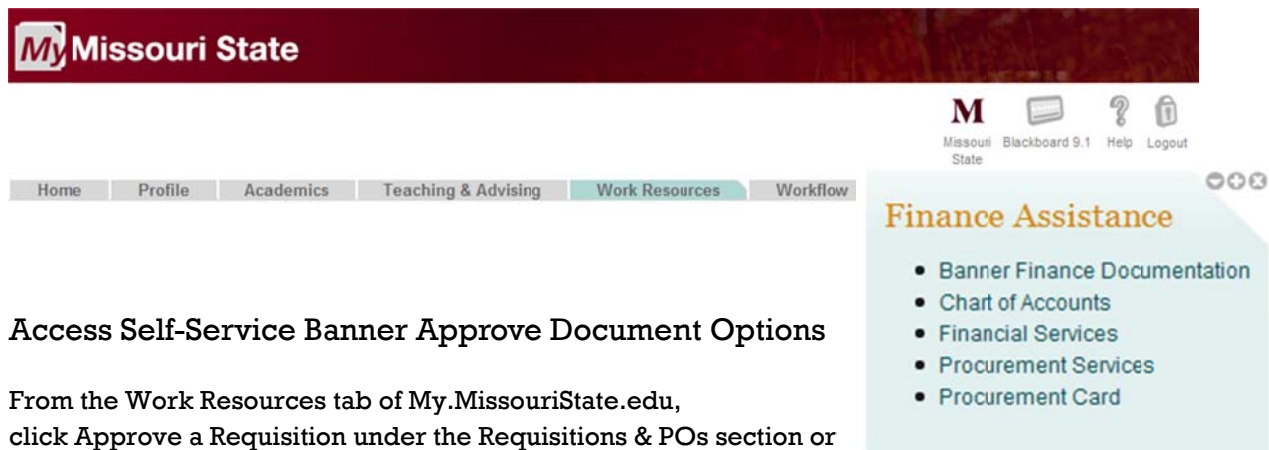
Self-Service Banner - Finance Document Approval - User Guide

Gaining Access

1. Make sure you have authorized Fund/Organization access in Banner.

Obtain access by completing and submitting a FOAPAL Authorization Request to the Office of Financial Services. Online form link is available on the Banner Finance Documentation page which may be accessed from the Work Resources tab of My.MissouriState.edu in the Finance Assistance section.

You must be an Authorized Approver of the Fund/Organization to approve a document for it.

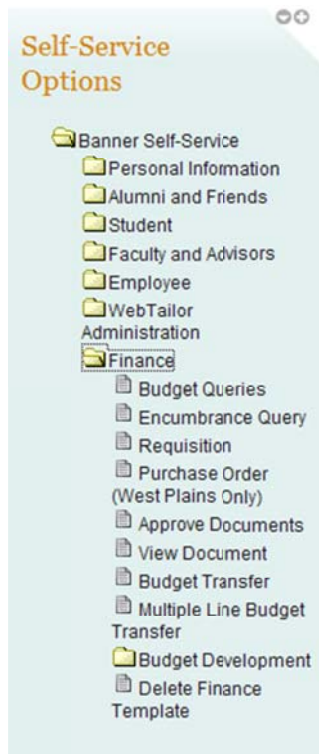


2. Access Self-Service Banner Approve Document Options

From the Work Resources tab of My.MissouriState.edu, click Approve a Requisition under the Requisitions & POs section or click Approve Documents under Self-Service Options – Finance folder.



Although various types of finance documents may be approved through SSB, only Requisitions require approval on items funded to a Springfield Campus Fund/Organization. Requisitions, Purchase Orders, and Invoices require approval on items funded to a West Plains Campus Fund/Organization.



Note that the Finance Options folder will only be displayed once you have been granted authorized Fund/Organization access.

These same options are also accessible from the menu at the bottom of any of the SSB pages.

[Budget Queries | Encumbrance Query | Requisition | Purchase Order (West Plains Only) | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Budget Development | Delete Finance Template]

Depending upon your authorization, you may not see or have access to all of these options.

Approving or Disapproving a Document

1. Submit a Query to view documents awaiting your approval.

My Missouri State

«Back to My Missouri State

Personal Information Alumni and Friends Student Faculty Services Employee WebTailor Administration **Finance**

MENU SITE MAP HELP

Approve Documents

Enter Approval Parameters

User ID: PMORRISSEY

Document Number:

☒ Documents for which you are the next approver

☐ All documents which you may approve

Submit Query

Enter your User ID, a specific Document Number (if desired) and select whether you want to see “Documents for which you are the next approver” or “All documents which you may approve” and click Submit Query.

2. View Query Results.

My Missouri State

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MENU SITE MAP HELP

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: PMORRISSEY Pamela Morrissey

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				CPARKER	1,948.79	DOC		R0021285	History	Approve	Disapprove

Another Query

You may click on the document number link to View Document Details or the History link to View Document Approval information that has been recorded for the selected document. If you are the Authorized Approver over the document listed, the Approve and Disapprove links will also be available for you to take the desired action.

3. Click to Approve or Disapprove the Document.

The screenshot shows a web interface for 'My Missouri State'. At the top, there is a navigation bar with a 'Back to My Missouri State' link and a user profile icon. Below this is a menu bar with 'MENU', 'SITE MAP', and 'HELP' links. The main heading is 'Approve Document'. Underneath, there is a section titled 'Document Information' containing a table with the following data: Document Number: R0021285, Type: REQ, Change Seq#, Sub#, Amount: 1,948.79. Below the table is a 'Comment:' label and a text input field containing the text 'This document has been approved.'. At the bottom of the form are two buttons: 'Approve Document' and 'Cancel'.

Document Information	
Document Number:	R0021285 Type: REQ
Change Seq#	Sub#
Amount:	1,948.79

Comment: This document has been approved.

Approve Document Cancel

If you selected to Approve the document, you will have the opportunity to enter additional comments before clicking the Approve Document button.

Click the Cancel button to take no action and return to your Query Results.

The screenshot shows a web interface for 'My Missouri State' similar to the previous one. The main heading is 'Disapprove Document'. The 'Document Information' table is identical, showing Document Number: R0021285, Type: REQ, Change Seq#, Sub#, and Amount: 1,948.79. The 'Comment:' text input field contains the text 'Approval has been denied.'. At the bottom of the form are two buttons: 'Disapprove Document' and 'Cancel'.

Document Information	
Document Number:	R0021285 Type: REQ
Change Seq#	Sub#
Amount:	1,948.79

Comment: Approval has been denied.

Disapprove Document Cancel

If you selected to Disapprove the document, you will also have the opportunity to enter additional comments as to why the requisition is being denied before clicking the Disapprove Document button.

Click the Cancel button to take no action and return to your Query Results.

Note that if a requisition is disapproved, an email notification containing your comments will automatically be sent to the originator of the requisition. If the document is being disapproved for additional updates, the originator may access the original requisition as a Pending Document and re-complete with any required updates. If the requisition is simply being disapproved, it will be removed as part of month end processing by Financial Services.

Be aware that disapproved requisitions may affect the balance available used when checking for non-sufficient funds (NSF) in your budget until they have been removed.