

## Finance Dashboard – Approve Requisition User Guide

### Part I - Gaining Access

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

FOAPAL stands for six accounting elements of finance data in Banner: Fund, Organization, Account, Program, Activity and Location. FOAPAL authorization can also be called Fund-Organization Access. In Banner, all access to the (University and Foundation) Finance data is based on the Fund/Organization Access that has been authorized/established for an individual. **You must have Approver access over Fund/Organization before you can approve requisition.**

To request “Approver” access, submit a [FOAPAL Authorization - Approver](#) Request. This form can be used to replace approver access. To request “Originator” or “View Only” access, submit a [FOAPAL Authorization - Originator/View](#) Request.

If necessary, you may run [Fund & Organization Access Report](#) report to check access for you or others. [What does Approver, Originator or View Access mean?](#)

2. Access Finance Dashboard **Approver Document** Options.

From [My Missouri State](#) portal, use the **Discover** tool from the main menu and search “Finance”, select **Finance Resources** card and click on **Finance Dashboard** to start.

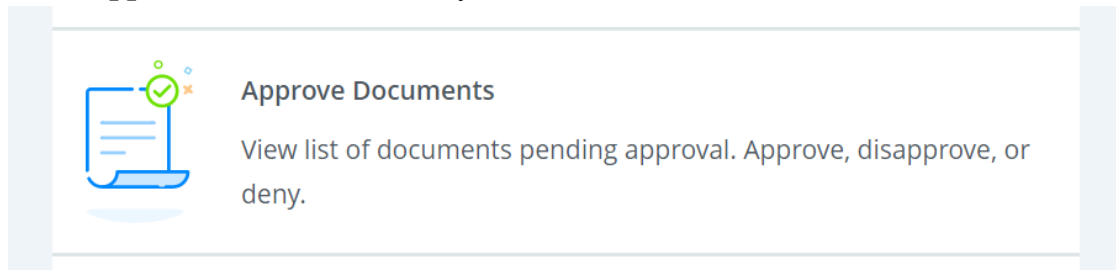
My Finance

Hello Xiaomin,  
Create, edit and approve transactions and view financial information for department / organization.

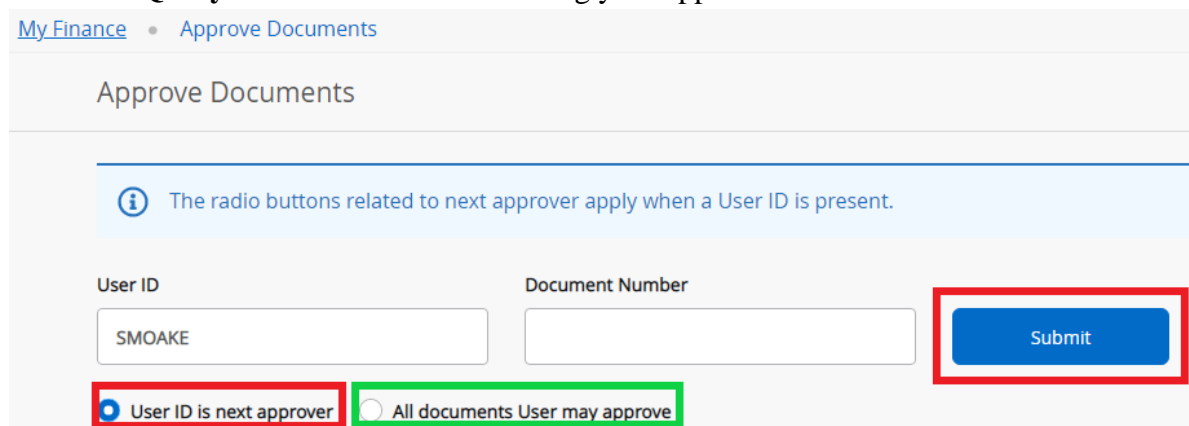
- My Finance Query**  
Create, view and share budget availability, encumbrance and payroll queries.
- My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.
- My Journals**  
Create and view draft, pending and completed journals and supporting documentation.
- Purchase Orders**  
Create purchase orders or purchase orders in process.
- Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.
- Budget Development**  
Create and review fiscal year operating budgets for the budget development process.
- Delete Finance Template**  
Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- View Document**  
View draft, pending and completed documents with related information and approval history.

## Part II - Approving or Disapproving a Document (Requisition)

1. Click **Approve Document** from My Finance Dashboard



2. **Submit a Query** to view documents awaiting your approval

A screenshot of the "Approve Documents" query form. At the top, there is a breadcrumb trail: "My Finance > Approve Documents". Below this is the title "Approve Documents". A blue information banner states: "The radio buttons related to next approver apply when a User ID is present." Below the banner are two input fields: "User ID" containing "SMOAKE" and "Document Number" which is empty. To the right of these fields is a blue "Submit" button. Below the input fields are two radio button options: "User ID is next approver" (which is selected and highlighted with a red box) and "All documents User may approve" (highlighted with a green box).





- By default, system will have your user ID auto-filled and ‘**User ID is the next approver**’ checked, by clicking on Submit button, system shows all the requisitions that are waiting for your approval. You may enter the requisition number under Document Number field to query for specific requisition to approve.
- If a requisition has mixed funding (for example, shared funding by multiple departments) where approvers are from different departments, you must check the box of “**All documents User may approve**” to submit to see them.
- “%” sign can be used as **wildcard** to query for specific requisitions. For example, you may search for any requisitions starting with R0048 by using ‘R0048%’ under document number field.
- You may change the User ID to see what is waiting for other people to approve. For example, you may change it to your department approver’s user ID and submit a query to see what requisition are waiting for your department approver to approve.

If for any reason that you do not see what you are expecting to see from the query, you may reach out to [BannerFinance@MissouriState.edu](mailto:BannerFinance@MissouriState.edu) for help.

### 3. View Query Results

Approve Documents List 15

*Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment....*

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History
<a href="#">R0048704</a>	REQ	-	-	[REDACTED]	6,931.00	Yes	-	DOC		
<a href="#">R0048678</a>	REQ	-	-	[REDACTED]	9,900.00	Yes	-	DOC		

- You may click on the requisition number link to View Details or the History link to View requisition approval information that has been recorded for the selected document.
- You may also click on the **Attachment button to review the supporting document.**
- Only if you are the Authorized Approver over the requisition listed, the Approve and Disapprove links will be available for you to take the desired action.

### 4. Approve or Disapprove the Requisition (Document)

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.

#### Approve Document ×

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Document Number: R0048716      Document Type: REQ

Change Sequence: -      Submission: -

Amount: 45,000.00

**Comment**

This document has been approved. You may add more comments here.....

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

### Disapprove Document ✕

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Document Number	Document Type
R0048716	REQ
Change Sequence	Submission
-	-
Amount	
45,000.00	

**Comment \***

You may add your comments here on why you are disapproving.....

- If a requisition is disapproved, an email notification containing your comments will automatically be sent to the originator of the requisition. If the requisition is being disapproved for additional updates, the originator may access the original requisition from Draft Requisition under My Requisition Dashboard. Originator can either re-complete with any required updates or simply delete such requisition from Draft Requisition if not needed.
- Be aware that disapproved requisitions affect the balance available used when checking for non-sufficient funds (NSF) in your budget until they have been removed/deleted. Disapproved requisition is under Draft Requisition queue.
- Refer to Part III – Checking Requisitions Approval of [My Requisitions Processing User Guide](#) for additional information regarding how requisition approval works in Banner.