

# BANNER FINANCE SELF-SERVICE

APPROVALS PROCEDURES DOCUMENTATION

MISSOURI STATE UNIVERSITY

*U*-Link

Financial Services  
Missouri State University  
901, South National Avenue  
Springfield, MO-65897  
(417) 836-5632

[BannerFinance@MissouriState.edu](mailto:BannerFinance@MissouriState.edu)

[www.MissouriState.edu/FinancialServices/BannerFinance](http://www.MissouriState.edu/FinancialServices/BannerFinance)

[www.MissouriState.edu/Ulink](http://www.MissouriState.edu/Ulink)

# Finance

- Budget Queries
- Encumbrance Query
- Requisition
- Purchase Order
- Approve Documents**
- View Document
- Budget Transfer
- Multiple Line Budget Transfer
- Budget Development

## Approving Documents:

1. All requisitions entered into Self-Service Banner will go through an approval process. When the originator enters a requisition, the requisition will remain in the queue of the next approver till that person goes in and approves the document.

Personal Information **Finance**

Search

## Approve Documents

### Enter Approval Parameters

User ID

Document Number:

Documents for which you are the next approver

All documents which you may approve

Document awaiting approval currently

Documents that will need to be approved in future.

1. An approver can view those documents that they are the next approver for
2. Or view all documents for which they could approve in future.

**Approve Documents List**

| Next Approver | Type | NSF Change | Seq# | Sub# | Originating User | Amount   | Queue | Type | Document | History                 | Approve                 | Disapprove                 |
|---------------|------|------------|------|------|------------------|----------|-------|------|----------|-------------------------|-------------------------|----------------------------|
| Y             | REQ  |            |      |      | UTRAIN01         | 1,500.00 | DOC   |      | R0000190 | <a href="#">History</a> | <a href="#">Approve</a> | <a href="#">Disapprove</a> |
| Y             | REQ  |            |      |      | UTRAIN14         | 1,605.00 | DOC   |      | R0000191 | <a href="#">History</a> | <a href="#">Approve</a> | <a href="#">Disapprove</a> |
| Y             | REQ  |            |      |      | UTRAIN01         | 1,400.00 | DOC   |      | R0000192 | <a href="#">History</a> | <a href="#">Approve</a> | <a href="#">Disapprove</a> |

3. Click on the RXXXXXXX number to view requisition that was entered into Banner

## View Document

**Requisition Header**

| Requisition    | Order Date                                      | Trans Date   | Delivery Date              | Print Date                | Total       |
|----------------|-------------------------------------------------|--------------|----------------------------|---------------------------|-------------|
| R0000191       | Jun 13, 2008                                    | Jun 13, 2008 | Aug 31, 2008               |                           | 1,585.00    |
| Origin:        | SELF_SERVICE                                    |              |                            |                           |             |
| Complete:      | Y                                               | Approved:    | N                          | Type:                     | Procurement |
| Cancel Reason: |                                                 |              |                            | Date:                     |             |
| Requestor:     | UTrain Fourteen                                 |              | 059914                     | FINANCE TRAINING FOURTEEN |             |
|                | 417836-1414                                     |              | UTrain14@missouristate.edu |                           |             |
| Accounting:    | Document Level                                  |              |                            |                           |             |
| Ship to:       | 901 S National<br>STMA<br>Springfield, MO 65804 |              |                            |                           |             |
| Attention:     | Receiving Manager                               |              |                            |                           |             |
| Contact:       | Receiving Manager                               |              |                            | 417-836-5776              |             |
| Vendor:        | M99999954 UTrain Vendor Fifty-Four              |              |                            |                           |             |
|                | 5454 Street<br>Springfield, MO 65804            |              |                            |                           |             |
| Phone:         | 417-836-5454                                    |              | Fax:                       |                           |             |

**History:** will show approvers that approved the document.

**Document Identification**

|                 |          |                 |             |
|-----------------|----------|-----------------|-------------|
| Document Number | R0000191 | Type            | Requisition |
| Originator:     | UTRAIN14 | UTrain Fourteen |             |

**Approvals required**

| Queue | Description              | Level | Approvers            |
|-------|--------------------------|-------|----------------------|
| UTRN  | UTRAIN APPROVAL QUEUE 10 |       |                      |
|       |                          |       | Clement Balasundaram |
|       |                          |       | UTrain One           |

No approvals have been recorded for this document

To Approve: Click Approve, Approve Document.

## Approve Document

---

### Document Information

|                  |          |       |     |
|------------------|----------|-------|-----|
| Document Number: | R0000190 | Type: | REQ |
| Change Seq#      |          | Sub#  |     |
| Amount:          | 1,500.00 |       |     |

### Comment:

This document has been approved.

Click to approve document

Approve Document

Cancel

To disapprove: Click Disapprove, Disapprove Document.

**NOTE: WHEN A DOCUMENT IS DISAPPROVED, THE REQUESTOR (ORIGINATOR) WILL HAVE TO RE-ENTER THE ENTIRE REQUISITION, UNLESS THE REQUISITION WAS SAVED AS A TEMPLATE.**

## Disapprove Document

---

### Document Information

|                  |          |       |     |
|------------------|----------|-------|-----|
| Document Number: | R0000192 | Type: | REQ |
| Change Seq#      |          | Sub#  |     |
| Amount:          | 1,400.00 |       |     |

### Comment:

Approval has been denied.

Click to Disapprove Document

Disapprove Document

Cancel