Approving in Banner Self Service

Various functionalities (including Purchase Requisitions, Budget Transfers and Purchase Orders) in Banner may trigger the need for an electronic approval. Reviewing those pending documents and confirming your approval or rejection of the request is all done online using Banner Self Service.

If you are responsible for reviewing any of these document types, you will receive an e-mail notifying you that your attention is required. Furthermore, you can also access these pending documents if you are aware of them prior to receiving the automated e-mail from the Finance system.

Open an internet browser. From the Lafayette Home page, select the Offices & Resources link at the bottom of the page, and locate the Banner Self-Service under the “Resources” section.

Once you are logged in, the screen will be personalized to you. Each person may see different options, depending on what he/she has permission to access in Self Service. Click on the Finance link to find the documents for your review.

Within the Finance menu, select Approve Documents. to find any documents requiring your review.
A new screen will open into which your User ID should automatically populate. You can leave the Document Number field blank. Select Documents for which you are the Next Approver and then Submit Query.

You will then see a list, potentially similar to the one below, listing the documents available for your review. The Document Type column will identify if it is a Purchase Requisition (REQ), and Budget Transfer (JV) or a Purchase Order (PO). You can also see the User ID of the person who submitted the document. If you submitted a document which requires someone else’s approval, you can Disapprove your own submission which will remove it from consideration by the designated approver.

Click on the blue Document number hyperlink to view the document contents.

Click the History hyperlink if you want to see (1) who else has already approved this document, (2) who else is required to approve this document or (3) who else is able to approve this document (in the case where multiple approvers are assigned).

Click on the Approve button if the transaction described is acceptable to you or the Disapprove button if it is not. In either case, you will then have an opportunity to type a reason why the document is acceptable or not. See below:
The message you provide in the **Comment** field will be returned to the person who originated the document and any other approvers (via an automated e-mail). The **Comment** field will automatically be populated with the text shown above, but you are welcome to supplement or replace that standard text with a customized message. If a document is denied, the originator has the ability to re-open it, make any changes that were requested, and re-submit the request. Be sure to finalize your decision by clicking either the **Approve Document** button or the **Disapprove Document** button, as applicable. Once you do, a new screen will open that should show a green checkmark confirming the record of your decision; an example is shown below:

**Document Pending Approval**

✅ Document P0040018 has your approval.

[Continue]

**HINTS:**

- If the required approver submitted the original document, his/her approval is implied and the separate step using the Approve Document function is not required.

- When viewing a pending submission via the Approve Document functionality, the contents are not always complete (in the case of Purchase Requisitions and Purchase Orders) depending on how the originator completed the form. To ensure you are seeing the maximum amount of information, it is best to copy the Document Number and search for it using the **View Document** function.

When in the View Document area, be sure you have selected the appropriate Document Type and make sure the **Display Document/Line Item Text** and **Display Commodity Text** is set to “All.” [Note: the default is “Printable.”] Then click the **View Document** button. When you are done, return to the Approve Document screen.
If the NSF column has a “Y” it means there is insufficient budget to cover the cost of the transaction. If approved, this transaction will be “over-budget.”