

Approving Finance Documents in Banner Finance Self-Service

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

If you are responsible for reviewing any of these document types, you will receive an email 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 email.

Accessing Banner Self-Service & Approve Documents

- Navigate to <https://my.lafayette.edu> and sign in using your Lafayette NetID and password
 - Need help logging in? Please contact the Help Desk at (610) 330-5501
- From the Finance dashboard, select **Approve Documents**
- By default, your NetID will populate and you may leave the **Document Number** blank and press **Submit**
 - Selecting radio button:
 - **User ID is next approver**: returns documents where you are next in the approval queue
 - **All documents User may approve**: see all documents which can accept your approval. This will supersede any approvers before your position in the hierarchy
- From the results screen, you can:
 - Drill into the **Document Number** to see the document contents
 - Select the **History** button to see the document approval status and approval hierarchy
 - Select the **Approve** button if the document is acceptable or **Disapprove** if not
 - In either case you will have the ability to fill out a **Comment** which will be emailed to the original submitter and other approvers. If a document is denied, the originator can re-open it, make any changes that were requested, and re-submit the request
 - Select **Approve** or **Disapprove** again to confirm your selection

HINTS

- Approvals should be made promptly. Any approvals not made by the month's budget close will require the Requisition to be deleted and resubmitted for the current fiscal period.
- Approvers will need access to both the Fund and Organization of the document to view it for approval. If there are issues viewing the document, contact financeapprovals@lafayette.edu
- 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.
- If the approval queue hierarchy needs to be adjusted, contact financeapprovals@lafayette.edu