



BANNER WEB SELF SERVICE USER GUIDE FOR DOCUMENT APPROVALS

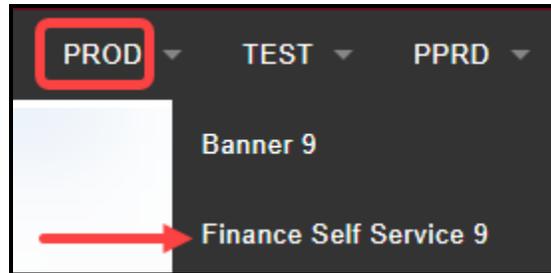
Prepared by: FISCAL SERVICES DEPARTMENT

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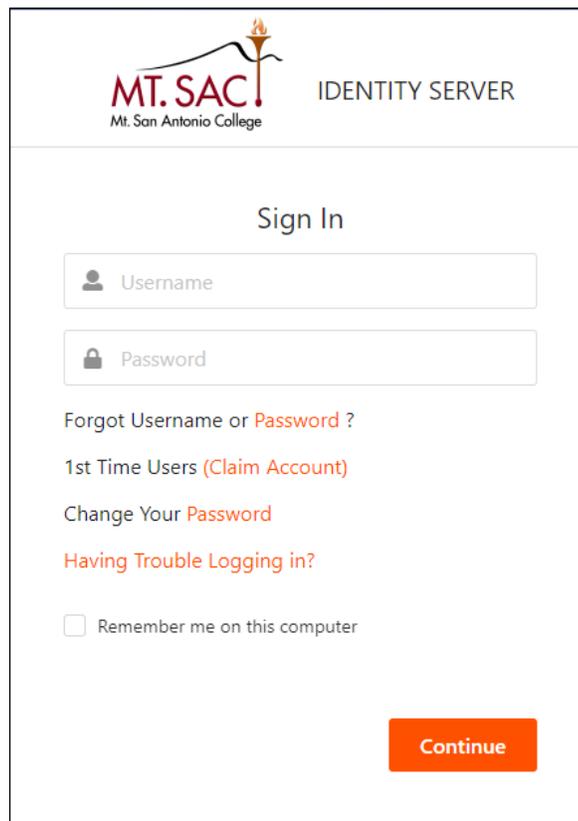
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VIEW DOCUMENTS PENDING APPROVAL

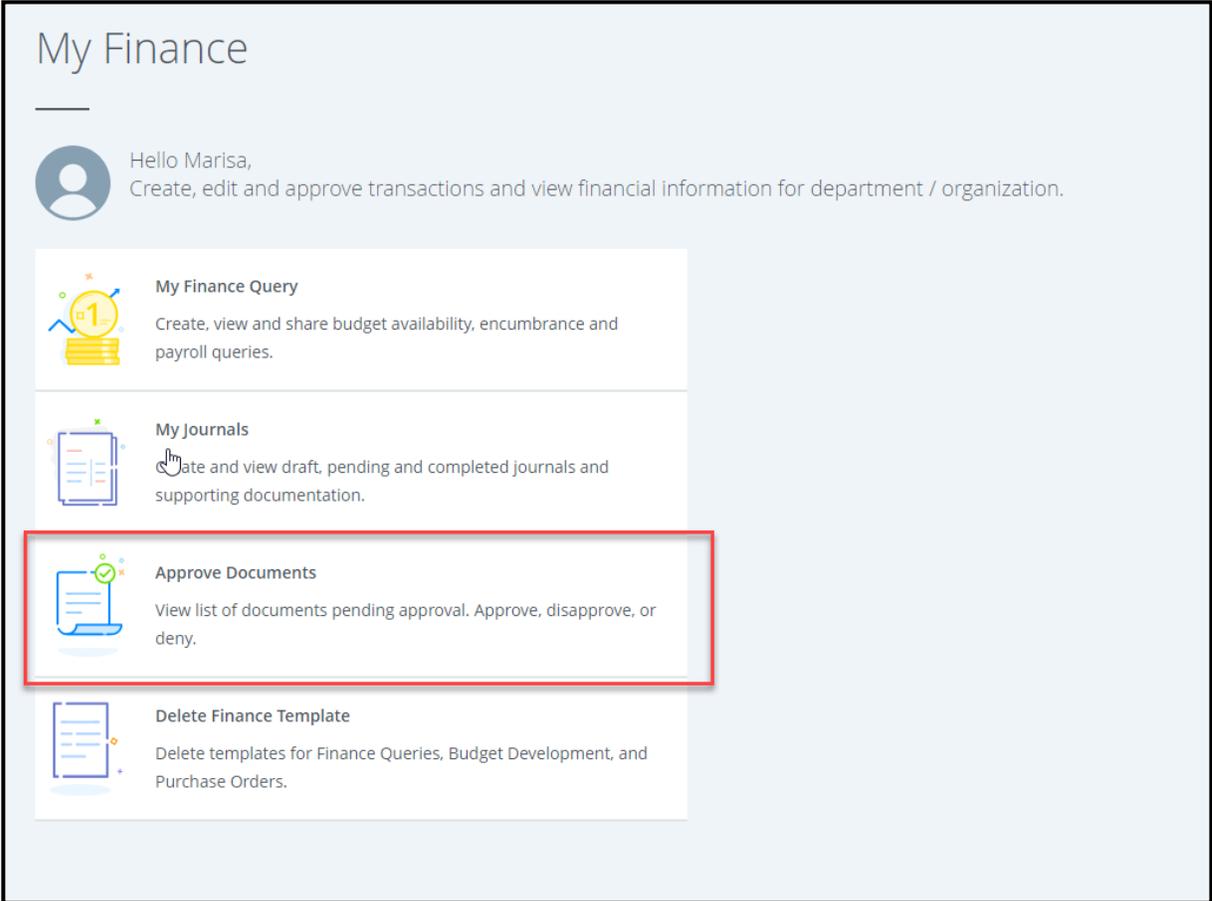
1. Access Banner Finance Self-Service 9 through Mt. San Antonio College application home page through the web <http://banner.mtsac.edu>. If you are unable to access Banner, contact the Helpdesk at Ext. 4357.
2. Under the PROD tab select **Finance Self-Service 9**



3. Sign in with your Username Name and Password

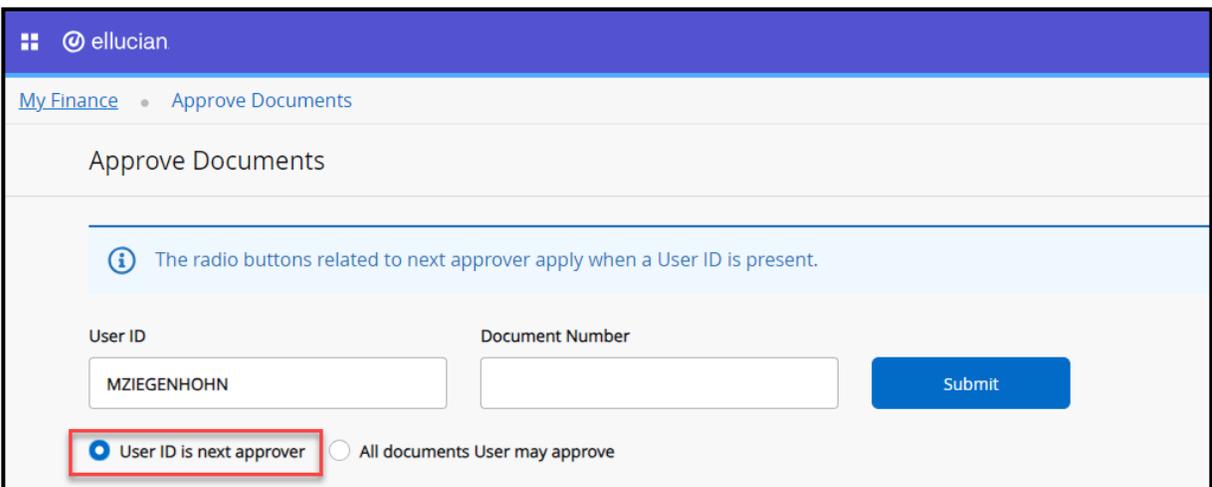
A screenshot of the Mt. SAC Identity Server Sign In page. The page features the Mt. SAC logo (Mt. San Antonio College) and the text 'IDENTITY SERVER'. Below the logo, the heading 'Sign In' is centered. There are two input fields: 'Username' and 'Password'. Below the input fields, there are several links: 'Forgot Username or Password?', '1st Time Users (Claim Account)', 'Change Your Password', and 'Having Trouble Logging in?'. At the bottom, there is a checkbox labeled 'Remember me on this computer' and an orange 'Continue' button.

4. Select **Approve Documents**.



The screenshot shows the 'My Finance' dashboard for a user named Marisa. The dashboard includes a greeting and a list of four main actions: 'My Finance Query', 'My Journals', 'Approve Documents', and 'Delete Finance Template'. The 'Approve Documents' option is highlighted with a red rectangular box. The 'Approve Documents' option includes an icon of a document with a checkmark and the text: 'View list of documents pending approval. Approve, disapprove, or deny.'

5. The Approve Documents Dashboard will appear. To view the documents in your queue, select **User ID is next approver**.



The screenshot shows the 'Approve Documents' dashboard. At the top, there is a blue header with the 'ellucian' logo. Below the header, the breadcrumb 'My Finance > Approve Documents' is visible. The main heading is 'Approve Documents'. A light blue information banner states: 'The radio buttons related to next approver apply when a User ID is present.' Below this, there are two input fields: 'User ID' containing 'MZIEGENHOHN' and 'Document Number'. A blue 'Submit' button is to the right of the 'Document Number' field. At the bottom, there are two radio buttons: 'User ID is next approver' (which is selected and highlighted with a red box) and 'All documents User may approve'.

6. Click on **Submit**.

My Finance • Approve Documents

Approve Documents

i The radio buttons related to next approver apply when a User ID is present.

User ID: MZIEGENHOHN Document Number: [Empty]

User ID is next approver All documents User may approve

Submit

7. You will now see a list of documents in your queue. These documents are pending for your approval.

Note: To learn how to approve a document, view the Approve or Disapprove Document Section (pages 9 – 15).

My Finance • Approve Documents

Approve Documents

Queried Parameters: [Another Query]

Approve Documents List 110

i 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	History	Disapprove	Approve
R0080013	REQ	-	-	AMARIN28	500.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0080015	REQ	-	-	AMARIN28	500.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0080241	REQ	-	-	AMARIN28	250.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0081049	REQ	-	-	MNAIRNEPROULX	147.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>

- a. Select the **document number** to view the documents details. A PDF file will open in a new tab for you to review.

Note: The PDF file shows the requestor’s name, transaction, and delivery dates, and accounting distribution.

Approve Documents List 110

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	History	Disapprove	Approve
R0080013	REQ	-	-	AMARIN28	500.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0080015	REQ	-	-	AMARIN28	500.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0080241	REQ	-	-	AMARIN28	250.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0081049	REQ	-	-	MNAIRNEPROULX	147.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>

- b. To go back to the previous screen, close the PDF file or select the Approve Documents tab.

- c. Select the **History** tool of the document to display pending approvals, approval history, and any related documents.

Approve Documents List 110

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	History	Disapprove	Approve
R0080013	REQ	-	-	AMARIN28	500.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0080015	REQ	-	-	AMARIN28	500.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0080241	REQ	-	-	AMARIN28	250.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>
R0081049	REQ	-	-	MNAIRNEPROULX	147.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>

History ×

Document Number: R0080013 Document Type: Purchase Requisitions

Originator: AMARIN28 Originator Name: Ann Marie A Marin

Related Documents

i No Related Documents information available for R0080013

Approvals Required

Queue	Description	Level	Approvers
ACCT	ACCOUNTING REQUISITION REVIEW	1	Delana Miller Jackson Kuo Marisa Ziegenhohn Rosa Royce

Approvals Recorded

Queue	Level	Date	User
DENY	0	May 03, 2023	Ann Marie A Marin
R059	2	May 13, 2023	Michelle Sampat
R059	1	May 09, 2023	Susan Lee

8. To close out the query, select **Another Query**

Approve Documents

Queried Parameters

Another Query

Tip: If you have a specific document to view, enter the document number under **Document Number** and click **Submit**.

Approve Documents

 The radio buttons related to next approver apply when a User ID is present.

User ID:

Document Number:

User ID is next approver All documents User may approve

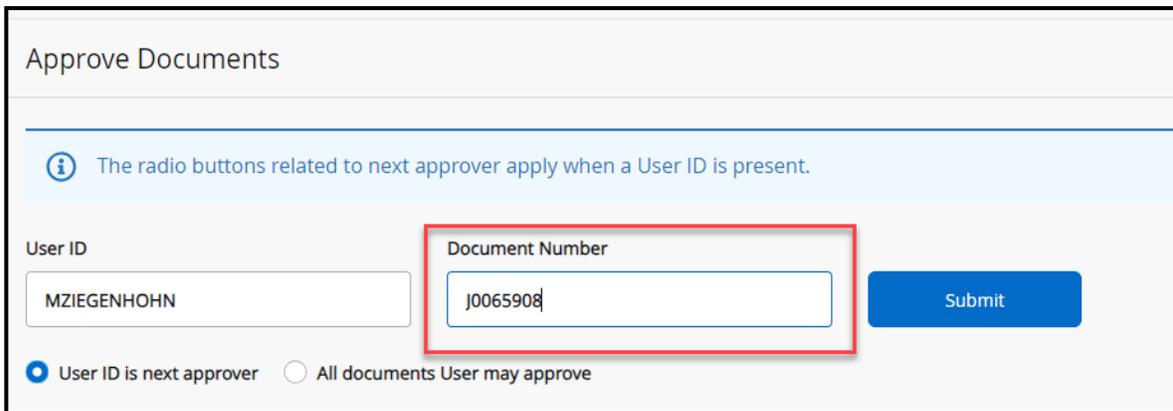
Approve Documents List 1

 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	History	Disapprove	Approve
R0081234	REQ	-	-	CPARKS3	5,396.00	Yes	-	DOC		<input type="button" value="Disapprove"/>	<input type="button" value="Approve"/>

APPROVE OR DISAPPROVE DOCUMENTS

1. Go to the **Approve Documents** module.
 - a. To view a specific document, enter the document number under **Document Number** and click **Submit**.
 - b. To view all documents for which you are the **next approver** on the approval queue, select **User ID is next approver**, then click **Submit**.
 - c. To view all documents that require your approval, even if you are not the next approver, select **All documents User may approve**, then click **Submit**.



Approve Documents

i The radio buttons related to next approver apply when a User ID is present.

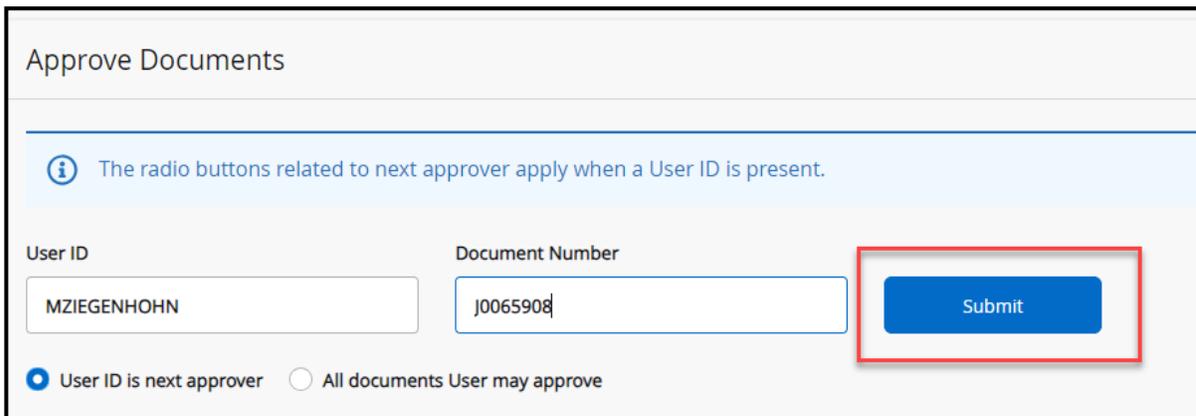
User ID: MZIEGENHOHN

Document Number: J0065908

User ID is next approver All documents User may approve

Submit

2. Select **Submit**.



Approve Documents

i The radio buttons related to next approver apply when a User ID is present.

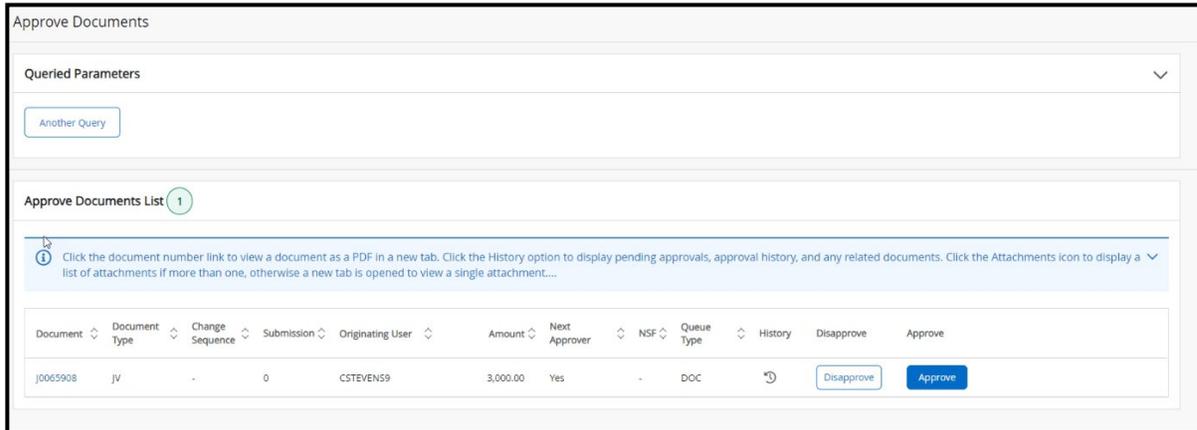
User ID: MZIEGENHOHN

Document Number: J0065908

User ID is next approver All documents User may approve

Submit

3. The **Approve Documents List** will appear.



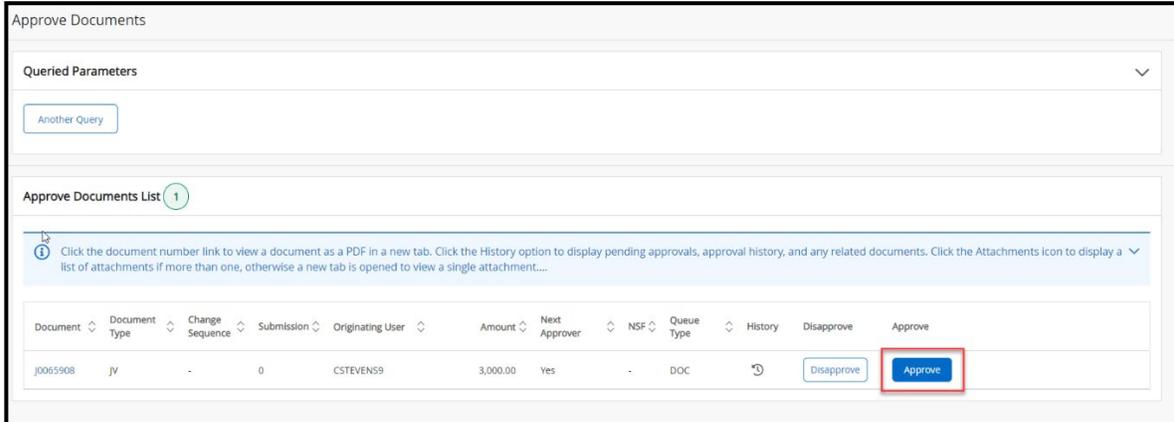
- a. Select the **document number** to view the document details, A PDF file will open in a new tab for you to review. Verify all information is accurate before finalizing approval.

Note: The PDF file shows detailed information about the document, depending on the type of documents you are selecting to approve.

- b. Select the **History** tool of the document to display pending approvals, approval history, and any related documents.

To Approve:

1. To approve the document, select **Approve**.



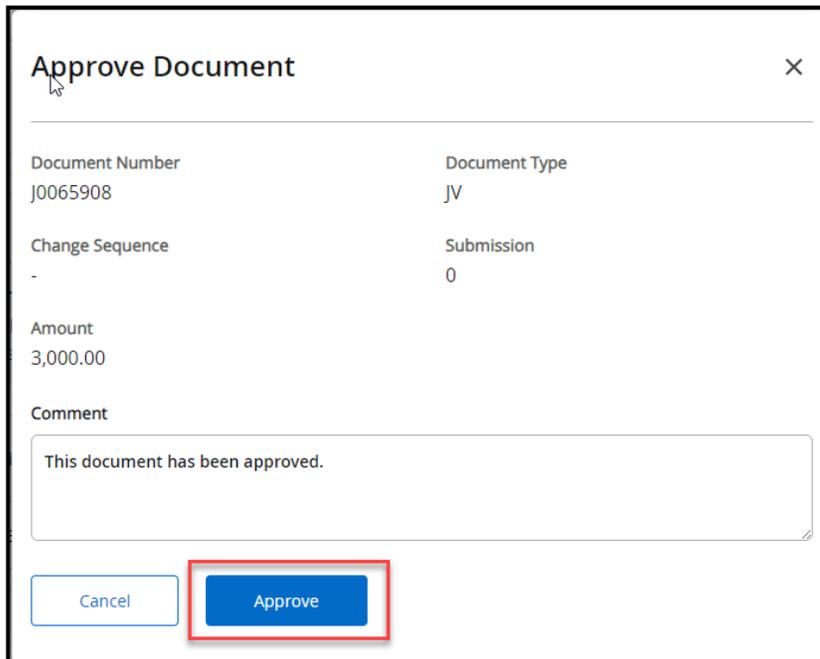
The screenshot shows the 'Approve Documents' interface. At the top, there is a 'Queried Parameters' section with an 'Another Query' button. Below that is the 'Approve Documents List' section, which contains a table of documents. The table has columns for Document, Document Type, Change Sequence, Submission, Originating User, Amount, Next Approver, NSF, Queue Type, History, Disapprove, and Approve. The first row of the table shows a document with ID J0065908, type JV, change sequence -, submission 0, originating user CSTEVEN59, amount 3,000.00, and next approver Yes. The 'Approve' button for this document is highlighted with a red box.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	History	Disapprove	Approve
J0065908	JV	-	0	CSTEVEN59	3,000.00	Yes	-	DOC		Disapprove	Approve

2. A box will appear with the document information. Verify that the information is correct.

Note: You may add any comments in the Comment box.

3. Select **Approve**.

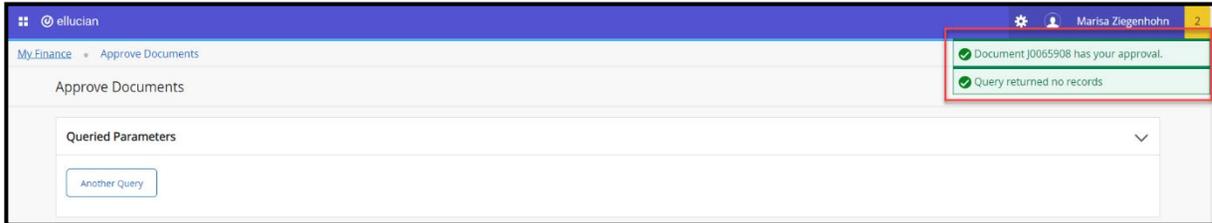


The screenshot shows the 'Approve Document' dialog box. It displays the following information:

- Document Number: J0065908
- Document Type: JV
- Change Sequence: -
- Submission: 0
- Amount: 3,000.00
- Comment: This document has been approved.

At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Approve'. The 'Approve' button is highlighted with a red box.

4. A message will appear that the Document has your approval.



5. To return back to the previous screen, select **Another Query** under Queried Parameters.

To Disapprove:

1. To disapprove a document, select **Disapprove**.

Approve Documents List 1

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	History	Disapprove	Approve
J0065843	JV	-	0	NKAM	1,804.00	Yes	-	DOC		Disapprove	Approve

2. A box will appear. Enter the reason why the document is disapproved in the **Comment** box.

Disapprove Document ×

Document Number: J0065843

Document Type: JV

Change Sequence: -

Submission: 0

Amount: 1,804.00

Comment *

Approval has been denied.

3. Select **Disapprove**.

Disapprove Document [X]

Document Number	Document Type
J0065843	JV
Change Sequence	Submission
-	0
Amount	
1,804.00	

Comment *

Approval has been denied.

Cancel Disapprove

4. A message will appear that the document has been disapproved.

Note: When you disapprove a document, the document will go back to the user to correct and resubmit. If you leave a comment for the user, they will see the reason for the disapproval.

My Finance - Approve Documents

Approve Documents

Queried Parameters

Another Query

Approve Documents List

Query returned no records.

Document J0065843 has been disapproved by you.

Query returned no records

5. To return back to the previous screen, select **Another Query** under Queried Parameters.



References

FOAPAL CODE DESCRIPTIONS

CODE	DESCRIPTION
Fund	The Fund code specifies the funding source where the money comes from. Funds are either unrestricted or restricted (e.g., grant funds, bond funds).
Organization	The Organization code identifies the department or location responsible for the financial activity.
Account	<p>The Account code identifies the spending or revenue categories such as Office Supplies or Services. There are 8 major categories:</p> <ul style="list-style-type: none"> 1000 Academic salaries 2000 Classified salaries 3000 Employee benefits 4000 Supplies and materials 5000 Other operating expenses and services 6000 Capital outlay 7000 Other outgo 8000 Revenue
Program	<p>The Program code reflects the purpose of the expenditures. All activities are classified as either instructional or administrative and support.</p> <ul style="list-style-type: none"> • For Instructional Programs, Program codes follow the Taxonomy of Programs (TOP) manual from the Chancellor's Office. • For administration and support, Program codes follow the Budgeting and Accounting Manual from the Chancellor's Office.
Activity	The activity code is used to determine instructional and non-instructional salary and benefit expenditures. The activity code must be included when transferring To/From salary and benefit accounts.
Location	This code is used to specify the assigned physical location of an asset. This code is not used for requisitions, purchase orders, or budget transfers.

BANNER FINANCE SUPPORT

Support for Banner Finance modules (Budget Transfers and Approvals) is divided among the IT and Fiscal Services Departments.

ISSUE	DEPARTMENT	CONTACT
Accessing Banner	IT Help Desk	Ext. 4357
Personal passwords		
User ID		
Budget questions	Fiscal Services– Marisa Ziegenhohn	Ext. 6445
Access to Banner Finance forms		
Online Budget Transfer	Fiscal Services-Melanie Lazo Fiscal Services-Yvette Shane budgetrevisions@mtsac.edu	Ext. 5388 Ext. 5539
Requisitions and Change Order	Purchasing purchasing@mtsac.edu	Ext. 4245