

## **Recommended Daily Steps—Banner Approvals Process**

### Everyone, Especially Approvers

1. Log into Banner every day.
2. Direct Access the Approvals Notification form FOIAINP and enter

*If there are any documents awaiting your action, navigate to the user approval form.*

- a. Menu bar, Options then User Approval FOAUAPP
- b. Enter your username, tab to Next Approver box and uncheck
- c. Perform a Next Block
- d. Click on the Queue icon. This brings you to FOAAINP the Document Approval Form now perform a Next Block
- e. To review commodity and FOAPAL information regarding this transaction, click on the Detail icon
  - i. By clicking the Detail icon are able to view summary information regarding the document. To review the entire document go to the Options drop down menu Query Document. Exit out of the document approval form, which returns you to FOAAINP. Approve or disapprove the document by clicking on the check mark or X icon.
- f. If you disapprove the document, explain why or what action the user should take.

### Data-Entry Staff

In addition to the steps above, you may want to review the status of documents you have entered. You can do this by doing the following:

1. Direct Access User Approval form FOAUAPP
2. Clear out your username, tab to Document and type the number, tab to Next Approver box and uncheck, Perform a Next Block
3. Click on the Queue icon. This brings you to FOAAINP the Document Approval Form now perform a Next Block
4. The left side shows the Queue ID and Level by highlighting the highest queue level for each approval queue ID, the corresponding approvers will list on the right side of the form.
5. If your document has been awaiting approval for some time, you may want to call or e-mail the approver to draw his/her attention to it or see if you can provide further information to assist in the approver's review.

## Banner Approval Forms Hot List—by Function Title

There are numerous forms within Banner where you can view or update information about transactions (documents) that have already been entered. Listed below are the ones associated with transaction approvals that we feel will be most valuable, sorted by Banner Form Title (the characters that go into the “Direct Access” box on the main menu). This list does not attempt to inventory all available Banner transaction query forms.

Financial documents are *entered* (processed) using the following forms:

- FPAREQN     for requisitions
- FAAINVE     for invoices (direct pay or regular)
- FGAJVCD     for budget moves, journal entries, and cash receipts

Banner Form Title	Banner Form Name	What can you find here?
Queries about Approval Status		
FOADOCU	Documents by User Form	Use this form to display all documents that were entered by a selected user, as well as their status (completed, canceled, approved, etc.) An approver <i>cannot</i> deny the document from this form, although it appears as if you can. You can query by document type, document number, document status, and/or within a range of activity dates.
FOIAPPH	Document Approval History Form	This query form displays documents that have had approvals applied, showing the Queue ID, Queue Level, Approver's Name, and Approved Date for the queried document. You can query by document number or type; however, you cannot update the document to denote approval or denial.
FOIAPHT	Approval History Form	This query form displays documents that have had approvals applied, showing the Queue ID, Queue Level, Approver's Name, and Approved Date for the queried document. It also shows the originating user, which appears to be the main difference between this form and FOIAPPH. You can query by document number or type; however, you cannot update the document to denote approval or denial.
FOIAINP	Approvals Notification Form	This query form shows information about documents awaiting the approval of the logged-in user. It displays the count, document type, and an informational message (awaiting your review) for each distinct document type.
Forms where an Approver can Apply Approval or Denial		
FOAAINP	Document Approval Form	Use this form to display a document that is in the approval process--showing where it is in the approval process as well as who is the next approver. An approver can approve or disapprove the document from this form and can also view the detail of the document. Note: you must know the document number to use this form.
FOAUAPP	User Approval Form	Use this form to display documents that are awaiting approval, by the User ID of the approver. An approver can approve or disapprove the document from this form and can also view the detail of the document.