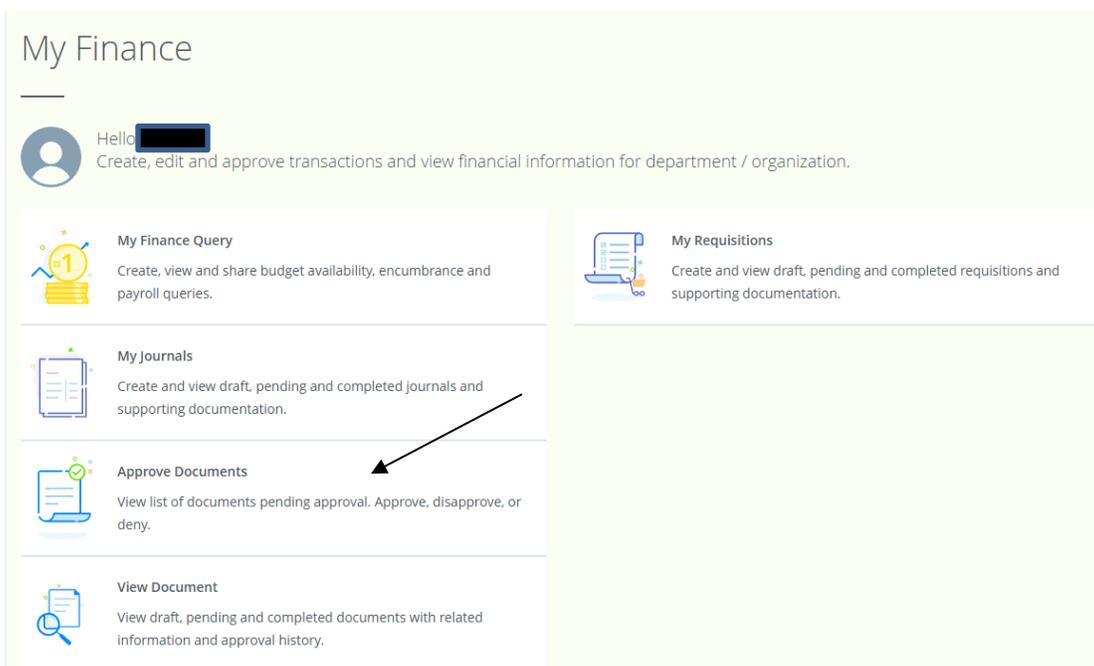# UAH Banner 9 Finance Self Services Approval Workbook

This UAH Banner 9 Finance Self Services Approval Workbook is provided to guide you through navigating the various screens in Banner 9 to approve requisitions in your queue as referenced in the link below.

https://financeselfservicetest.uah.edu/FinanceSelfService/

Approve Documents Overview

- An authorized user can choose to approve or disapprove a document (requisition, journal voucher, etc.)
- All users can recall unapproved documents they have created that were sent to the approvals system.

Approve Documents Parameters

On the Approve Documents parameters page, you can populate the **Document Number** field to view information about a specific document to be approved; use % or _ as a wildcard.

- Select the **User ID is next approver** option to view all the documents that are waiting for the specified user's approval before they can proceed to the next approval queue.

- Select the **All documents User may approve** option to view all the documents the specified user can approve even if they are not the next approver.

Approve Documents List

You will see a list of all documents you may approve.

- To view the document before you approve it, click the document number link in the first column, labeled Document. It will download a pdf copy of the document.

- To view the attachments to the document, click on the 📎 icon in the Attachments column.

- To view pending approvals, approval history, and any related documents, click on the 🕘 icon in the History column.

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Approve a Document

The **Approve** button enables an authorized user to approve the document.

The **Approve** button is only enabled if the person who logged in is authorized to approve the document.

1. In the **Approve Documents** list, review the document detail and supporting information related to a document.

2. Click **Approve**. **Result:** The **Approve Document** window appears with the **Approve** and the **Cancel** buttons.

3. **Optional:** You may replace the default comment "This document has been approved" with another comment that explains the reason for approving the document.

4. Click **Approve** to complete the approval process.

5. Click **Cancel** if you need to return from the **Approve Document** window without approving.

Approve Document ✕

Document Number	**Document Type**
R0145843	REQ
Change Sequence	**Submission**
-	-

Amount
1,000.00

Comment

> This document has been approved.

[Cancel] [**Approve**]

Disapprove a Document

The **Disapprove** button is only enabled if the person who logged in is either authorized to disapprove the document or is the originator of the document.

Procedure

1. In the **Approve Documents** list, review the document detail and supporting information related to a document.

2. Click **Disapprove**. **Result:** The **Disapprove Document** window appears with the **Disapprove** and the **Cancel** buttons.

3. **Required:** The Comment field is a mandatory field. Please enter a comment that explains the reason for disapproving the document.

4. Click **Disapprove** to complete the disapproval process.

5. Click **Cancel** if you need to return from the **Disapprove Document** window without disapproving.

Disapprove Document   ✕

Document Number   Document Type
R0145843   REQ

Change Sequence   Submission
-   -

Amount
1,000.00

Comment *

Approval has been denied.

Cancel	**Disapprove**

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