

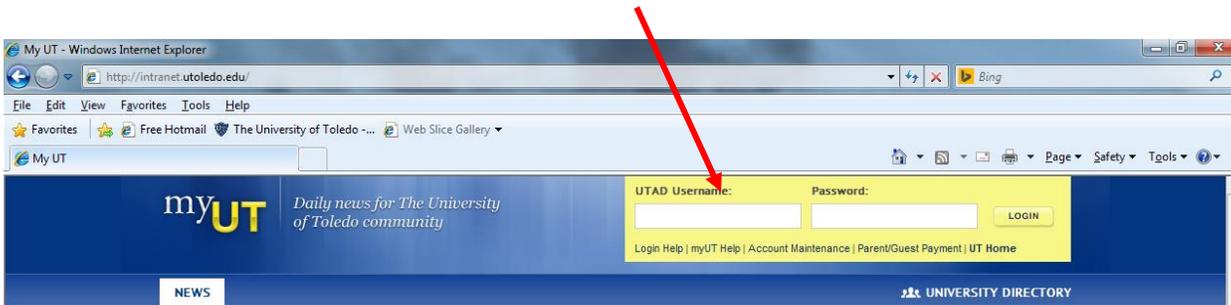
Banner Approver Training Manual

BANNER NAVIGATION

Welcome to Banner! This is a brief overview of basic navigation required to utilize the Self Service system.

Accessing Banner SSB (Self Service)

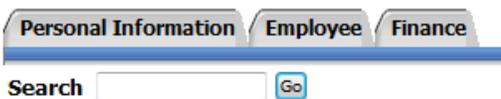
1. Open a session of Internet Explorer
2. Type in <http://myut.utoledo.edu>
3. Enter your UTAD username and Password



4. Click **LOGIN**

SSB – Self Service Banner for **APPROVING REQUISITIONS**

At the Main Menu, Click on the **Finance** tab.



Main Menu

5. From the list of options, there are 3 links **Requisition**, **Approve Documents**, and **View Document** that may be used to view and approve documents.

The approvers will most often simply use the **“Approve Documents”** link.

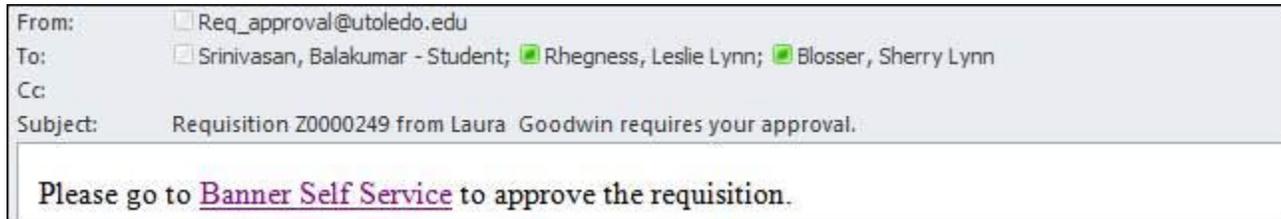
Finance

- [Budget Queries](#)
- [Encumbrance Query](#)
- [Requisition](#)
- [Purchase Order](#)
- [Approve Documents](#)
- [View Document](#)
- [Budget Transfer](#)
- [Multiple Line Budget Transfer](#)
- [Delete Finance Template](#)

Banner Approver Training Manual

OR

Approvers will receive an email notification from Req_approval@utoledo.edu alerting them an action needs to be taken on a specific requisition. The embedded link will take you to the menu to then choose “Approve Documents”.



APPROVER Process

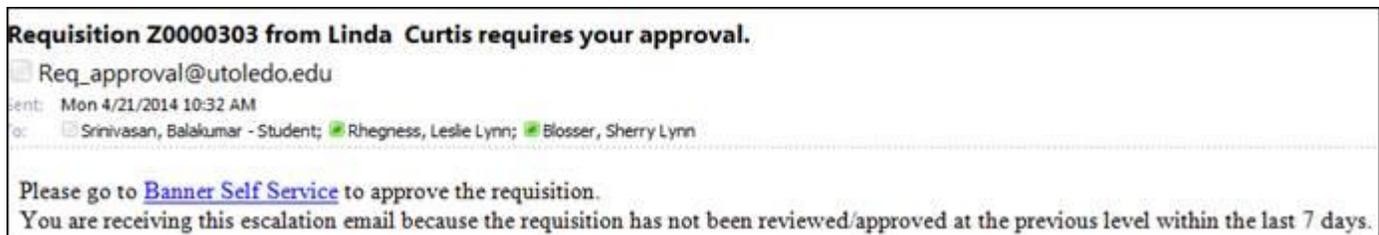
There are various levels of approvals built within Banner Workflow. There are **3 levels** as they exist today:

Level 1	0-9999
Level 2	10,000 – 24,999
Level 3	25,000 +

There are also stops in **GRANTS ACCOUNTING** as well as a newly added approval QUEUE called “**LARGE PO’s**”

LARGE PO Queue is designed for any order over \$50K to have one last set of eyes to ensure we are processing these transactions according to our business rules and regulations.

Escalation occurs after 7 business days, if no action is taken, workflow sends to the next level approver.



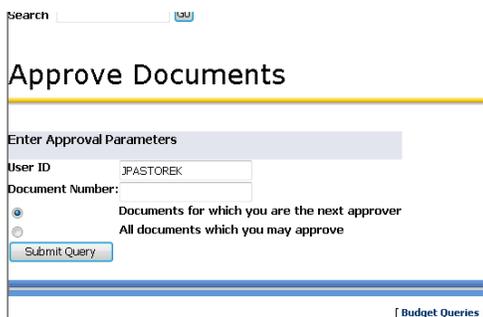
Banner Approver Training Manual

How to access:

1. Click on **Finance Tab**

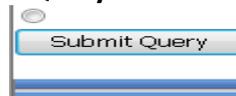


2. Click on **Approve Documents**



You may choose either to look at only the documents for which you are next approver or all documents you may approve.

1. Click on **Submit Query.**



You will receive a listing of Document Types (Requisitions) in which to take action on.

Banner Approver Training Manual

Approve Documents

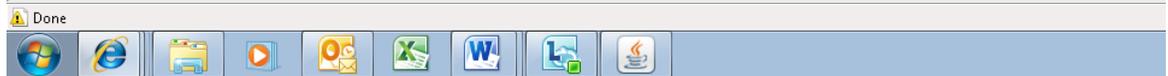
Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Ap

Queried Parameters

User ID: JPASTOREK Jennifer Pastorek
 Document Number:
 Documents Shown: Next Approver

Approve Documents List

Next Approver	Type	NSF	Change	Seq#	Sub#	Originating User	Amount	Queue	Type	Document	History	Approve	Disapprove
Y	REQ					LRHEGNE	4.00		DOC	Z0000053	History	Approve	Disapprove
Y	REQ					JDUNN9	1.00		DOC	Z0000054	History	Approve	Disapprove
Y	REQ					JPASTOREK	600.00		DOC	Z0000055	History	Approve	Disapprove
Y	REQ					POWSLEY	500.00		DOC	Z0000056	History	Approve	Disapprove
Y	REQ					POWSLEY	650.00		DOC	Z0000058	History	Approve	Disapprove
Y	REQ					MWOLF	58.50		DOC	Z0000059	History	Approve	Disapprove
Y	REQ					TPAKULSKI	53.00		DOC	Z0000060	History	Approve	Disapprove
Y	REQ					JCOMMAGER	301.95		DOC	Z0000061	History	Approve	Disapprove
Y	REQ					TPAKULSKI	5.00		DOC	Z0000062	History	Approve	Disapprove
Y	REQ					JCOMMAGER	3,011.00		DOC	Z0000063	History	Approve	Disapprove
Y	REQ					TPAKULSKI	25.00		DOC	Z0000064	History	Approve	Disapprove
Y	REQ					TPAKULSKI	10.00		DOC	Z0000065	History	Approve	Disapprove
Y	REQ					JCOMMAGER	3,304.25		DOC	Z0000066	History	Approve	Disapprove
Y	REQ					TPAKULSKI	40.00		DOC	Z0000067	History	Approve	Disapprove
Y	REQ					POWSLEY	25.00		DOC	Z0000068	History	Approve	Disapprove
Y	REQ					MWOLF	73.98		DOC	Z0000069	History	Approve	Disapprove



There are 4 links in which to view/take action steps on.

1. **Document** – click on this link to view the requisition needing approved. You can look at any related attachments that may have been uploaded with the requisition.
2. **History** – click on this link to view the originator of the Requisition and the Approvals required.

Personal Information / Student / Financial Aid / Employee

Search

View Document

Document Identification
 Document Number Z0000153 Type Requisition
 Originator: POWSLEY Patty Owsley

Approvals required

Queue	Description	Level	Approvers
0310	A10608 APPROVAL QUEUE 10		Jennifer Pastorek

✓ No approvals have been recorded for this document

Banner Approver Training Manual

3. **Approve** – this link will APPROVE the requisition. There is a Comment area that has a canned text line “This document has been approved”. You may also add additional text to this area.

Search

Approve Document

Document Information
Document Number: Z0000148 Type: REQ
Change Seq# Sub#
Amount:

Comment:

Click on the **APPROVE DOCUMENT** button. A green check mark  with comment that the document has your approval will appear.

Personal Information Student Financial Aid Employee Finance

Search

Document Pending Approval

 Document Z0000148 has your approval.

Click on **CONTINUE** to go back to list of requisitions. Repeat steps as needed.

4. **Disapprove** – use this link to disapprove a requisition. There is a canned comment box with text “Approval has been denied.” You may also add additional information as to why the requisition is not being processed.

Banner Approver Training Manual

Disapprove Document

Document Information
Document Number: Z0000152 Type: REQ
Change Seq# Sub#
Amount: 150.00

Comment: Approval has been denied.

Click on the **Disapprove Document** button.

An email will be sent to the requestor alerting them their requisition has not been approved.

From: Req_approval@utoledo.edu
To: Srinivasan, Balakumar - Student; Rhegness, Leslie Lynn; Blosser, Sherry Lynn
Cc:
Subject: Requisition Z0000152 has been rejected.

Jennifer Pastorek has rejected the requisition Z0000152. The following message contains information relating to the rejected requisition:
Approval has been denied.

A green check mark  with comment that the document has been disapproved will appear.

Personal Information / Student / Financial Aid / Employee / Finance

Search

Document Pending Approval

Document Z0000152 has been disapproved by you.

Click on **CONTINUE** to go back to list of requisitions. Repeat steps as needed.