Approvals
Banner, Bearkat Buy, and Chrome River
What are they?

• Electronic Approvals provide a paperless process for documents to move through the approval process in Banner and other systems.

Which documents?

• Most documents (e.g. journal vouchers, purchase and travel requisitions, and budget adjustments) must be approved before they will be processed or posted.
IMPORTANT NOTES
For the Approver

In approving a requisition, you attest that:

• this is a legitimate purchase to be used for the good of the University or (in the case of grants) is used for the sole purpose of achieving results for the agreed upon contract.

• the purchase does not violate any State of Texas or University guidelines,

• and that sufficient funds are on hand for this purchase.

• AN ELECTRONIC APPROVAL IS THE SAME AS YOUR SIGNATURE ON A DOCUMENT.
Review Before You Approve:

- **Occurrence:** The transaction occurred (or in the case of requisitions, is expected to occur)
  - E.g. If you have déjà vu during your review, it could mean a document was inadvertently entered twice. If the transaction only occurred once, the duplicate should be deleted.

- **Accuracy:** Amounts, quantities, dates, descriptions, and FOAPs are accurate

- **Completeness:** Everything that should be accounted for is included

- **Classification:** Expenditures and earnings are properly classified
  - Account designation is appropriate for the expenditure or earning, e.g. Asset, Liability, Expense (salaries, travel, supplies, etc.), or Revenue. Also whether it’s an Internal vs. External transaction.

- **Appropriateness:** Expenditures are allowable and appropriate

- **Reasonableness:** Expenditure amounts are within set limitations or guidelines (e.g. travel allowances, PO guidelines, etc.) and appear reasonable, and quantities are reasonable. Good check for typos or miscalculations.

- **Budget:** Funds are sufficient to cover current and future expenditures
Approvals in Banner Self-Service (SSB)
Your user ID will automatically default in
### Approving Documents – SSB

#### Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the history of the document. Select the Approve link to approve the document. Select the Disapprove link to disapprove the document.

#### Queried Parameters

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#### Approve Documents List

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Check the FOAP(s):
E.g. Fund is correct, Org matches your dept., Account is appropriate for the expenditure, etc.

Check the details:
E.g. Dates, rule codes, quantities, descriptions, amounts, etc.
Approve Documents – SSB

Approve Documents

Select the Document Number link to display the details of a document. Select the Approve button to approve the document or the Disapprove button to disapprove the document.

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Approve the document to send it to the next step in the process or disapprove so the originator/requestor can:

1) do corrections where needed or
2) delete the requisition altogether.
When approving or disapproving, you may input a message in this box to relay back to the requestor.
Document Pending Approval

Document J0080756 has your approval.

Click Continue to Complete the Approval
Once a document has been approved, the user is returned to the main approval screen.

This means there are no more documents to approve.
Approval History – SSB

Click the blue History link to see the originator and required approvers of the document.

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Approval History – SSB
Approvals in Banner XE
Approvals in Banner XE

Users can also approve documents in Banner XE. The process is similar – but if you are unfamiliar with Banner XE, it may seem more involved.

Forms related to Approvals in Banner XE

- **FOAUAPP** (User approval form)
  Lists all documents awaiting your approval

- **FOAAINP** (Document approval form)
  Lists all approvers that the document is waiting for action

- **FOIAPPH** (Document approval history form)
  Lists approvers who approved/disapproved the document
At the beginning of each Banner session, approvers will receive notification of documents awaiting approval.
If you do NOT wish to view documents at this time, “X” to close and continue to requested form.
Alternatively, if you do wish to view documents awaiting approval, select ‘Related’ and ‘User Approval [FOAUAPP]’
You can also access approval forms from the Welcome page by typing in the form name.
FOAUAPP in Banner XE

Your user ID will automatically default in

Click on ‘Go’ or ‘Next Section’ to see all documents awaiting your approval
FOAUAPP in Banner XE

Select a row, then ‘Detail’

Requestor
FOQJVCD – Journal Voucher Details

Check all FOAP(s), the Transaction Date, and the Document Total
FOAUAPP (Approve/Disapprove)

Approve the document to send it to the next step in the process or disapprove so the originator/requestor can:
1) do corrections where needed or
2) delete the requisition altogether.

User Approval FOAUAPP 9.0 (BANFROD)

User ID: DLD012  Say: DeLynn  Document: Next Approver: 

Approve Disapprove Detail Queues

NSF Document Type Document Number Change Sequence Submission Originating User Document Amount Queue Type Next Approver
JV J0080805 0 ACC_SLS 476.00 DOC Y
JV J0080806 0 ACC_SLS 3,369.80 DOC Y
JV J0080807 0 ACC_SLS 4,552.56 DOC Y
JV J0080815 0 ACC_SLS 762.72 DOC Y
JV J0080847 0 ACC_SLS 1,993.33 DOC Y
JV J0080846 0 ACC_SLS 3,962.45 DOC Y
JV J0080850 0 ACC_SLS 1,492.09 DOC Y
JV J0080853 0 ACC_SLS 1,944.80 DOC Y
JV J0080854 0 ACC_SLS 1,899.08 DOC Y
JV J0080856 0 ACC_SLS 2,512.10 DOC Y
FOAUAPP (Approve/Disapprove)

This is where a transaction will be flagged as NSF in Banner XE.

If “NSF” is flagged, ALWAYS Disapprove. This means that at least one line of the requisition or budget change has a FOAP with insufficient budget for this transaction.

If approved at the Department level, it WILL be denied by Procurement, Travel, or Budget. This will cause unnecessary delays in processing your transactions.
When approving or disapproving, you may input a message in this box to relay back to the requestor.
Reviewing the QUEUE in Banner XE

Click here to see who still needs to approve for the selected document (row).

The ‘Queue’ button takes you to the FOAAINP form and populates it with the document number you had selected. Then click on Go or ‘Next Section’.
These will be in alphabetical order by their queue ID, not in approval order.

You can also view the details of the document and approve/disapprove here.

The FOAAINP form shows who still needs to approve a document.
FOAAINP in Banner XE

Select a Queue ID to see the corresponding approver list

Click on the column heading to sort by Queue Level (Approval Order)
Viewing Approval History from FOAAINP

Clicking here takes you to the FOIAPPH form, where you can see who has already approved the document.

You can use the same menu to access Approval History from FOAUAPP.
FOIAPPHH (Document Approval History Form)

This document was approved by this person on this date

The FOIAPPH form shows who has already approved a document
This document was denied and then approved later the same day once it had been corrected.

GUAMESG is the message form in Banner where you receive notification of document approvals and denials.
Approvals in Bearkat Buy (BKB)
Approvals in Bearkat Buy

Purchase requisitions must be approved in Bearkat Buy and feed to Banner once they are approved.

Purchase requisition is entered in BKB

**Academic Approval Queue**
- $0 - $20,000 - Chair
- $20,000-$50,000 - Dean
- $50,000-$150,000 - Provost
- $150,000+ - President

Purchasers review and approve

PO is created and fed to Banner as encumbrance / committed funds
Approvals in Bearkat Buy

Review a Requisition

• To review requisitions in your approval queue click on your Action Items tab at the top right hand side of the screen.

• Then click on the Unassigned Requisitions Needing Approval.
Approvals in Bearkat Buy

Review a Requisition

- A screen will pop up with requisitions needing approval.
- Click on an individual requisition number to view the requisition detail.
Approvals in Bearkat Buy

Review a Requisition

- Review the entire requisition to ensure everything is correct before approving.
- Includes checking FOAPs, items, amounts, quantities, etc.
Approvals in Bearkat Buy

Approving a Requisition

• To add any additional comments to the requisition before approval go to the comments tab and click on add comments.

• The following screen will pop up to add comments. If you select the box for email notifications then an email will also be sent to the originator.
Approvals in Bearkat Buy

Approving a Requisition

• To add additional email recipients click on the ‘add email recipient’ button and the following screen will pop up to search for an additional recipient.

• Click on the search button and a list of recipients will pop up. Click on the select button on the right side to select the additional recipient.

• It will then drop in the additional recipient to send an email to along with the originator. Click the Add Comment button to add the comment and send the emails.
Approving a Requisition

- To then approve the requisition go back to the requisitions tab. Select the drop down from your Available Actions, and select the Approve/complete step option.
- Click on the Go button and the requisition will be forwarded on in the approval workflow process.
Approving a Requisition

• You can also approve a requisition via email.

• Scroll to the bottom of the email and click on the link that will drop you back into BearKat Buy site to look at the requisition to approve.

• The link will drop you directly into the approval screen where you will follow the previous steps for approving a requisition.
Disapproving a Requisition

- Two methods of disapproval:
  - **Return to Requisitioner**: Sends back to requisitioner for edit and resubmission.
  - **Rejecting a Requisition** (in whole or in part): Kills the requisition or individual line items rejected.

- To disapprove (with either method), you must first **assign the requisition to yourself**. Follow the steps to Review a Requisition, then under the Available Actions, click ‘Assign to myself’. Additional options will be available once you assign it.
Approvals in Bearkat Buy

Disapproving a Requisition

- **Return to Requisitioner**: Sends back for edit and resubmission.
- Once you assign the requisition to yourself, it will give you the following options from the drop down list of Available Actions. Select the Return to Requisitioner option and click on the Go button.
- Enter a reason for the requisition being sent back and click the Return to Requisitioner button.
Disapproving a Requisition

- **Rejecting a Requisition**: Kills part or entire requisition.
- Assign the requisition to yourself, then additional options will be available in the Available Actions.
- To reject individual line items you can scroll down to where the lines are listed. Make sure the line to be rejected is checked off on the right side and select Reject Selected Items from the Available Actions drop down. Click on Go.
Disapproving a Requisition

- Rejecting a Requisition:
  - The pop up will appear asking for a reason that the line is being rejected. Put in a reason and click on Reject Line Item.
  - The rejected line item will now show up with a little red ‘x’ next to it.
Disapproving a Requisition

- Rejecting a Requisition:
- To reject the entire Requisition click on your Available Actions drop down at the top and choose Reject Requisition. Click on the Go button.
- Enter a reason for the requisition being rejected and click the Reject Requisition button.
Approvals in Chrome River
Approving Pre-Approvals by Email

- If your account is set up to receive HTML emails, you can approve the expenses or return them to the requester with questions or comments by tapping the **ACCEPT** or **RETURN** buttons in the email itself.

- An additional email from Chrome River with action requested will pop-up once action selected. User will need to select the send button for action to apply to report. Comment is not required in the email. Simply select SEND.
Pre-Approvals

Approving Pre-Approvals In Application

• In the **Approvals Needed** notification bar at the top of the Dashboard, tap on **PRE-APPROVALS**.

• Tap on the approval you wish to view and a preview will slide in from the right. Or double-tap on the approval to open it.
Pre-Approvals

Approving Pre-Approvals In Application

• Tap **APPROVE** to send the pre-approval request to the next step in the routing process or **RETURN** to send it back to the requester.

• The only way to edit a pre-approval request is to Return to originator to make correction. You should enter a comment on what needs to be corrected within the Chrome River application.
Approvals in Chrome River

Approving Expense Reports In Application

• In the **Approvals Needed** notification bar at the top of the Dashboard, tap on **EXPENSE REPORTS**

• Once you click on the expense report you would like to review, the option to Approve or Return is located in the top right hand section of the screen. To review the details of expenses, select Open.
Approving Expense Reports In Application

- You may tap on individual line items to mark them as adjusted or returned, but **none of your actions will take effect** until you have tapped the **RETURN** or **SUBMIT** button at the bottom of the line item list. Unless they have compliance warnings, line items are marked as approved by default.
Approving Expense Reports In App

- If the expense you are approving has a linked pre-approval, you may view the details by tapping the PDF download button next to the name of the Applied Pre-Approval Report. This allows you to easily compare the original pre-approval to its associated expense report.
Chrome River Guidance

Find helpful information in the Help section of Chrome River

You can click the links at the top, or simply type in a topic in the search box.
# Questions?

If you need more information, please contact:

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<tr>
<th>Name</th>
<th>Extension</th>
<th>Email</th>
<th>System</th>
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