

Electronic Approvals - HOW TO use the Minerva Approve Documents menu

How to Approve or Disapprove Completed Documents in Minerva

The Approve Documents Menu option in Minerva and the Banner form FOAUAPP are used to approve or disapprove documents that are set for approval. Both options fulfill the same function. Approvers for financial transactions are **automatically granted access** to the Finance > Approve Documents menu option in Minerva. In order to access the Banner form, you must have access to the Finance module.

The most common documents which a Fund Financial Manager (FFM) / Principal Investigator (PI) or their delegate may approve are Purchase Requisitions (PR), submitted through the McGill MarketPlace (MMP).

- It is important to perform approvals of MMP Requisitions at a minimum twice daily (before 11 a.m. and before 3 p.m.) to ensure catalog orders are placed with Suppliers in the same working day.
- Read the article about the approvals process of MMP Requisitions for more information.

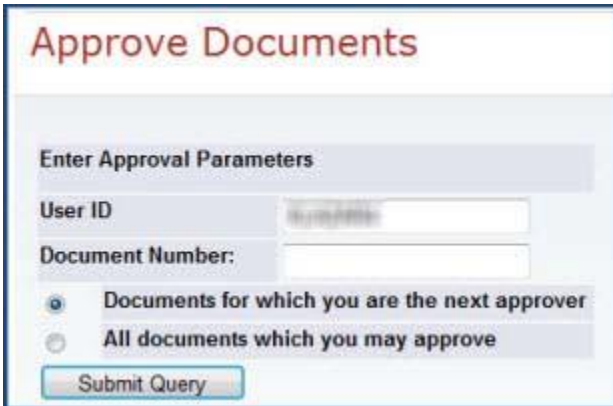
Step by step instructions for how to use Minerva Approve Documents Menu:

For Research Grants, please note the following: Grant holder/delegate authorization of purchase requisitions/orders for international acquisitions (purchases/shipments) includes authorization of the costs incurred for customs and brokerage charges for the acquisitions.

1. If you have received an Approval email notification **click** on the link in the email (log in is required). It will bring you directly to the Approve Documents screen in Minerva.
OR
If you have not received an email, log in to [Minerva](#) and select the Finance (Fund) Administration > Approve Documents menu option.

Note: You may also access the Approve Documents menu option in Minerva from [myMcGill](#) > Finance Admin portlet > Documents to Approve.

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The screenshot shows a web form titled "Approve Documents". It contains a section "Enter Approval Parameters" with the following fields and options:

- User ID:** A text input field with a default value of "R0000000".
- Document Number:** A text input field.
- Radio buttons:**
 - Documents for which you are the next approver
 - All documents which you may approve
- Submit Query:** A button at the bottom of the form.

2. In the **User ID** field, your **Short Username** will be displayed by default. **Leave as is.** You may choose to enter the document number (provided in the email) in the field or leave it blank. If left blank, it will bring all documents awaiting your approval.

Note: If you choose to enter the document number, make sure you enter "R0" (zero), not "RO" (the letter "O").

3. By default, the option "**Documents for which you are the next approver**" will be selected. You may leave it as is. Only the documents where you are the next approver will be displayed.

OR

Choose the option "**All documents which you may approve**". All documents that you may approve, but, for which you are not the next approver will be displayed.

Note: Use this option if you are the originator of a document and wish to cancel the document by disapproving it.

4. Click the **Submit** Query button.
5. All pending documents awaiting your approval will be displayed.
6. To view document details before you approve or disapprove a document, click on the **hyperlinked Document number**. Click the browser Back button to return to the Approval Documents list.

Note: The Approve/Disapprove links are enabled only for users with authority to approve or disapprove.

7. Click the **Approve** link next to the document you wish to approve.

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8. Click the **Approve Document** button to complete the approval.

To Disapprove a Document

1. Click the **Disapprove** link next to the document you wish to disapprove.
2. Click the **Disapprove Document** button to complete the disapproval.
3. Type in a descriptive **explanation** for the reason of the disapproval.

How to view Documents awaiting your approval in Minerva

Follow the steps above.

At Step 3, be sure to select the option "**All documents which you may approve**"

How to view all of the Approvers or Approval History for a specific document in Minerva

Before You Begin:

- You must have the document number you wish to query on hand.

Use the **Finance (Fund) Administration Menu > View Document** menu option.

- Please see How to Minerva Page: <https://www.mcgill.ca/financialservices/gfm/fis-system/minerva>

Approval history exists for the following documents only:

- Purchase Requisitions (MMP orders)
- Change Orders
- IDC
- JE15/JE16
- US currency deposit documents