

# Electronic Approvals - HOW TO use the Banner Approval Forms

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## How to Approve or Disapprove Completed Documents in Minerva and Banner

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 Banner 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. Login to **Banner**.
2. Enter **FOAUAPP** in the **Go To** field and hit **Enter** or select **User Approval Form [FOAUAPP]** from the **Finance FastTrack Menu**.
3. In the **User ID** field, your **Short Username** will be displayed by default. **Leave as is**.
4. You may choose to enter the document number you wish to approve in the Document 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").

5. TAB to the **Next Approver** field. By default, the **Next Approver** box will be checked. You may leave it as is. Only Documents where you are the next approver will be displayed.  
OR  
Uncheck to see all documents that you may approve, but, for which you are not the next approver.

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6. Click on the **Next Block** icon or use **Ctrl-Page Down** if you prefer using the keyboard.
7. All pending documents awaiting your approval will be displayed. **Document Type, Document Number, Original User, Document Amount, Queue** information and **Next Approver** fields will be presented.
8. Click on the **Detail** icon under the document to view accounting information.
9. Click on the **Approve** icon under the document you wish to approve to approve.
10. Click on the **Disapprove** icon to disapprove the document and enter a reason for the disapproval.

### If you have the document number on hand:

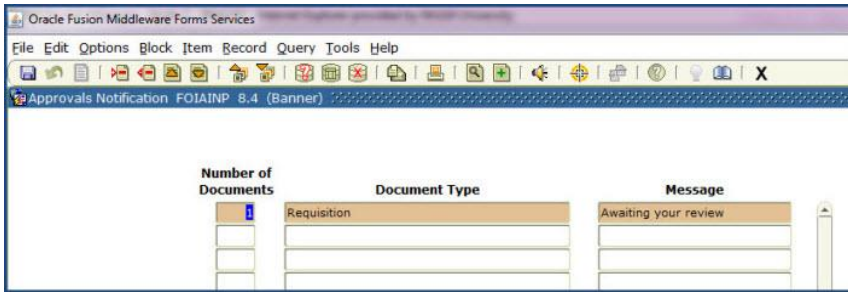
11. Login to **Banner**.
12. Enter **FOAAINP** in the **Go To** field and hit **Enter** or select **Document Approval Form [FOAAINP]** from the **Finance FastTrack Menu**.
13. Enter the document number in the **Document** field. (Example: R0000001, J00000013). The **Type** field will display automatically based on the Document number you have entered.  
Note: When viewing 'J' documents, verify that a 0 (zero) appears in the **Submission** field. If missing, type it in.
14. Click on the **Next Block** icon or use **Ctrl- Page Down** if you prefer using the keyboard.
15. The Queue ID, Description, Queue Level and the names of the Approvers will be displayed.
16. Click on the **Detail** icon to view the document details.
17. Click on the **Approve** icon to approve the document.
18. Click on the **Disapprove** icon to disapprove the document and enter a reason for the disapproval.

You may choose to enter the document

### How to view Documents awaiting your approval in Banner

1. Login to **Banner**.
2. Enter **FOIAINP** in the **Go To** field and hit **Enter**.

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3. FOIAINP will display a list of documents awaiting your approval. No further action to be taken on this screen.
4. Click on the **Exit (black X) icon** to exit the form.

*Note:* If there are documents pending your approval, when you log in to Banner and go to any Finance form, this form will automatically appear. If the form does not appear, this means that there are no documents, at this time, which require your approval.

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

Before You Begin:

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

Approval history exists for the following documents only:

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

**For documents which are still pending approval** (not all approvals have been recorded):

1. Login to **Banner**.
2. Enter **FOAIINP** in the **Go To** field and hit **Enter** or select **Document Approval Form [FOAIINP]** from the **Finance FastTrack Menu**.
3. Enter the document number in the **Document** field. (Example: R0000001, J00000013). The Type field will display automatically based on the Document number you have entered.

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Note: When viewing 'J' documents, verify that a 0 (zero) appears in the **Submission** field. If missing, type it in.

4. Click on the **Next Block** icon or use **Ctrl- Page Down** if you prefer using the keyboard.
5. The **Queue ID, Description, Queue Level and the names of the Approvers** will be displayed.

Queue ID	Queue Description	Queue Level	Approval Level	Queue	Level	U
RFQ	Central queue for FADM RFQ	50	50	RFQ	50	RFQ-1000
				RFQ	50	RFQ-1000

For approved documents (all approvals have been recorded):

1. Login to **Banner**.
2. Enter **FOIAPPH** in the **Go To** field and hit **Enter**.
3. Enter the document number in the **Document code** field. (Example: R0123456, J0456789).
4. Click on the **Execute** icon or press **F8** if you prefer using the keyboard to execute the query.
5. The **Document type, Queue Level and ID, the Approver's Name and Approval Date** will be displayed.

Queue ID	Level	Approver's Name	Approved Date
RFQ	50	RFQ-1000	04-APR-2016
RFQ	50	RFQ-1000	04-APR-2016
RFQ	50	RFQ-1000	07-APR-2016

6. Click on the **Exit (black X)** icon to exit the form.