



THE CITADEL

Banner 9 Approval Process

Option 1

1. Log into Lesesne Gateway and click on the Finance Tab. In the Approval Alerts section select the link to All Documents. If that link is not available, go to the section labeled Finance Links and select the link to Budget Query. Along the middle of the screen various finance links will be listed. Select the link to Approve Documents and click on the radio button that reads for “All documents which you may approve” then Submit Query.
2. To view detail about a specific item click on the document number. When you are done, select your browser’s back arrow to return to Approve Documents list.
3. You may now Approve or Disapprove the document. When the dialogue box appears click Approve again.

Option 2

1. Enter FOAUAPP in the search bar on the Banner 9 Welcome screen and click enter on your keyboard.
2. Once the User Approval screen opens, make sure your user name appears in ID field. Remove the checkmark in the Next Approver field and click on the Go button on the upper right corner of the screen or click the Next Section arrow on the lower left of the screen.
3. All documents that you may approve will appear in list format. Find the document number of the item that needs your approval and click on the originating user name that corresponds with that document.
4. To view additional information about the item being approved, click on the Detail button near the top left of the screen. You will see vendor information, funding source or index, document total and a description of what is being purchased. Once you’re finished viewing the document click the X in the upper left corner to close.
5. Choose an action; Approve or Disapprove the document. Once you have made your selection, a dialogue box will appear. Click OK again to move on to the next document or to close.

6. Once you are done, two messages will appear in the upper right corner indicating that the document has been approved or disapproved and that your action has been saved.

Option 3

1. Enter FOAAINP in the search bar on the Banner 9 Welcome Screen and click enter on your keyboard.
2. When the Document Approval screen appears, enter the document number in the Document field and press the tab key.
3. Once your cursor is in the field labeled Type, confirm that the correct document type is listed. For example, INV for invoice, PO for purchase order, or REQ for requisition. Click on the Go button on the upper right corner of the screen or click on the Next Section icon on the lower left of the screen.
4. The next screen shows an approver list and offers the option to see additional Detail, Approve or Disapprove the document. When Approve or Disapprove is selected, a dialogue box appears. You may add additional information about your action and click OK.