

**Banner Finance Approval Processes**

Approving Budget Entries, Journal Vouchers, and Cash Receipts

**Controller’s Office**

**Banner Approvals**

* **What are they?**

- Electronic approvals provide a paperless process for documents to move through the approval process in Banner.

* **Which documents?**

- All Banner journal entries, budget reallocations, and cash receipts **must** be approved in Banner before they will be posted.

**Banner Approval Rules and Policies**

* The document “running” total (total of all transactions) will determine how many approvals, and what administrative levels, are necessary for Banner documents (budget entries and journal entries):

- Fiscal Administrators $100,000 or less

- Dean/Director $100,001 - $500,000

- Vice President $500,001 - $999,999

- President $1,000,000 and over

- The Controller’s Office will approve journal entry transactions of $1,000,000 or more.

* Cash receipt entries only require a Fiscal Administrator approval.
* Attempts to circumvent approval controls are prohibited.

**Banner Approval Responsibilities**

* **“Explicit” approvals are implemented.**

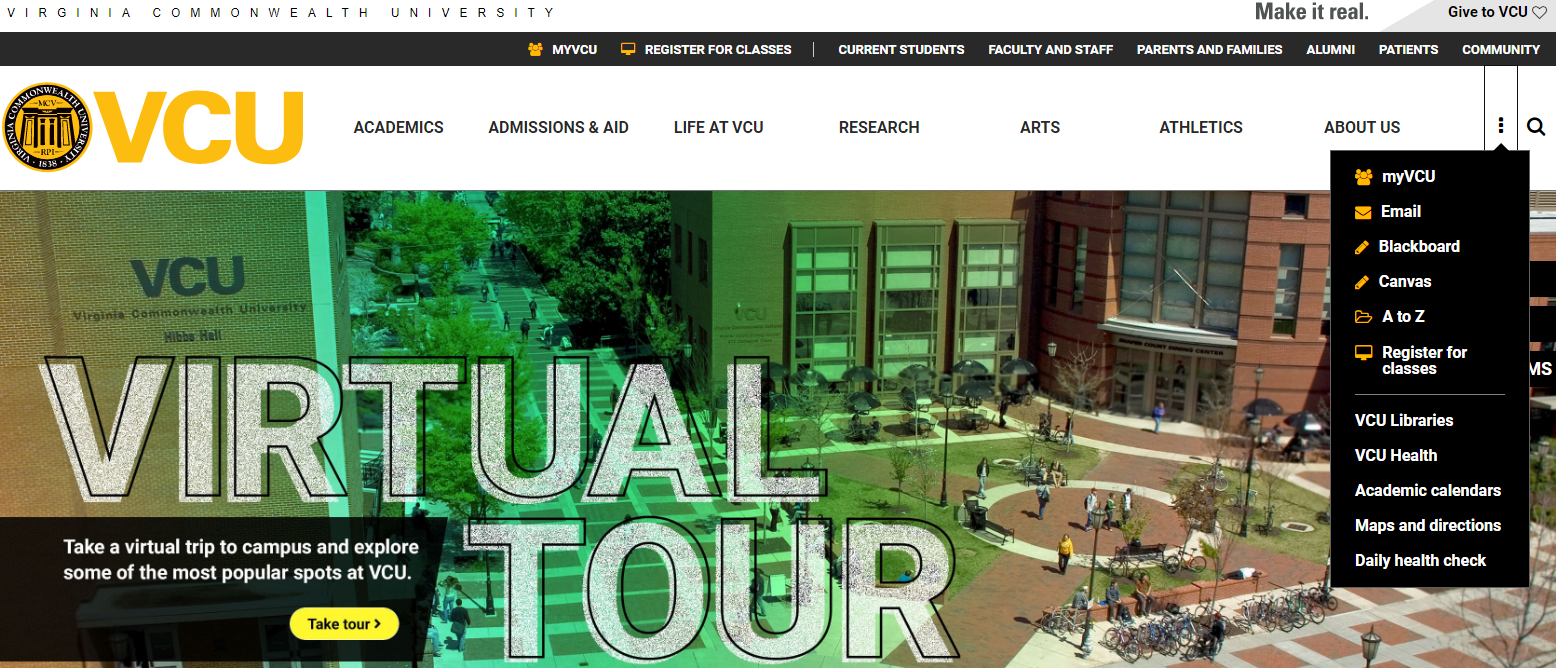
- The person who keys the entry cannot approve their own document.

* **Please review documents waiting for approval in a timely manner. All Banner   
  Finance documents must be approved or rejected within 5 business days.**

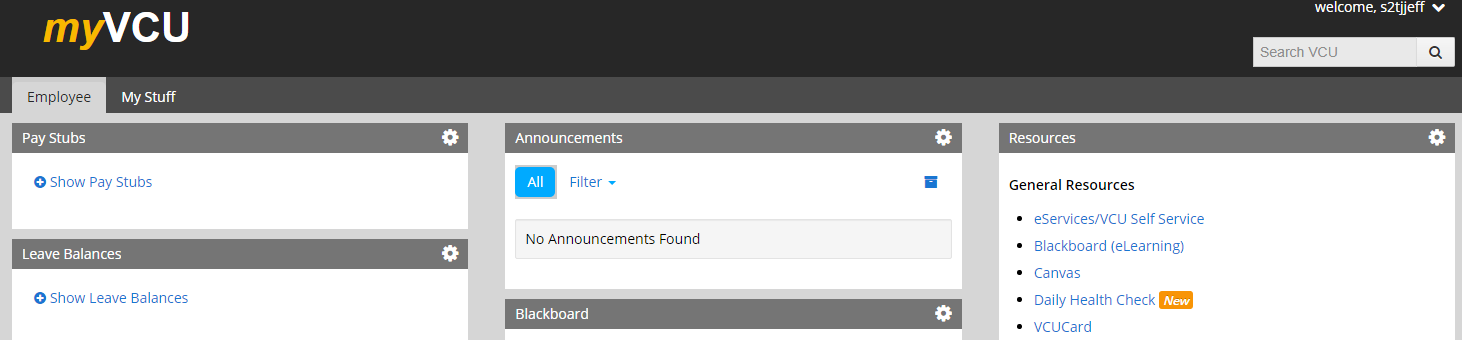
- When you access any finance form, you will receive a message in Banner

notifying you that documents are waiting for your approval.

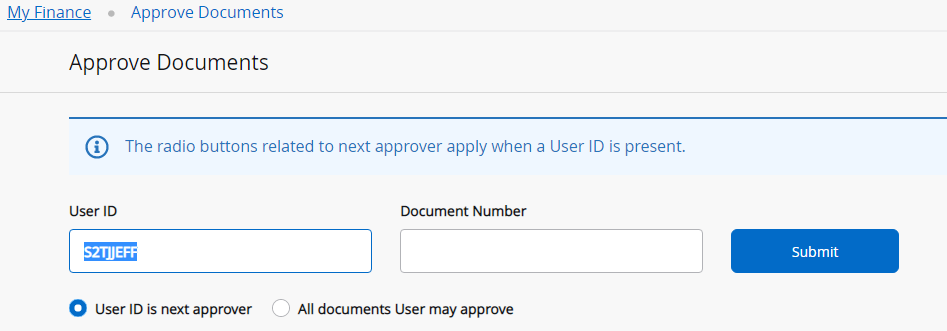
* You can approve Banner Finance documents in Banner 9 Self-Service.
* Log into Banner 9 Self-Service through “myVCU” found on the VCU homepage. <https://www.vcu.edu/>



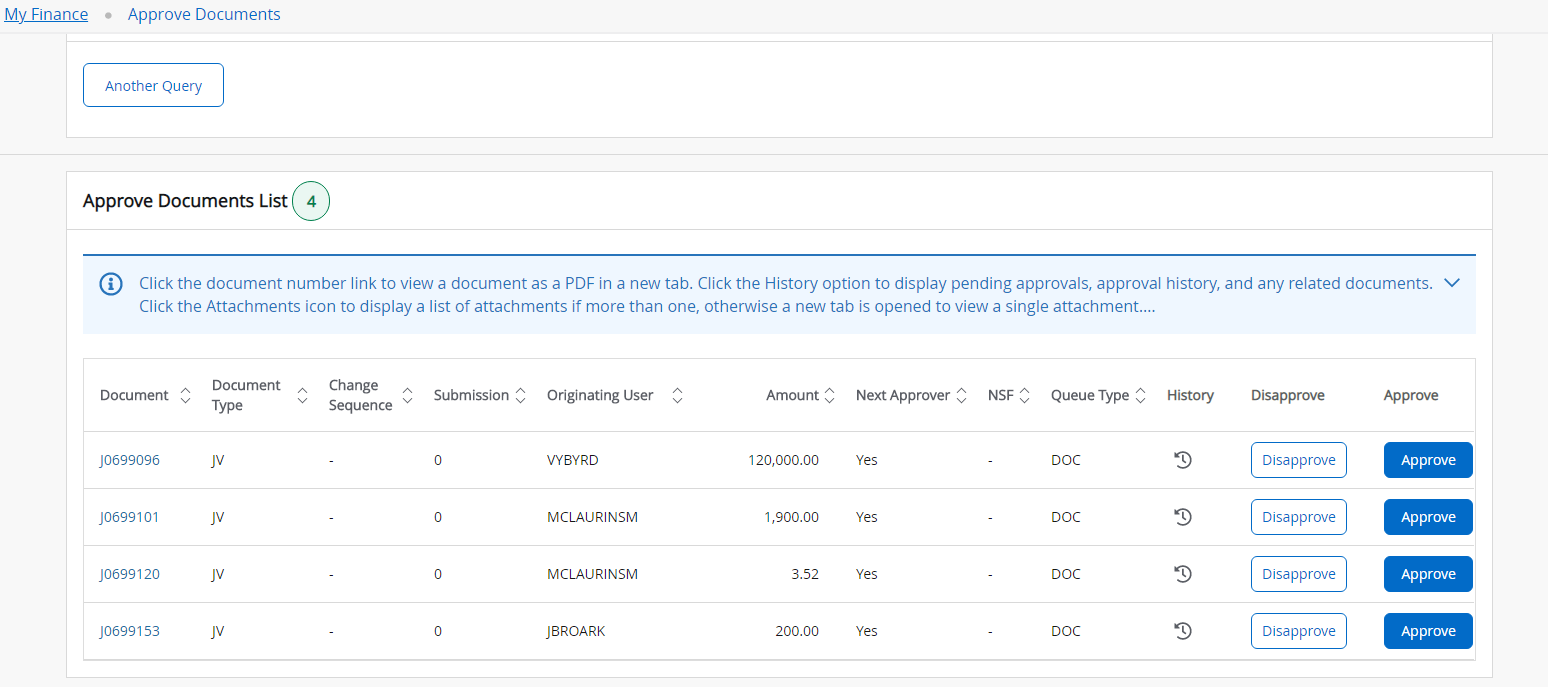
* Click on “eServices/VCU Self Service”.



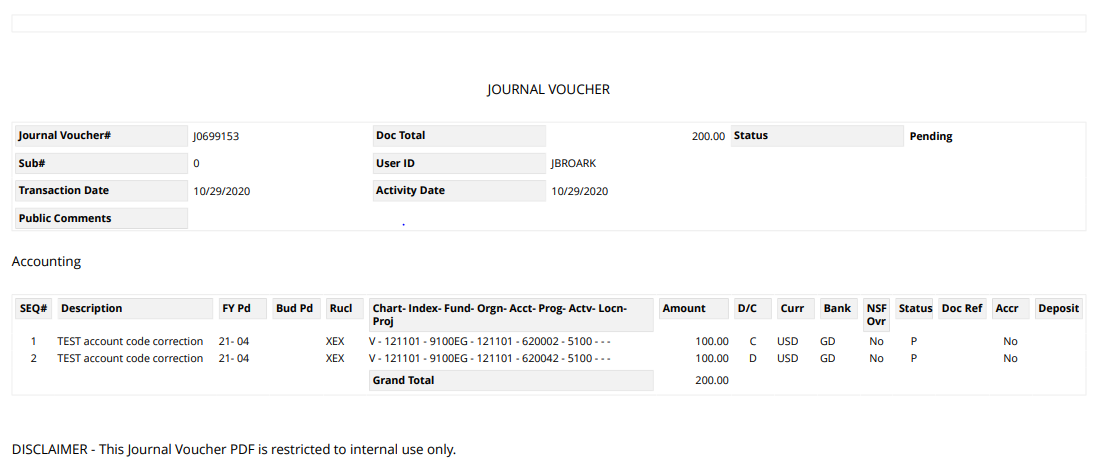
* Navigate to the Finance page using the menu at the top.
* Click on “Approve Documents”.
* Your “user ID” will populate.
* You do not have to enter a “document number”.
* To see the documents for which you are the next approver, select “user ID is next approver” and click “submit”.
* Tip: If you would like to see all documents that need your approval, select “all documents user may approve” and click “submit”.



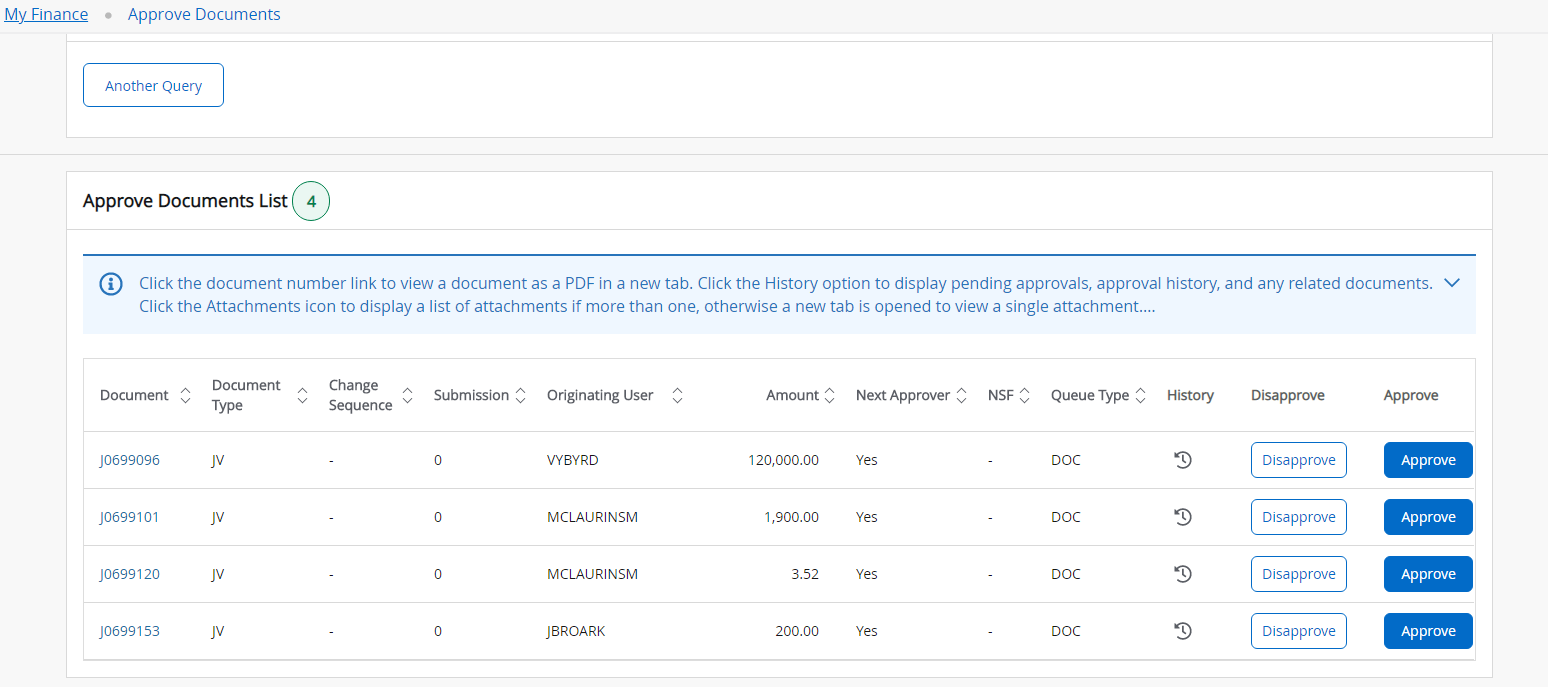
* To view the document detail, click on the document number.



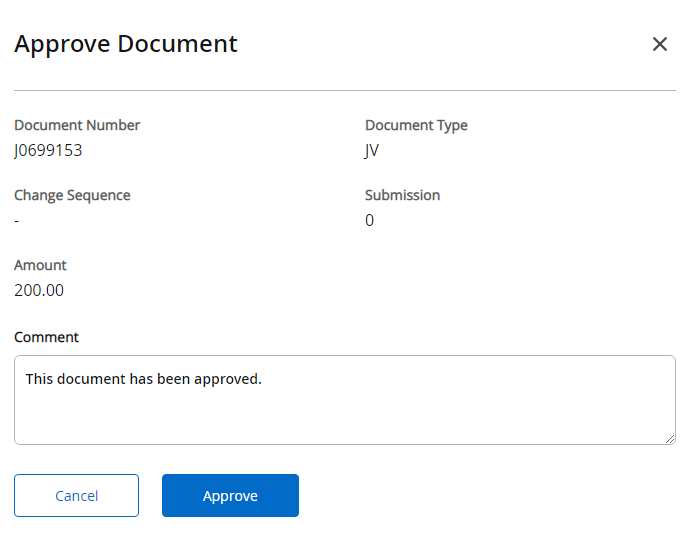
* Review the entire PDF for accuracy.



* Close the PDF to return to the “approve documents list” window.
* You can approve or disapprove the document.



* If you need to return from the “approve document” window without approving the document, click “cancel”.
* To **approve** the document from the “approve document” window, click “approve”.



* You will receive a message that indicates the document has been approved.



* To **disapprove** a document from the “approve document” window, click “disapprove”.
* You will receive a message that indicates the document has been disapproved.
* To approve or disapprove another document, repeat the similar steps above.