Banner Finance Approval Processes

Approving Budget Entries, Journal Vouchers and Cash Receipts

VCU 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):

- Dean/Director - $100,001 - $500,000
- Fiscal Administrators - $100,000 or less
- 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.
"Explicit" approvals 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.
SSB/eServices Approvals

You can also approve Banner documents through Banner eServices. Login to eServices through myVCU on the VCU homepage.
Click on **eServices/VCU Self Service** in the left navigation pane.
Click on the Finance link.
Click on Approve Documents.
Click on Submit Query to see the documents for which you are designated as the next approver.
To view the document detail, click on the document number.
Review all the lines (Seq#s) of the document, then use your browser’s back button to return to the approval page.
From here you can approve or disapprove the document.

![Approve Documents interface](https://sssb.vcu.edu/proddad/bwflkapp.P_UserApproval)

<table>
<thead>
<tr>
<th>Next Approver</th>
<th>Type</th>
<th>NSF Change Seq#</th>
<th>Sub# Originating User</th>
<th>Amount Queue Type</th>
<th>Document History</th>
<th>Approve</th>
<th>Disapprove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y 0</td>
<td>JV</td>
<td>0</td>
<td>PRPERKINS</td>
<td>1.00</td>
<td>DOC</td>
<td>History Approve Disapprove</td>
<td></td>
</tr>
<tr>
<td>Y 0</td>
<td>JV</td>
<td>0</td>
<td>PRPERKINS</td>
<td>1.00</td>
<td>DOC</td>
<td>History Approve Disapprove</td>
<td></td>
</tr>
</tbody>
</table>
Click on Approve Document.

The Approval page appears
A check mark indicates the document has been approved. Click on the Continue button to return your list of approvals.