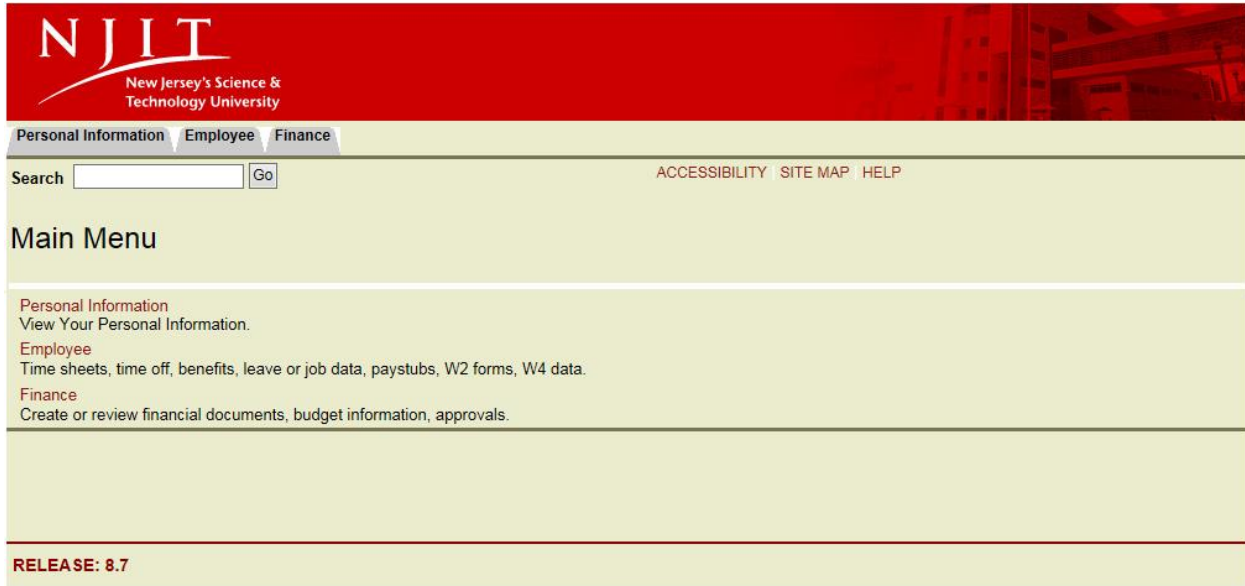


APPROVE DOCUMENTS- How to View Document by Invoice and Approve Invoices.

In this demonstration you will learn how to view document by invoice and approve invoices for payment using Self Service Banner (SSB).

Note: If you haven't done so already, please review the [View Document by Purchase Order Video](#) before you proceed.

When in Self Service Banner click on the Finance link



The screenshot shows the NJIT Self Service Banner Main Menu. At the top is the NJIT logo with the text "New Jersey's Science & Technology University". Below the logo are three tabs: "Personal Information", "Employee", and "Finance". A search bar with a "Go" button is on the left, and "ACCESSIBILITY", "SITE MAP", and "HELP" links are on the right. The "Main Menu" section lists three categories: "Personal Information" (View Your Personal Information), "Employee" (Time sheets, time off, benefits, leave or job data, paystubs, W2 forms, W4 data), and "Finance" (Create or review financial documents, budget information, approvals). At the bottom, it says "RELEASE: 8.7".

Then select Approve Documents



The screenshot shows the NJIT Self Service Banner Finance Menu. At the top is the NJIT logo with the text "New Jersey's Science & Technology University". Below the logo are three tabs: "Personal Information", "Employee", and "Finance". A search bar with a "Go" button is on the left, and "RETURN TO MENU", "SITE MAP", and "HELP" links are on the right. The "Finance" section lists several options: "Budget Queries", "Encumbrance Query", "Requisition", "Approve Documents", "View Document", and "Delete Finance Template". A mouse cursor is pointing at "Approve Documents". At the bottom, there is a breadcrumb trail: "[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Delete Finance Template]". At the very bottom, it says "RELEASE: 8.7".

To view documents in your approval queue select all documents which you are the next approver

Then select submit query

The screenshot shows the NJIT web application interface. At the top is the NJIT logo with the text 'New Jersey's Science & Technology University'. Below the logo is a navigation bar with tabs for 'Personal Information', 'Employee', and 'Finance'. A search bar is located below the navigation bar, with a 'Go' button and links for 'MENU', 'SITE MAP', and 'HELP'. The main heading is 'Approve Documents'. Underneath is a section titled 'Enter Approval Parameters' containing a 'User ID' field with the value 'NEVANS', a 'Document Number' field, and two radio button options: 'Documents for which you are the next approver' (which is selected) and 'All documents which you may approve'. A 'Submit Query' button is positioned below the radio buttons. At the bottom of the page, there is a footer with a list of links: '[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Delete Finance Template]' and the text 'RELEASE: 8.3'.

NJIT
New Jersey's Science & Technology University

Personal Information Employee Finance

Search Go MENU SITE MAP HELP

Approve Documents

Enter Approval Parameters

User ID

Document Number:

Documents for which you are the next approver

All documents which you may approve


[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Delete Finance Template]

RELEASE: 8.3

You will see the list of invoices awaiting your approval.

Before approving invoices for payment

Click on the document number (“I” number)



Personal Information | Employee | **Finance**

Search MENU | SITE MAP | HELP

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters
User ID: NEVANS Nakia J Evans
Document Number:
Documents Shown: Next Approver


Approve Documents List

Next Approver	Type	NSF Change	Seq#	Sub#	Originating User	Amount	Queue	Type	Document	History	Approve	Disapprove
Y	INV			0	CHANSEN	13.59	DOC	I1605551	History	Approve	Disapprove	
Y	INV			0	CHANSEN	5.78	DOC	I1605552	History	Approve	Disapprove	
	INV			0	NEVANS	62.96	DOC	I1535676	History	Approve	Disapprove	
	INV			0	NEVANS	13.55	DOC	I1535677	History	Approve	Disapprove	
	INV			0	NEVANS	173.69	DOC	I1600875	History	Approve	Disapprove	
	INV			0	NEVANS	4,000.00	DOC	I1601130	History	Approve	Disapprove	
	INV			0	NEVANS	1,275.00	DOC	I1603164	History	Approve	Disapprove	
	INV			0	NEVANS	756.06	DOC	I1603177	History	Approve	Disapprove	

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Delete Finance Template]

RELEASE: 8.3

This will bring you to the View Document by Invoice main page, here you will see the invoice details


New Jersey's Science & Technology University

Personal Information Employee Finance

Search
MENU | SITE MAP | HELP

View Document

Invoice Header

Invoice	Sub#	Purchase Order	Invoice Date	Trans Date	Payment Due	Total
I1605551	0	P1506337	Jul 27, 2015	Sep 01, 2015	Sep 01, 2015	13.59

Complete:	Y	Approved:	N	Vendor Inv	782586102001A
Open Paid:	O	Suspense:	N	Hold:	N
Credit Memo:	N	Cancel Date:		Recurring:	N
1099 Tax Id:		1099 Vendor:	N	Income Type	
Accounting:	Document Level		Matching:	Not Required	

Vendor:	31000645 Office Depot
	Po Box 633211
	Cincinnati, OH 45263-3211
Collects Tax:	Collects No Taxes
Discount Code:	30 Net 30
Currency:	

Invoice Commodities

Vendor Invoice: 782586102001A Vendor Inv Item 1

Item	Commodity	Description							
1	Office Supplies								
	P O Item	U/M	Tax Group	ToIOverride	Final Pmt	Last Rcv	Suspense		
	1	EA					N		
		Ordered	Accepted	Invoiced	Approved	Disc	Addl	Tax	Net
	Quantity	1	1	1	1				
	Unit Price	500	0	13.59	13.59				
	Amount	500.00	0.00	13.59	13.59	0.00	0.00	0.00	13.59

Total of all Commodities 13.59

Invoice Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Loch	Proj	Net
				Bank NSF Susp	NSFOvr	Approved	Disc	Tax	Addl		
1	1	16		100000	414000	734010	350010				
		AP	N	N		13.59	0.00	0.00	0.00		13.59

Total of displayed sequences: 13.59

Related Documents

Transaction Date	Document Type	Document Code	Status	Indicator
Jan 05, 2015	Requisition	R1506985	Approved	
Jan 07, 2015	Purchase Order	P1506337	Approved	

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#) | [Delete Finance Template](#)]

RELEASE: 8.5.0.4

Right click on the “1” number and select open in new window to view the image of the invoice

Office DEPOT
Office Depot, Inc.
PO BOX 630813
CINCINNATI OH
45263-0813

FEDERAL ID: 59-2663954

ORIGINAL INVOICE 10000

THANKS FOR YOUR ORDER
IF YOU HAVE ANY QUESTIONS
OR PROBLEMS, JUST CALL US
FOR CUSTOMER SERVICE ORDER: (888) 263-3423
FOR ACCOUNT: (800) 721-6592

INVOICE NUMBER	AMOUNT DUE	PAGE NUMBER
782586102001	13.59	Page 1 of 1
INVOICE DATE	TERMS	PAYMENT DUE
27-JUL-15	Net 30	26-AUG-15

SHIP TO:
NJIT - ACCOUNTS PAYABLE
FENSTER HALL RM 550
323 MLK BLVD
NEWARK NJ 07102-1982

BILL TO:
ATTN: ACCTS PAYABLE
NJIT
UNIVERSITY HEIGHTS
323 DR MLK BLVD
NEWARK NJ 07102

ACCOUNT NUMBER	PURCHASE ORDER	SHIP TO ID	ORDER NUMBER	ORDER DATE	SHIPPED DATE
59918575	P1506337	P802288	782586102001	23-JUL-15	27-JUL-15
BILLING ID	ACCOUNT MANAGER	RELEASE	ORDERED BY	ATTN	COST CENTER
86101			cathy hansen		

CATALOG ITEM #/ MANUF CODE	DESCRIPTION/ CUSTOMER ITEM #	U/M	QTY ORD	QTY SHIP	QTY B/O	UNIT PRICE	EXTENDED PRICE
423300 WR209MB	REST WRIST.FOAM.COMP.BK 423300	EA	1	1	0	13.590	13.59

Please note our payment remit-to address has changed. Please update your system to this new address to avoid delay in the application of your payment. Thank you.

To ensure timely and accurate application of your payment, please include the following on your remittance: account number, invoice number, and the amount you are paying for each invoice.

SUB-TOTAL	13.59
DELIVERY	0.00
SALES TAX	0.00
TOTAL	13.59

All amounts are based on USD currency


To return supplies, please repack in original box and insert our packing list, or copy of this invoice. Please note problem so we may issue credit or

Once you have reviewed the invoice details and image, return to the view document window and click the back button.

This will bring you back to your approval queue.

If the invoice is not ok to pay, **DO NOT** click Disapprove, contact the Originating User, who is the AP Rep that posted the invoice.

If the invoice is ok to pay, click Approve next to the "I" number you just viewed



New Jersey's Science & Technology University

Personal Information Employee Finance

Search Go MENU SITE MAP HELP

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

User ID: NEVANS Nakia J Evans
Document Number:
Documents Shown: Next Approver

Approve Documents List

Next Approver	Type	NSF Change	Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
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	INV			0	NEVANS	62.96	DOC	I1535676	History	Approve	Disapprove
	INV			0	NEVANS	13.55	DOC	I1535677	History	Approve	Disapprove
	INV			0	NEVANS	173.69	DOC	I1600875	History	Approve	Disapprove
	INV			0	NEVANS	4,000.00	DOC	I1601130	History	Approve	Disapprove
	INV			0	NEVANS	1,275.00	DOC	I1603164	History	Approve	Disapprove
	INV			0	NEVANS	756.06	DOC	I1603177	History	Approve	Disapprove

Another Query

[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Delete Finance Template]

RELEASE: 8.3

Then select approve document

NJIT
New Jersey's Science & Technology University

Search MENU SITE MAP HELP

Approve Document

Document Information
Document Number: I1605551 Type: INV
Change Seq# Sub# 0
Amount: 13.59
Comment: This document has been approved.

RELEASE: 8.7

You will then receive a message that your document has been approved

NJIT
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Personal Information Employee Finance

Search MENU SITE MAP HELP

Document Pending Approval

✔ Document I1605551 has your approval.

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#) | [Delete Finance Template](#)]

RELEASE: 8.7

Click continue to return to your approval queue.