

INVOICE APPROVALS- How to view Invoice Approvals Required and Recorded

In this demonstration you will learn how to view Invoice Approvals Required and Recorded by using View Document by Invoice in Self Service Banner (SSB).

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 | HELP" is 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 View Document



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 | HELP" is on the right. The "Finance" section lists five options: "Budget Queries", "Encumbrance Query", "Requisition", "Approve Documents", "View Document", and "Delete Finance Template". A mouse cursor is pointing at "View Document". At the bottom, there is a breadcrumb trail: "[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Delete Finance Template]". At the bottom left, it says "RELEASE: 8.7".

From the Choose Type drop down menu select Invoice

In the Document Number field enter the invoice number also known as the "I" number

(If you do not know your "I" number or how to retrieve it, please see the View Document by Purchase Order video)

Next click Approval History

NJIT
New Jersey's Science & Technology University

Personal Information Employee **Finance**

Search MENU SITE MAP HELP

View Document

Instructions to view document image using BDMS

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type:

Submission#: Change Seq#

Display Accounting Information

Yes No

Display Document/Line Item Text **Display Commodity Text**

All Printable None All Printable None

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

RELEASE: 8.5.0.4

Here you see the Originator, who is the AP Rep that posted the invoice

For invoices that need approval you will see Approvals Required with a list of individuals who can approve the invoice.

NJIT
New Jersey's Science & Technology University

Personal Information | Employee | **Finance**

Search MENU | SITE MAP | HELP

View Document

Document Identification

| | | | |
|-----------------|--------------------------|------|---------|
| Document Number | I1605552 | Type | Invoice |
| Originator: | CHANSEN Catherine Hansen | | |

Approvals required

| Queue | Description | Level | Approvers |
|-------|--------------------------------|-------|---|
| APID | Accts Payable Invoice Approval | 1000 | Nakia J Evans |
| APID | Accts Payable Invoice Approval | 2000 | Nakia Evans Maria La Lima Nakia J Evans William Garcia |

✓ No approvals have been recorded for this document

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

RELEASE: 8.5.0.4

For invoices that have already been approved you will see Approvals Recorded and the date and name of who approved the invoice.



Personal Information Employee **Finance**

Search MENU SITE MAP HELP

View Document

Document Identification

| | | | |
|-----------------|--------------------------|------|---------|
| Document Number | I1605551 | Type | Invoice |
| Originator: | CHANSEN Catherine Hansen | | |

✓ There are no approvals required at this time

Approvals recorded

| Queue Level | Date | User |
|-------------|--------------|---------------|
| APID 1000 | Sep 01, 2015 | Nakia J Evans |
| APID 1000 | Sep 01, 2015 | Nakia J Evans |
| APID 2000 | Sep 01, 2015 | Nakia J Evans |

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

RELEASE: 8.5.0.4