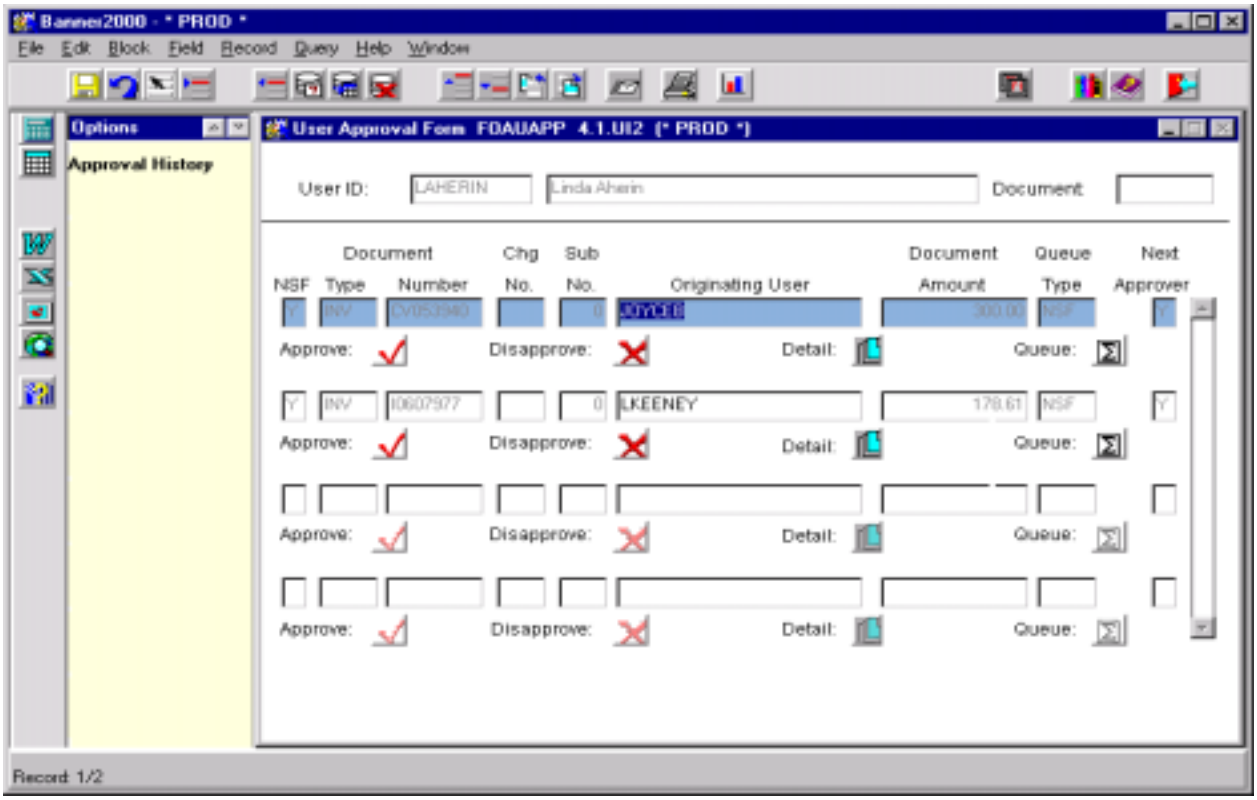
## Document Approval Procedure

■ USING THE EXPERT MODE:

1. At the ***Direct Access*** ==> prompt, type **FOAUAPP** and press **[Enter].**

NOTE: If you have a document(s) requiring your approval, each time you sign on and request a Finance form, the system will automatically take you to the Approval Notification (FOIAINP) form. If you choose to do the approval procedure now, click on the **User Approval** option. You will automatically be taken to the FOAUAPP form. If you do not choose to do the approval procedure now, press **[EXIT]** or click on the **Exit** icon and you will be taken to the form you were originally selecting.

2. In the ***User Id*** field, your Osprey user id appears. EX: LAHERIN. Press **[NEXT BLOCK]** to view all documents in your queue awaiting approval.




NOTE: Beneath the "Next Approver" is a field which indicates whether you are the Next approver for this document. You should not approve a document unless the "Y" appears next to the document.

3. You now have the option to APPROVE or DISAPPROVE the document(s). To approve a document, click on the **Approve** button. Or to disapprove a document, click on the **Disapprove** button. If you need more information to make your decision, continue with step #4, then return to this step.

   If you approve a document, the system responds by:

   a) Removing the record from your Approval Queue.

   b) Forwarding the document through the remaining Approval Queue(s) or on to the posting process.

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If you disapprove a document, the system responds by:

a) Allowing you to type a reason for the disapproval in the Disapproval Text form.

b) Removing the record from your Approval Queue.

c) Marking the disapproved document as incomplete, just as if the originator had never completed the document. The originator can, and should, make adjustments and recomplete the document or delete it.

d) Sending your Banner Message from step a) to the originator indicating the document number and reason for disapproval.

If you leave it blank, the system responds by:

a) Doing nothing. The document will remain in your Approval Queue until you make an approval decision.

4. To view the on-line document, press **[NEXT FIELD]** to the **Detail** button and press **[ENTER]** or click on the **Detail** button. This will take you to the _____ Approval Form. Where the _____ is, will display the name of the particular form you are approving (i.e. Requisition, Purchase Order, Departmental Purchase Order, or Journal Voucher). This form displays an accounting summary.

   For Requisitions, Purchase Orders, and Departmental Purchase Orders:
   If you would like to go to the on-line document, click on the **Query Document** option. Press **[NEXT BLOCK]** to scroll through the pages of the document. Press **[EXIT]** or click on the **Exit** icon to return to the Approval Form.

   For Journal Vouchers:
   If you would like to view your budget(s), press **[ENTER QUERY]** or click on *QUERY*, then *ENTER*. Then press **[NEXT FIELD]** to the ***Index*** field or click on the ***Index*** field. Enter the first two letters of your budget followed by the % wildcard. EX: AB%. Press **[EXECUTE QUERY]** or click on *QUERY*, then *EXECUTE*. Then press **[NEXT RECORD]** and **[PREVIOUS RECORD]** to view all your budget charges/credits in this document. If text exists for the document, you can click on the **Document Text** option to view it. Press **[EXIT]** or click on the **Exit** icon when done viewing the text. Press **[EXIT]** or click on the **Exit** icon again to get back to the User Approval form.

5. ***This is an optional step***. To view the Document Approval History (FOIAPPH) form, press **[COUNT QUERY HITS]** or click on the **Approval History** option from any field on this form. This contains information about where the document has been in the approval system. When finished, press **[EXIT]** or click on the **Exit** icon.

6. ***This is an optional step***. To view the Document Approval form (FOAAINP), press **[NEXT FIELD]** to the **Queues** button or click on the **Queues** button. Press **[NEXT BLOCK]**. This form lists Queue(s) the document will still go through to be approved. Press **[EXIT]** or click on the **Exit** icon to return to the User Approval Form.

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NOTE: After viewing document detail and/or history, return to step #3 and Approve or Disapprove this document.

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