Step-By-Step Guide to Approving/Disapproving Documents

The Approve Documents screen allows you to approve documents and is accessible from the Approve/Disapprove Documents link of the WINGS Express Finance menu.

To approve documents:

1. **Click on the Approve/Disapprove Documents link** and you will see the screen shown below.

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User ID: Defaults to your ID. (You can input another user’s ID to see their name and a list of documents awaiting their approval. For example, if you are backup for that person and they are out. Also, you can leave the User ID field blank to see a list of all documents awaiting approval.

Document Number: Leave this field blank to see all docs. Type a specific document # into this field to go directly to that one document.

Documents for which you are the next approver: This option is selected by default. By leaving this button selected, you will see only the list of documents for which you are in the next queue and level, and documents you originated or already approved. **This is the recommended choice.

All documents which you may approve: Selecting this option displays a list of all documents in approvals where you appear in the route, even if you are not next. This allows you to view all documents in the pipeline. Please check with your Business Officer regarding approving documents in your area where you are not the next approver since approving out of turn may preempt/override other approvers.
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2. **Click Submit Query** to obtain a list of documents for which you are the next approver.
Queried Parameters: Displays parameters from the previous web page.

Approve Documents List: Lists the docs with some basic info. The Approve/Disapprove links are only highlighted if you are now able to take the highlighted action.

- **Next Approver**: Y if you are the next approver in the doc route.
- **Type**: JV = Journal Voucher.
- **NSF**: Not used at WSU (Non-Sufficient Funds)
- **Change Seq#**: Not used at WSU.
- **Sub#**: Submission# not used at WSU.
- **Originating User**: ID of document originator.
- **Amount**: Document total (hash total).
- **Queue Type**: DOC = document.
- **Document**: Document number. Click this link to view the document information, see the approval history, & take approval/disapproval action all from one web page. Your fund/org security privileges determine how much info you will see.
- **History**: Approval history. Click on this link to see who has/has not approved this doc. You can also add a manual approver, or e-mail a copy of the document to someone.
- **Approve**: If this link is highlighted, you may approve the doc. Since WSU is using “explicit” approvals, if you are the Originator and are also on the approval route for a doc you must go in and approve the doc as a separate step.
- **Disapprove**: If this link is highlighted, you may disapprove the doc. This stops the doc and the originator is notified. Originators may disapprove their own docs even if they are not listed on the approval queues. Note that disapproved docs are removed from the system after a month.
- **Doc Desc**: Description that appears on the first line of the JV.
- **Rucl Code**: Rule Code used on the JV. (B__ rule codes are budget entries, J__ rule codes are actual expense/revenue entries, etc.)
3. **Click the Document** Number (J0094468) on the Approve Documents screen to view the journal voucher you wish to review/approve.
When you click the Document link, the View Document info for that doc appears. See the Step-by-Step Guide to Viewing Docs for detailed explanations of the various fields. The Approval History information is then displayed (see below for details about this section). This one web page allows you to review and take action on the document!

Click on the History link on the Approve Documents screen to view just the approval history.

![Approval History Display](image)

**Document Identification:** Displays doc #, doc type, and originator ID & name.

**Approvals Required:** Displays the approval queues, levels, and approvers assigned to the document route based on FOAPs input. The display sorts alphabetically by queue name and level and does not represent the “next approver” sequence. If a level in a certain queue shows more than one approver, only one of these approvers’ approval will satisfy this level in the queue.

**Approvals Recorded:** Displays the approval queues, levels, and approvers of approvals recorded.

**Next Approver:** Displays the queue, level, and the associated approver(s) who have been notified to take action on the document.
**Manual Assign:** Click this button to add an approver to the document route. The list of persons to choose from will include all WINGS Express Finance users.

![Manual Assign](image)

Input a name or partial name (using the % key for a wildcard) and click Find to narrow your search for the person you wish to add to the route for this document.

When you click on the person’s name, they will be added to the route for the document in a separate queue with the queue code “~MAN”.

**Manual Un-Assign:** This button is for Business Managers only and permits them to remove an approver manually assigned to a document if needed.

**Email Doc:** Allows you to e-mail a screenshot of the document content that you see (via your fund/org security access) to another person. The document will be sent as an attachment to the e-mail.

![Email Document](image)

Type in or search for the email addresses, then compose your email & click Send. The email will be sent & will include an attachment showing the View Document information for that Journal Voucher.

**Approve:** Click this button to approve the document. You will then see a pop-up window below, where you will need to click Approve Document (or click Cancel if you don’t wish to approve). Note that any text you type here into the Comment box does not become part of the document or get sent.
elsewhere.

A second pop-up window will appear (below) confirming your approval. You may click Continue to go back to your list of documents.

**Disapprove:** If you wish to disapprove the document, click on the Disapprove link. You should also add the reason for the disapproval to the Comment section (see example below).

Info displayed is similar to the Approve Document page. However, disapproving the document removes it from further approvals, changes the doc to an incomplete state, and e-mails the originator (along with all of the text in the Comment box above). If a document is disapproved, the originator will receive an e-mail notifying them that the document has been denied. Note: disapproved docs are removed from the system after a month.