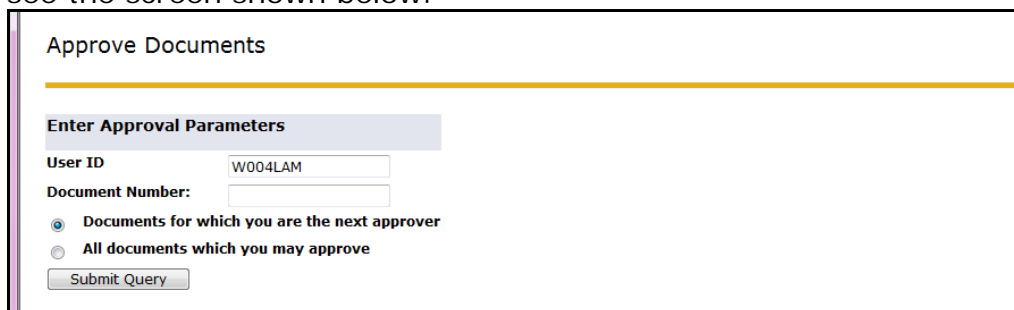


Step-By-Step Guide to Approving/ Disapproving Documents

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.



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.

2. **Click Submit Query** to obtain a list of documents for which you are the next approver.

Approve Documents

Select the Document Number link to display the details of a document. For JVs you can now also see approval history, add manual approvers, email a copy, and take action to approve/disapprove as applicable, all on 1 page. New functionality! See the [What's New](#) chapter in the WINGS Express Finance Wiki for details. 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: W004LAM Lisa May
 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	Doc Desc	Rucl Code
Y	JV			0	W001KAC	71,691.50	DOC	F0068624	History	Approve	Disapprove		
Y	JV			0	W112CAA	1,600.80	DOC	J0092372	History	Approve	Disapprove	667913 - add budg to match exp & pd	BD02
Y	JV			0	W006AAA	180.00	DOC	J0094468	History	Approve	Disapprove	ROTCScholarFreshmenlowropes9/1/10	J16
Y	JV			0	W016MTL	160,000.00	DOC	J0094814	History	Approve	Disapprove	One time trf to Comm & Mkt	BD04
Y	JV			0	W003JSR	2,034.72	DOC	J0095026	History	Approve	Disapprove	Move Expenses to Foundation Fund	J16
Y	JV			0	W002SJH	1,000.00	DOC	J0095146	History	Approve	Disapprove	Sponsorship-Raider Pack T-Shirts	J16
Y	JV			0	W001PED	129.20	DOC	J0095288	History	Approve	Disapprove	Procard correction SU to GK	J16
Y	JV			0	W001SBB	1,093.68	DOC	J0095289	History	Approve	Disapprove	Electrician & Plumber for 10/2	J16

Another Query

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.

Journal Voucher Header

Journal	Sub#	Status	Trans date	Activity date	User ID	Doc Total
J0094468	0	Pending	Sep 21, 2010	Sep 21, 2010	W006AAA	180.00
Document Text: ARMY ROTC Scholarship Freshmen Low Ropes Course						
Program; Program Date: 9/1/10						
Time: 1pm-4pm=3hrs. Level 1 pricing=\$30hr						
Total program cost = \$90.00						

Journal Voucher Accounting

Seq#	Description						BudPd	Curr	Doc Ref	Accr	Bank	Deposit					
	COA	FY	Pd	Rucl	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	Total	D/C	NSFOvr	Status	
1	ROTCScholarFreshmenlowropes9/1/10									03				01			
	W	11	03	J16		190000	211190	747930	50005	OT			90.00	-		N	
2	ROTCScholarFreshmenlowropes9/1/10									03				01			
	W	11	03	J16		190000	213100	746600	10005				90.00	+		N	
Total of displayed sequences:													180.00				

Document Identification

Document Number J0094468 Type Journal Document
 Originator: W006AAA Amy Anslinger

Approvals required

Queue	Description	Level	Approvers
~ACT	CONTROLLER'S OFFICE 10		Lisa May
~ACT	CONTROLLER'S OFFICE 20		Jeff Ulliman John White Lisa May John Mbagwu

Approvals recorded

Queue	Level	Date	User
SU00	10	Sep 21, 2010	Pam Davis
SU00	10	Sep 21, 2010	Pam Davis
SU00	20	Sep 21, 2010	Pam Davis
CITY	30	Oct 07, 2010	Ryan Black
CITY	30	Oct 07, 2010	Ryan Black
CITY	40	Oct 07, 2010	Ryan Black
CITY	10	Oct 06, 2010	Rodney Williams

Next Approver

Queue	Description	Level	Approvers
~ACT	CONTROLLER'S OFFICE 10		Lisa May

Manual Assign Manual Un-Assign Email Doc Approve Disapprove

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.

Document Identification

Document Number J0094468 Type Journal Document
 Originator: W006AAA Amy Anslinger

Approvals required

Queue	Description	Level	Approvers
~ACT	CONTROLLER'S OFFICE	10	Lisa May
~ACT	CONTROLLER'S OFFICE	20	Jeff Ulliman John White Lisa May John Mbagwu

Approvals recorded

Queue	Level	Date	User
SU00	10	Sep 21, 2010	Pam Davis
SU00	10	Sep 21, 2010	Pam Davis
SU00	20	Sep 21, 2010	Pam Davis
CITY	30	Oct 07, 2010	Ryan Black
CITY	30	Oct 07, 2010	Ryan Black
CITY	40	Oct 07, 2010	Ryan Black
CITY	10	Oct 06, 2010	Rodney Williams

Next Approver

Queue	Description	Level	Approvers
~ACT	CONTROLLER'S OFFICE	10	Lisa May

Manual Assign Manual Un-Assign Email Doc

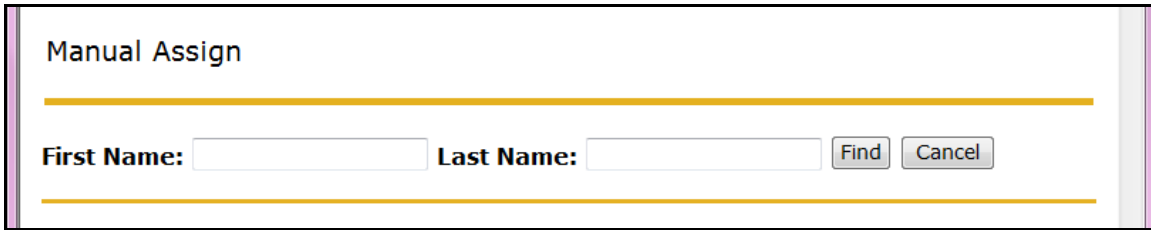
Document Identification: Displays doc #, doc type, and originator ID & name.

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.



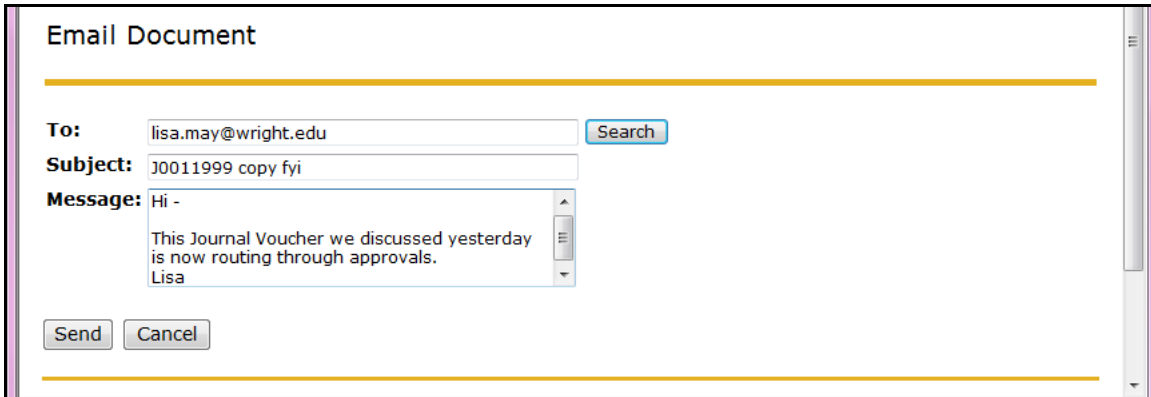
The screenshot shows a dialog box titled "Manual Assign". It features a horizontal yellow line at the top. Below the line, there are two input fields: "First Name:" followed by a text box, and "Last Name:" followed by another text box. To the right of these fields are two buttons: "Find" and "Cancel". Another horizontal yellow line is located below the input fields.

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.



The screenshot shows a dialog box titled "Email Document". It features a horizontal yellow line at the top. Below the line, there are three input fields: "To:" with the value "lisa.may@wright.edu" and a "Search" button to its right; "Subject:" with the value "J0011999 copy fyi"; and "Message:" with the value "Hi -". Below the message field, there is a preview of the email content: "This Journal Voucher we discussed yesterday is now routing through approvals. Lisa". At the bottom of the dialog box, there are two buttons: "Send" and "Cancel". Another horizontal yellow line is located below the buttons.

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.

Approve Document

Document Information

Document Number: J0094426 Type: JV
Change Seq# Sub# 0
Amount: 600.00

Comment: This document has been approved.

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

Document Pending Approval

Document J0094426 has your approval.

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).

Disapprove Document

If you click "Disapprove Document" this document will be removed from approvals & will not post to the system. Please use the **Comment** text box below to detail the issue(s) causing disapproval; this text will be auto-emailed to the document originator.

Document Information

Document Number: J0093729 Type: JV
Change Seq# Sub# 0
Amount: 10.00

Comment: Approval has been denied. This entry was already recorded as J0093700 and this JV would be a duplicate. thanks, Lisa x3198

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.