Northeastern University
INTERNAL CONSULTING

User Guide – Banner Finance Approval Queues

Internal Consulting Dept NU

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Contents

Overview

Banner Finance Approval Queues

At Northeastern, multiple functions fall under Banner: including Finance, Human Resources, Advancement, and Student Services.

Banner Finance is the financial system used by all Northeastern departments to track budgets, perform budget transfers, create requisitions, and approve or deny financial transactions.

An approval queue is a control in a workflow to ensure that requests are appropriately approved before the final outcome.

Separate approval queues exist to approve

      a) access (to submit documents)

      b) documents themselves

Approval queues for finance live in:

      - Banner (*requisitions, invoices, journal vouchers, budget transfers*)

      - K2 (*direct pay invoice, journal vouchers, asset disposition*)

In this document, we will specifically be discussing approval queues for documents in Banner Finance. These approval queues are managed by the Internal Consulting Department.
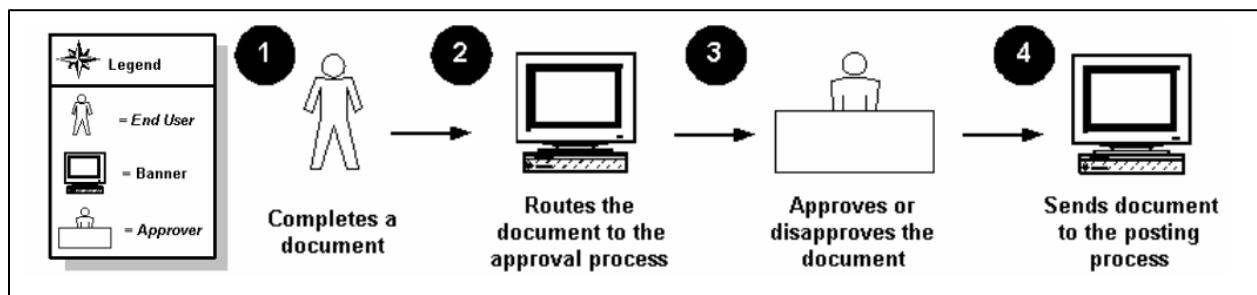

Figure 0. Overview of process for document approval within Banner Finance

Dashboard

Overview

A dashboard was created to provide visibility into Banner Finance approval queues. This dashboard can be found on the Northeastern University Finance website, or at the following link.

This dashboard can be used to view approval queues based on many filters, such as: document type, fund type, division, or approver name. The following sections will provide further information on how to use this tool.
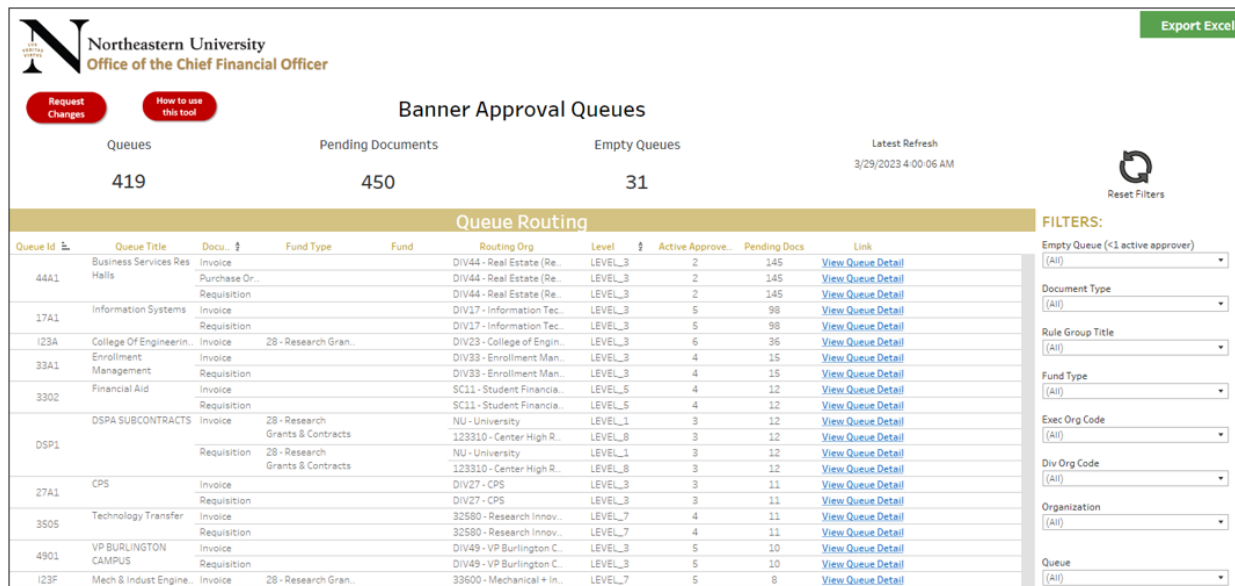
Home Page

Figure 1. Home page of Dashboard (No filters applied)

The above figure shows the initial view of the approval queue dashboard (hosted on *Tableau*). When no filters are applied (as above), the data shows *all queues*. You may view all queues and their routing information in this way, or use the filters on the right-hand side to narrow your search.

On the upper-left-hand side, you will find buttons to "Request Changes" and "How to use this tool".

Figure 2. Links on Dashboard

Click "Request Changes" to be taken to the request form. This form will have options to create, update, or remove approval queues as well as approvers. *(See How to Request Changes section for more information).*

Click "How to use this tool" to review the guide on Approval Queues.

Figure 3. Summary Data Header

A summary of queue data can be viewed at the top of the home page: number of queues, number of pending documents in queues, and number of empty queues. This data is based on the filters selected (i.e. if no filters are selected, data is *total values*).

Note: "Empty Queues" are defined as those with zero (0) active approvers.

Figure 4. Results and Filters

Figure 5. Filter fields

The above figures show possible data fields to filter results by, such as Fund Type Code, Exec Org Code, Div Org Code, Organization, Queue, and Approver.

The filter fields are interdependent (i.e. if *Fund Type Code* is set to "28", all other filter fields (*Exec Org Code, etc …)* will populate values related to *Fund Type 28.)*

Filters are set to "(All)" by default. **To filter by a value**: open the desired filter, de-select "(All)", and select desired value(s).

Note: You may also search for a value in a filter menu by typing. Relevant results will be shown within the menu.
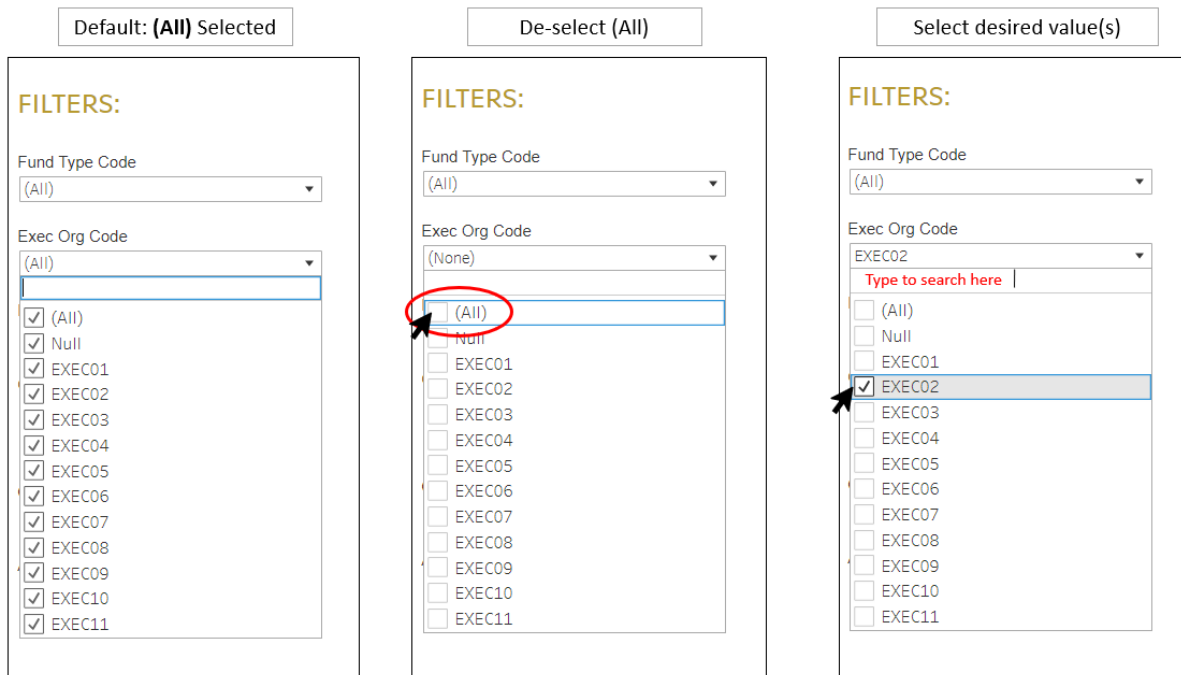
Figure 6. How to use filter

To remove a filter, click the button above the filter selection.
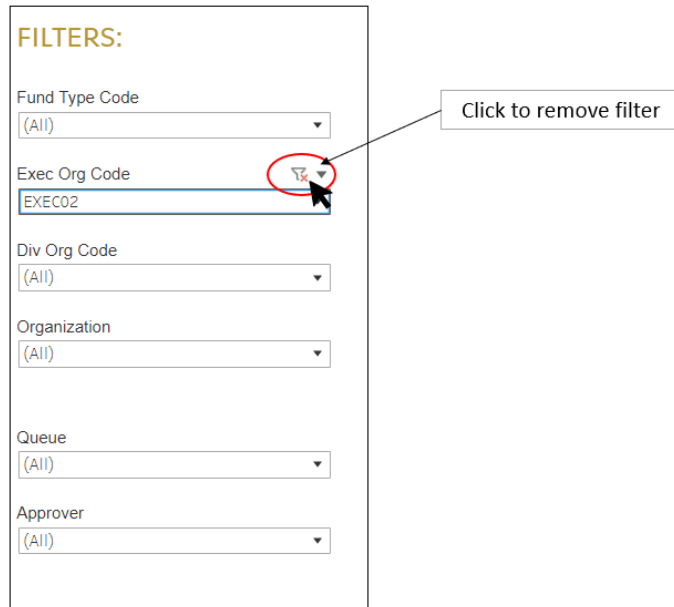
Figure 7. How to remove a filter value

To remove **all** filters and reset to default results, click "reset filters".

Figure 8. Data Columns

On the Home Page view, the following are column headers and their respective definitions:

Queue ID – The unique, four-character alphanumeric code for an approval queue.

Queue Title – Descriptive title of queue. Typically correlates to Routing Org (e.g. Accounting Office).

Doc Type Title – The document type(s) that are routed to this approval queue (*Invoice, Requisition,* or *Journal Document).*

Fund Type – The fund type for which documents are routed.

Fund – The fund for which documents are routed.

Routing Org – The organization for which documents are routed.

Level – The organizational hierarchical level of the associated *Routing Org*.

> *Level 1 = University*
>
> *Level 2 = Executive*
>
> *Level 3 = Division*

Level 5 – 8 = Department

Active Approvers – The number of approvers in a queue who are active employees of the University.

Pending Documents – The number of documents awaiting approval in a queue.

Link – Link to view additional queue details for selected queue (List of approvers and pending documents).

View Queue Details

For additional information of an approval queue, click on "View Queue Detail" in the *Link* column of the main dashboard.

You will be brought to the selected queue's detail page:

Figure 9. Queue details page

In this detailed view, you will be able to see a variety of information including the queue limit, routing information, approvers, and queue status.

To return to the home page, click the "Back" button on the top-right corner.

Queue Configuration

Figure 10. Queue Configuration details

In this section, you can view the Queue ID, Queue Description, Queue Limit, and "Next Queue".

Queue ID – The unique, four character alphanumeric code for an approval queue. Typically correlates to Division (e.g. Queue *06A1* is in Division 06).

Queue Description – Descriptive title of queue. Typically correlates to Routing Org (e.g. Accounting Office).

Queue Limit – The total monetary value that documents can be requested/approved up to. Must be equal to highest approver limit ($1,000,000,000.00)*

> ***Note:*** *Unless "Next Queue" is populated, in which case Queue Limit must equal zero ($0.00).*

Next Queue – *Optional.* If populated, this indicates the *Queue ID* of the succeeding queue that document(s) will be sent to after approval in current queue. If populated, the *Queue Limit* must equal zero ($0.00).

Routing Configuration

Figure 11. Routing Configuration details

The Routing Configuration section provides information on how documents are routed to the queue.

The documents that can be routed to Banner Finance approval queues are: Requisition, Invoice, and/or Journal Voucher. A queue may have one or multiple document types routed for approval.

Below are definitions of Routing Configuration fields:

Doc Type Code – The code of the document type(s) that are routed to this approval queue.

> *Doc Type 1 = Requisition*
>
> *Doc Type 3 = Invoice*
>
> *Doc Type 20 = Journal Document*

Doc Type Title – The document type(s) that are routed to this approval queue (*Invoice, Requisition,* or *Journal Document).*

Executive Code – The code for the Executive Level Org related to the Routing Org (EXEC____)

Division Code – The code for the Division Level Org related to the Routing Org (DIV____)

Routing Org – The specific organization code and title for which documents are routed.

Level – The organizational hierarchical level of the associated *Routing Org.*

> *Level 1 = University*
>
> *Level 2 = Executive*
>
> *Level 3 = Division*
>
> *Level 5 – 8 = Department*

Fund Type – The fund type for which documents are routed.

Fund – The fund code for which documents are routed.

Account – The account code for which documents are routed.

Program – The program code for which programs are routed.

Queue Status

Figure 12. Queue Status bar

Queue Status is a summary of data that can help users determine if any action is necessary for the queue.

You can view the number of active approvers, inactive approvers, and pending documents in the queue.

Active approvers – The total number of approvers who are active employees of the University. This field is recommended to be equal to or greater than two (2). When there are **one (1) or less** active approvers, action should be taken to avoid stalled documents (*add new approvers*).

Inactive approvers – The total number of approvers who are *not active* employees of the University. This field may indicate if there are approvers who no longer work for the University, and should be removed from the approval queue.

Pending Documents – The total number of documents awaiting approval in the selected queue.

Approvers

This section provides details on the individuals who are **approvers** for documents routed to the queue.

Approvers										
Queue Level	Nuid	Name	Approval L..	Executive ..	Division C..		Division Title	Department ..	Department	Active?
1000	000166972	Jeffrey Wormuth	$0.00	EXEC03	DIV02	Finance		156000	Internal Consulting	Yes
3000	000166972	Jeffrey Wormuth	$1,000,000..	EXEC03	DIV02	Finance		156000	Internal Consulting	Yes

Figure 13. Approvers Table

Below are definitions of column headers in the Approvers data table:

Queue Level – The order in which documents are routed to the approver. Directly correlated with *Approval Limit* field. *Please note that most queues will have Level 1000 and Level 3000 only.*

Level	Approval Limit	Functions
Level 1000	$0.00	View all documents routed to queue
Level 2000	$5,000.00	View and approve documents between $0.00 - $5,000.00
Level 3000	$1,000,000,000.00	View and approve documents between $5,000.01 - $1,000,000,000.00

NUID – The Northeastern University ID of the approver.

Name – The name of the approver.

Approval Limit– The highest dollar value that the approver may receive and approve documents for. The following are standardized options:

> **$0.00** (Level 1000)
>
> *$5,000.00 (Level 2000)*
>
> **$1,000,000,000.00** (Level 3000)

Executive Code– The code of the executive org that the approver reports to.

Division Code– The code of the division that the approver reports to.

Division Title – The title of the division that the approver reports to.

Department Code – The department code that the approver reports to.

Department – The department that the approver reports to.

Active? – Is the approver an active employee of the University (*Yes/No)*?

Predecessor Queues

This section of the queue details page provides the Queue ID of preceding queues. In other words, if populated, this indicates the approval queue(s) **from which** documents are routed to the queue currently being viewed. *Please note: There are few queues with values in this table. It is typical to be left blank.*

Figure 14. Predecessor Queues

In the example above, we see that "IFAC" is a Predecessor Queue. We see this on the queue details page of queue "APIN". This means that documents are first routed to be approved in "IFAC", then sent to "APIN".

Pending Documents

The *Pending Documents* section provides a summary of all documents awaiting review in the selected queue.

Figure 15. Pending Documents Table

Doc Code is the ID of the document, which can be used for lookup in Banner Finance. **Doc Type Code** is the code of the document type awaiting approval.

Doc Type 1 = Requisition

Doc Type 3 = Invoice

Doc Type 20 = Journal Document

How Approval Queues work

Overview

This section is intended to provide a general understanding of how a document is routed from submission to an approval queue within Banner Finance. Queue configurations, queue routing, and approver routing will be discussed.
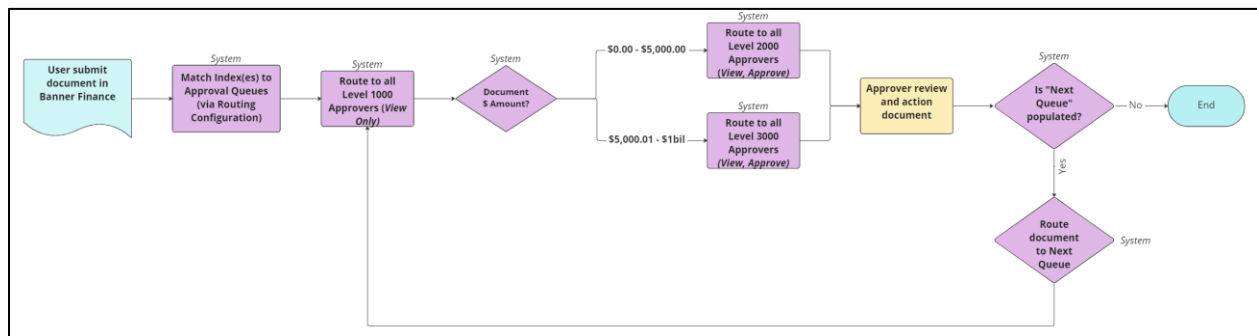
Figure 16. Document Routing Overview

The above figure shows a high-level overview of how Banner Finance documents are routed to approval queues and approvers. Please note that this figure does not display all possible scenarios (e.g. If no queues are matched, no approvers are matched, or document is rejected), but merely intended to provide a picture of generally how documents are routed in Banner Finance.

Documents are first routed to an approval queue, then individual approvers within that queue. If applicable, the document will then be routed to the *Next Queue*, and repeated until approved or rejected.

Queue Routing

Figure 17. Routing in Queue Details page

When submitting a document for approval in Banner Finance, users will provide an Index to which the request is charging against. The index corresponds to a Fund and Org. FOAP, also

known as Fund/Org/Account/Program, determines the routing for an approval queue. Routing can be configured for **any combination** of FOAP: only Organization, only Fund, or a combination of Fund, Org, Account AND Program, etc.

Approval queues are configured to receive documents of a particular *document type* and FOAP. A single document may match the routing rules of multiple queues, however, it is **only sent to the approval queue with the lowest organizational Level.** (e.g. Level 3 Div > Level 8 Org – It is sent to Level 8 queue). (See *__Level__* definition).

"Catch-all" Queues

There are approval queues configured to function as high-level or "catch-all" queues, to ensure that documents will have *at least one* matched approval queue. For example: The DIV02 (Finance Division) queue will receive any documents whose FOAP have not matched more specific organizations within the Finance Division. This is critical, to ensure that documents are not displaced and pending approval.

Another example is the OVR queue, which catches documents that have **no** queues to be routed to. This queue is attended by Central Finance. Measures should be taken to avoid documents from being routed to a catch-all, to ensure that they are not stagnant and pending approval.

Queues at higher organization level (such as Division), should mainly be used for documents requiring Division-level approval, rather than documents that can be approved by lower-level organizations (but which do not have a specific approval queue). *It is recommended to have department-level approval queues set-up.*

Approvers

Within a specific queue, the document is routed to approvers within that queue based on their *Level* and *Approval Limit.*

Queue Level	Nuid	Name	Approval L..	Executive ..	Division C..	Division Title	Department ..	Department	Active?
						Approvers			
1000	000166972	Jeffrey Wormuth	$0.00	EXEC03	DIV02	Finance	156000	Internal Consulting	Yes
3000	000166972	Jeffrey Wormuth	$1,000,000..	EXEC03	DIV02	Finance	156000	Internal Consulting	Yes

Figure 18. Approvers

Levels provide an order to how documents are routed to approvers. Approval limits are the highest dollar amount value of documents that the approvers will be routed and have the ability to approve. Level - Approval limit pairings are standardized (*See **Levels** definition).*

The document is first routed to approvers within Level 1000, which has an approval limit of $0.00. This Level is intended to provide "View"-only functions. Individuals within this level will be able to view **all** documents routed to the queue, no matter the document dollar ($) amount. *Note: Individuals that are only in this level will not have approval abilities.*

Then, the document will be routed to the next lowest applicable level of approvers, based on the document dollar ($) amount. For Northeastern University, there are two additional levels of approvers: Level 2000 ($5000.00 Approval limit), and Level 3000 ($1,000,000,000.00 Approval limit).
Note: Level 2000 (Limit $5000.00) is rarely used but included in this document for visibility.

If a document is $5000.00 or below, it will be routed to Level 2000 approvers only. Once approved by a Level 2000 approver, it will either move to "Next Queue" (*more info below)* or be complete.

If a document is between $5000.01 and $1 billion, it will be routed to Level 3000 approvers only. Level 2000 approvers will not be routed this document.

Note: Each successive approver only sees those documents with a dollar value higher than the limit of the last approver. *Unless they are also in Level 1000*

Level	Approval Limit	Functions
Level 1000	$0.00	View all documents routed to queue
Level 2000	$5,000.00	View and approve documents between $0.00 - $5,000.00
Level 3000	$1,000,000,000.00	View and approve documents between $5,000.01 - $1,000,000,000.00

Next Queue

The "Next Queue" data field provides information on the queue that is configured to immediately follow the current queue.

Figure 19. No next queue configured

Figure 20. Next Queue is configured to be "APIN". Documents will be routed to APIN queue after all approvals in current queue (IFAC). Please note that Queue Limit is set to $0.00 due to "Next Queue" function being active.

Once a document receives all appropriate approvals within a queue, it will then either be completed **or** routed to "Next Queue" *(See Next Queue definition), if configured.* If a document is routed to an approval queue where "Next Queue" is configured, it will then go into the specified Next Queue for further approvals. At this stage, the process described above (*Approvers)* will repeat.

It is possible for a document to be routed through multiple sequential "Next Queue"s.

If "Next Queue" is configured, the Queue Limit must also be configured to $0.00 in the same queue. All individual approvers will have their appropriate Levels and Approval limits as well as

functionality. However, the **Queue Limit** must be set to $0.00 to trigger documents to be routed to the Next Queue after approvals.

Frequently Asked Questions

Q) Can a document be routed to multiple queues?

A) A single document may match the routing rules of multiple queues, however, it is **only sent to the approval queue with the lowest organizational Level.** (e.g. Level 3 Div > Level 8 Org – It is sent to Level 8 queue). (See *Level* definition).

Q) I submitted a document and it was approved by a queue, but I see that it's still pending and needs additional approval? Why?

A) The document was likely routed to a queue where **Next Queue** is populated. This means the document must be approved by both queues (and any following *Next Queue* thereafter). (See *Next Queue* definition).

Q) Can approvers in the same level have different approval limits?

A) **No.** All approvers that are at the same level (e.g. Level 2000) must have the same approval limit (e.g. $5,000.00).

Q) Can one approver be in multiple levels?

A) **Yes**. Any approver who is added to the highest approval level (Level 3000), will also be added to the lowest approval level (Level 1000) by default. Below is a table summary of Levels/Limits and their functions:

Level	Approval Limit	Functions
Level 1000	$0.00	View all documents routed to queue
Level 2000	$5,000.00	View and approve documents between $0.00 - $5,000.00
Level 3000	$1,000,000,000.00	View and approve documents between $5,000.01 - $1,000,000,000.00

Level 1000 AND Level 3000	$0.00 $1,000,000,000.00	View all documents routed to queue View and approve documents between $5,000.01 - $1,000,000,000.00 View and approve documents between $0.00 - $5,000.00 *on behalf of a Level 2000 Approver*
Level 1000 AND Level 2000	$0.00 $5,000.00	View all documents routed to queue View and approve documents between $0.00 - $5,000.00
Level 2000 AND Level 3000	$5,000.00 $1,000,000,000.00	View and approve documents between $0.00 - $5,000.00 View and approve documents between $5,000.01 - $1,000,000,000.00

Q) What is implicit approval?

A) Implicit approval may occur when the individual who submitted the document is an approver in the queue that the document is routed to. For this to occur, the document type must have "Implicit Approval" enabled in its configuration. Documents may be implicit, explicit, or bypass approval.

> **Note:** *For Northeastern University: Reqs, Invoices, and JVs are configured to allow implicit approval.*

Q) What happens if there are no active approvers in the queue that a document is in?

A) The document is stalled in the approval queue. The approval queue should be updated as soon as possible with at least one (1) approver.

Q) When I use the dashboard, I do not see any results / or / I do not have any options in the filter menus

A) If you do not see filter options or results, you may still have <u>filters applied </u>to your results. Please make sure to "remove" filter views to see all results.

In addition, you may have selected "Null" as a value in a filter. Please note that all the filters are interdependent; in other words, one filter's selections will affect the options you see for another filter. This is to prevent selections that are incompatible.

Figure 21. Example of no options available – Caused by a "null" filter selected (not pictured).

How to request changes

Process Overview

Any Northeastern University employee may submit a request to change an approval queue, whether they are Banner Finance user, approver, or an organization lead. The changes that may be requested are:

Queue	Approver
Create new	Add
Edit existing	Edit (Level/Limit)
Disable	Remove

Change requests are submitted, reviewed, and completed via *ServiceNow.* The requester will download the request form, complete necessary information, and email it to ICD at *financesystemssupport@northeastern.edu.* This will automatically create a ServiceNow case, which ICD will review.

Once received, Internal Consulting Department (ICD) will review the request. Approval for the request will be sought out by ICD via email to the appropriate party (e.g. *Division Lead).*

If approved, ICD will move to enact the requested changes in Banner.

If denied, ICD will notify the individual requesting the change.

The sections below will describe in further detail how to request changes.

Form Overview

The form to request changes to Banner Finance approval queues can be found on the Dashboard or Finance Website (Link).

Individuals requesting changes can download this editable PDF form to their computer, fill out necessary information, and email as attachment to financesystemssupport@northeastern.edu. *Please contact ICD via this email if you require support to download or use this form.*

Figure 22. "Request Changes" button on Dashboard

Figure 22. Change Request Form

How to download and edit the form

Step 1. Access form link

Step 2. Download form to computer

Step 3. Open form

Step 4. Complete form

Step 1. Access form link

The approval queue form can be accessed via a link on the Dashboard or Finance Website (Link). (Direct link here)

Step 2. Download form to computer. *Optional*

Download the form to your computer, or skip to Step 3 to edit directly in browser.
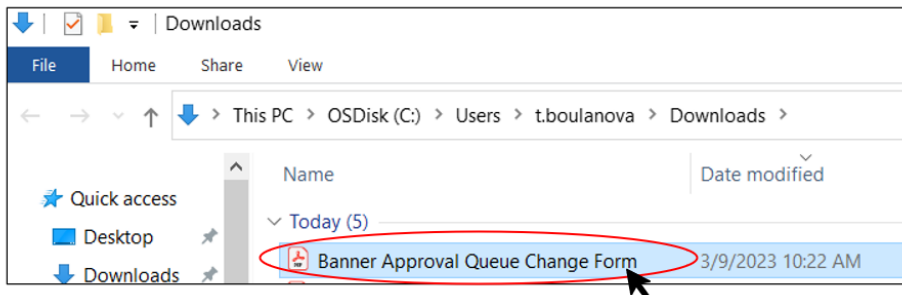
Step 3. Open form

You can open the form to make edits in Adobe Acrobat or a browser (such as Google Chrome).
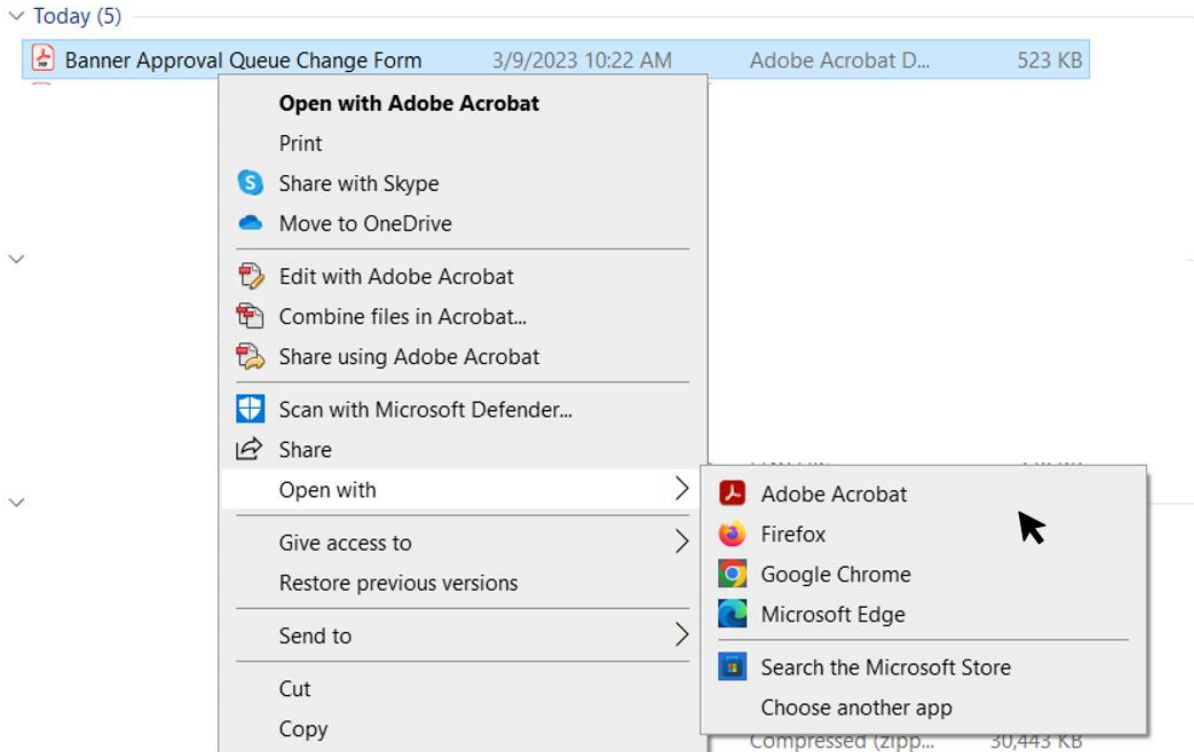
Step 4. Complete form

The request form can be edited right in Adobe Acrobat or a browser. Click fields to complete them. *Form does not need to be printed.*

How to complete the form
Click to jump to section:

Create new approval queue

Edit approval queue

Disable approval queue

Add approver(s)

Edit approver(s)

Remove approver(s)

Create new approval queue

A new approval queue may need to be created in the case of a new fund, organization, account, or program that will receive documents via Banner Finance.

Step 0. *Download request form*

Step 1. Complete Requester Information

Step 2. Check "Create a new approval queue". Complete details.

Step 3. Provide justification.

Step 4. Complete page 2, approvers.

Step 5. Save and submit form

Step 0. *Download request form.* (Click to jump to section)

Step 1. Complete Requester Information

REQUESTER INFORMATION

Name:

NUID:

Email :

Phone number:

Supervisor Name:

Step 2. Check "Create a new approval queue". Complete details-

REQUEST DETAILS:
☐ Create a new approval queue. Effective Date:

Please complete and attach page 2.

Queue ID: Program:

Queue Description   Account :

Document Type(s): ☐ Requisition ☐ Invoice   Division:

Fund Type: Organization:

Fund: Next Queue:

Effective Date = The date you would like this queue to be placed into effect.

Queue ID = A unique alphanumeric code, three to four characters for the Queue. *Optional*

Queue Description = A short descriptive title of the queue. For example, "Internal Consulting Department".

Document Type(s) = The document types that will be routed to this queue. Please select one or both options.

Fund Type / Fund / Program / Account / Division / Organization = Please complete *at least one (1)* for routing purposes.

Next Queue = Indicates the *Queue ID* of the succeeding queue that document(s) will be sent to after approval in current queue. *Optional*

Step 3. Provide justification for your request.

Please add any necessary information for the basis of the approval queue change. For example: *"Requesting new approval queue for newly appointed DIV56. No approval queues currently exist for this Division."*

Please provide Justification:

_____

Step 4. Complete page 2, approvers. New approval queue must have a minimum of one (1) approver in Level 1000 and Level 3000. *Level 2000 optional.* See figure on bottom-right corner for guidelines on Level-Limit.

*Required field		Approvers			
Action	**Queue ID(s)***	**Name***	**NUID***	**Level**	**Limit**
☐ Add. ☐ Edit ☐ Remove					
☐ Add. ☐ Edit ☐ Remove					

Action = Select "Add"

Queue ID(s) = The Queue ID of the queue you would like to add approvers to. *Please leave blank or fill "N/A" in case of creating a new approval queue.*

Name = The name of the employee you would like to add to a document approval queue.

NUID = The Northeastern University ID of the employee you would like to add to a document approval queue.

Level/Limit = The approval Level/Limit of the approver being added to a queue. Please see table on bottom-right corner of form (Page 2) for guidelines.

Approval Limits - Guidelines

Level	Limit
1000	$0 (View-only)
2000	$5,000
3000	$1,000,000,000.00

Step 5. Save and submit form

([Link to jump to section](#))

Edit approval queue

An existing approval queue can be edited in its configuration and/or approvers. This section will provide steps on how to edit queue description, "Next Queue", and limit.

Step 0. Download request form.

Step 1. Complete Requester Information

Step 2. Check "Edit approval queue". Complete details.

Step 3. Provide justification.

Step 4. Save and submit form

Step 0. Download request form. ([Click to jump to section](#))

Step 1. Complete Requester Information

REQUESTER INFORMATION

Name:

NUID

Email :

Phone number:

Supervisor Name:

Step 2. Check "Edit approval queue". Complete details.

☐ Edit approval queue.

Queue ID: _____ *How to find queue ID*

☐ Edit queue Description. New queue description

☐ Edit Next Queue
Next queue:

☐ Edit queue Limit.
New queue Limit:

Please provide the Queue ID of the queue you would like to edit. You may select one or multiple options: edit description, edit next queue, or edit queue limit.

Queue Description = A short descriptive title of the queue. For example, "Internal Consulting Department".

Next Queue = Indicates the *Queue ID* of the succeeding queue that document(s) will be sent to after approval in current queue.

Queue Limit = The maximum dollar ($) approval limit of the queue. Recommended to be the same as the highest level approver limit (typically level 3: $1bil).

Step 3. Provide justification for your request.

Please add any necessary information for the basis of the approval queue change.

For example: "Requesting to change queue description, due to a title change of the department. New description to reflect new org title."

Please provide Justification:

Step 4. Save and submit form

(*Link to jump to section*)

Disable queue

An approval queue may need to be "disabled" or "retired" if documents no longer should be routed to the queue for approval. An example scenario is in the case of a change in organization.

> ***Step 0.*** *Download request form.*
>
> **Step 1.** Complete Requester Information
>
> **Step 2.** Check "Disable Queue". Complete details.
>
> **Step 3.** Provide justification.
>
> **Step 4.** Save and submit form

Step 0. *Download request form.* ([Click to jump to section](#))

Step 1. Complete Requester Information

REQUESTER INFORMATION

Name:

NUID

Email :

Phone number:

Supervisor Name:

Step 2. Check "Disable Queue". Complete details.

☐ Disable approval queue.

Queue ID   *How to find queue ID*

Effective date:

Please provide the Queue ID of the queue you would like to disable, and the date you would like this change to go into effect.

Step 3. Provide justification for your request.

Please add any necessary information for the basis of the approval queue change. For example: *"Requesting to disable queue due to organizational change – Queue is no longer necessary for org"*.

Please provide Justification:

Step 4. Save and submit form

(Link to jump to section)

Add new approver(s)

Approvers may be added to one or multiple approval queues. This is an option if you would like additional employees to have view or approval functions in Banner Finance approval queues.

Step 0. *Download request form*

Step 1. Complete Requester Information.

Step 2. Check "Add new approver(s)" on page 1.

Step 3. Provide justification.

Step 4. Complete page 2, approvers.

Step 5. Save and submit form

Step 0. *Download request form.* ([Click to jump to section](#))

Step 1. Complete Requester Information

REQUESTER INFORMATION

Name:	
NUID	
Email :	
Phone number:	
Supervisor Name:	

Step 2. Check "Add new approver(s)" on page 1.

Please complete and attach page 2.

☑ Add new approver.

☐ Edit approver (limit, level)

☐ Remove approver.

Step 3. Provide justification for your request.

Please add any necessary information for the basis of the approval queue change. For example: "*Requesting to add new approvers to queue, to replace inactive employees*".

Please provide Justification:

Step 4. Complete page 2, approvers.

*Required field			Approvers		
Action	**Queue ID(s)***	**Name***	**NUID***	**Level**	**Limit**
☐ Add. ☐ Edit ☐ Remove					
☐ Add. ☐ Edit ☐ Remove					

Action = Select "Add"

Queue ID(s) = The Queue ID of the queue you would like to add approvers to.

Name = The name of the employee you would like to add to an approval queue.

NUID = The Northeastern University ID of the employee you would like to add to an approval queue.

Level/Limit = The approval Level/Limit of the approver being added to a queue. Please see table on bottom-right corner of form (Page 2) for guidelines.

Approval Limits - Guidelines

Level	Limit
1000	$0 (View-only)
2000	$5,000
3000	$1,000,000,000.00

Step 5. Save and submit form

(*Link to jump to section*)

Edit approver(s)

Existing approvers in Banner Finance can be moved to new Levels/Limits within a queue as necessary. This can occur in the case of a change in approver role or title.

> **Step 0.** *Download request form*
>
> **Step 1.** Complete Requester Information.
>
> **Step 2.** Check "Edit approvers" on page 1.
>
> **Step 3.** Provide justification.
>
> **Step 4.** Complete page 2, approvers.
>
> **Step 5.** Save and submit form

Step 0. Download request form. ([Click to jump to section](#))

Step 1. Complete Requester Information

Step 2. Check "Edit approvers" on page 1.

Step 3. Provide justification for your request.

Please add any necessary information for the basis of the approval queue change. For example: "*Requesting to increase approval limit for approver"*.

Please provide Justification:

Step 4. Complete page 2, approvers.

*Required field		Approvers			
Action	**Queue ID(s)***	**Name***	**NUID***	**Level**	**Limit**
☐ Add. ☐ Edit ☐ Remove					
☐ Add. ☐ Edit ☐ Remove					

Action = Select "Edit"

Queue ID(s) = The Queue ID(s) of the queue(s) of which you would like to edit approvers.

Name = The name of the approver whose level/limit you would like to edit.

NUID = The Northeastern University ID of the approver you would like to edit.

Level/Limit = The approval Level/Limit of the approver you would like **changed to**. Please see table on bottom-right corner of form (Page 2) for guidelines.

Approval Limits - Guidelines

Level	Limit
1000	$0 (View-only)
2000	$5,000
3000	$1,000,000,000.00

Step 5. Save and submit form

(*Link to jump to section*)

Remove Approvers

Approvers who are no longer related to the routing organization of an approval queue, or who no longer work for the University, should be "removed" from approval queues.

Note: *There must be at least one approver per Level in an approval queue. Before removing an approver, please ensure that there is an additional approver in the Level(s) they are being removed from. If an approver must be added in this individual's place, please also complete the "Add Approver" section of the document.*

Step 0. Download request form.

Step 1. Complete Requester Information.

Step 2. Check "Remove Approvers" on page 1.

Step 3. Provide justification.

Step 4. Complete page 2, approvers.

Step 5. Save and submit form

Step 0. Download request form. (Click to jump to section)

Step 1. Complete Requester Information

REQUESTER INFORMATION

Name:

NUID

Email :

Phone number:

Supervisor Name:

Step 2. Check "Remove approver(s)" on page 1.

Please complete and attach page 2.

☐ Add new approver.

☐ Edit approver (limit, level)

☐ Remove approver.

Step 3. Provide justification for your request.

Please add any necessary information for the basis of the approval queue change. For example, *"Requesting to remove approver from queue due to employee change in department."*

Please provide Justification:

Step 4. Complete page 2, approvers.

*Required field	Approvers				
Action	**Queue ID(s)***	**Name***	**NUID***	**Level**	**Limit**
☐ Add. ☐ Edit ☐ Remove					
☐ Add. ☐ Edit ☐ Remove					

Action = Select "Remove"

Queue ID(s) = The Queue ID(s) of the queue(s) you would like to remove approvers from.

Name = The name of the approver you would like to remove from a queue.

NUID = The Northeastern University ID of the employee you would like to remove from an approval queue.

Level/Limit = The approval Level/Limit of the approver being removed. Please list all Level(s) you would like the approver to be removed from (one or multiple).

Step 5. Save and submit form

([Link to jump to section](#))

How to save and submit form

Step 1. Save file
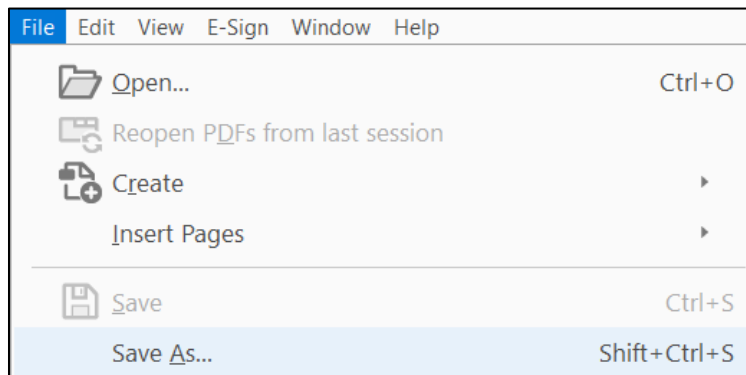
Step 2. Attach file to email

Step 3. Email to financesystemssupport@northeastern.edu

Step 1. Save file

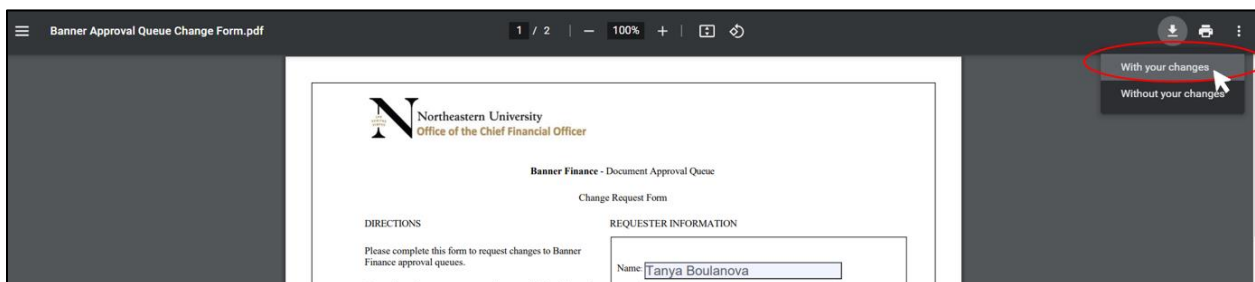After completing the request form, save the file with your changes.

If using Adobe Acrobat –

Click File > "Save As".

If using a browser such as Google Chrome –

Click download icon -> "With your changes".

Step 2. Attach saved file to email, and email to *financesystemssupport@northeastern.edu*

Format	**Insert**	Draw	Options	🗑 Discard	➢ Send

📎 Files	▦ Table	🖼 Pictures	🔗 Link	😊 Emoji

From: t.boulanova@northeastern.edu

To: Finance Systems Support;   👤   Cc & Bcc

Banner Approval Queue Change Request

Attachments

📄 PDF Banner Approval Queue...   ✕
522.02 KB

Hello,

Please see attached form to request an approval queue change.

Thank you,

--
Tatyana (Tanya) Boulanova
Business Analyst, Internal Consulting
Finance Division | Northeastern University
177 Huntington Ave, Boston, MA 02115
t.boulanova@northeastern.edu

Technical Support

For any support regarding the Approval Queues dashboard, form, or sending a request, please contact ICD at financesystemssupport@northeastern.edu.