

# SSB Approver Training



## Approve Documents

View list of documents pending approval. Approve, disapprove, or deny.


# PURCHASING

located in the

Administration Building, Room 81

- Lisa Bosquez, 210-805-5836, [lbosquez@uiwtx.edu](mailto:lbosquez@uiwtx.edu)
- Jessica Cevallos, 210-805-1236, [jevarga1@uiwtx.edu](mailto:jevarga1@uiwtx.edu)
- Carmen Rivera, 210-805-5837, [rivera@uiwtx.edu](mailto:rivera@uiwtx.edu)
- Marisa Vasquez, 210-829-3999, [mvasque@uiwtx.edu](mailto:mvasque@uiwtx.edu)
- Michael Castilleja, 210-805-3571, [micasti2@uiwtx.edu](mailto:micasti2@uiwtx.edu)

# Access Cardinal Apps



Sign In

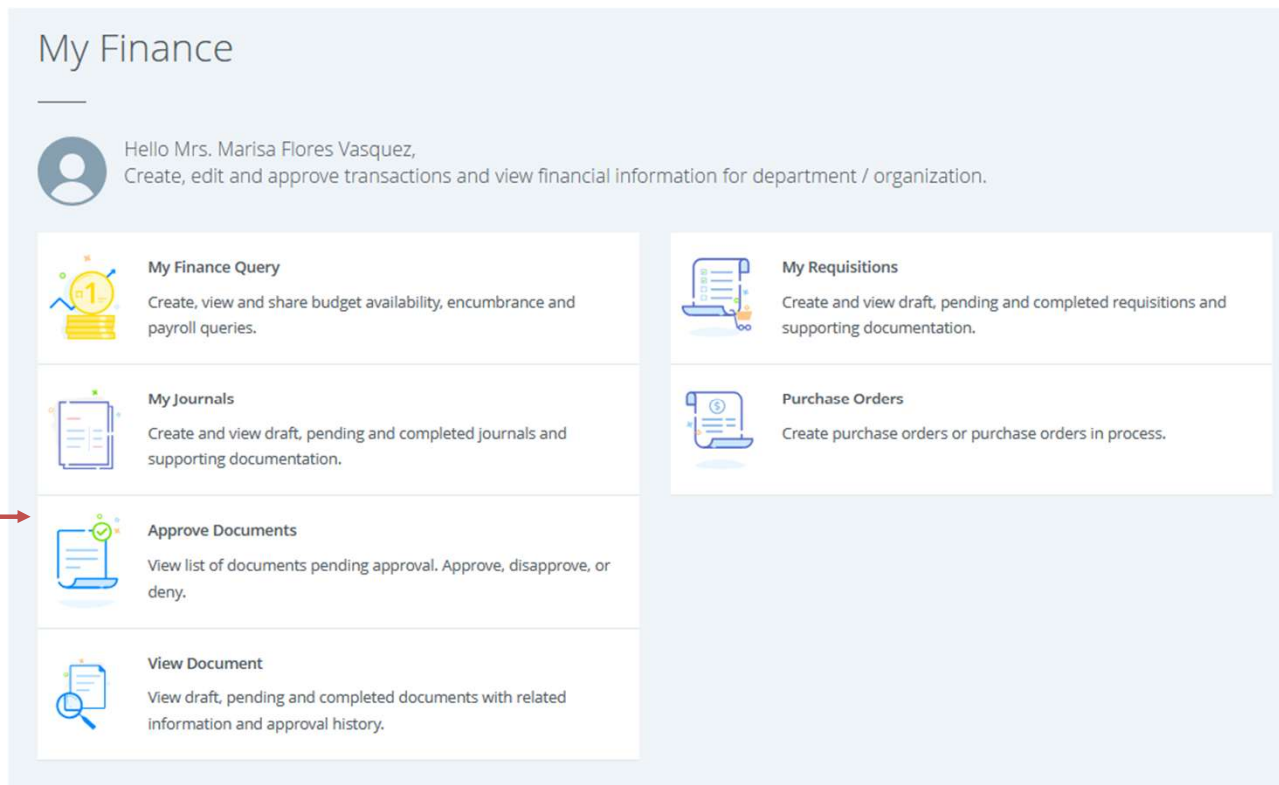
**LOGIN**

[Reset Password](#) | [Need Help?](#)

# Click on B9 Finance Self Service



# Approvers select Approve Documents




The image shows a screenshot of a 'My Finance' dashboard. At the top left, the title 'My Finance' is displayed. Below it, a user profile icon is followed by the text 'Hello Mrs. Marisa Flores Vasquez, Create, edit and approve transactions and view financial information for department / organization.' The dashboard features a grid of tiles. A red arrow originates from the main title and points to the 'Approve Documents' tile. The tiles are as follows:

- My Finance Query**: Create, view and share budget availability, encumbrance and payroll queries.
- My Journals**: Create and view draft, pending and completed journals and supporting documentation.
- Approve Documents**: View list of documents pending approval. Approve, disapprove, or deny.
- View Document**: View draft, pending and completed documents with related information and approval history.
- My Requisitions**: Create and view draft, pending and completed requisitions and supporting documentation.
- Purchase Orders**: Create purchase orders or purchase orders in process.

**Ellucian**

[My.Finance](#) • Approve Documents

### Approve Documents

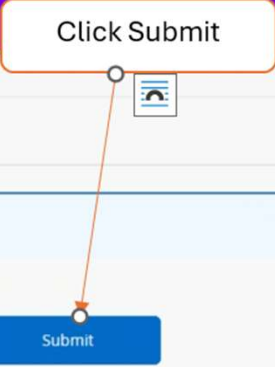
 The radio buttons related to next approver apply when a User ID is present.

User ID:  Document Number:

User ID is next approver  All documents User may approve

**Submit**

**Click Submit**



My Finance • Approve Documents

### Approve Documents

Queried Parameters

Another Query

Click on the Requisition Number

Approve Documents List 1

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment....

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove
<a href="#">R0092170</a>	REQ	-	-	RIVERA	200.00	Yes	-	DOC	-		<a href="#">Disapprove</a>

Review request details to confirm:

- selected Vendor
- correct Description (s)
- correct FOAP
- correct Amount

Once confirmed, close out the tab.

PURCHASE REQUISITION  
(Non-negotiable; not a valid Purchase Order)

Requestor	Carmen Rivera	Requisition Number	R0092178
Phone	210- 805 Ext. 5837	Transaction Date	02/02/2026
Email	rivera@uiwtx.edu	Delivery Date	02/03/2026
Organization	Comptroller Office (6131)	Status	In Approval
Accounting Type	Document Level	Currency	USD

Ship To	1000	Vendor	Heights Office Supply (60462)
Address	University of the Incarnate Word 4301 Broadway San Antonio TX 78209	Address	10203 Kotzebue St Ste 117 San Antonio TX 78217-4447
Attention To	Carmen Rivera - Ext	Phone	- Fax -
		Email	

Requisition Comments

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	test	EA	1.00	200.0000	0.00	200.00
Total Commodities						200.00

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Loen-Proj	NSF Suspende	NSF Override	Suspende	Distribution Percent	Net Amount
1	1-- 10010- 6131- 6584- 6200- --	No	No	No	100.0000	200.00
Total Accounting Distributions						200.00

DISCLAIMER - A Purchase Requisition does not represent a valid Purchase Order to provide to a vendor or supplier. As such, this PDF of the Purchase Requisition is restricted to internal use only.

# View Attachments

The screenshot shows the Elucian 'Approve Documents' interface. At the top, the header includes the Elucian logo, a settings gear, a user profile for 'Armando Villarreal Jr', and the breadcrumb 'My.Finance > Approve Documents'. Below the header, there is a section titled 'Approve Documents' containing a 'Queried Parameters' box with an 'Another Query' button. The main content area is titled 'Approve Documents List' with a notification badge '1'. A blue information banner provides instructions: 'Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...'. Below this is a table with columns: Document, Document Type, Change Sequence, Submission, Originating User, Amount, Next Approver, NSF, Queue Type, Attachments, History, and Disapprove. The first row contains the data: R0092178, REQ, -, -, RIVERA, 200.00, Yes, -, DOC, and a document icon. A callout box with the text 'Click on the Attachments Icon' has an arrow pointing to the document icon in the 'Attachments' column of the first row.

Elucian

My.Finance > Approve Documents

Approve Documents

Queried Parameters

Another Query

Approve Documents List 1

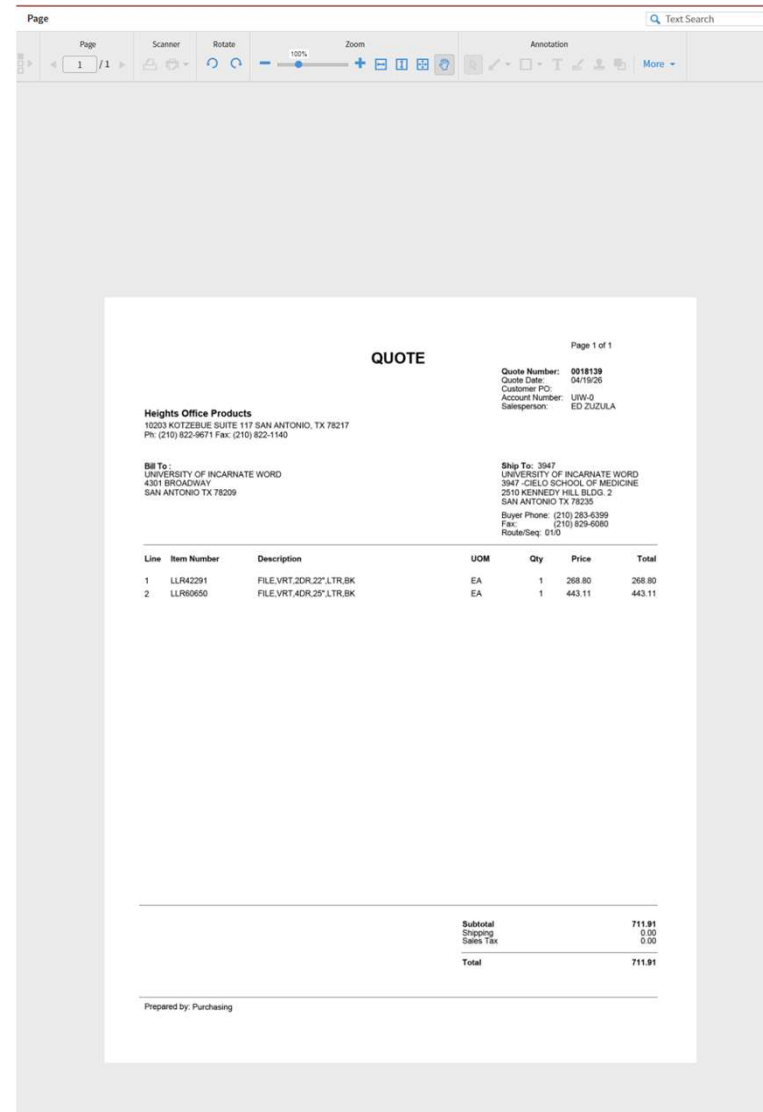
Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove
R0092178	REQ	-	-	RIVERA	200.00	Yes	-	DOC			Disapprove

Review attachment(s) to confirm:

- Document is attached.
- Document is accurate.

Then return to approve documents tab.



# Review to Disapprove or Approve

Ellucian

My Finance > Approve Documents

Approve Documents

Queried Parameters

Another Query

Approve Documents List 1

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
REQ	-	-	RIVERA	200.00	Yes	-	DOC			Disapprove	Approve

Confirm your approval by clicking the APPROVE button below.

**Approve Document** ✕

---

Document Number	Document Type
R0092178	REQ
Change Sequence	Submission
-	-

Amount  
200.00

Comment

This document has been approved.

Once APPROVE button is clicked:

- Document will route to next level of approval, if needed.
- Purchasing will review for PO assignment after all department approvals are completed.

The screenshot displays the Ellucian user interface for the 'Approve Documents' page. The top navigation bar is purple and contains the Ellucian logo, a settings gear, a user profile icon for 'Armando Villarreal Jr', and a notification badge with the number '2'. Below the navigation bar, the breadcrumb trail shows 'My Finance' and 'Approve Documents'. The main content area is titled 'Approve Documents' and features two notification messages in the top right corner: a green message stating 'Document R0092178 has your approval.' and another green message stating 'Query returned no records'. The interface includes a 'Queried Parameters' section with a dropdown arrow and a button labeled 'Another Query'. Below this is the 'Approve Documents List' section, which contains a light blue message box with an information icon and the text 'Query returned no records.'

If you choose to DISAPPROVE:

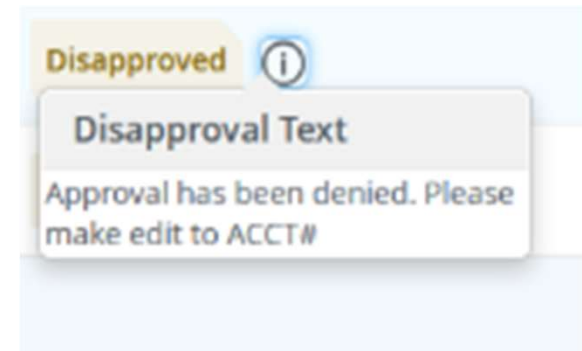
- Add a comment, to requested edits.

- \* This note is only a Banner note.

### Disapprove Document ×

Document Number	Document Type
R0092178	REQ
Change Sequence	Submission
-	
Amount	
200.00	
Comment *	
<input type="text" value="Approval has been denied."/>	
<input type="button" value="Cancel"/>	<input type="button" value="Disapprove"/>

A reason for disapproval is needed in the Comment\* box



Notify your requestor via email or teams that you have disapproved their requisition.

The screenshot displays the Elucian application interface. At the top, a purple header contains the Elucian logo on the left and a user profile for Armando Villarreal Jr. on the right, including a settings gear icon and a page number '2'. Below the header, a breadcrumb trail shows 'My Finance' and 'Approve Documents'. The main content area is titled 'Approve Documents' and features a 'Queried Parameters' section with a dropdown arrow and a button labeled 'Another Query'. Below this is an 'Approve Documents List' section, which contains a light blue informational message: 'Query returned no records.' In the top right corner, a notification box displays two messages: 'Document R0092178 has been disapproved by you.' and 'Query returned no records', both with green checkmark icons.