

Step by Step: Self Service-View Document

1. Log on to Banner Finance self-service
2. Navigate to Financial Information Menu
3. Navigate to "View Documents"
4. If you know the type and the document number already, populate these fields and press view document.
5. If you do not know the document number, press on the Document Number button. This will bring up the following lookup screen. Populate at least one of the fields with the * and then press Execute Query.

Requisition Code Lookup	
Document Number *	<input type="text"/>
User ID *	<input type="text" value="MAWEISS"/>
Activity Date *	<input type="text" value="All"/> <input type="text" value="All"/>
Transaction Date *	<input type="text" value="All"/> <input type="text" value="All"/>
Vendor ID *	<input type="text"/>
Requestor	<input type="text"/>
Approved	<input type="text" value="All"/>
Completed	<input type="text" value="All"/>
<input type="button" value="Execute Query"/>	
<input type="button" value="Exit without Value"/>	

6. If you have documents that match your query, you will see something like the following, depending on the type of document you are searching:

Results:

Document Number	User ID	Activity Date	Trans Date	Vendor ID	Vendor	Requestor	Approved	Completed
<u>R0000019</u>	MJONES	Apr 09, 2003	Apr 09, 2003	100408399	ACTC	MJones	Yes	Yes
<u>R0000020</u>	MJONES	Apr 09, 2003	Apr 09, 2003	100408398	Accountemps	MJones	No	Yes

7. Once you get the list of documents that match your query, select the document you would like to view by clicking your mouse on the document number.
8. You will be returned back to the “View Document” screen where your document number has now been populated in the “Document Number” field.
9. Select “View document” at the bottom of the page. Your complete document information should now be displayed.

Step by Step: Self Service-View Document Approvals

1. If you would like to view the approval history of a requisition, please follow steps 1 through 8 above, using requisition as your document type.
2. At the bottom of the page, press “Approval History”, the following will be displayed if all of your approvals have been recorded. If approvals have not been recorded, you will also be notified on this screen.

Document Identification

Document Number	R0000019	Type	Requisition
Originator:	MJONES	Mary Jones	

There are no approvals required at this time

Approvals recorded

Queue	Level	Date	User
IRT	1	Apr 09, 2003	IRT
BS	1	Apr 09, 2003	Bob Smith
JJ	1	Apr 09, 2003	Jane Jones