

# Viewing Documents

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## Introduction

The Finance Self-Service View Document Form allows a user to view detail information about a document (requisition, purchase order, invoice, journal voucher, encumbrance, or direct cash receipt). You also have the option to display commodity text for purchase orders, requisitions, and invoices. It functions similarly to the online Document Retrieval Form, FGIDOCR.

This option is not restricted to documents created on the Web. Any existing Banner document may be retrieved and viewed by this means.

You can submit a document query by

- document type
- document number
- submission number
- change sequence number.

## Displaying Commodity Text

There are two kinds of text that can be associated with a commodity item on the Requisition and Purchase Order: item text and commodity text. Each type of text can be viewed online only and/or printed on the document, depending on the radio button you select on the View Document page.


1. Item Text is ad hoc text that is entered by the end user for any given item, which can be used with or without a commodity code. The text is only stored for that item in that specific document, much like document level or header text. Item text can be associated with a commodity item on requisitions and purchase orders.
2. Commodity Text is standard wording that is appended to a commodity code description, which is maintained along with the other commodity code data on the Commodity Maintenance Form (FTMCOMM). Commodity Text can be associated with a commodity item on requisitions and purchase orders. Viewing commodity text is not currently an option on the Invoice/Credit Memo Query Form (FAIINVE); however, you can now view commodity text for an invoice on the View Document page.

## Steps

Follow these steps to complete the process.

1. Click on **View Document** from the Finance Menu to navigate to the Document Page.
2. Enter a document number in the **Document Number** field.

### View Document

 To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type:	<input type="text" value="Requisition"/>	<input type="text" value="Document Number"/>	<input type="text"/>
Submission#:	<input type="text"/>	Change Seq#	<input type="text"/>
		Reference Number	<input type="text"/>

Display Accounting Information	
<input checked="" type="radio"/> Yes	<input type="radio"/> No

Display Document/Line Item Text	Display Commodity Text
<input type="radio"/> All <input checked="" type="radio"/> Printable <input type="radio"/> None	<input type="radio"/> All <input checked="" type="radio"/> Printable <input type="radio"/> None

<input type="button" value="View document"/>	<input type="button" value="Approval history"/>
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Note: You can enter a document number from an external system, such as an e-procurement system, in the **Reference Number** field.

- Click the **View Document** button to view that document.

**Requisition Header**

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0000176	08/18/04	08/18/04	08/18/04		1,054.50
Origin:	BANNER				
Complete:	N	Approved:	N	Type:	Procurement
Cancel Reason:				Date:	
Requestor:	Ann Rollag		11003	Department of Art	
	DSKFJL-D X DLKF		kdjflskdjfl		
Accounting:	Commodity Level				
Ship to:	222 EAST ST.				
	EAST CAMPUS				
	#2 2nd				
	COLLEGETOWN, PA 19341				
Attention:	MR. EAST				
Contact:	MR. EAST			111-222-3333 X 4444	
Vendor:	WWWWWWWWW		Warehouse Supreme		
	1214 West Brandywine Avenue				
	Suite 314				
	Malvern, PA 19355				
Phone:			Fax:		
Document Text:	dsfsdfsdfsdfsdfsdfsdf				

**Requisition Commodities**

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount	
				Disc	Addl	Tax	Cost
1	WWWWWWWWWWW	New commodity for 7.0 testing	BOX	1	1	1.00	
				nn	nn	nn	1 nn

4. Click the **Approval History** icon to view the document's properties.

**Document Identification**

Document Number	R0000137	Type	Requisition
Originator:	TRAIN03	George	


☒ There are no approvals required at this time

**Approvals recorded**

Queue	Level	Date	User
GC05	1	Mar 21, 2003	Vice President Finance
NSF	1	Mar 21, 2003	Accounting Clerk I

5. If you wish to browse through documents of a specific type, select it in the **Choose Type** field and click the **Document Number** button to navigate to the Document Lookup field.

## View Document

 To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type:

Submission#:  Change Seq#

**Display Accounting Information**

☒ Yes ☐ No

**Display Document/Line Item Text** **Display Commodity Text**

☐ All ☒ Printable ☐ None ☐ All ☒ Printable ☐ None

6. Enter the desired search terms in the fields, and click the **Execute Query** button to generate a list of all matching documents. At least one of the starred fields is required to execute a query.

\* - at least one of these fields required.

Requisition Code Lookup	
Document Number*	<input type="text" value="R0000013"/>
User ID*	<input type="text" value="DMCGARRY"/>
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"/>
Reference Number*	<input type="text"/>
<input type="button" value="Execute Query"/>	

7. Click a **Document Number** to select and view the document, click the **Exit without Value** to return to the View Document page, or click the **Another Query** icon to return to a (blank) Document Lookup page.

☒ 20 documents selected.

**Requisition Lookup Results**

Document Number	User ID	Activity Date	Trans Date	Vendor ID	Vendor	Requestor	Approved	Completed	Reference Number
<a href="#">DMR0216</a>	DMCGARRY	Feb 16, 2004	Feb 16, 2004			Denise McGarry	Yes	Yes	
<a href="#">DMR0625</a>	DMCGARRY	Jun 24, 2004	Jun 24, 2004	V3	Micro Center	Denise McGarry	Yes	Yes	
<a href="#">DMR10</a>	DMCGARRY	Feb 16, 2004	Feb 16, 2004	V3	Micro Center	Denise McGarry	Yes	Yes	
<a href="#">DMR11</a>	DMCGARRY	Feb 16, 2004	Feb 16, 2004	V1	Office Max	Denise McGarry	Yes	Yes	
<a href="#">DMR16</a>	DMCGARRY	Feb 17, 2004	Feb 17, 2004	V3	Micro Center	Denise McGarry	Yes	Yes	