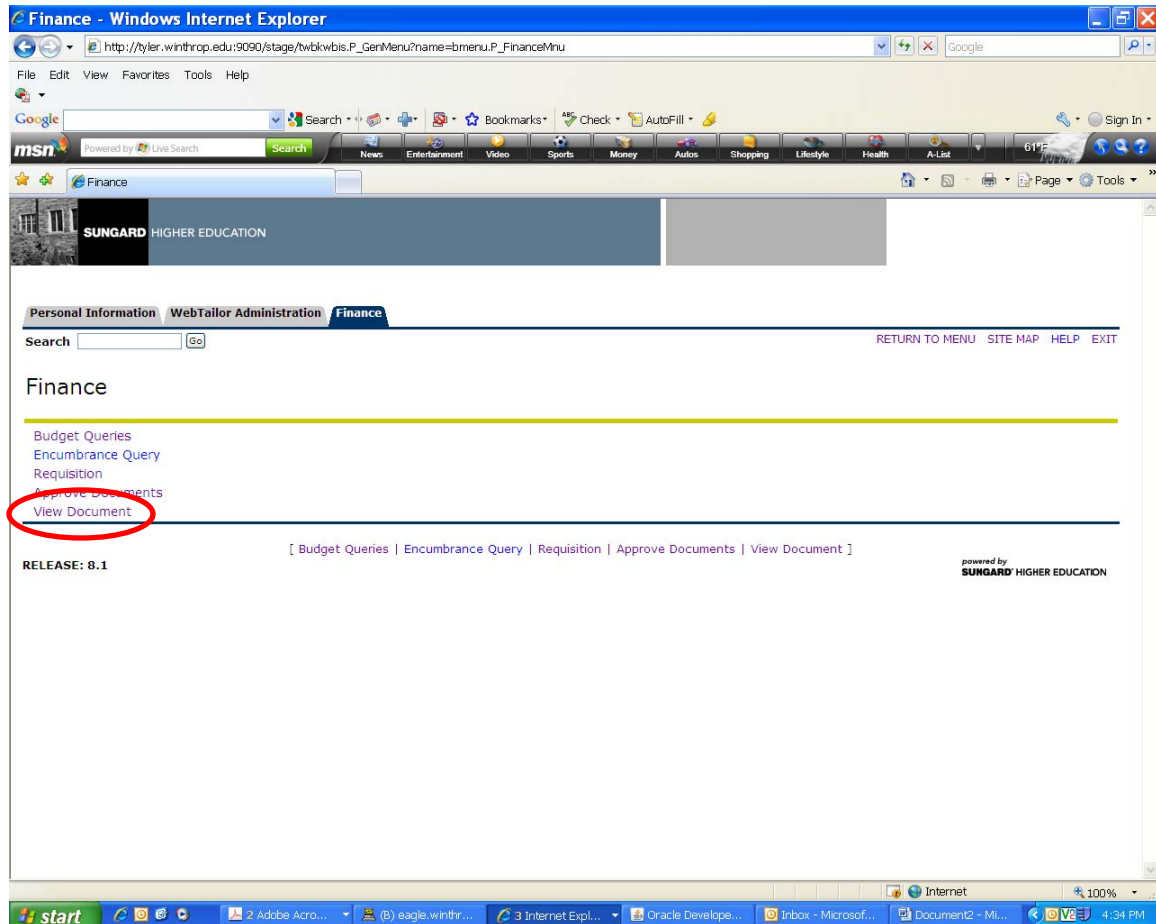


# To view a Document in Self-Service Banner (SSB) Finance

1. From the Self-Service Banner (SSB) Finance *Main Menu*, click **Finance**, then **View Document**.



2. The *View Document* screen in Self-Service Banner (SSB) Finance displays a number of options for you to choose from when you wish to view a document. These options include **Document Type**, **Document Number**, **Submission#**, **Change Seq#**, **Reference Number** as well as display information.

Personal Information Finance

Search   MENU SITE MAP HELP EXIT

## 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#  Reference Number

Display Accounting Information

Yes  No

Display Document/Line Item Text  All  Printable  None

Display Commodity Text  All  Printable  None

## Document Type

By default, the **Choose type:** dropdown is populated with **Requisition**. You can also view **Purchase Orders** (cut by Procurement based on a submitted requisition), **Invoices**, **Journal Vouchers**, and **Encumbrances** (the **Direct Cash Receipt** option is not currently available).

### To select the document type

In the **Choose Type:** dropdown, select the type of document you wish to view.

Choose type:

Submission#:

Display Accounting Information  Yes

- Requisition
- Purchase Order
- Invoice
- Journal Voucher
- Encumbrance
- Direct Cash Receipt

## Document Number

If you know the document number for the document you wish to view, type it in the **Document Number** input box. If you have forgotten the document number, you can query for it.

### To query for your Document Number

1. Click the **Document Number** button.

This takes you to the *Document Lookup* screen. By default, the **Document Number** input box is blank, the **User ID** is populated with your Banner ID, the **Activity Date** and **Transaction Date** are populated with **All**, the **Vendor ID** is blank, the **Requestor** is blank, the **Approved** and **Completed** dropdowns are populated with **All**, and **Reference Number** is blank.

The screenshot shows a web application interface with a navigation bar at the top containing 'Personal Information' and 'Finance'. Below the navigation bar is a search area with a text input field and a 'Go' button. On the right side of the search area, there are links for 'MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'Document Lookup'. Below the heading, a note states '\* - at least one of these fields required.' The form contains several fields: 'Document Number\*' (text input), 'User ID\*' (text input with 'UTRAIN02'), 'Activity Date\*' (dropdown menu with 'All'), 'Transaction Date\*' (dropdown menu with 'All'), 'Vendor ID\*' (text input), 'Requestor' (text input), 'Approved' (dropdown menu with 'All'), 'Completed' (dropdown menu with 'All'), and 'Reference Number\*' (text input). At the bottom of the form, there are two buttons: 'Execute Query' and 'Exit without Value'.

2. Type the known document information, such as if the document has been approved or its activity date, into the corresponding input boxes to narrow your search.
3. Click **Execute Query** to run the search.

You will see a list of all documents that meet your search criteria. If you do not see the document you wish to view, go back and broaden your search criteria. Once you have found the document number of the document you wish to view, click its number, which will return you to the *View Document* screen and will populate the **Document Number** input box with the document number you selected.

**NOTE:**

One or more fields marked with a red asterisk must be input to run the query. You cannot query all documents in the system by blanking out all fields; the system does not allow this.

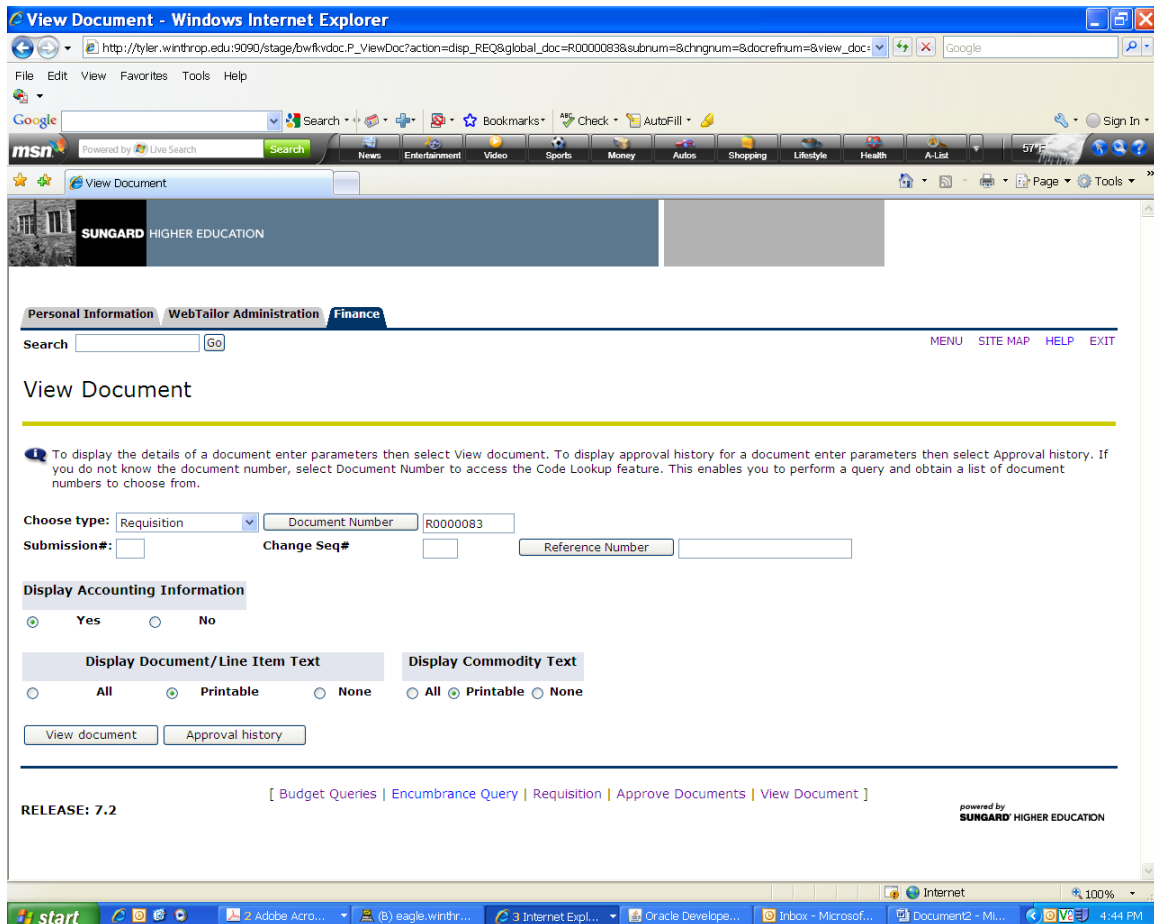
The screenshot shows a web browser window titled "Document Lookup - Windows Internet Explorer". The address bar shows the URL: [http://tyler.winthrop.edu:9090/stage/bwfidsec\\_P\\_Code\\_Lookup](http://tyler.winthrop.edu:9090/stage/bwfidsec_P_Code_Lookup). The browser toolbar includes a search bar with "Google" and various navigation buttons. The page content includes a header for "SUNGARD HIGHER EDUCATION" and a navigation menu with "Personal Information", "WebTailor Administration", and "Finance". A search bar is present with a "Go" button. Below the search bar, the page title is "Document Lookup". A message states: "Press the document number link to return the value to the View Document page. Press the Exit without Value button to return without a value to the View Document page." A checkbox is checked, indicating "11 documents selected." The main content is a table titled "Requisition Lookup Results".

Document Number	User ID	Activity Date	Trans Date	Vendor ID	Vendor	Requestor	Approved	Completed	Reference Number
R0000050	FADMIN19	May 12, 2009	Apr 21, 2009	A00010042	Apple Computer	Savage, Glenn	No		
R0000063	FADMIN19	Apr 22, 2009	Apr 22, 2009	A00010043	Rock Hill Coca Cola Bottling	Savage, Glenn	Yes	Yes	
R0000069	FADMIN19	Apr 22, 2009	Apr 22, 2009	A00010015	Cardinal Health	Savage, Glenn	Yes	Yes	
R0000075	FADMIN19	May 01, 2009	Apr 28, 2009	A00010011	Walker Electric Co	Savage, Glenn	Yes	Yes	
R0000081	FADMIN19	Apr 30, 2009	Apr 30, 2009	A00010030	Rock Hill Industrial Piping and Fabrication Inc	Savage, Glenn	No		
R0000082	FADMIN19	May 01, 2009	Apr 30, 2009	A00010030	Rock Hill Industrial Piping and Fabrication Inc	Savage, Glenn	Yes	Yes	
R0000083	FADMIN19	May 01, 2009	Apr 30, 2009	A00010030	Rock Hill Industrial Piping and Fabrication Inc	Savage, Glenn	Yes	Yes	
R0000084	FADMIN19	May 01, 2009	Apr 30, 2009	A00010030	Rock Hill Industrial Piping and Fabrication Inc	Savage, Glenn	Yes	Yes	
R0000085	FADMIN19	May 01, 2009	Apr 30, 2009	A00010009	White Office Furniture	Savage, Glenn	Yes	Yes	
R0000130	FADMIN19	May 12, 2009	May 12, 2009	W10307437	Drueke, Timothy	Savage, Glenn	Yes	Yes	
R0000133	FADMIN19	May 13, 2009	May 13, 2009	A00010028	Southpaw Screenprinting and Designs	Savage, Glenn	Yes	Yes	

Below the table, there are two buttons: "Exit without Value" and "Another Query".

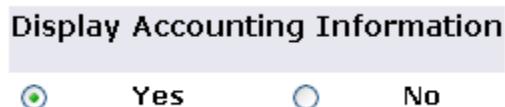
# Display Options

There are some additional fields that control how the information on the document will be presented to you. **You can leave the *Submission #*, *Change Seq #*, and *Reference Number* blank.**



## Display Accounting Information

The **Display Accounting Information** radio button tells the system whether or not to display FOAPAL information. For our purposes, you will want to leave this radio button defaulted to **Yes**; otherwise, the necessary FOAPAL information will not display.



## Display Document/Line Item Text

The **Display Document/Line Item Text** radio button tells the system whether or not to display all, some, or none of the information entered into the text areas in the *Document Text and Commodity Line Item Text* popups you encountered while submitting the requisition. There are three values for this radio button:

**All** — Displays information entered in both the *Print* and *No Print* text areas.

**Printable** — Displays only information entered in the *Print* text area. This is the default value, and it is recommended that you leave this radio button set to **Printable**.

**None** — Hides all information entered in the *Print* and *No Print* text areas.

Display Document/Line Item Text

All  Printable  None

## Display Commodity Text

The **Display Commodity Text** radio button is not currently in use. You can leave this radio button defaulted to **Printable**.

Display Commodity Text

All  Printable  None

## Viewing Options

Now that you've set the **Document Number** and all the display options, you can choose one of two viewing options:

**View Document** — To view the document identified by the number you have populated in the **Document Number** field, with the display options you have set, click the **View Document** button at the bottom of your screen. This displays a printable view screen of the document.

View document

### NOTE:

To print this document, select your browser's **File>Print** menu option or type CTRL+P on your keyboard and follow the prompts to print it.

View Document - Windows Internet Explorer

http://tylr.winthrop.edu:9090/itstage/bwfvdoc\_P\_ViewDoc

File Edit View Favorites Tools Help

Google

msn

View Document

Cancel Reason: Date:  
Requestor: Savage, Glenn 1515 Athletics Administration  
Accounting: Document Level

Ship to: Winthrop University  
Central Receiving  
520 Cherry Rd  
Rock Hill, SC 29733  
Attention: Savage, Glenn  
Contact:

Vendor: A00010030 Rock Hill Industrial Piping and Fabrication Inc  
450 Hall Spencer Rd  
Catawba, SC 29704  
Phone: 803-329-4781 Fax: 803-329-4119

**Requisition Commodities**

Item	Commodity Description	U/M	Qty	Unit Price	Ext Amount	Disc	Addl	Tax	Cost
1	Miscellaneous	EA	5	15	75.00	0.00	0.00	5.25	80.25
2	More Miscellaneous	EA	20	75	1,500.00	0.00	0.00	105.00	1,605.00
3	Much more Miscellaneous	EA	8	125	1,000.00	0.00	0.00	0.00	1,000.00
Total:									2,685.25

**Requisition Accounting**

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFS	Susp	NSFOvr	Susp	Amount
1	W	09	12X030	1515	71111	552					N	N	N		805.57
2	W	09	145220	5420	71111	111					N	N	N		1,074.10
3	W	09	13X320	1605	71111	552					N	N	N		805.58
Total of displayed sequences:															2,685.25

**Related Documents**

Transaction	Date	Document	Type	Document	Code	Status	Indicator
May 12, 2009		Purchase Order		P0000068		Approved	

Any field that is colored blue can be accessed. For instance, we can view the Purchase Order that was created from the requisition.

View Document - Windows Internet Explorer

http://tylr.winthrop.edu:9090/itstage/bwfvdoc\_P\_ViewDoc?action=disp\_PC0&global\_doc=P0000068&subnum=8&chngnum=8&disp\_actg=18&disp\_text=P

File Edit View Favorites Tools Help

Google

msn

View Document

**Purchase Order Header**

Purchase Order	Change#	Order Date	Trans Date	Delivery Date	Print Date	Total
P0000068		May 12, 2009	May 12, 2009	May 12, 2009		2,685.25

Origin: BANNER  
Complete: Y Approved: Y Type: Regular  
Cancel Reason: Date:  
Requestor: Savage, Glenn 1515 Athletics Administration  
Accounting: Document Level

Ship to: Winthrop University  
Central Receiving  
520 Cherry Rd  
Rock Hill, SC 29733  
Attention: Glenn Savage  
Contact:

Vendor: A00010030 Rock Hill Industrial Piping and Fabrication Inc  
450 Hall Spencer Rd  
Catawba, SC 29704  
Phone: 803-329-4781 Fax: 803-329-4119  
Currency:

**Purchase Order Commodities**

Item	Commodity Description	U/M	Qty	Unit Price	Ext Amount	Disc	Addl	Tax	Cost
1	Miscellaneous	EA	5	15	75.00	0.00	0.00	5.25	80.25
2	More Miscellaneous	EA	20	75	1,500.00	0.00	0.00	105.00	1,605.00
3	Much more Miscellaneous	EA	8	125	1,000.00	0.00	0.00	0.00	1,000.00
Total:									2,685.25

**Purchase Order Accounting**

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFS	Susp	NSFOvr	Susp	Amount
1	W	09	12X030	1515	71111	500					N	N			805.57

**Approval History** — To view the *Approval History* of the document identified by the number you have populated in the **Document Number** field, with the display options you have set, click the **Approval history** button at the bottom of your screen. This takes you to the *Approval History* screen for the document.

Approval history

The screenshot shows a Windows Internet Explorer browser window with the address bar displaying `http://tyler.winthrop.edu:9090/stage/bwfkvdoc.P_ViewDoc`. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar contains a search box with the text 'Google'. Below the browser window, the SUNGARD HIGHER EDUCATION website is visible. The page has a navigation menu with 'Personal Information', 'WebTailor Administration', and 'Finance'. A search box is present with a 'Go' button. The main content area is titled 'View Document' and features a yellow horizontal line. Under the heading 'Document Identification', there is a table with the following data:

Document Number	R0000082	Type	Requisition
Originator:	FADMIN19 Savage, Glenn		

Below the table, there is a checkbox labeled 'There are no approvals required at this time' which is checked. Under the heading 'Approvals recorded', there is a table with the following data:

Queue Level	Date	User
REQX 1	May 01, 2009	Boggs, Charlene
REQX 1	May 01, 2009	Boggs, Charlene
REQX 2	May 01, 2009	Boggs, Charlene

At the bottom of the page, there is a navigation menu with links: [ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document ]. The page footer includes 'RELEASE: 7.2' and 'powered by SUNGARD HIGHER EDUCATION'. The Windows taskbar at the bottom shows the Start button and several open applications, including Adobe Acrobat, Internet Explorer, and Oracle Developer.