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.

**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.
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.

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.
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

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