Financial Services
Missouri State University
901, South National Avenue
Springfield, MO-65897
(417) 836-5632

BannerFinance@MissouriState.edu

www.MissouriState.edu/FinancialServices/BannerFinance

www.MissouriState.edu/Ulink
1. Click the View Document link to access the screen below

2. There are 6 types of documents that can be queried:
   a. Requisition
   b. Purchase Order
   c. Invoice
   d. Journal Voucher
   e. Encumbrance
   f. Direct Cash Receipt
3. In the event that a banner generated document is unknown a search can be performed by click on Document Number. The following lookup page will appear.

**Document Lookup**

- at least one of these fields required.

**Cash Receipt Code Lookup**

- **Document Number**
- **User ID**
- **Activity Date**
- **Transaction Date**
- **Vendor ID**
- **Approved**
- **Completed**

**Execute Query**

4. To view all documents created by JOHN DOE, leave document number Blank and Execute Query. Depending on what Document Type is selected the results will be displayed.

5. Alternatively, if there is a particular document that is being searched, entering that number in the Document Number field will display that document number alone.
6. Use the Activity Date, transaction date and vendor ID field to narrow down search to a particular period, or vendor.

7. A wildcard maybe used while querying specific documents. Use of the % either before or after an indicator like R-Requisition, I-Invoice, P-Purchase Order will generate those documents alone. Also while querying for a Invoice and the last three digits are known, a search, %123 can be performed. This will return all Invoices that end with 123. Placing the % after 123 will not result in any hits as all invoices start with the letter I only.

8. Results in Requisitions ending in 12. If a search is performed for %12%, anything that has 12 anywhere in the code will be returned. This will show only those Requisitions created by the person logged in and that end in 12.

9. By clicking on R0000012, this will select the Requisition number and go back to previous view document screen.
10. Now click on View Document to view selected document

![View document button]

11. After selecting View Document, SSB will display the requisition that was entered.

**View Document**

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**Requisition Header**

<table>
<thead>
<tr>
<th>Requisition</th>
<th>Order Date</th>
<th>Trans Date</th>
<th>Delivery Date</th>
<th>Print Date</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>R00000082</td>
<td>Jun 05, 2008</td>
<td>Jun 05, 2008</td>
<td>Jun 05, 2008</td>
<td></td>
<td>415.00</td>
</tr>
</tbody>
</table>

**Origin:** SELF_SERVICE  
**Complete:** Y  
**Approved:** Y  
**Type:** Procurement  
**Cancel Reason:**  
**Date:**  
**Requestor:** UTrain One  
**059991**  
**FINANCE TRAINING ONE**  
**Accounting:** Document Level

**Ship to:**  
901 S National  
STMA  
Springfield, MO 65804

**Attention:** Receiving Manager

**Contact:** Receiving Manager  
417-836-5776

**Vendor:** M999999955  
UTrain Vendor Fifty-Five  
5555 Street  
Springfield, MO 65804

**Phone:** 417-836-5555  
**Fax:**

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**Requisition Commodities**

<table>
<thead>
<tr>
<th>Item</th>
<th>Commodity Description</th>
<th>U/M</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Ext Amount</th>
<th>Tax</th>
<th>Amount</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1PA110</td>
<td>Paper-Academic 3w+1w EA</td>
<td></td>
<td>20</td>
<td>25</td>
<td>500.00</td>
<td></td>
<td>415.00</td>
<td>415.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>100.00</td>
<td>15.00</td>
<td>0.00</td>
<td>415.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total:** 415.00

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At bottom of page, a related documents area will display additional documents generated from this requisition. Invoice, Purchase Orders, Bids, etc will display at the bottom.

Click on the link to view document.

*TO VIEW CHECK AND SUPPORTING DOCUMENTATION, NAVIGATE TO INVOICE*

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**Related Documents**

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Document Type</th>
<th>Document Code</th>
<th>Status Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 25, 2008</td>
<td>Purchase Order</td>
<td>P00000006</td>
<td></td>
</tr>
</tbody>
</table>

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Click to view PO information