

Finance Dashboard - My Finance Query

View Document User Guide

Part I - Gaining Access

1. Make sure you have authorized Fund/Organization (FOAPAL) access in Banner.

FOAPAL stands for six accounting elements of finance data in Banner: Fund, Organization, Account, Program, Activity and Location. FOAPAL authorization can also be called Fund-Organization Access. In Banner, all access to the (University and Foundation) Finance data is based on the Fund/Organization Access that has been authorized/established for an individual. **You must have (Approver, Originator or View) access to a Fund/Organization before you can use View Document function.**









To request “Approver” access, submit a [FOAPAL Authorization - Approver](#) Request. This form can be used to replace approver access.

To request “Originator” or “View Only” access, submit a [FOAPAL Authorization - Originator/View](#) Request.

If necessary, you may run [Fund & Organization Access Report](#) reprot to check access for you or others. [What does Approver, Originator or View Access mean?](#)

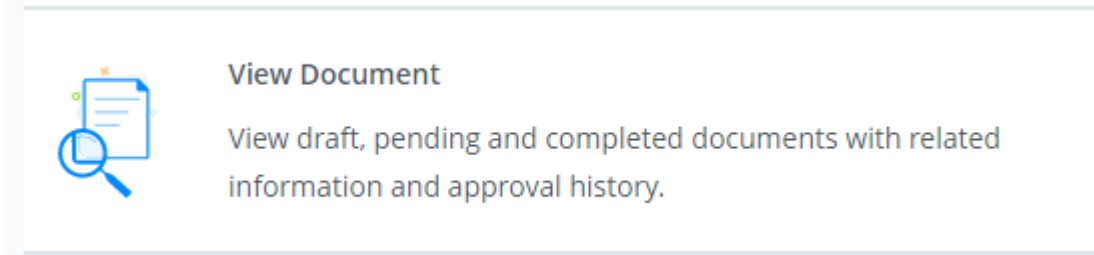
2. Access Finance Dashboard **Approver Document** Options.

From the [My Missouri State](#) portal, use the **Discover** tool from the main menu and search “Finance”, select **Finance Resources** card and click on **Finance Dashboard** to start.

 My Finance Query Create, view and share budget availability, encumbrance and payroll queries.	 My Requisitions Create and view draft, pending and completed requisitions and supporting documentation.
 My Journals Create and view draft, pending and completed journals and supporting documentation.	 Purchase Orders (West Plains Only) Create purchase orders or purchase orders in process.
 Approve Documents View list of documents pending approval. Approve, disapprove, or deny.	 Budget Development Create and review fiscal year operating budgets for the budget development process.
 Delete Finance Template Delete templates for Finance Queries, Budget Development, and Purchase Orders.	 View Document View draft, pending and completed documents with related information and approval history.

Part II – Performing a View Document Query

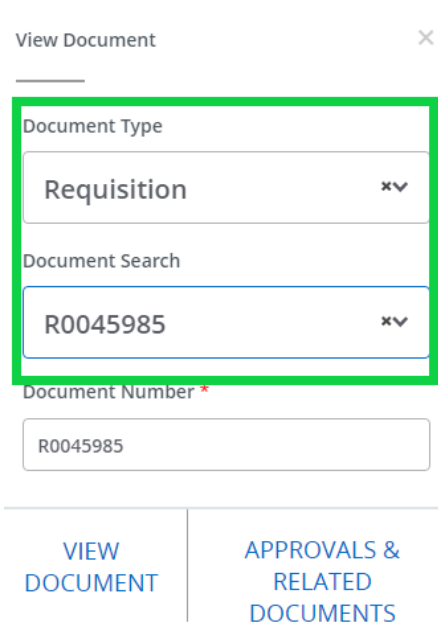
1. From **My Finance Dashboard** click on **View Document** to start.



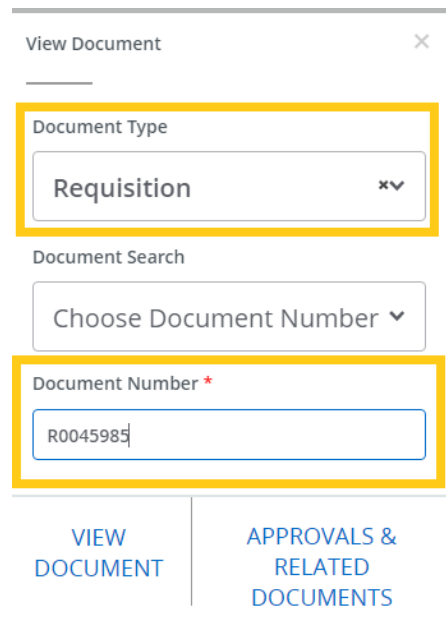
2. Select the **Document Type** and **Document Number**.

You may click the Document Search box to search for documents by selecting the **Document Type** and typing the document number or choosing one from the **Document Search** dropdown box, document number field will auto populated based on your selection.

You may leave the **Document Search** box blank and **type the number** in the **Document Number** field to find your documents



The screenshot shows the "View Document" form. The "Document Type" dropdown is set to "Requisition" and the "Document Search" dropdown is set to "R0045985". The "Document Number" field is populated with "R0045985". The "VIEW DOCUMENT" and "APPROVALS & RELATED DOCUMENTS" buttons are visible at the bottom.



The screenshot shows the "View Document" form. The "Document Type" dropdown is set to "Requisition" and the "Document Number" field is populated with "R0045985". The "Document Search" dropdown is set to "Choose Document Number". The "VIEW DOCUMENT" and "APPROVALS & RELATED DOCUMENTS" buttons are visible at the bottom.

3. **VIEW DOCUMENT** Option

By clicking on **VIEW DOCUMENT** option, it opens a new window with the document detail in PDF format. This option does not provide information of related documents.



PURCHASE REQUISITION
(Non-negotiable; not a valid Purchase Order)

Requestor	Shelly Deckard	Requisition Number	R0045985
Phone	- Ext.	Transaction Date	03/10/2021
Email	[REDACTED]	Delivery Date	03/17/2021
Organization	CTR FOR APPL SCIENCE & ENGINEERING (072008)	Status	Converted to PO
Accounting Type	Document Level	Currency	USD

Ship To	JVIC	Vendor	
Address	524 N Boonville	Address	
	Springfield MO 65804		
Attention To	Matt Curry 417- 8365279 Ext	Phone	- Fax -
		Email	

Requisition Comments

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	Supplies(SU)	EA	1.00	8,750.0000	0.00	8,750.00

Total Commodities						8,750.00
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Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspende	NSF Override	Suspende	Distribution Percent	Net Amount
1	11-103030-032008-73316-031	No	No	No	100.0000	8,750.00

4. **APPROVALS & RELATED DOCUMENTS** option

Approvals & Related Document option lets user see sets (a & b) of information below:

- a. **Related Documents:** It lists all related documents: Requisition, Purchase Order, Invoice, or check disbursement. When a hyperlink is provided here, you will be able to access associated image of those documents.

[My.Finance](#) > [View Document](#) > [Approval & Related Documents - Requisition](#)

Approval & Related Documents - Requisition

Related Documents

Purchase Order P005432Z Approved	Invoice I055949Z Paid	Check Disbursement V0006664	Receiving Documents Y0008470 Completed
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Attachments

No Attachments for R0045985

Approval History

SPFD GRANT VALIDATION (GGRT) (10)
Beth Minor| 03/16/2021

GRNT CTR FOR APP SCI & ENGINR (GCA1) (10)
Matthew Curry| 03/10/2021

Approvals Required

No Approval required information available for R0045985

[BACK TO VIEW DOCUMENT](#)

Note that although a document may affect various budget, you will only see documents detail relating to those Fund/Organizations for which you have been granted access.

b. Approval History

Approval history lets you see all approvals which have been performed on the document and whether the document is waiting for any additional approvals and by whom.

My Finance • View Document • Approval & Related Documents - Requisition

Approval & Related Documents - Requisition

Related Documents

Purchase Order R0054327 Approved	Invoice I055949Z Paid	Check Disbursement V0006604	Receiving Documents Y0008470 Completed
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Attachments

No Attachments for R0045985

Approval History

SPFD GRANT VALIDATION (GGRT) (10)
Beth Minor| 03/16/2021

GRNT CTR FOR APP SCI & ENGINR (GCA1) (10)
Matthew Curry| 03/10/2021

Approvals Required

No Approval required information available for R0045985

BACK TO VIEW DOCUMENT

5. Document (Requisition) Number Lookup feature

Banner 2023's Q3 upgrade restored the Document (Requisition) Number Lookup feature.

- Added a search button labeled Document Number Lookup on the View Document page (the button uses a magnifying glass icon) that opens a lookup parameter page.

My Finance • View Document

View Document

Document Type
Requisition x v

Document Search
Choose Document Number v

Document Number *
Please Enter Document Number [magnifying glass icon]

- Added a lookup parameter page specific for requisition document type with parameter fields associated with that document type.

My Finance • View Document • Look Up - Requisition

Look Up - Requisition

Document Number:

User ID:

Activity date - From: Activity date - To:

Transaction Date - Year: Transaction Date - Month:

Vendor ID:

Requestor:

Approved: Completed:

Reference Number:

Query result:

My Finance • View Document • Lookup Results

Lookup Results

Requisition - Lookup Results 3

Document Number	User ID	Activity Date	Transaction Date	Vendor ID	Requestor	Approved	Completed	Reference Number
R0044299	XZHOU	04/14/2020	04/13/2020	M02953124	Theresa McCoy	Yes	Yes	-
R0045687	XZHOU	01/05/2021	01/04/2021	M02953124	Theresa McCoy	Yes	Yes	-
R0049293	XZHOU	02/17/2023	02/17/2023	M02953124	Mandy - Xiaomin Zhou	No	No	-

Other fixe from 2023 Q3 upgrade: View Document - Restore capability to view Check Date with the Related Documents section for View Document

My Finance • View Document • Approval & Related Documents - Invoice

Related Documents

Requisition R0000132 Approved	Purchase Order P0000182 Approved	Check Disbursement 00370157 09/24/2008
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Part III – Issues in Finance Dashboard/View Document

There are a few important features existing in Legacy SSB8 but missing in SSB9 – Finance Dashboard/View Document, which have been reported to Ellucian Banner Support center and will keep all finance users updated for any changes. For now, if you need to use those features below, please go to **Legacy Finance Self-Services - View Document** option.

1. Transaction Date is not provided for each document under View Document/Related Document section. Transaction Date for check disbursement is restored from 2023's Q3 upgrade.
2. No hyperlink (image link) for Check Disbursements.
3. Hyperlinks (to view associated images in BDM) for all related documents (Requisition, PO, Invoice or Check) are NOT displayed in one place/page. You can only access one type of document's hyperlinks at a time.

If you are viewing document for a Requisition, then you will only be able to see the hyperlink (images of requisition if available) for that requisition, there will be NO hyperlinks for PO, Invoice or Check. To view the image of PO, Invoice or Check, you must query that document.

The screenshot shows two side-by-side panels. The left panel, titled "Finance Resources", contains two entries: "Finance Dashboard" and "Legacy Finance Self-Service". The "Legacy Finance Self-Service" entry is highlighted with a red box. The right panel, titled "Self-Service Options", contains a list of options: "Banner Self-Service", "Alumni and Friends", "Student", "WebTailor Administration", "Finance", "Grant Comparison Report", and "View Document". The "View Document" option is highlighted with a red box.

The screenshot shows two side-by-side panels. The left panel, titled "Finance Resources", contains a "Finance Dashboard" section with a description and two links: "Fund & Organization Access Report" and "Finance Dashboard Training Guides". The "Legacy Finance Self-Service" link is highlighted with a red box. The right panel, titled "Finance", contains a list of options: "Grant Comparison Queries", "View Document", and "Purchase Order (West Plains Only)". The "View Document" option is highlighted with a red box.