

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](#) report to check access for you or others. [What does Approver, Originator or View Access mean?](#)

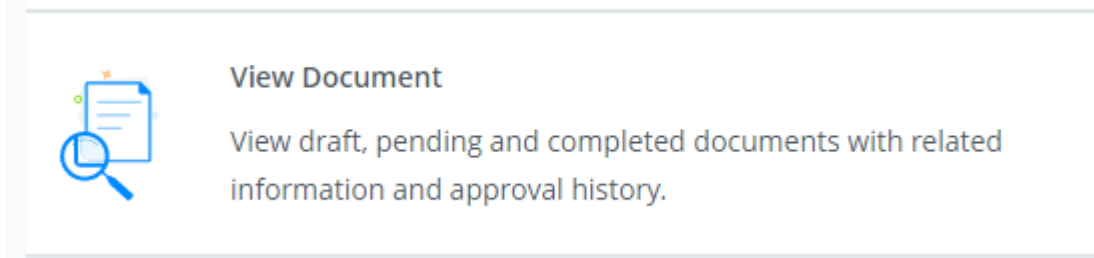
2. Access Finance Dashboard **Approver Document** Options.

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 image shows the "View Document" form with the following fields highlighted in green:

- Document Type**: Requisition x▼
- Document Search**: R0045985 x▼
- Document Number ***: R0045985

At the bottom, there are two buttons: **VIEW DOCUMENT** and **APPROVALS & RELATED DOCUMENTS**.

The image shows the "View Document" form with the following fields highlighted in yellow:

- Document Type**: Requisition x▼
- Document Search**: Choose Document Number ▼
- Document Number ***: R0045985

At the bottom, there are two buttons: **VIEW DOCUMENT** and **APPROVALS & RELATED DOCUMENTS**.

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.



Missouri State
UNIVERSITY

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

Accounting Distributions						
SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	11-103030-033000-73316-031	NA	NA	NA	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—along with their status and transaction date. Under the attachments section, if a hyperlink is provided, you will be able to access the associated image of the queried documents. Note that fund-org security is applied, so you can only access those documents or their backup images if you have access to all fund-orgs associated with the document.

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

Approval & Related Documents - Requisition

Related Documents

Purchase Order	Invoice	Check Disbursement	Receiving Documents
P0054327 03/25/2021 Approved	I0559497 05/05/2021 Paid	V0006664 05/07/2021 Completed	Y0008470 05/05/2021 Completed

Attachments

[ACCOUNT REMITTANCE INFORMATION - CUSTOMER.PDF](#) - Requisition
[ACCOUNT INFORMATION - CUSTOMER.PDF](#) - Requisition
[PRECISIONTORQUECONTROL.PDF](#) - Requisition
[VENDORREGISTRATIONFORM.PDF](#) - Requisition

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.

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

5. Document (Requisition) Number Lookup feature

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

- a. 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

Search

- b. 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	-		