BANNER FINANCE SELF-SERVICE

MISSOURI STATE UNIVERSITY

U-Link

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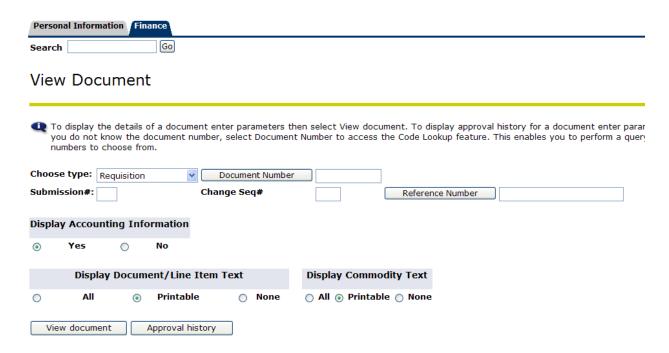(417) 836-5632

BannerFinance@MissouriState.edu

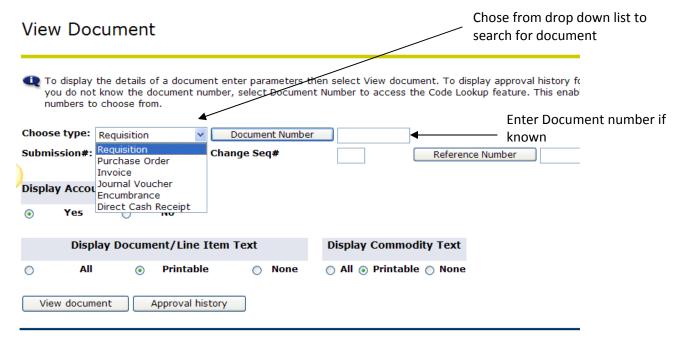www.MissouriState.edu/FinancialServices/BannerFinance

www.MissouriState.edu/Ulink

Finance

Budget Queries
Encumbrance Query
Requisition
Purchase Order
Approve Documents
View Document
Budget Transfer
Multiple Line Budget Transfer
Budget Development

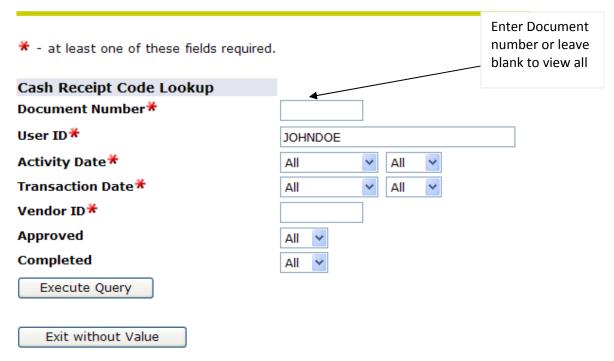1. Click the View Document link to access the screen below

Personal Information | Finance

Search [＿＿＿＿＿] [Go]

View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters
you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query
numbers to choose from.

Choose type: [Requisition ▾] [Document Number] [＿＿＿＿＿]
Submission#: [＿＿] Change Seq# [＿＿] [Reference Number] [＿＿＿＿＿＿＿＿＿]

Display Accounting Information
◉ Yes   ○ No

Display Document/Line Item Text   **Display Commodity Text**
○ All   ◉ Printable   ○ None   ○ All ◉ Printable ○ None

[View document] [Approval history]

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

View Document

To display the details of a document enter parameters then select View document. To display approval history fo you do not know the document number, select Document Number to access the Code Lookup feature. This enab numbers to choose from.

Choose type: | Requisition | Document Number |

Requisition
Purchase Order
Invoice
Journal Voucher
Encumbrance
Direct Cash Receipt

Submission#: | Change Seq# | Reference Number |

Enter Document number if known

Display Accou

Yes   No

Display Document/Line Item Text	Display Commodity Text
○ All ⊙ Printable ○ None	○ All ⊙ Printable ○ None

[View document] [Approval history]

[Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents | View Documen Development]
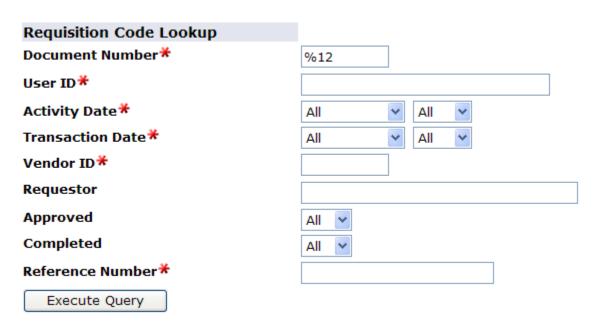
3. In the event that a banner generated document is unknown a search can be performed by click on [Document Number]. The following lookup page will appear.

Document Lookup

✱ - at least one of these fields required.

Enter Document number or leave blank to view all

Cash Receipt Code Lookup

Document Number✱

User ID✱   JOHNDOE

Activity Date✱   All   All

Transaction Date✱   All   All

Vendor ID✱

Approved   All

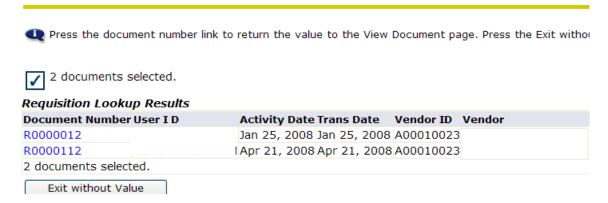Completed   All

[Execute Query]

[Exit without Value]

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.

Requisition Code Lookup

Document Number*	%12
User ID*	
Activity Date*	All All
Transaction Date*	All All
Vendor ID*	
Requestor	
Approved	All
Completed	All
Reference Number*	

Execute Query

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.

Document Lookup

ℹ️ Press the document number link to return the value to the View Document page. Press the Exit withou

☑ 2 documents selected.

Requisition Lookup Results

Document Number	User I D	Activity Date	Trans Date	Vendor ID	Vendor
R0000012		Jan 25, 2008	Jan 25, 2008	A00010023	
R0000112		I Apr 21, 2008	Apr 21, 2008	A00010023	

2 documents selected.

Exit without Value

9. By clicking on R0000012, this will select the Requisition number and go back to previous view document screen.

Choose type:	Requisition	Document Number	R0000012
Submission#:		Change Seq#	

10. Now click on View Document to view selected document

View document	Approval history

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

View Document

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0000082	Jun 05, 2008	Jun 05, 2008	Jun 05, 2008		415.00

Origin:	SELF_SERVICE				
Complete:	Y	Approved:	Y	Type:	Procurement
Cancel Reason:				Date:	
Requestor:	UTrain One		059901	FINANCE TRAINING ONE	
Accounting:	Document Level				

Ship to:	901 S National
	STMA
	Springfield, MO 65804
Attention:	Receiving Manager
Contact:	Receiving Manager

Contact phone: 417-836-5776

Vendor:	M99999955	UTrain Vendor Fifty-Five
	5555 Street	
	Springfield, MO 65804	
Phone:	417-836-5555	Fax:

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount	Cost
				Disc	Addl	Tax	
1	PA110	Paper-Academic 3w+1w	EA	20	25	500.00	
				100.00	15.00	.00	415.00
					Total:	415.00	

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

Related Documents

Transaction Date	Document Type	Document Code	Status Indicator
Jan 25, 2008	Purchase Order	P0000006	

Click to view PO information