HOW TO view a Purchase Requisition, Purchase Order, Invoice, Journal or Encumbrance in Minerva (View Document menu option) including approval history

The View Document menu allows authorized users* to view document details and the approval history of a document using either:

- Document number - you must have query access to at least one of the FOAPALs charged(Except Purchase Requisitions)
  OR
- Your Banner UserID - to see documents which you have processed

*Authorized User = Fund Financial Managers or Principal Investigators, those who are directly responsible for administering funds, have automatic access to query fund balances and transactions posted to their funds and grants in Minerva. Administrative staff and others who need access to query this information must attend training and submit the [FIS Authorization form](#).

Documents may also be viewed in Banner using the forms **FOIDOCH** and **FGIDOCR**.

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"Choose type" options explained

When using the View Document menu option, you **must always select a document type from the "Choose type" drop down list**.

The table below outlines when to select each document type.

Choose type option	Select this option if your document number starts with/for the following document type...
Requisition	**McGill MarketPlace (MMP)** requisitions - using the requisition number assigned in MMP (i.e. 12345678)

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	o All - to search for documents regardless of their status (Completed/In Process) o Yes - to search for documents which have been "Completed" (submitted) o No - to search for documents which are still "In Process"
Status	You may only select a status for Journal Voucher documents (i.e. IDC/JE15/JE16/US currency deposit) There are three options to choose from in the drop-down menu: o Pending - to search for documents which have not yet been posted to the ledger o Posted - to search for documents which have been posted to the ledger o Both - to search for documents regardless of their status

7. **Click** on the **Execute Query** button to display a list of documents meeting the entered search criteria.
8. Your search results will appear in a table.

The table below provides an explanation of pertinent fields:

Document Number	Banner assigned document number
User ID	Your Banner userID
Activity Date	The date the document was first created
Trans Date	Transaction Date - The last date the document was changed/updated
Requestor	Name of the person who created the document