

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

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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 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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## How to view document details OR the approval history of a document, if you have the Document Number on hand

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration Menu**
3. Select the **View Document** menu option.
4. From the **Choose type** drop down list, **select the document type** based on the document number you have on hand.
5. **TAB** to the **Document Number** field. Enter the document number (i.e. R0123456).  
If you have an **MMP assigned requisition number**, leave the Document Number field blank and enter it in the **Reference Number** field i.e. 12345678.
6. To view document details, click the **View document** button.  
OR  
To view the approval history of the document, click the **Approval history** button.

**Notes about approval history** - This option allows you to view a listing of "approvers" - individuals who have/have not already approved the document. Approvers may be Fund Financial Managers (FFM)/Principal Investigators (PI) and/or their delegates, and Financial Services staff (if applicable).

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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.**

### View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from. You can now view invoice document images. Click on the **HELP** link at the top right for more information.

Choose type: Invoice  
 Requisition  
 Purchase Order  
 Invoice  
 Journal Voucher  
 Encumbrance  
 Direct Cash Receipt

Document Number  
 Change Seq#  
 Reference Number

Display Document/Line Item Text  
 All  Printable  None

Display Commodity Text  
 All  Printable  None

View document Approval history

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...
<b>Requisition</b>	<b>McGill MarketPlace (MMP)</b> requisitions - using the requisition number assigned in MMP (i.e. 12345678)
	Banner requisition - document number starting with "R" (i.e. R0123456) - as indicated in the system generated approval notification emails
<b>Purchase Order</b>	Documents starting with "P0" (i.e. P0123456)
<b>Invoice</b>	<b>Payment Requests</b> - documents starting with "I" (i.e. I0123456)
	<b>Invoices paid with a purchase order</b> - documents starting with "I" (i.e. I0223456)
	<b>Electronic invoices paid with a purchase order</b> - documents starting with "IV" (i.e. IV013456)
<b>Journal Voucher</b>	<b>IDCs</b> (inter-departmental charges) - document number starting with "J" (i.e. J0123456)

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	<b>JE15/JE16s</b> (intra-fund/inter-fund journals) - document number starting with "J" (i.e. J0123456)
	<b>US currency deposits</b> - document number starting with "J" (i.e. J0123456)
	<b>Adjustment on Past Payroll Transaction</b> - document number starting with "PA" (i.e. PA123456)
<b>Encumbrance</b>	Encumbrances - document number starting with "E" (i.e. E0123456)
<b>Direct Cash Receipt</b>	<b>CDN currency deposits</b> - document number starting with "H" (i.e. H0123456)
	<b>Foreign currency deposits (other than US)</b> - document number starting with "H" (i.e. H0123456)

### How to view a scanned image of a non-electronic invoice

*Note:* Electronic invoices have document numbers starting with "IV". These are invoices which the supplier has submitted electronically - there is no paper/hard copy invoice to scan. The information displayed on the screen matches the invoice submitted electronically by the Supplier.

1. Follow the steps above to query an Invoice document.
2. If a scanned image of an invoice is available, you will see a **View** button near the top of the page (in the Supporting documents column).



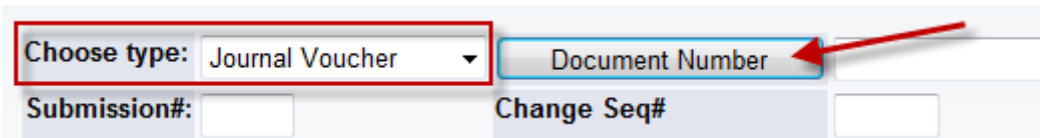
3. Click on the **View** button.
4. The scanned image will appear in a new window.

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## How to view a document which you processed/is in process and you do not have the document number

**Note:** You may only look up transactions which you originated in Banner (IDCs (inter-departmental charges), JE15/JE16s (intra-fund/inter-fund journals), deposits, and manual encumbrances).

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration Menu**
3. Select the **View Document** menu option.
4. From the **Choose type** drop down list, **select the document type** based on the document you wish to view.
5. **Click on the Document Number** button.



6. A search window will appear. By default, your Banner User ID is displayed in the User ID field - leave as is. To narrow the search results, you may use any of the following fields (this is optional):

<i>Field</i>	<i>Explanation</i>
<b>Activity Date</b>	The date the document was first created Select month and year
<b>Transaction Date</b>	The last date the document was changed/updated Select month and year
<b>Vendor ID</b>	9-digit ID assigned to a supplier's record in Banner
<b>Approved</b>	There are three options to choose from in the drop-down menu: <ul style="list-style-type: none"> <li>○ All - to search for documents regardless of their approval status</li> <li>○ Yes - to search only for documents which have been approved (by all assigned approvers)</li> <li>○ No - to search only for documents pending approval</li> </ul>
<b>Completed</b>	There are three options to choose from in the drop-down menu:

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	<ul style="list-style-type: none"> <li>○ All - to search for documents regardless of their status (Completed/In Process)</li> <li>○ Yes - to search for documents which have been "Completed" (submitted)</li> <li>○ No - to search for documents which are still "In Process"</li> </ul>
<b>Status</b>	<p>You may only select a status for Journal Voucher documents (i.e. IDC/IE15/IE16/US currency deposit)</p> <p>There are three options to choose from in the drop-down menu:</p> <ul style="list-style-type: none"> <li>○ Pending - to search for documents which have not yet been posted to the ledger</li> <li>○ Posted - to search for documents which have been posted to the ledger</li> <li>○ Both - to search for documents regardless of their status</li> </ul>

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.

### Requisition Lookup Results

Document Number	User ID	Activity Date	Trans Date	Vendor ID	Vendor	Requestor	Approved	Completed	Reference Number
<a href="#">R0194489</a>		Jun 03, 2009	Jun 19, 2009	260007799	VWR International Co.		No	Yes	<a href="#">11247050</a>
<a href="#">R0196627</a>		Jun 19, 2009	Jun 19, 2009	260008212	Agilent Technologies Canada Inc.		No	Yes	<a href="#">11476460</a>

The table below provides an explanation of pertinent fields:

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

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<b>Approved</b>	Document is approved - Yes or No If "No" is displayed, you may want to view the approval history of the document
<b>Completed</b>	Document is complete - Yes or No If "No" is displayed, the document is still In Process

9. Click on the **hyperlinked Document Number/Reference Number** for the document you wish to view.
10. You will be brought back to the main page of the View Document menu option and the Document Number field will display the selected document number.
11. Click on the **View document** button to view the document details.
12. To view another document from the search results, use the Back button on your browser until you see the search results. Repeat Steps 8 to 11.