Finance Self-Service- View Documents

The Finance Self-Service View Document Form allows a user to view detail information about a document (requisition, purchase order, invoice, journal voucher, encumbrance, or direct cash receipt). Any existing Banner document may be retrieved and viewed by this means.

To access Financial Self-Service:

1. Log on to your Pace Portal, click on your Staff tab
2. Select Finance Self-Service under the Staff Resources & Technology section.
3. Click on the My Finance Query button.

On the landing page of My Finance Query

click on the 8 towards the upper right-hand corner of the screen.

In the popup box that appears enter the following information:

1. Select Document Type
2. Use the Document Search functionality, by entering the first few characters of the document number to locate the correct number
3. OR enter the specific Document Number to search (ie. P0221981)
4. Click View Document button to view document details OR click on Approvals & Related Documents to view approval history and related documents such as Invoices.
View when clicking on **View Document**: 

```
PURCHASE ORDER

Requestor: [Redacted]  
Phone: Ext  
Email: [Redacted]  
Organization: [Redacted]  
Accounting Type: Commodity Level  
Type: Regular  
Purchase Order #: P0221981  
Transaction Date: 02/28/2019  
Delivery Date: 03/01/2019  
Status: Completed  
Currency: USD  
Matching: Not Required
```

```
Ship To: CV01  
Address: 100 Summit Lake Drive  
3rd Floor  
Valhalla NY 10595  
Attention To: [Redacted]  

Vendor: 161 William Street LLC (U00480106)  
Address: 110 East 59th Street  
37th Floor  
c/o Jack Resnick & Sons, Inc  
New York NY 10022
```

View when clicking on **Approvals & Related Documents**: 

```
Related Documents

Invoice: E9130809  
Check Disbursement: 00262419

Approval History

No Approval History Information available for P0221980

Approvals Required

No Approval required Information available for P0221980

OK
```