How to use View Document

Note: The View Document Form allows a user to view information about a document on the Web

- 1. Access the Minerva web site at http://www.is.mcgill.ca/minerva/
- 2. Click on Minerva Login
- 3. Enter your McGill ID (*Example: 15099999*)
- 4. Enter your **Pin** (If you do not know your Pin, click on the **Forgot Pin**? button, answer the **Authentication Question**, and enter in a new **Pin** number).
- 5. Click on McGill Fund Administration Menu

How to view a document using a document number

- 6. Click on View Document.
- 7. Select the **Document Type** from Drop down list *(example: Invoice)*
- 8. Tab to the Document Number field and enter the **Document Code** *(example: I0000010)*
- 9. Click on the View document button
- 10. The document will be displayed
- 11. Click on your browser's **BACK** button to perform another query

How to view a document without using a document number

- 12. Click on View Document.
- 13. Select the **Document Type** from Drop down list *(example: Requisition)*
- 14. Click on the **Document Number** button to perform specific search criteria
- 15. To improve response time, you must enter at least **ONE** of the following items:
 - a. Document Number (use a wildcard search like I%)
 - b. User Id the five character Banner Client Id of the user who originated the document)
 - c. Activity Date
 - d. Transaction Date
 - e. Vendor ID
- 16. Click on the **Execute Query** button.

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17. A list of documents meeting the search criteria will be displayed

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18. Click on the **Blue hyperlink** to view the document

Created by: Karen Kirouac, Training and Communications Officer, Accounting department

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- 19. Click on View Document
- 20. Click on your browser's **BACK** button to perform another query or view approval history

How to view approval history of a document

- 21. Click on View Document.
- 22. Select the **Document Type** from Drop down list *(example: Invoice)*
- 23. Tab to the Document Number field and enter the **Document Code** *(example: I0000010)*
- 24. Click on the Approval History button
- 25. Click on your browser's **BACK** button to perform another query or **Exit Minerva.**

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