

HOW TO view a Purchase Requisition, Purchase Order, Invoice or Cheque Document in Banner (FOIDOCH)

The form FOIDOCH allows authorized users* to view "purchasing" related documents:

- **Purchase Requisition** (linked to the form FPIREQN to view document details)
- **Purchase Order** (linked to the form FPIPURR to view document details)
- **Invoice** (linked to the form FAIINVE to view document details)
- **Cheque** payment (linked to the form FACHKH to view document details)

*Authorized User = An individual with Banner access to the Finance module.

Before you begin

To use this form, you must have the **document number** for one of the above mentioned document types (i.e. R0365612).

"Non-purchasing" related documents may be viewed using the **Banner form FGIDOCR**.

Documents may also be viewed using the **Minerva > Finance (Fund) Administration menu > View Documents** menu option.

How to use FOIDOCH

1. Log in to **Banner**.
2. Enter **FOIDOCH** in the **Go To** field and hit **Enter** or select **FOIDOCH** (Document History form) from the **Finance Fast Track menu**.
3. Based on the document number you have on hand, enter the **Document Type**:
 - Enter REQ if querying a purchase requisition
 - Enter PO if querying a purchase order (enter the letter "O")
 - Enter INV if querying an invoice
 - Enter CHK if querying a cheque

Oracle Fusion Middleware Forms Services: Open > FOIDOCH

File Edit Options Block Item Record Query Tools Help

Document History FOIDOCH 8.0 (Banner)

Document Type: REQ Requisition

Document Code: R0365612

Requisition	Status

Bid	Status

Purchase Order	Status

Issues	Status

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4. TAB to the **Document Code** field and enter the document number that you are querying, i.e. R0365612

Note - For requisitions, you must use the Banner assigned "R" document number.

5. Click on the **Next Block** icon or use **Ctrl- Page Down** if you prefer using the keyboard. All associated documents will be listed along with their status.

TIP:

In addition to the document number, the system displays the current status for each document. The status code appears in the one-character column to the right of the document number.

Legend for the status field:

Status	Explanation
A	Approved
C	Completed
P	Paid
S	Suspended
O	Opened
X	Cancelled
H	Hold

6. To obtain more information for any of the listed documents, select the document number - either highlight the row by using **Next Block** or **click on a specific** document number field.
7. Once highlighted/selected, click the **Options** menu and choose the appropriate form for the document you want to look up.

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The screenshot shows the Banner FOIDOCH form interface. At the top, there is a menu bar with 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons. The main window title is 'Invoice Information [FAIINVE]'. The form is divided into several sections, each with a 'Document Type' and a 'Status' indicator. The 'Document Code' is set to 'R0365612'. The sections are: Requisition (REQ), Bid, Purchase Order (PO), Issues, Invoice (I), Check, Return, Receiver, Asset Tag, and Asset Adjustment Status. The 'Invoice' section is circled in red, and the 'Status' indicator for the invoice is 'P'. A red arrow points to the 'View Status Indicators' button in the toolbar.

To access any of these forms directly (FPIREQN, FPIPURR, FAIINVE, FAICHKH), follow the instructions below.

1. Log in to **Banner**.
2. Enter **the form name** in the **Go To** field and hit **Enter**.
3. Enter the document number:
 - For FPIREQN, enter the document number beginning with the letter "R"
 - For FPIPURR, enter the document number beginning with "P0" (number zero)
 - For FAIINVE, enter the document number beginning with the letter "I"
 - For FAICHKH, enter the check number and Bank code (if you do not know the Bank Code, follow the steps above to query the form FOIDOCH)
4. Click on the **Next Block** icon or use **Ctrl- Page Down** if you prefer using the keyboard.
5. Document details will appear.
6. To navigate to the other windows in the form, click Next Block or use Ctrl- Page Down if you prefer using the keyboard.