

Banner Financial Information Systems Reference Manual

Querying Finance Documents

Banner v. 9

Tracking a Requisition using FOIDOCH

To look – up a requisition on the FOIDOCH form, follow these steps:

1. Open the FOIDOCH form. From the front page log in screen, type into the search bar: **'FOIDOCH'.** Press enter.

2. Type 'REQ' in the Document Type field.

3. Type the requisition number in the 'Document Code' field. Include the 'R' in front of the number.



Note: You can also use FOIDOCH to search other document types including Invoices, Purchase Orders, and Checks by double clicking in the 'Document Type' field which will bring you to menu FTVDTYP. Select the document type from the drop down menu.

Jocument History FOIDOCH 9.3.	2 (PROD)					E 100	METRIEVE	En la conco
ument Type: REQ	Requisition		Document Code:					
ed: Fill out the fields above and	press Go.							
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		Criteria Q Document Type ADJ	Document Description Adjustments to Inventory	Last Activity Date 10/11/1993				
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4. Click the **GO** button to view your results. All documents associated with your document will be indicated on the FOIDOCH screen.

Searching for Document Details in FOIDOCH

X Document History FOIDOCH 9.3.2 (PROD)			ADD		👗 RELAT	ED 🏶 TOOLS	
Document Type: REQ Requisition Document Code: R0048000						Start Over	
				0			
* DOCUMENT HISTORY		12: 5:	1500 C 00	Ea Insert	Delete	Copy T. Fiter	
Document Type	Document Number	Status	Status Description				
Requisition	R0048000	A	Approved				
Purchase Order	P0047162	A	Approved				
Invoice	11355134	P	Paid				
Invoice	11369301	P	Paid				
Invoice	11379638	A	Approved				
Check Disbursement	10621783						
Check Disbursement	10628205						
Coff > N 10 Par Page Record 1 of 7							

Requisition – used to request goods and/or services.

Purchase Order – used to place the order with a vendor.

Invoice – forwarded to Accounts Payable by the vendor.

Check Disbursement – used to pay invoices.

You can search for details on any of these documents by using the **RELATED** button. To view details of a document, follow these steps:

- 1. Select one the documents by clicking on the document number.
- 2. Click on the **RELATED** button.

X Document History FOIDOCH 9.3.2 (PROD)				🗈 ADD 📲 RETRIEVE 🛛 🟯 RELATED 🔅 TO				
Document Type: REG Regulation Document Code: R004000								
* DOCUMENT HISTORY				Requisition Info [FPIREQN]				
Document Type	Document Number	Status	Status Description					
Requisition	R0048000	A	Approved	Query Document [BY TYPE]				
		A						
Invoice	11355134	P	Paid					
Invoice	11369301	p	Paid					
Invoice	11379638	A	Approved					
Check Disbursement	10621783							
Check Disbursement	10628205							

3. Click 'Query Document (BY TYPE)'.

4. After selecting Query Document (BY TYPE)', the Document number will appear on a screen titled 'FPIPURR' (If querying a purchase order).

Purchase/Blanket/Change Order Query FPIPURR 9.0 (PROD)		ADD		晶 RELATED	TTOOLS
Purchase Order: P0047162	Blanket Order:		_		Go
Change Sequence:					
Number					
Get Started: Fill out the fields above and press Go.					

5. Press the GO button to initiate the Query on the Purchase Order.

X PurchaseBlanketChange Order Query FPIPURR 9.0 (PROD)							ADD		👗 RELA	TED 🔅 TOOLS	
Purchase Order: P0047162 Blanket Order: Change Sequence Number:											
* PURCHASE/BLANKET	- PURCHASEBLANKET ORDER INQUIRY: DOCUMENT INFORMATION									🖥 Copy 🛛 🗙 Filter	
Purchase Order	P0047162	Delivery Date	03/06/2018								
Blanket Order		Comments				Change Sequence					
						Number					
Order Date	03/06/2018	Commodity Total	20,000.00				In Suspense				
Transaction Date	03/06/2018	Accounting Total	20,000.00				Document Text				
* PURCHASE/BLANKET	ORDER INQUIRY: DOCUMENT INFORMATION								🗄 Insert	Delete	🛍 Copy 🔍 Filter
	✓ Complete			Requisition							
				Document Text							
	✓ Approved			Buyer Code	ARL						
Print Date	03/06/2018				Angie R. Logan						
Cancel Date				Blanket Order							
				Termination Date							
Closed Date					Rush Order						
Activity Date	03/06/2018				NSF Checking						
User ID	ALOGAN				Deferred Editing						
Туре	Standing			Purchase Order							
				Copied From							
Cancel Reason				Origin	BANNER						
				Reference Number							
	Purchase Order Created from Requisition										

If you don't know your document number, you can search for a document using various search criteria. To search for a document, follow these steps:

X Document History FOIDOCH 9.3.2 (PRC		🛱 ADO 🗎 RETRIEVE 🎄 RELATED	🛠 TOOLS
Document Type: REQ	Requisition Document Code:		Go
Get Started: Fill out the fields above and press	2		

1. If the Document type and Document code fields are populated with data that does not apply to your search criteria, press the F7 key on the keyboard to enter Query Mode. This will clear the data in the form and allow you to search for your document.

×	Requisition Val	idation FPIRQST 9.3.5 (PROD)			🔒 ADD		A RELATED	🔅 TOOLS
* REQUIS	ITION VALIDATIO	DN				🔛 insert	🖬 Delete 🦷 Co	py Y , Filter
Re	quest Number	R0032691	Deliver by Date	08/29/2014				
Re	questor Name	Christina Zdenek	Complete	Yes *				
	Organization	421200 Marine Sciences	Approved	Yes 💌				
	Vendor	J00380748 GovConnection Inc.	Origin	BANNER				
	Request Date	08/21/2014	Reference Number					
	Request Type	Purchase						
	1) of 43	3625 > N 1 • Per Page					Recor	d 1 of 43625

2. This will clear the fields and move you to the screen with a drop down menu titled 'Add Another Field'.



3. From the 'Add Another Field' drop down menu, select 'Organization'. You then have three fields: 'Organization' 'Contains' & a blank field. Key your ORG into the blank field and press the **GO** button.

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* REQUIS	TION VALIDATION		8	Insert 🖪 Delete	THE Copy	ř. Filter
						0
Organi	ation • Contains • 172100					•
Add A	oher Field *					
					Clear All	Go

4. This will return Requisitions with only your selected ORG.

5. Double click on the Requisition number of the document you want to retrieve. This will return you to the FOIDOCH screen with information for that requisition.

× Requisition Va	lidation FPIRQST 9.3.5 (PROD)		🖹 ADD 🚨 RETRIEVE 🛛 🟯 RELATED 🔅 TOOLS
REQUISITION VALIDAT	ON		🖬 Insert 🖾 Délete и Copy 🍸 Filter
			Filter Again 😣
Request Number	R0048854	Deliver by Date 06/11/2018	
Requestor Name	Robert Brown	Complete Yes *	
Organization	172100 Business Office	Approved Yes	
Vendor	J00209196 Fairfield Chair Inc.	Origin BANNER	
Request Date	05/11/2018	Reference Number	
Request Type	Purchase		
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Note: This process can be followed for requisitions, purchase orders and invoices.