Reviewing a Document: Document History Form (FOIDOCH)

Brief Description: The **Document History Form (FOIDOCH)** is used to track and review the status of any of the following types of Finance documents: requisitions, bids, purchase orders, issues, invoices, checks, returns, receivers, asset tags, and asset adjustments as well as their associated documents. Please note that the **Document History Form** is an **inquiry** form used to review information. This form is **not** designed to make changes to any documents.

Quick Tip

To access the **Document History Form,** enter **FOIDOCH** in the Direct Access field on the Banner Main Menu and press **Enter**.

Direct Access field
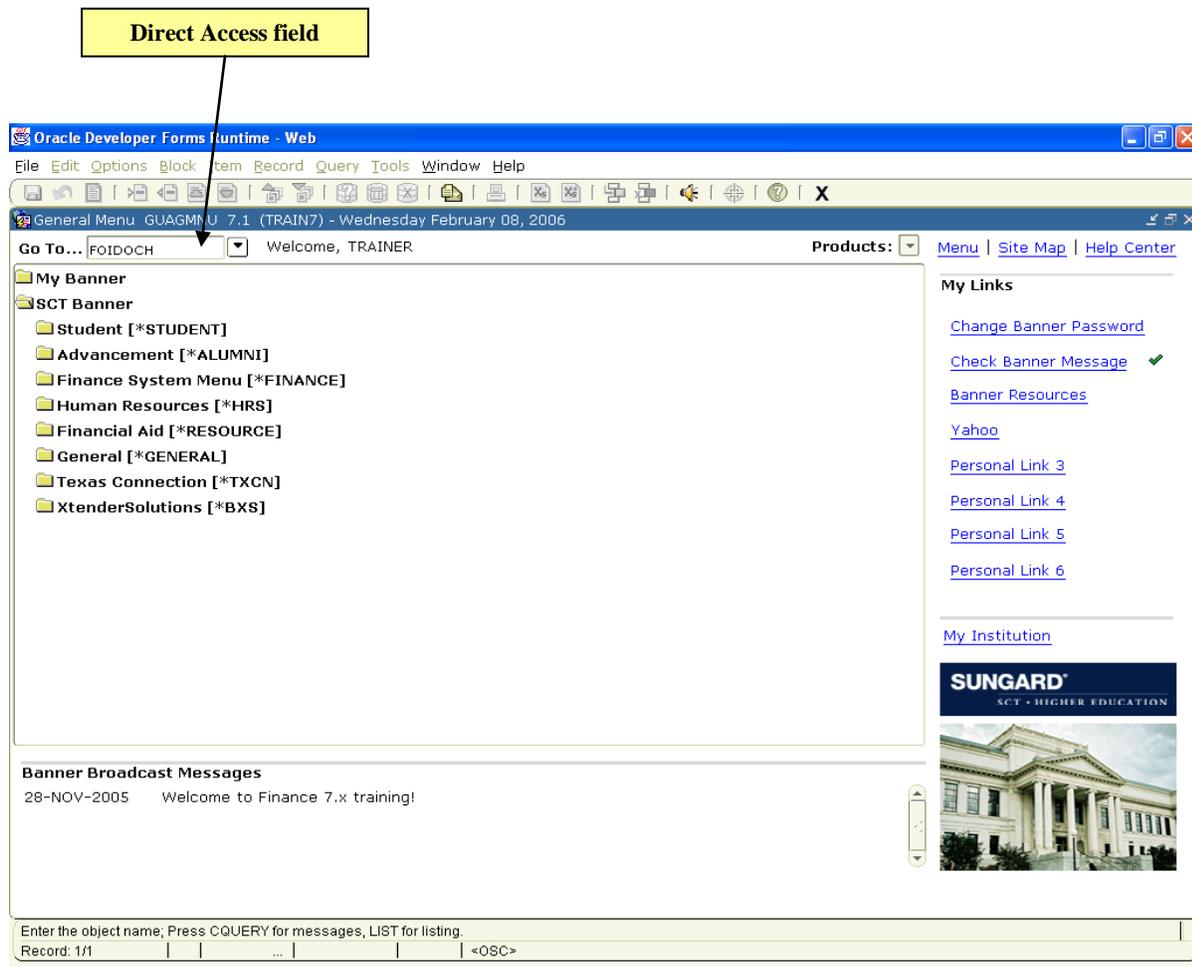
1. If you know the document type code, enter it in the **Document Type** field, and then **PROCEED TO STEP 4**. Otherwise, to look up the **Document Type** code, double click in the field to pull up the **Document Type List** (**FTVDTYP**).
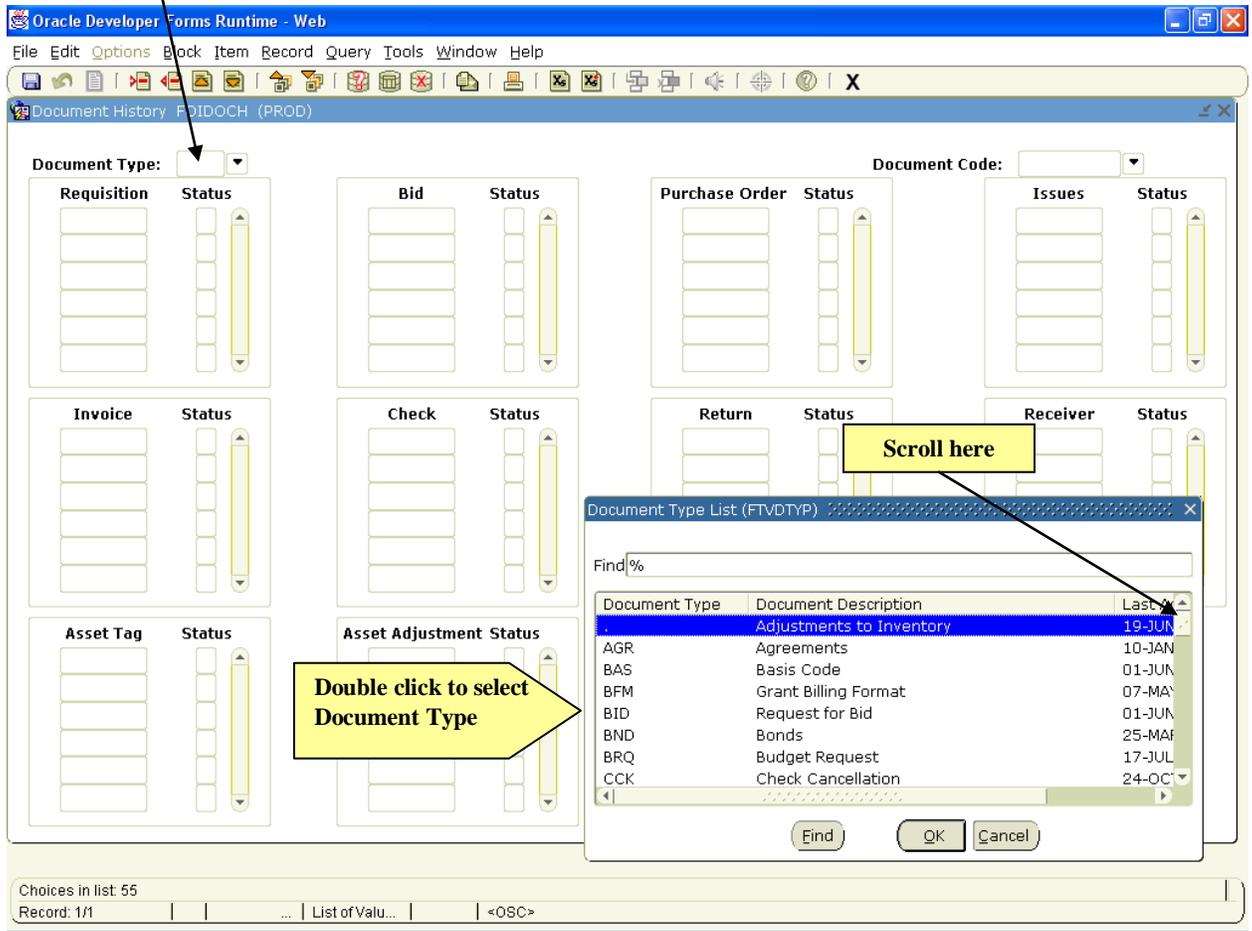
2. Scroll down, locate and click the desired **Document Type** and click **OK**. Valid document types for review on this form include the following:

- REQ   Requisitions
- BID   Request for Bid
- PO   Purchase Order
- INV   Invoice
- CHK   Check Disbursement

- RTN   Returns
- RCV   Receiving Documents
- FAS   Fixed Assets
- FAA   Fixed Assets Accounting Adjustments

3. The **Document Type** is returned to the **Document History Form**.

4. Enter the **Document Code** (Requisition number, P.O. number, Invoice number, etc.) and then **PROCEED TO STEP 7**.

5. If you do not remember the **Document Code**, use the **Search** icon to the right of the field to query for it.
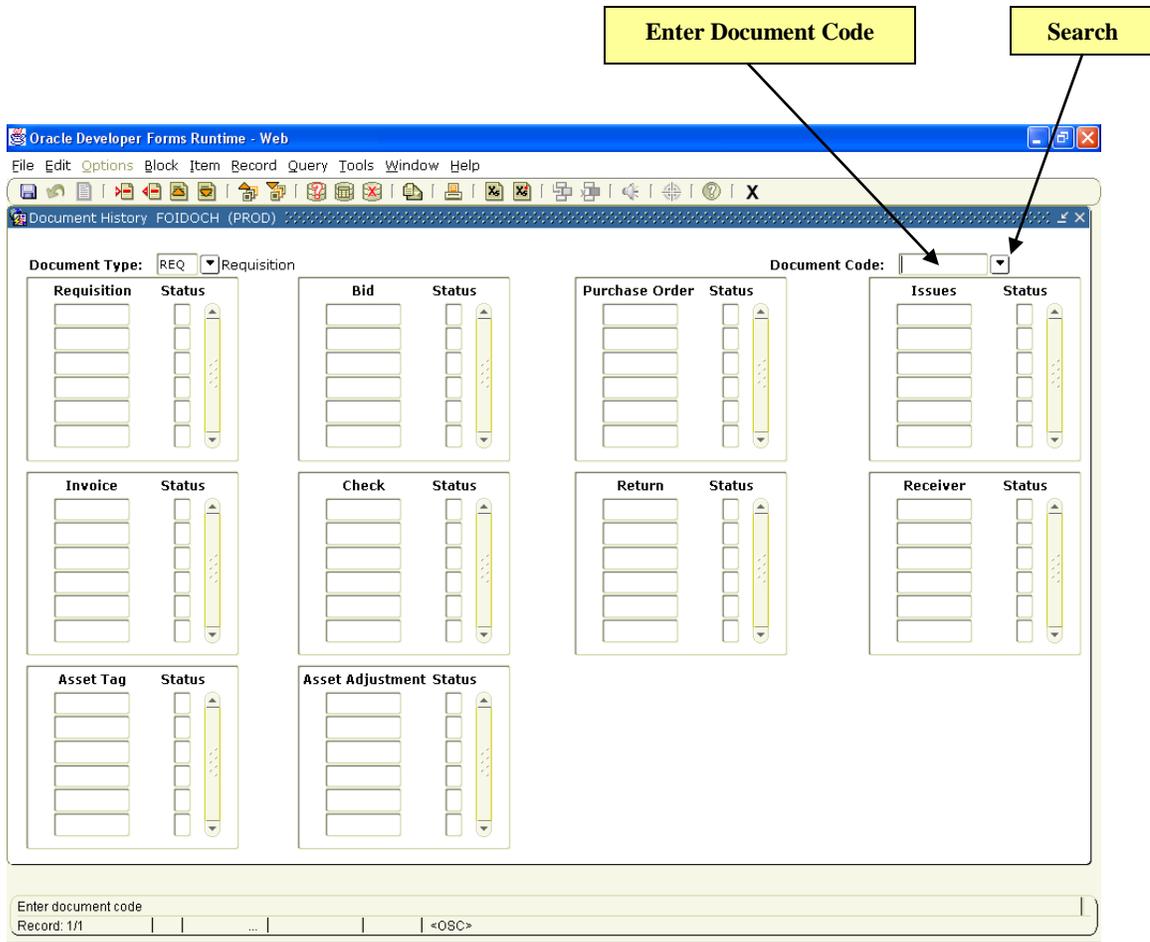
6. Once you have located the **Document Code** you want, double click to select and return it to the **Document History Form**.

7. **Next Block** (**Ctrl+PageDown**).

8. The Document and its related documents, along with the document status indicators for each document, now appear on the screen.

9. To see more detailed information on the primary document you are reviewing, click the appropriate choice in the **Options** menu. When you are finished reviewing the document detail, **Exit** (**Ctrl+Q**) to return to the **Document History Form**.
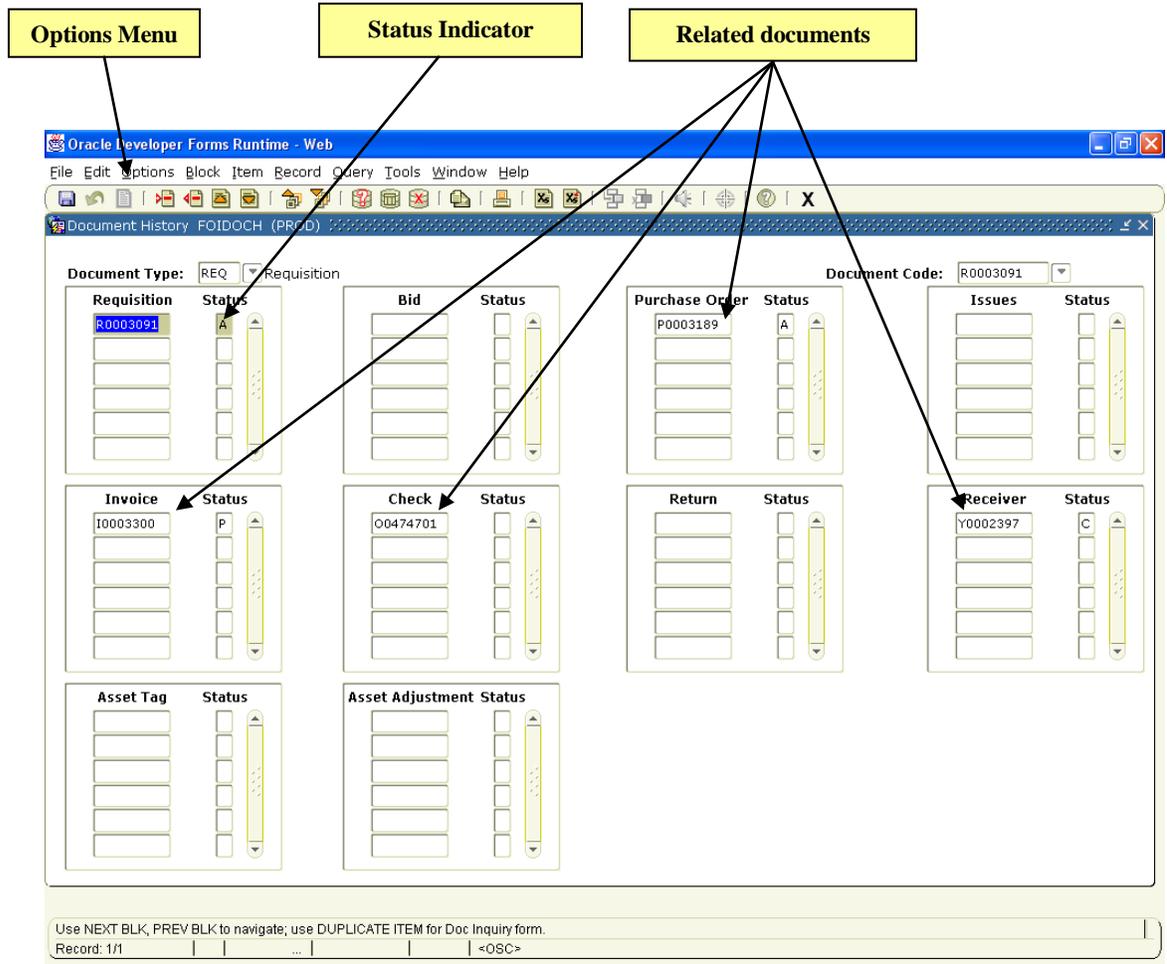
10. To view the legend for the document status indicators, select <u>V</u>**iew Status Indicators** from the **Options** menu.
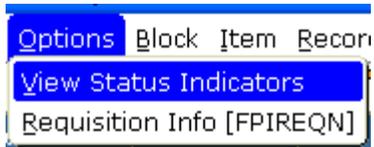
   a. The **Status Indicators** dialog box opens, displaying a legend for the Status Indicators.

   b. Once you are finished reviewing the information, click **Cancel** to hide the **Status Indicators**.
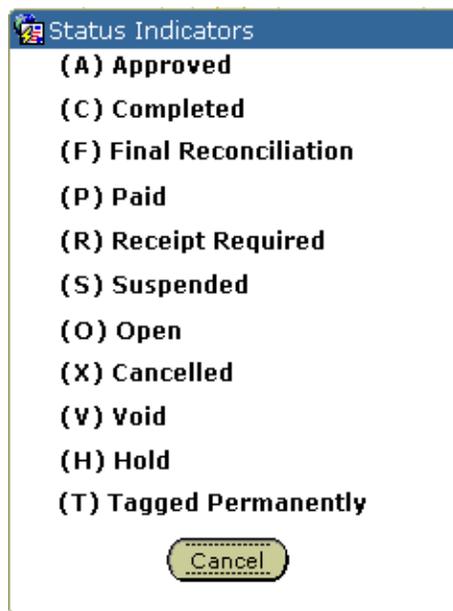
11. **Next Block** (**Ctrl+PageDown**) to navigate from one document to the next. Notice that the contents of the **Options** menu change to allow access to more detailed information on each related document.

12. To view detailed information on a specific document, click on the document code and then select the appropriate choice in the **Options** menu.

13. To exit these review screens, use the **Exit** (**Ctrl+Q**) command.

14. **Exit** (**Ctrl+Q**) the **Document History Form** when you are finished.

NOTES for REVIEWING A DOCUMENT