

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	
Oracle Developer Forms Runtime - Web	
ile Edit Options Block tem Record Query Tools <u>W</u> indow Help	
a 🖉 🖹 i 🕾 🛃 i 🛃 i 🕼 🕼 🕼 🕼 i 😫 i 🕾 i 🖳 i 🕾 🔄 i 🛊 i 🌾 i	I 🜐 I 🔞 I 🗴
gGeneral Menu GUAGMI U 7.1 (TRAIN7) - Wednesday February 08, 2006	<u>۲</u>
Go To FOIDOCH Velcome, TRAINER	Products: 💌 🛛 Menu Site Map Help Cent
My Banner	MyLinks
SCT Banner	
🗎 Student [*STUDENT]	Change Banner Password
🗎 Advancement [*ALUMNI]	Check Banner Message 🗸
Finance System Menu [*FINANCE]	Bapper Resources
Human Resources [*HRS]	
Financial Aid [*RESOURCE]	Yahoo
General [*GENERAL]	Personal Link 3
YtenderSolutions [#R¥S]	Personal Link 4
	Personal Link 5
	Personal Link 6
	My Institution
	SUNGARD
Banner Broadcast Messages	
28-NOV-2005 Welcome to Finance 7.x training!	
Enter the object name; Press CQUERY for messages, LIST for listing. Record: 1/1 <0SC>	

 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).

Double click here to look up type				
🖄 Oracle Developer Forms Runtime - Web				
Eile Edit Options Bock Item Record Query Tools Wi	ndow <u>H</u> elp			
- 1 😣 📾 😫 - 🛋 - 🔄 - 🚔 - 🔛 - 📓 -	🔁 I 📇 I 🔀 🔀 I 🗄	🛉 👍 [🚸 [🛞 [🗙		
Document History FOIDOCH (PROD)				≚ ×
Document Type:			Document Code:	
Requisition Status Bid	Status	Purchase Order Status	Issues	Status
Invoice Status Check	Status	Return Status	Receive Scroll here	er Status
	Docum Find	ent Type List (FTVDTYP) 3393		
		ument Type Document Des	scription	Last
Asset Tag Status Asset Adjustm	ent Status	Adjustments t	to Inventory	19-JUN <
	AGR	Agreements		10-JAN
Double click t	o select	Basis Code Grant Billing F	ormat	01-JUN 07-MA
Document Ty	BID	Request for Bi	id	01-JUN
	BND	Bonds		25-MAF
	BRQ	Budget Reque	est	17-JUL
		Check Cancell	lation	24-00
		Eind	QK Cancel	
	(
Choices in list: 55 Record: 1/1 List of Valu	<0SC>			

- 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.

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>View Status Indicators</u> 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**.

🙀 Status Indicators
(A) Approved
(C) Completed
(F) Final Reconciliation
(P) Paid
(R) Receipt Required
(S) Suspended
(O) Open
(X) Cancelled
(V) Void
(H) Hold
(T) Tagged Permanently
Cancel

- 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