UNIVERSITY OF SOUTH ALABAMA

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.
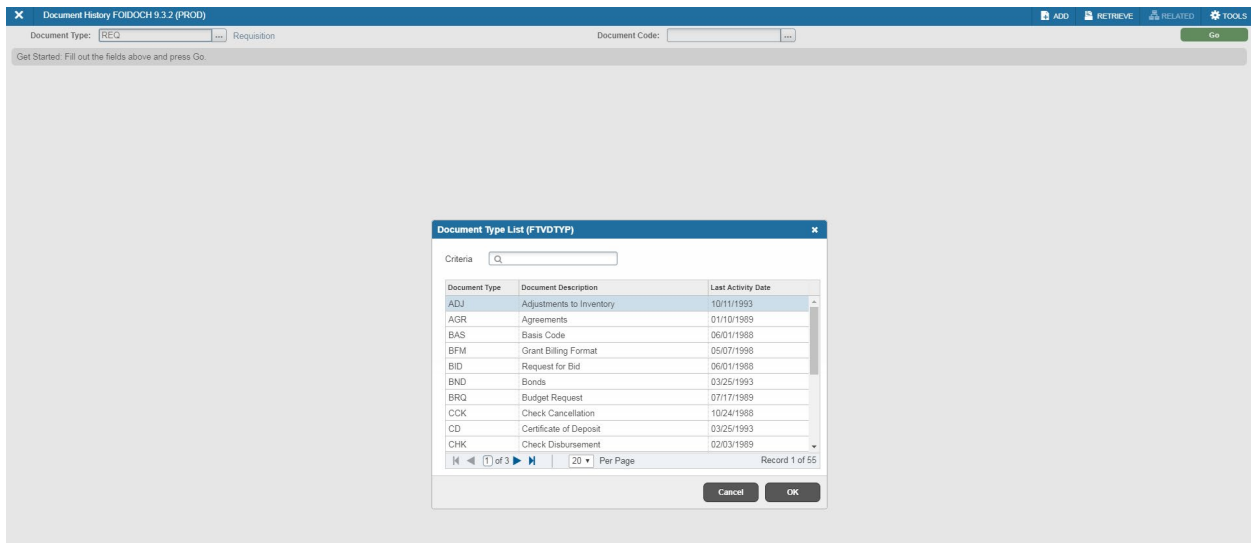
4. Click the **GO** button to view your results. All documents associated with your document will be indicated on the FOIDOCH screen.

Searching for Document Details in FOIDOCH

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.

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).

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

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:

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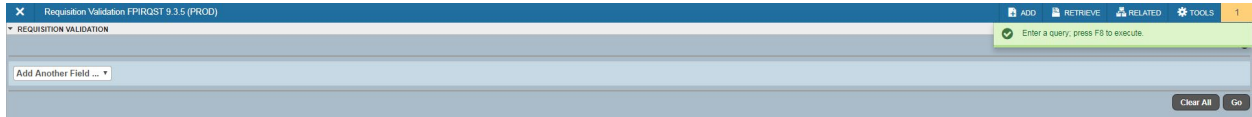
2. This will clear the fields and move you to the screen with a drop down menu titled 'Add Another Field'.
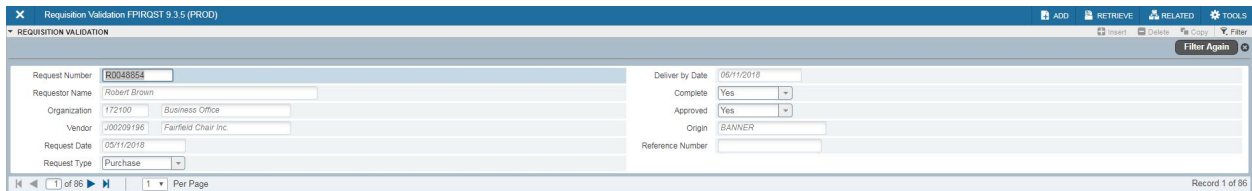

3. From the 'Add Another Field' drop down menu, select 'Organization'. You then have three fields: 'Organization' 'Contains' & a blank field. Key your ORG into the blank field and press the **GO** button.

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.

Note: This process can be followed for requisitions, purchase orders and invoices.