



UNIVERSITY OF SOUTH ALABAMA

Banner Financial Information Systems Reference Manual

## **Querying Finance Documents**

**Banner v. 9**

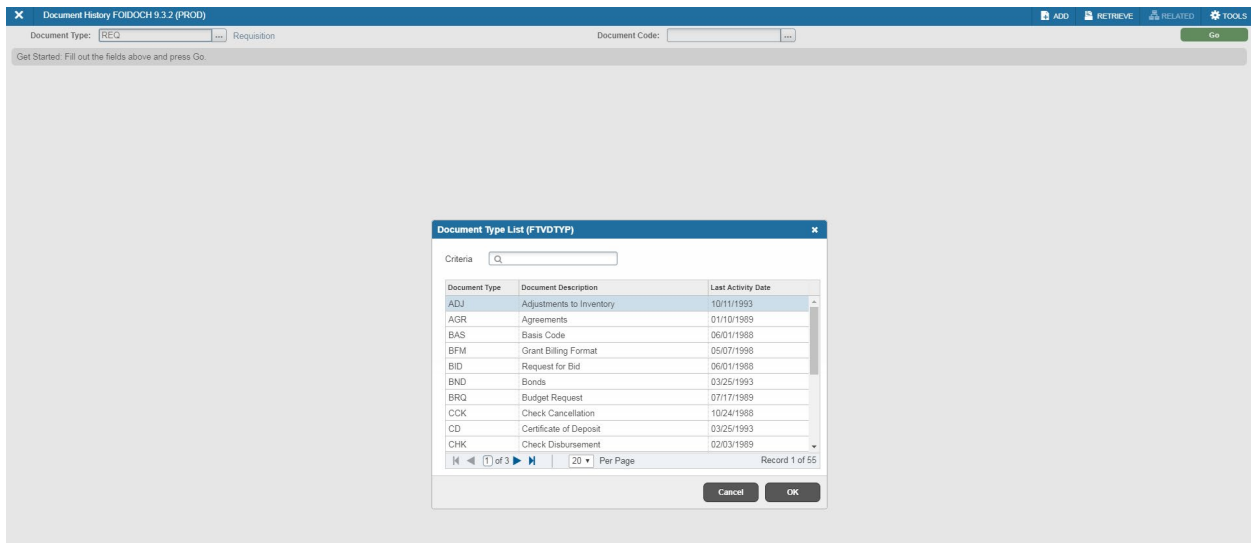
## Tracking a Requisition using FOIDOCH

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 FOIDDOCH

Document History FOIDDOCH 9.3.2 (PROD) | ADD | RETRIEVE | RELATED | TOOLS | Start Over

Document Type: REQ Requisition | Document Code: R0048000

Document Type	Document Number	Status	Status Description
Requisition	R0048000	A	Approved
Purchase Order	P0047162	A	Approved
Invoice	I1355134	P	Paid
Invoice	I1369301	P	Paid
Invoice	I1379638	A	Approved
Check Disbursement	10621783		
Check Disbursement	10628205		

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.

Document History FOIDDOCH 9.3.2 (PROD) | ADD | RETRIEVE | RELATED | TOOLS

Document Type: REQ Requisition | Document Code: R0048000

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Invoice	I1369301	P	Paid
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Check Disbursement	10628205		

Search

Requisition Info [FPREQN]

Query Document [BY TYPE]

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

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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)

Purchase Order: P0047162 Blanket Order: Change Sequence Number: [ ]

Go

Get Started: Fill out the fields above and press Go.

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

Purchase/Blanket/Change Order Query FPIPURR 9.0 (PROD)

Purchase Order: P0047162 Blanket Order: Change Sequence Number: [ ]

PURCHASE/BLANKET ORDER INQUIRY: DOCUMENT INFORMATION

Purchase Order: P0047162 Delivery Date: 03/06/2018

Commodity Total: 20,000.00 Accounting Total: 20,000.00

Requestion: [ ] Document Text: [ ] Buyer Code: ARL

Rush Order: [ ] NSF Checking: [ ] Deferred Editing: [ ]

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:

Document History FOIDDOCH 9.3.2 (PROD)

Document Type: REQ Document Code: [ ]

Go

Get Started: Fill out the fields above and press Go.

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 Validation FPIRGST 9.3.5 (PROD)

Request Number: R0032691 Deliver by Date: 06/26/2014

Requestor Name: Christina Zobenek Complete: Yes

Organization: 421200 Marine Sciences Approved: Yes

Vendor: J00360748 GovConnection, Inc. Origin: BANNER

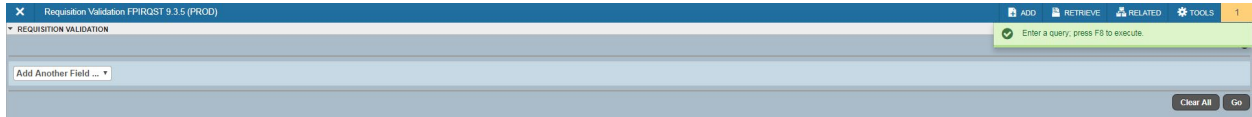
Request Date: 06/21/2014 Reference Number: [ ]

Request Type: Purchase

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



The screenshot shows the 'Requisition Validation' interface. At the top, there is a blue header with the title 'Requisition Validation FPIRQST 9.3.5 (PROD)'. Below the header, there is a toolbar with buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. A green notification bar at the top right says 'Enter a query, press F8 to execute'. The main area contains a dropdown menu labeled 'Add Another Field ...'. At the bottom right, there are 'Clear All' and 'Go' buttons.

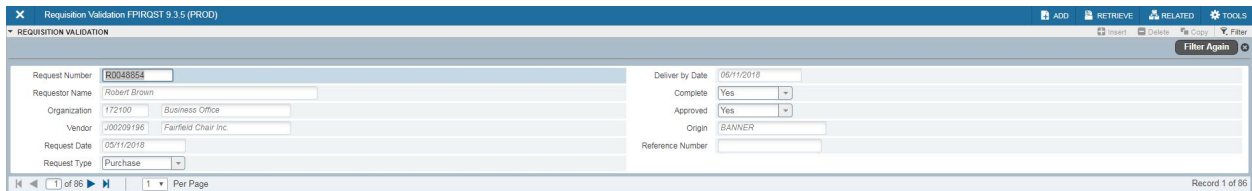
3. From the ‘Add Another Field’ drop down menu, select ‘Organization’. You then have three fields: ‘Organization’ ‘Contains’ & a blank field. Key your ORG into the blank field and press the **GO** button.



The screenshot shows the 'Requisition Validation' interface with search criteria entered. The dropdown menu is now set to 'Organization', the relationship is 'Contains', and the value is '172100'. Below this, the 'Add Another Field ...' dropdown is visible. At the bottom right, there are 'Clear All' and 'Go' buttons.

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.



The screenshot shows the 'Requisition Validation' interface displaying detailed information for a requisition. The 'Request Number' is 'R0048854'. Other fields include 'Requestor Name' (Robert Brown), 'Organization' (172100 Business Office), 'Vendor' (J00209196 Fairfield Chair Inc), 'Request Date' (05/11/2018), and 'Request Type' (Purchase). On the right side, there are fields for 'Deliver by Date' (05/11/2018), 'Complete' (Yes), 'Approved' (Yes), and 'Origin' (BANNER). At the bottom, there is a 'Filter Again' button and a 'Record 1 of 86' indicator.

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