

Document History (FOIDOCH) Banner Desktop Procedures

1. In the **Go To** field on the **Main Menu**, type in **FOIDOCH** and press enter to go directly to the **Document History** form.
2. To view the status of a request for a purchase order, enter **REQ** in the first blank field to the right of **Doc Type**.
3. Press the tab key to advance to the **Doc Code** field on the far right.
4. Enter the letter “**R**” and the requisition number.
5. Click **Block** (menu bar) and then click **Next** to advance to the next block. (Shortcuts: while pressing the **Shift** key, press the **Page Down** key OR click the **Next Block** icon located near the center of the toolbar: the icon looks like an orange downward-facing triangle with sheets of paper beside it).
6. Banner will now display the purchase order number if it has been issued. It will also display invoice and check number information if the vendor has invoiced the College for payment and a check has been issued.
7. To obtain detailed information on a document, place the cursor on the document number and click on the **Options** menu located on the menu bar. Select **Requisition Information, Purchase Order Information, Invoice Information** or **Check Information**, as appropriate.

Note: check details can only be accessed by Business and Finance staff members.

8. To navigate through the series of forms related to each document, use any of the “next block” functions (press **Shift** and **Page Down**, OR click **Block** and then **Next** on the menu bar, OR use the **Next Block** icon located near the middle of the toolbar: the icon looks like an orange downward-facing triangle with sheets of paper beside it).

IMPORTANT: *To view the status of a request for a check, enter INV in the first blank field to the right of Doc Type. Press Tab and then type “R” and the requisition number in the Doc Code field. Follow instructions 5 through 8 to continue the query.*

9. Click the **Exit** icon located on the toolbar to return to the previous screen. It is the last icon on the right: large black X.
10. Click the **Rollback** icon located on the toolbar to clear all data from the form. It is the second icon from the left: curved, left-facing arrow.

- To close the Banner session, exit from the **Main Menu** (top right – small black “x”) and the system will prompt you with the question: **Are you sure you want to exit this SCT Banner session?** Click “Yes” to exit.

FOIDoch FORM

MENU/TOOL BAR



STATUS INDICATORS