

TRACKING STATUS OF DOCUMENTS

The screenshot displays the Oracle Fusion Middleware Forms Services interface. At the top, the browser title is "Oracle Fusion Middleware Forms Services". Below the title bar, there is a menu bar with "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". A toolbar with various icons is visible below the menu bar. The main content area shows a "Go To..." dropdown menu with "FOIDOCH" selected and circled in red. To the right of the dropdown, it says "Welcome, SHERI MOORE." and "Products: [dropdown]". Below the dropdown, there is a tree view of modules under "My Banner", including "Banner", "Student [*STUDENT]", "Finance System Menu [*FINANCE]", "Human Resources [*HRS]", "Financial Aid [*RESOURCE]", "General [*GENERAL]", "Banner Security [*SECURITY]", and "Document Management Suite [*BDMS]". On the right side, there is a "My Links" section with links for "Change Banner Password", "Check Banner Messages", "Banner Documentation", "CLPCCD Info Page", "Personal Link 3", "Personal Link 4", "Personal Link 5", and "Personal Link 6". Below the links, there is a "My Institution" section with the "ellucian." logo.

STEPS:

1. Enter FOIDOCH in the "Go To..." area.
2. Press Enter.

NOTES:

Use this module to track the status of documents that you know codes for.

You can use this module after you receive a copy of your Requisition with the requisition number at the top left corner. This way you can see if a PO has been used.

TRACKING STATUS OF DOCUMENTS (contd)

Document History FOIDOCH 8.8.0.6 (PROD)

Document Type: 1

Document Code: 3

Document Type List (FVDTYP)

Document Type	Document Description	Last A
ADJ	Adjustments to Inventory	11-OC
AGR	Agreements	10-JA
BAS	Basis Code	01-JU
BFM	Grant Billing Format	07-MA
BID	Request for Bid	01-JU
BND	Bonds	21-JU
BRQ	Budget Request	17-JU

STEPS:

1. Enter “REQ” for a requisition or “PO” for a purchase order or click the “Tab” next to Document Type to indicate the type of search.
2. Scroll down to “REQ” for Requisition and click on OK.
3. Enter the Requisition Number or the Purchase Order Number in the Document Code field.
4. Press CTRL and PAGE DOWN.

NOTES:

A Requisition number of R317-6462 would be entered as “R3176462”.

A Purchase Order would be entered as “P0900172”. A PO will start with a “P” and is defined as an order for specific items for a one-time purchase. The amount of the PO is a defined amount (total of all items, shipping if applicable, and tax).

An Open Order would be entered as “O0900152”. An “Open Order” will start with an “O” and is defined as an order that may have several “sub-orders” placed against it throughout the fiscal year. The amount of an Open Order will be a “not to exceed” amount. Example: An Open Order placed with Follett Bookstore where several purchases will be made during the year.

TRACKING STATUS OF DOCUMENTS (contd)

Oracle Fusion Middleware Forms Services: Open > FOIDOCH

File Edit Options Block Item Record Query Tools Help

Document History FOIDOCH 8.8.0.6 (PROD)

Document Type: REQ Requisition Document Code: R3176462

Document Type	Status
Requisition	A
Bid	
Purchase Order	A
Issues	
Invoice	P
Check	
Return	
Receiver	
Asset Tag	
Asset Adjustment	

Example of the Query for the Requisition R317-6462

NOTES:

This screen shows the history of your document and all other documents related to it, including:

- Requisition number and status
- Purchase Order number and status
- Invoice number and status (Banner's invoice number not the Vendor's)
- Check number and status
- Receiver number and status

TRACKING STATUS OF DOCUMENTS (contd)

Oracle Fusion Middleware Forms Services: Open > FOIDOCH

File Edit Options Block Item Record Query Tools Help

Document History FOIDOCH 8.8.0.6 (PROD)

Document Type: REQ Requisition Document Code: R3176462

Document Type	Status
Requisition	A
Bid	
Purchase Order	A
Issues	
Invoice	P
Check	
Return	
Receiver	
Asset Tag	
Asset Adjustment	

STEPS:

1. To view details of any of the documents listed, click on Options in the Menu at the top of the Screen.
2. Select Requisition Info from the Options Menu.

STEPS:

1. This screen will be displayed.
2. Press CTRL and PAGE DOWN.

Oracle Fusion Middleware Forms Services: Open > FOIDOCH - FPIREQN [Q]

File Edit Options Block Item Record Query Tools Help

Requisition Query FPIREQN 8.4 (PROD)

Requisition: R3176462

NOTES:

TRACKING STATUS OF DOCUMENTS (contd)

Oracle Fusion Middleware Forms Services: Open > FOIDOCH - FPIREQN [Q]

File Edit Options Block Item Record Query Tools Help

Requisition Inquiry: Document Information FPIREQN 8.4 (PROD)

Requisition: R3176462
Order Date: 21-JUL-2016
Delivery Date: 11-AUG-2016
Commodity Total: 3,500.00

Transaction Date: 21-JUL-2016
Comments:
Accounting Total: 3,500.00

In Suspense
 Document Text

Complete
 Approved
Print Date:
Activity Date: 25-JUL-2016
Cancel Date:
User ID: TROTHMAN
Closed Date: 11-AUG-2016

Cancel Reason:

Document Type: P PROCUREMENT
 NSF Checking
 Deferred Editing
Requisition Copied From:
Origin: BANNER
Reference Number:

Example of the Query for the Requisition

STEPS:

1. Once you are finished with this screen, click the “X” to return to the Document History screen.

NOTES:

End of “Track Status of Documents”