

How to Inquire on Document History

Description: The Document History Form displays the processing history of purchasing and payment documents. It identifies and provides the status of all documents in the processing path for the document you select.

Form Name/Direct Access: FOIDOCH

Menu: Purchasing Query Menu *FINPOQRY

Navigation: Products Menu
Finance System Menu
Purchasing and Procurement System Menu
Purchase Order Processing Menu
Purchasing Query Menu
Document History Form

General Note:

The flashlight icon provides a list of valid entries for applicable fields and fields with blue text can be double-clicked to get a list of valid entries.

Instructions:

1. Select *Document History Form*.

Oracle Developer Forms Runtime - Web: Open > FOIDOCH

File Edit Options Block Item Record Query Tools Help

Document History FOIDOCH 8.5M1

Document Type: [] Document Code: []

Document Type	Status
Requisition	LIST
Bid	LIST
Purchase Order	LIST
Issues	LIST
Invoice	LIST
Check	LIST
Return	LIST
Receiver	LIST
Asset Tag	LIST
Asset Adjustment	LIST
Work Order	LIST

Enter document type or choose LIST to view valid options

Record: 1/1 | ... | List of Valu... | <OSC>

This form displays windows with related document numbers for *Requisitions, Bids, Purchase Orders, Change Orders, Fixed Asset Adjustments, Fixed Asset Origination Tags, Fixed Asset Permanent Tags, Issues, Invoices, Checks, Returns,* and *Receiving Documents*. Each purchasing and payable transaction that relates to the specified document number appears within the window of the appropriate document type. In addition to the document number, the system indicates the status of each document.

Doc Type: Enter the type of document you want to see a history for. Double click in the field to get a list of values. Not all values presented are valid for this form. The following are the valid types:

REQ: Requisition
BID: Not used.
PO: Purchase Order
ISS: Not used.
INV: Invoice (voucher)
CHK: Cheque
RTN: Returns
RCV: Receiving Report
FAS: Fixed Asset Tag
FAA: Fixed Asset Adjustment.

Use of any other code will yield the following message at the bottom of the screen: *Document type inappropriate for this form.*

Doc Code: Enter the code representing the document. If you do not know the document number, use the search icon (flashlight), F9 from the keyboard or *List* from the *Help* menu to initiate a query. Some document types will immediately display a list. If a list does not appear, execute a query to see the possible documents (click the *Execute Query* button on the tool bar, F8 from the keyboard or select *Execute* from the *Query* menu). Double click to select the desired document.

2. *Next Block* (use ctrl page down, the toolbar button or on the main menu, select *Block* then *Next*).

The screenshot shows the Oracle Developer Forms Runtime window titled "Oracle Developer Forms Runtime - Web: Open > FOIDOCH". The main form is "Document History" for document type "PO" (Purchase Order) and document code "P0000002". The form is organized into a grid of sections, each with a header and a list of fields with status indicators:

- Requisition:** 5 empty rows.
- Bid:** 5 empty rows.
- Purchase Order:** 5 rows, the first row contains "P0000002" and status "A".
- Issues:** 5 empty rows.
- Invoice:** 5 rows, the first row contains "I3015292" and status "P".
- Check:** 5 rows, the first row contains "U0000022".
- Return:** 5 empty rows.
- Receiver:** 5 rows, the first row contains "Y0000001" and status "C".
- Asset Tag:** 5 empty rows.
- Asset Adjustment Status:** 5 empty rows.
- Work Order:** 5 empty rows.

At the bottom of the form, there is a status bar with the text: "Use NEXT BLK, PREV BLK to navigate; use DUPLICATE ITEM for Doc Inquiry Form. Record: 1/1 | ... | <OSC>"

This takes you to the second part of the *Document History Form* and displays all documents related to the one you specified. The information that appears on this form is display only. You may not update any of these fields.

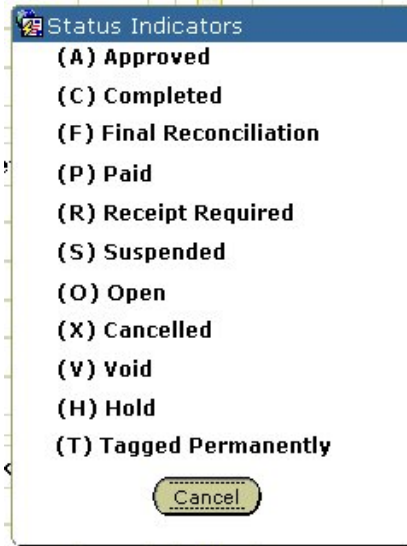
Requisition: Displays a list of requisition numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).

Bid: Not used. Will always be blank.

Purchase Order: Displays a list of purchase order numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).

Issues: Currently not used in the Memorial University system as it relates to Stores Inventory. Displays a list of *Issues* related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).

- Invoice:** Displays a list of invoice numbers related to the document number you specified. (Banner uses this term to describe vouchers. This invoice number is **not** the vendor invoice number.) The first field is the document number. The second field is the status indicator (described later).
- Check:** Displays a list of cheque numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).
- Return:** Displays a list of goods returned form numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).
- Receiver:** Displays a list of receiving report numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).
- Asset Tag:** Displays a list of asset tag numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).
- Asset Adjustment:** Displays a list of asset adjustment numbers related to the document number you specified. The first field is the document number. The second field is the status indicator (described later).
3. You may scroll through list of each document if you wish. Use the scroll bar to the right of each document type window (or select *Next* from the *Record* menu at the top of the screen or use the appropriate button on the toolbar) to scroll through the list of documents.
 4. To view the document details, click once on the appropriate document number you wish to query to highlight it and select the appropriate choice from the *Options* menu at the top of the screen. The choices presented depend on the document you select with your mouse.
 5. To view the list of status indicators and their definition, select *View Status Indicators* from the *Options* menu at the top of the screen. You will be presented with the following list. Click *Cancel* when finished.



6. *Exit* when finished or *Rollback* (use the toolbar button or select *File* from the main menu, then *Rollback*) to view another document.