

Navigating within Document History (FOIDOCH)

Banner 9 – Document History (Main Screen)

The screenshot shows the main interface for Banner 9 Document History (FOIDOCH). At the top, there is a navigation bar with the Stockton University logo, a search icon, and user information for Karen Lynn Lutgen, including a 'Sign Out' link. Below this is a blue header bar with the text 'Document History FOIDOCH 9.0 (PROD)' and navigation buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main content area features two input fields: 'Document Type:' and 'Document Code:', each with a dropdown arrow. A green 'Go' button is positioned to the right of these fields. A grey instruction box below the fields reads: 'Get Started: Fill out the fields above and press Go.'

Banner 8 Comparison

The screenshot displays the 'Banner 8 Comparison' screen. It features a blue title bar with the text 'Document History FOIDOCH 8.8.0.6 (PROD)'. The interface is organized into a grid of comparison panels. At the top left, there is a 'Document Type:' dropdown menu. At the top right, there is a 'Document Code:' dropdown menu. The grid consists of 11 panels, each representing a different document type. Each panel has a title (e.g., 'Requisition', 'Bid', 'Purchase Order', 'Issues', 'Invoice', 'Check', 'Return', 'Receiver', 'Asset Tag', 'Asset Adjustment') and a 'Status' column. The 'Status' column contains a vertical slider control with a yellow bar and a downward arrow, used for comparing values between the two columns. The panels are arranged in three rows: the first row has four panels, the second row has four panels, and the third row has three panels.

Document Type: Search feature available

The screenshot shows the Stockton University Document History FOIDDOCH 9.0 (PROD) interface. At the top, there is a navigation bar with the university name, a search icon, and user information (Karen Lynn Lutgen, Sign Out). Below the navigation bar, there are buttons for ADD, RETRIEVE, RELATED, and TOOLS. The main area contains input fields for Document Type and Document Code, with a Go button. A modal window titled "Document Type List (FVDTYP)" is open, showing a search criteria field with "REQ" entered. The modal displays a table with the following data:

Document Type	Document Description	Last Activity Date
BID	Request for Bid	07/01/1970
BRQ	Budget Request	07/01/1970
REQ	Requisition	07/01/1970
SRQ	Special Requirements	07/01/1970

The modal also includes a pagination control showing "Record 3 of 4" and buttons for Cancel and OK.

After entering the Document type (REQ) and Requisition number, choose **Go** to populate the screen:

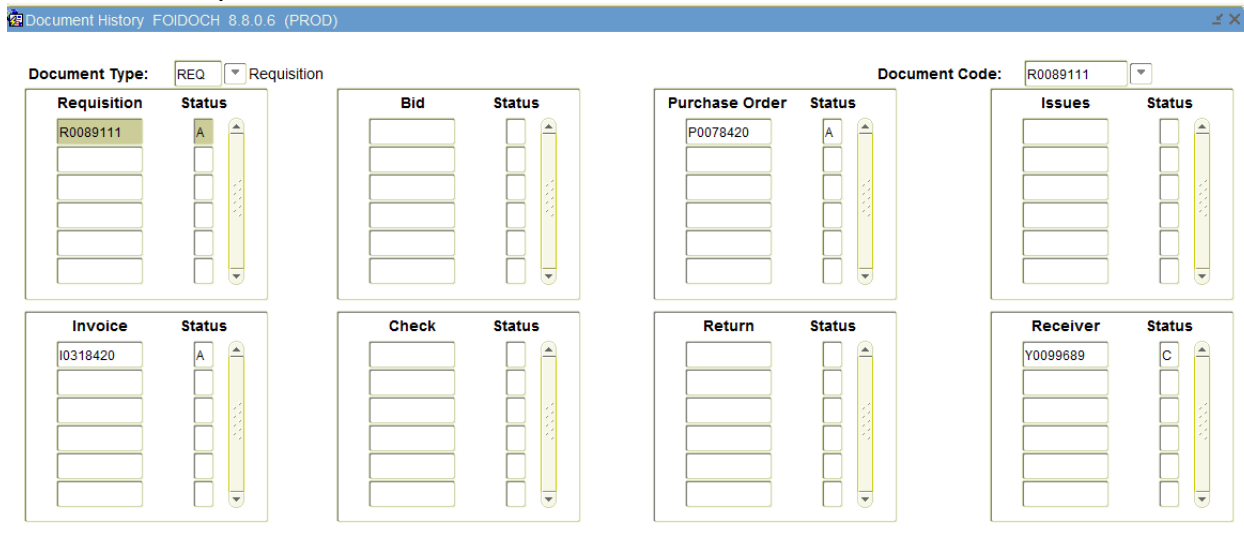
Requisition and linked documents (PO/Invoice/Receiving) as displayed in Banner 9:

The screenshot shows the Stockton University Document History FOIDDOCH 9.0 (PROD) interface after a search. The Document Type is set to "REQ Requisition" and the Document Code is "R0089111". A "Start Over" button is visible. Below the search results, there is a section titled "DOCUMENT HISTORY" with a table of linked documents. The table has columns for Document Type, Document Number, Status, and Status Description. The data is as follows:

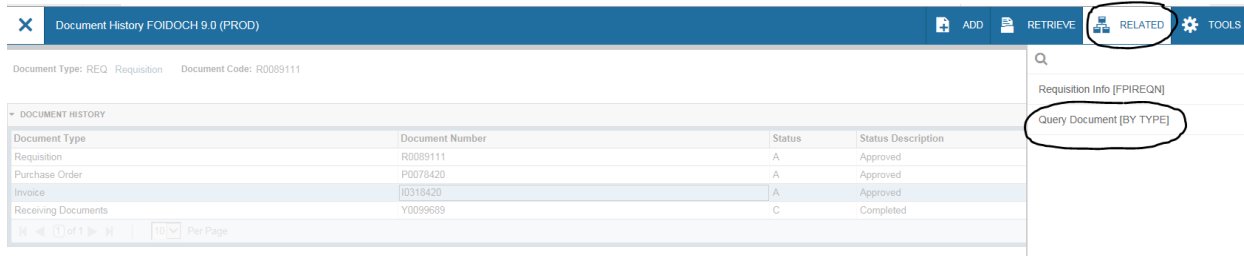
Document Type	Document Number	Status	Status Description
Requisition	R0089111	A	Approved
Purchase Order	P0078420	A	Approved
Invoice	I0318420	A	Approved
Receiving Documents	Y0099689	C	Completed

The table also includes a pagination control showing "Record 1 of 4" and buttons for Insert, Delete, Copy, and Filter.

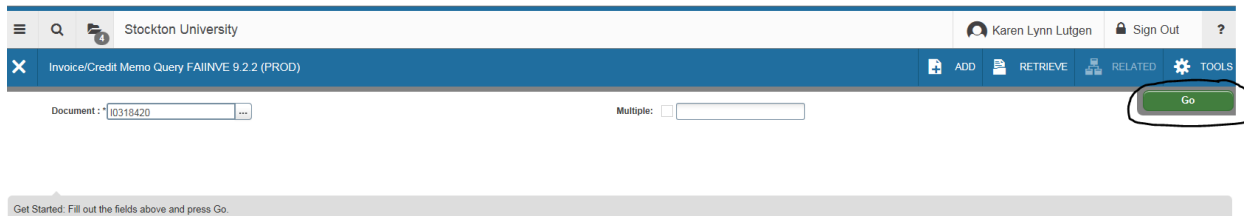
Banner 8 comparison



To view the document, use **Related** and **Query Document [BY TYPE]**. This is the same as using Options/View Invoice Information (for example) in Banner 8.



GO to display the document



Takes you to Invoice/Credit Memo Query (FAINVE)

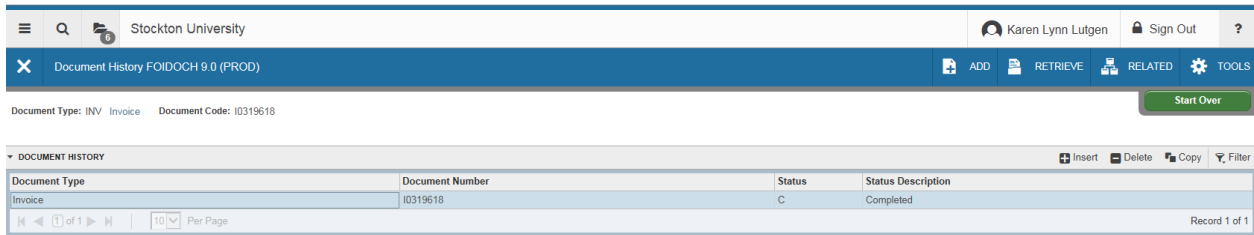
Invoice/Credit Memo Query FAINVE 9.2.2 (PROD) ADD RETRIEVE RELATED TOOLS

Document : 10318420 Multiple: Regular Vendor: Z00000404 Promotions & Unicorns Too Inc Vendor Hold: Purchase Order: P0078420 Start Over

INVOICE/CREDIT MEMO HEADER Insert Delete Copy Filter

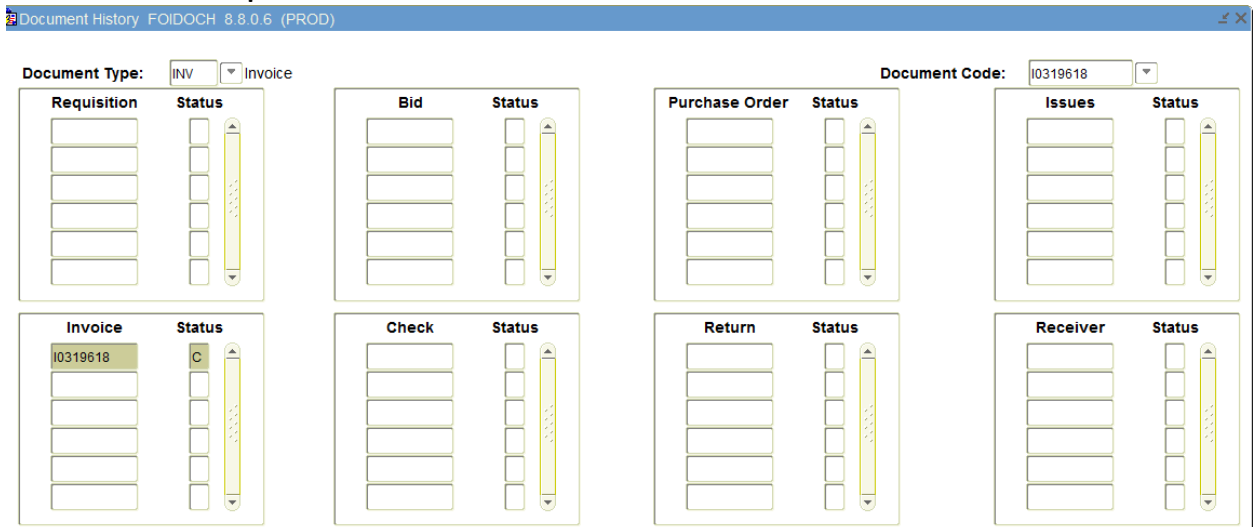
Invoice Date	11/16/2017	<input checked="" type="checkbox"/> Document Accounting
Transaction	11/16/2017	Check Vendor
Cancel		
Address Code	RT	Collects Tax <i>N</i> Collects no taxes
Sequence Number	1	City <i>Freehold</i>
Street Line 1	PO Box 1231	State or Province <i>NJ</i>
Street Line 2		ZIP or Postal Code <i>07728-1231</i>
Street Line 3		Nation <i>157 United States of America</i>
Discount Code	05	Direct Deposit Status <i>Yes</i>
Payment Due	12/16/2017	<input type="checkbox"/> IAT
Bank	01 <i>RSC Operating Account</i>	ACH Transaction Type
Vendor Invoice	13457 <input type="button" value="D"/>	<input type="checkbox"/> Credit Memo
		<input type="checkbox"/> 1099 Vendor
		<input type="checkbox"/> Direct Deposit Override

A Direct Pay displayed in Banner 9 (FOIDOCH)



Note: there are no linked documents displayed. Absence of a requisition/PO indicates a direct pay.

Banner 8 comparison



Add and **Retrieve** will allow access to BDMS.