

Banner Requisition Training

REVISED 8/9/17

Banner 9

The following guidelines are provided to guide you through the purchasing process including creating requisitions. While Unimarket should be used as the primary method of creating a requisition, there will be instances where you will be unable to use Unimarket and should use Banner to create a requisition.

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FPAREQN

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General Navigation

Enter FORM NAME or KEYWORD in the Search Box



Form History

A history of forms last-accessed can be found by clicking the "folder" icon (top left)

Application Navigator

A menu of forms is available by clicking the "hamburger menu" (3 horizontal lines - top left)

General Navigation Training for Banner 9

A short 20-minute online training course is available to guide you through the navigation changes introduced in the Banner 9 interface. Please be sure to review the following online training prior to proceeding.

BANNER NAVIGATION

You will need an "Ellucian Hub" account to access the training above. <u>Click Here</u> to signup for a FREE Ellucian Hub account. Your Ellucian Hub account gets you access to Banner training, documentation, and support system.

GUAPMNU

Organize "My Banner" form to setup your menu

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Filter Available Object Types

Click in the "Object Type" (Left Column) menu to focus the cursor, then click the "Filter" menu (top right)

Add Objects to Menu

Double-click to select the Object Type that you'd like add, then click the "Insert Selection" button (middle column)

Save Changes

When finished, click the "SAVE" button (lower right) - White X to leave screen top left

FGIBDST

Organization Budget Status form

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- a. Enter your ORG/ and Fund (if it is other than 110000) and hit Enter or Go
- b. Select Next Section Arrow to the bottom left and your budget will populate

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- To view the values shown in Commitments column, click on the dollar amount and it will highlight in blue.
- Select from the top left tab RELATED and a drop down will offer you options to view. Select Transaction Detail and the orders associated with the amount in the Commitment will appear.
- To view the purchase order listed follow the same process- click on the PO number to highlight and RELATED will provide Query document.

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FPAREQN

Requisition Form - Banner Order Entry Basics

Create New Requisition - Your default budget will populate the Commodity Accounting section on all orders. To change this budget to a Grant or Other ORG - follow these steps:

REVISION EFFECTIVE 8/9/17

IMPORTANT NEW INSTRUCTIONS FOR CHANGING THE FUND OR ORG TO A <u>GRANT OR OTHER</u> <u>BUDGET.</u>

- 1. GO TO FORM- FGIBDST- ENTER THE NEW BUDGET INFORMATION AND VERIFY THE PROGRAM CODE FOR THE NEW FUND/ORG YOU ARE USING IN THE REQUISITION. WRITE THE INFORMATION DOWN!!! DO THIS STEP **BEFORE** STARTING THE REQUISITION.
- 2. BEGIN THE INSTRUCTIONS TO CREATE A REQUISITION AS FOLLOWS.

To create a NEW requisition, click the green "GO" button (top right). A requisition request is created with the Requisition Number of "NEXT"

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Delivery Date

Click the calendar icon for "Delivery Date" and choose a date 2-3 weeks from time of entry

Ship To

Scroll down to the "Ship To" field. Either enter the 4-digit extension of the person receiving the deliver or click the "..." (3 dots) menu to search. Once a 4-digit extension has been entered, hit the "Tab" key (on the keyboard). The remaining Ship To fields will populate.

Click the "Next Section" button (triangle pointing down - bottom left)



Vendor Information

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On the "Vendor" line, enter ONLY the VENDOR NAME in the larger field (see above)

Click the "Next Section" button (triangle pointing down - bottom left)



Commodity/Accounting

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DO NOT SEARCH OR ENTER ANY DATA IN THE COMMODITY BOX - TAB TO DESCRIPTION BOX Double-click under the "Description" heading. A text box will appear. Enter item Product #, Description., etc.

Using the TAB key (on the keyboard), move to each of the following fields and complete:

U/M - Unit of measure Ex. EA for each Quantity - Ex. 1 Unit Price - price per unit Ex. 99.99

Hit the TAB key one more time to calculate.

DOCUMENT/ITEM TEXT :

When more description information is need select RELATED on the TOP Right and the options of Item or Document Text will be available. Select the one that you need to provide the vendor with the most information. The text screen will open and you DO NOT need to fill in any information just select GO. A new window opens enter information in the new text box and for more lines select Down arrow. Once completed select SAVE a confirmation of your data being saved and WHITE X (top left) to go back to the Commodity screen. There is a check mark in the box related to your selection by the line item or a check in Document text on the top right. This is a confirmation the data will print on the purchase order.

To add additional line items, use the "Down" key on the keyboard when the cursor is in the item row. Repeat the steps above for each line item.

Click the "Next Section" button (triangle pointing down - bottom left) to proceed to the Accounting section.



Accounting

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Using the TAB key, ensure that the following fields are complete and accurate:

COA - Chart of Accounts - M for Manhattan

Year - Fiscal Year - 18 for FY18

Index - Leave Blank

Fund - Ex. 110000 for Operating Budget

Orgn - Organization Budget Ex. 2320 for ITS

Acct - Accounting Code Ex. 7828 for Software

Prog - Program Code - see new instructions as follows.

IMPORTANT NEW INSTRUCTIONS FOR CHANGING THE FUND OR ORG TO A <u>GRANT OR OTHER</u> <u>BUDGET.</u>

- 1. TAB TO THE FUND BOX AND **DELETE 110000.** TAB TO THE ORG BOX AND ENTER THE NEW 4 DIGIT NUMBER. TAB TO ACCOUNT CODE BOX AND COMPLETE THAT ENTRY. **CONTINUE TO TAB THROUGH TO THE TOTAL COST. THIS WILL ALLOW THE SYSTEM TO ASSIGN THE CORRECT PROGRAM CODE ASSOCIATED WITH THE NEW ORG. To change a fund from 110000 to a Grant delete 110000 and enter the new fund. Follow same steps to allow system to update the program code.**
- 2. AGAIN: THE FUND (110000) WILL RE- POPULATE AFTER THE NEW ORG IS ENTERED AND THIS WILL UPDATE THE PROGRAM CODE.
- 3. DO NOT CONTINUE UNTIL YOU HAVE CHECKED ALL FOUR BOXES ARE ACCURATE!!!!

Click the SAVE button (bottom right).

Click the "Next Section" button (triangle pointing down - bottom left) to proceed to the section.

Finalize Requisition

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Ensure that the Status of all fields shows "BALANCED".

Note the Requisition number (top left).

Click the "Complete" button (bottom left) to complete the requisition process. Otherwise, if you are not done, click "In Process" to complete the requisition later. Take note of the Requisition number. The Requisition number will be confirmed on the next screen. (top right - green message)

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FPIREQN - Requisition Status (View Only)

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Enter the Requisition number in the "Requisition" field and click the green GO button (top right).

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Congratulations - You have completed a requisition.

Your next step:

Send an email to Elena Mastrangelo to advise her of this requisition and include the company name, and Requisition Number. If the company is new, you must also contact them for their <u>W9</u> (attach to this email),

Business name, address, phone, contact person, contact email for the purchase order. Also include in the attachments any quotation that was prepared for this purchase.

The requisition will be transitioned to a purchase order and completed by Elena. You will be copied when the po is emailed to the vendor so you have it for your records.

FOIDOCH

Document History form - Look up your Purchase Order / Requisition/ Invoice and Check Number

Enter "FOIDOCH" in the search box and hit Enter



Enter the Document Type ex: REQ, PO , INV.

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Enter the Document Code (R00..... or P18..... for Banner orders and for Unimarket use prefix MC....) this is the number of the record you want to view. Click the green GO button (top right)

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Next Screen will open-

FOIDOCH- continued:

The related requisition number/ purchase order/ invoice and check number will populate based on the stage of progress of the original requisition. NOTE: Unimarket purchase orders require MC prefix ex: MC180001 and the requisition number **will not** be shown as it was only used in Unimarket.

To open the Req/PO/Invoice/Check click on the number ex: P1700268 and click on RELATED - Dropdown - choose Query Document or Transaction Details to view more details.

FPIPURR

Purchase/Blanket/Cancel Query form This is a view only form

Enter PO number in window and select GO. Use Arrow down on bottom left (Next section) to move through the purchase order screens .