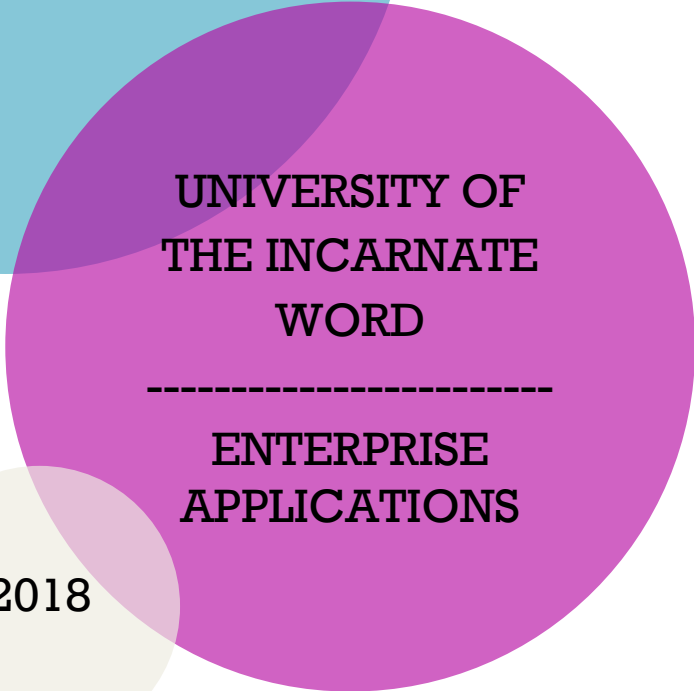




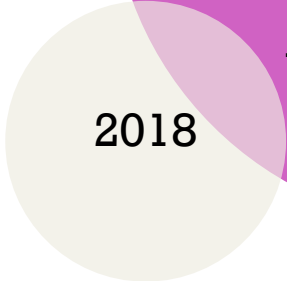
BANNER 9

Requisitions



UNIVERSITY OF
THE INCARNATE
WORD

ENTERPRISE
APPLICATIONS



2018

Welcome to Banner 9 INB for Requisitions

A requisition is a request for goods or services made by an employee to the Purchasing Department. If the request is approved, the Purchasing Department will submit a purchase order to the vendor or supplier of the goods or services.

Completion and approval of a requisition does not authorize a purchase. A purchase order is the official procurement document for the university and must be issued and signed by Purchasing Director or Senior Buyer before an order can be placed. Orders placed in violation of this rule are considered non-compliant.


The following pages contain screenshots and instructions to walk you through the process of creating a requisition and submitting the requisition for approval.

If you need additional assistance with this process contact the Purchasing department.

Process Outline . . .

- Check for Budget Availability on FGIBAVL
- Create a requisition on FPAREQN
- Attach supporting documents.
- Inform the approver that a document is in their queue.
- Research your requisition on FOIDOCH.

1. Login into the MyWord Portal



Sign In


Username

Password

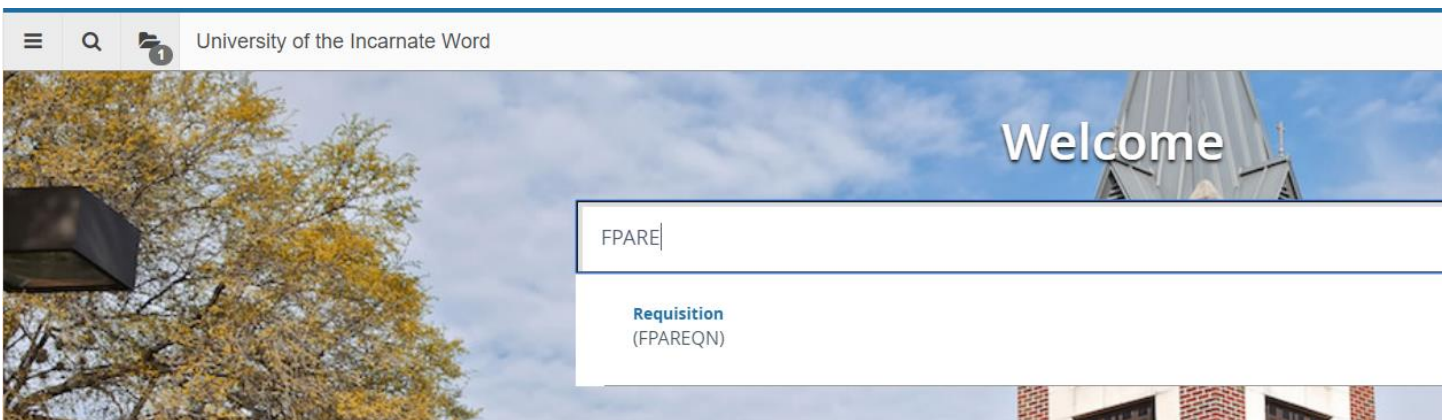
LOGIN

[Reset Password](#) | [Need Help?](#)

2. From the Launch Pad select, Banner 9 Admin Pages (INB)

 **Banner 9 Admin Pages**

3. In the search bar type FPAREQN, press enter or Click on the FPAREQN in the drop down



University of the Incarnate Word

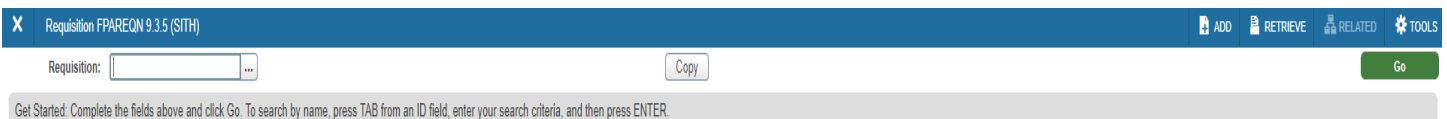
Welcome

FPARE|

Requisition
(FPAREQN)

Requisitions Entry

4. The Requisition screen will open
5. To start a new requisition press the GO button in the upper right corner



Requisition FPAREQN 9.3.5 (SITH)

ADD RETRIEVE RELATED TOOLS

Requisition:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

6. The new requisition screen will open

Requisition: NEXT

Requestion ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT

Order Date * 04/30/2018

Transaction Date * 04/30/2018

Delivery Date *

Comments

Commodity Total 0.00

Accounting Total 0.00

In Suspende

Document Text

Document Level Accounting

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

Requestor * Angela Mazzara

Organization * ...

COA * 1 ... Univ. of the Incarnate Word

Email williams@uiwtx.edu

Phone Area Code 210

Phone Number 8325621

Phone Extension

Fax Area Code

Fax Number

Fax Extension

Ship To * 1000 ...

Street Line 1 University of the Incarnate Word

Street Line 2 4301 Broadway

Street Line 3

Contact Sam Wages

Attention To * Sam Wages

Building

Floor

City San Antonio

State or Province TX

Zip or Postal Code 78209

Nation

Area Code

Phone Number

Extension

7. Click in the Delivery Date and enter tomorrows date, press enter
8. If you have a comment enter it in the Comment field
9. Using the down arrow in the lower left corner move to the next block or ALT and Page Down key together will take you there too



Requestor/Delivery Information Tab

10. Tab to the Organization code field and enter your ORG code

REQUESTOR/DELIVERY INFORMATION

Requestor * Angela Mazzara

Organization * 6306 ... Enterprise Applications

COA * 1 ... Univ. of the Incarnate Word

Email williams@uiwtx.edu

NOTE: At this time you are not able to enter an additional email, Ellucian is fixing this defect

11. Tab to the Attention To field and enter your name or the person to receive the order

REQUESTOR/DELIVERY INFORMATION

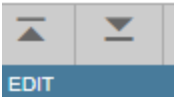
Requestor * Angela Mazzara

Organization * 6306 ... Enterprise Applications

COA * 1 ... Univ. of the Incarnate Word

Email williams@uiwtx.edu

12. Using the down arrow in the lower left corner move to the next block or ALT and Page Down key together will take you there too



Vendor Information Tab

13. Enter the Vendor number or use the search function.

A screenshot of a software application's "Vendor Information" tab. The tab is part of a larger window with other tabs: "Requestor/Delivery Information", "Vendor Information" (active), "Commodity/Accounting", and "Balancing". Under the "VENDOR INFORMATION" section, there are several fields: "Vendor" with the value "60462" and a dropdown arrow, followed by the text "Heights Office Supply"; a "Vendor Hold" checkbox; "Address Type" with the value "BU" and a dropdown arrow; "Sequence" with the value "2" and a dropdown arrow; "Street Line 1" with the value "9901 Broadway St Ste 114"; and "Street Line 2" which is currently empty.

14. Click on the ellipsis dropdown to start the search



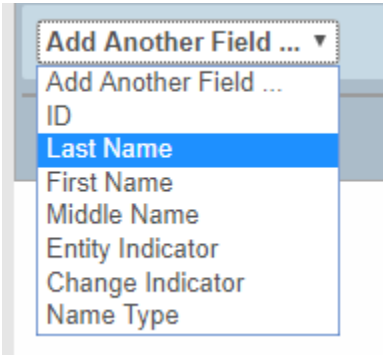
15. Select from the option list Entity Name/ID Search (FTIIDEN)

A screenshot of a dialog box titled "Option List" with a close button (X) in the top right corner. The dialog contains two options, each with a blue highlight: "Entity Name/ID Search (FTIIDEN)" and "Vendor Maintenance (FTMVEND)". At the bottom right of the dialog is a "Cancel" button.

16. Vendor should have a check mark

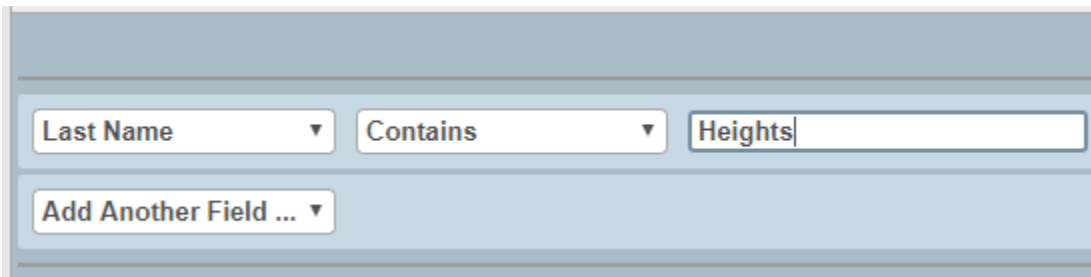
A screenshot of the "ENTITY NAME/ID SEARCH" section in the software application. It features three checkboxes: "Vendors" (checked), "Terminated Vendors" (unchecked), and "Grant Personnel" (unchecked).

17. Under details click the dropdown arrow select Last Name from the list

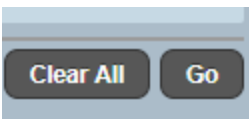


18. Filter commonly used is Contains but you are free to choice from the dropdown, for this instructions we will leave it Contains

19. In the blank field, type the company name or last name. example "Heights"



20. You can add other fields to search by or press the GO button on the right side of the screen.



21. After you press GO you will receive a list of vendors to choose from. Select the vendor you need

814261	Alamo Heights Night LLC	
@00147485	Alamo Heights Night LLC	
W00874267	Alamo Heights Night LLC	
60462	Alamo Heights Office Supply	
W00060462	Alamo Heights Office Supply	

NOTE: By default, the page only shows 20 lines. You can increase the number of lines by using the Per Page dropdown to change the number of lines. 50 lines is the max to display per page. If your query exceeds 20 lines per page, you will see a set of arrows in the lower left corner to toggle between the pages.



22. When selecting the correct vendor you can double click on the vendor code or use the Select button in the lower right corner to choose the vendor code.

EL SELECT

Commodity/Accounting

1. Tab past the Commodity to the Description field
2. In the Description field enter the description of what you are requesting (BSN 1234 Pens, Fine PT)

COMMODITY		
Item	Commodity	Description
1		Blue Pen XZY 456
	<input type="text"/>	<input type="text"/>

If you need additional room to type information or to make an "ISSUE CHECK" request, click on Related on the upper, right hand side and got to Item Text.

ADD RETRIEVE RELATED TOOLS

Search

Review Commodity Information [FOICOMM]

Item Text [FOAPOXT]

Document Text [FOAPOXT]

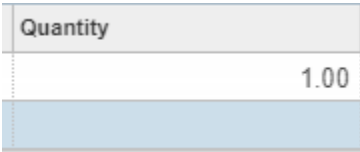
Commodity Text [FOATEXT]

Then click on Go and this will get you to the first line. Down arrow on your keyboard for additional lines. (Reminder: 3 periods on 3 separate lines flags us for an Issue Check Request) **This is viewable on the PO.**

3. Tab to the U/M field and enter EA

U/M
EA

4. Tab to Quantity and enter the amount of the product or service you need



A screenshot of a software interface showing a 'Quantity' input field. The field is highlighted with a blue border and contains the value '1.00'. Below the field is a blue bar.

5. Tab to Unit Price and enter the price for the product or service



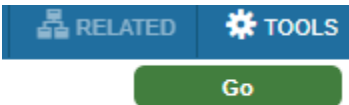
A screenshot of a software interface showing a 'Unit Price' input field. The field is highlighted with a blue border and contains the value '1.0000'. Below the field is a blue bar.

Note: If you need to add Item text to a line, you will click on the Related button at the top, select Item Text (FOAPOXT).




Adding Item Text

1. When the procurement text entry form opens click the green GO button in the upper right corner



2. The text section will open. Type your text as needed.



A screenshot of a software interface showing a 'PROCUREMENT TEXT ENTRY' form. The form has a title bar with a dropdown arrow and the text 'PROCUREMENT TEXT ENTRY'. Below the title bar is a text input field with the label 'Text'. At the bottom of the form is a navigation bar with a back arrow, a page indicator '(1) of 1', a forward arrow, a dropdown menu with '10', and the text 'Per Page'.

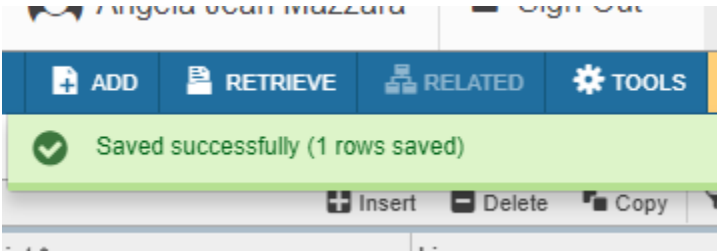
3. Use the down arrow to get a new line if your text needs to be on multiple lines



4. When you have completed click the Save button in the lower right corner



5. You will get a confirmation message that you successfully saved

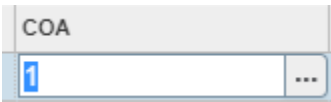


6. Click the X to exit the screen back to your requisition.



Commodity/Accounting Continued

1. Once you have all your line items entered use the down arrows or ALT Page down to get to the Accounting section
2. The COA will default to 1



3. Year will default to the current Fiscal Year (18)
4. Tab past Index
5. Tab to Fund which will default based on your accounting access
6. Tab to the ORGN which will default based on your accounting access
7. Tab to the ACCT enter the account number to be charged
8. Tab to PROG which will default based on your accounting access

Fund	Orgn	Acct	Prog
10010	6306	6584	6250

9. Tab past ACTV, LOCN. PROJ we currently do not use these
10. Continue to tab through the total section
11. Once you have completed the accounting section move to the Balancing and completing tab

Balancing/Completing Tab

1. Adding a document as back up
2. Click the ADD button at the top of the page to access Xtender



3. Click the New Page Icon arrow
4. Click New Page

5. Click Import File
6. Click Append File
7. This will bring up a box that contains your files (Import Files), locate the correct document to import, double click on the document to add
8. Once the document is loaded on your screen click the New Document Icon (the page with the starburst)
9. Click the save button
10. If your document is more than 1 page you will get the modify option.
11. Click on the green plus sign on the multiple pages to add all
12. You will get a message "All pages will be attached. Do you want to proceed?" Click the OK button.
13. Log out of Xtender to return to your requisition
14. Click the Retrieve button to view your document that you just attached

If you are done click the Complete button at the bottom left. If you may have changes click the Save button bottom lower right.

