BANNER 9

My Requisition

UNIVERSITY OF THE INCARNATE WORD

2018

Welcome to Banner 9

My Requisition Self-Service

Purchase Requisition Overview

Purchase Requisition Overview Purchase Requisition allows you to create and submit a purchase requisition. You can create a purchase requisition using either document-level or commodity-level accounting. You can also use this application for the following:

• Save requisition as a draft (Draft status) • Edit a draft requisition and submit a draft requisition

• Delete a draft requisition

• View requisition status

• Copy a completed requisition

• Add comments (public and private)

• Add and delete attachments using Banner Document Management

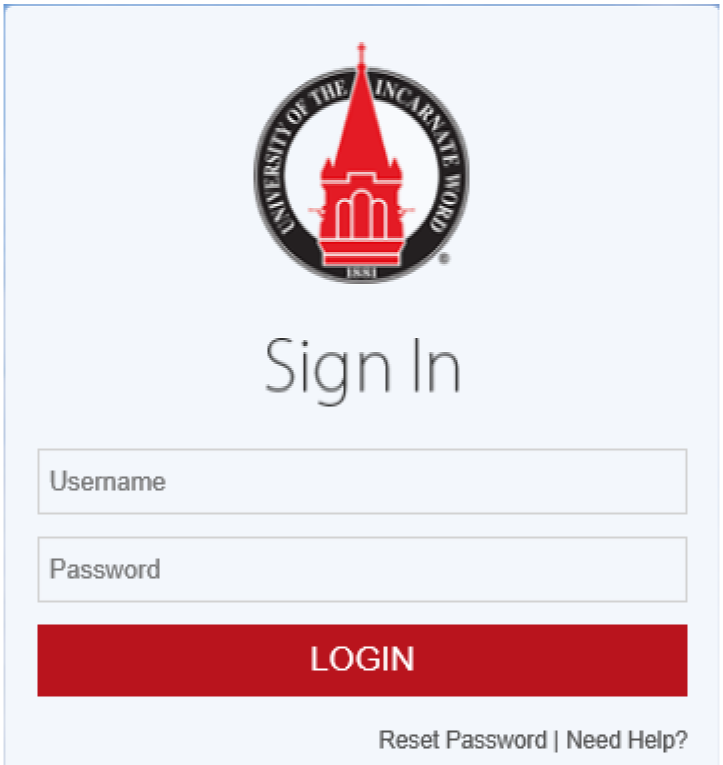
• Recall your requisition from Banner Finance approvals

• View a requisition as a PDF

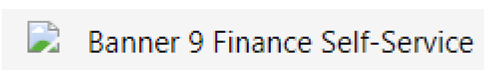
The following pages contain screenshots and instructions to walk you through the process of creating a requistion and submitting the requisition for approval.

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

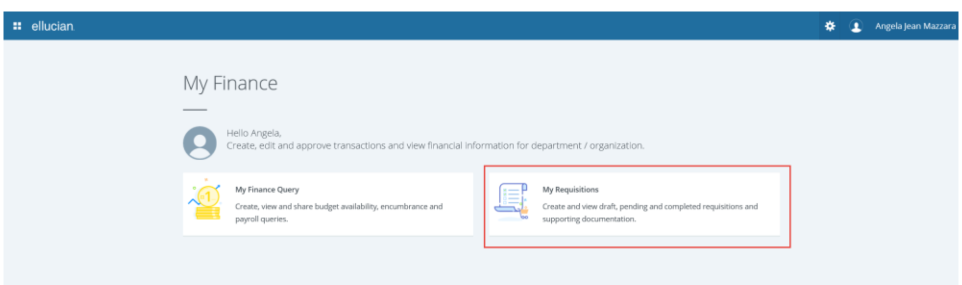
Step 1 Login to the MyWord Portal



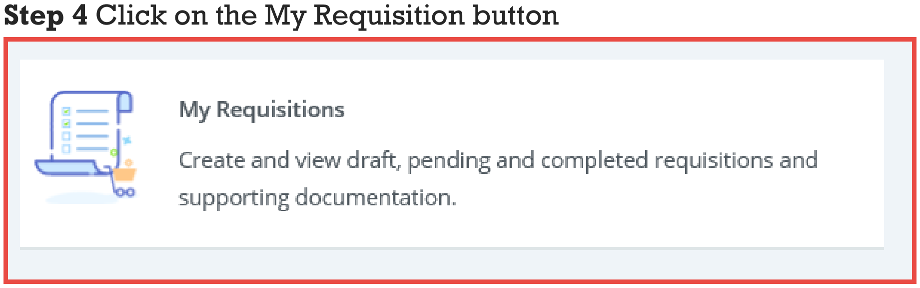
Step 2 From the Left side of the screen in your Launch Pad select the Banner 9 Finance Self-Service link.



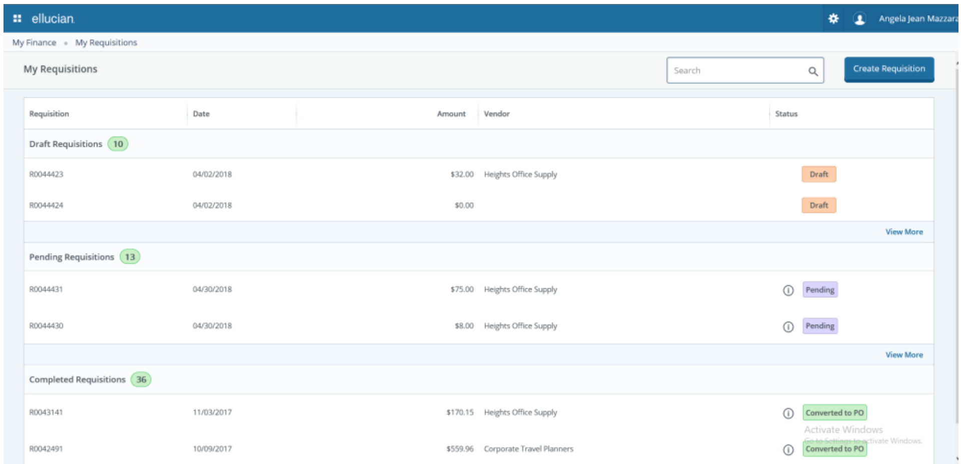
Step 3 The My Finance dashboard will open once you have selected the link. If you do not receive this dashboard contact the Help Desk.



Step 4 Click on the My Requisition button



Step 5 Your My Requisition Dashboard will open. The dashboard contains your Draft, Pending and Converted to PO requisitions. You can also click on the Create Requisition button to begin a new request.

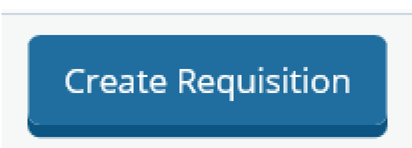


A Draft is a requistion you have started but not completed.

A Pending requisition is a request you have completed and sent for approval.

A Converted to PO is a requisition that is approved and the Purchasing department has converted to a Purchase Order.

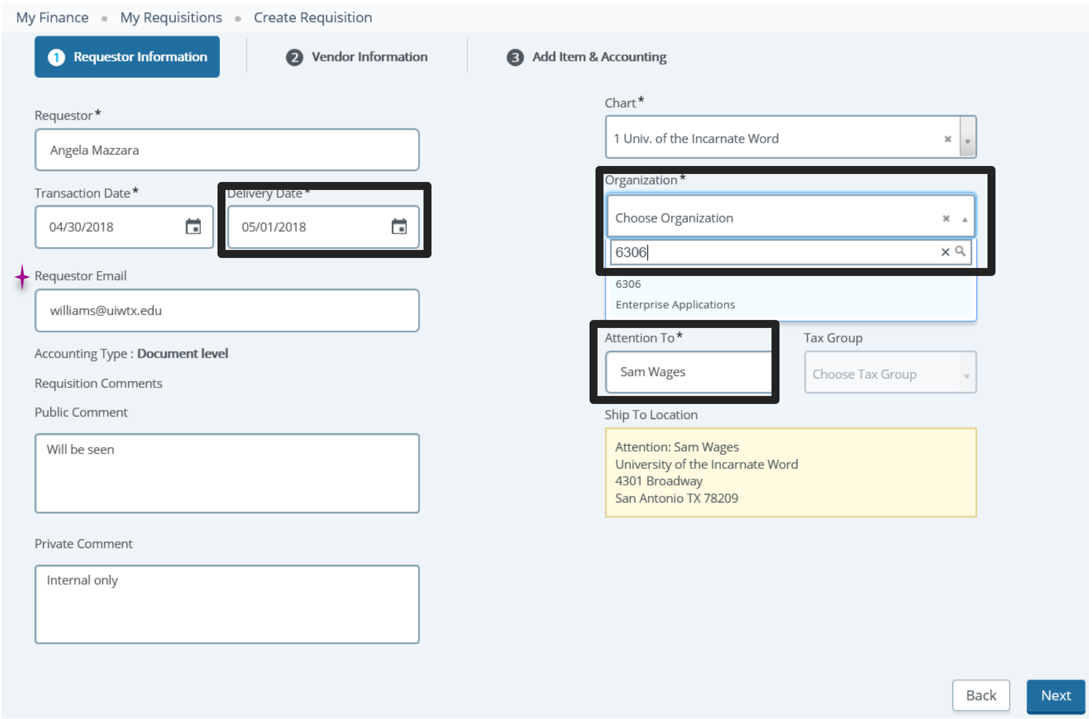
Step 6 Click the Create Requistion button to begin a new request.



Step 7 This is the Requestor/Delivery Page. You will complete the following steps on this page:

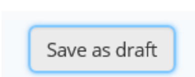
- Enter requested delivery date (must be at least 1 day ahead of the transactions date.
- Enter the Organization number
- Attention to
- Document Text (optional)

Note: At this time only one requestor email may be entered.



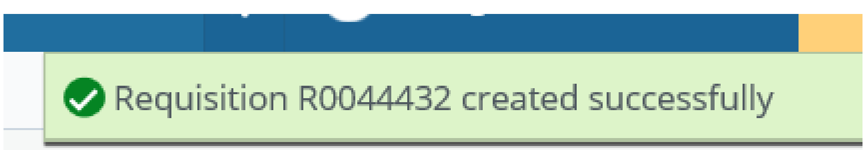
Step 8 Click the Next button in the lower right of the screen to move to the next section of the request.

Back button will return you to the dashboard



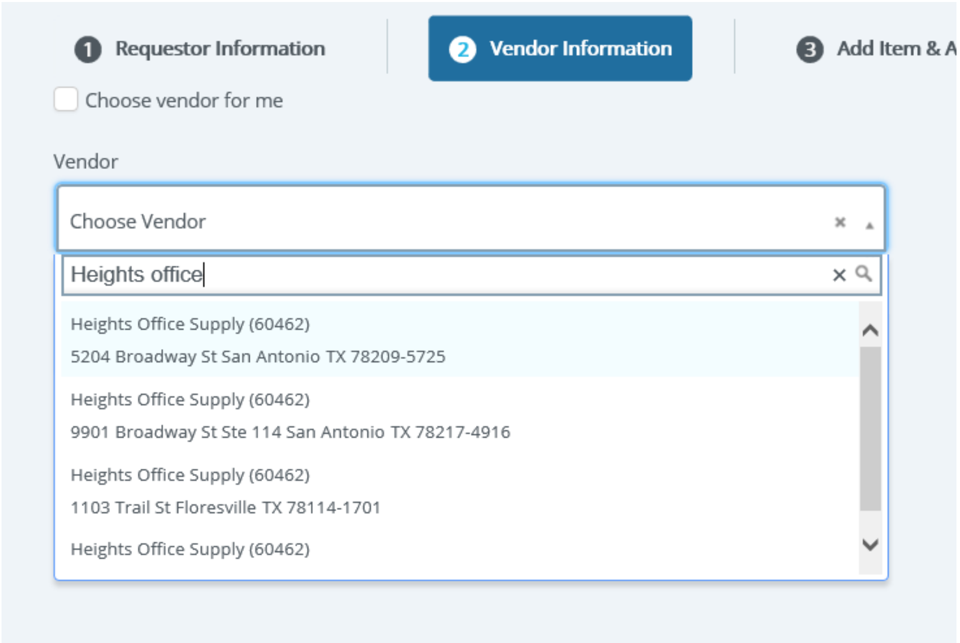
Save as draft will save your requistion to the draft section of the My Requisition Dashboard.

Once you click Next you will receive confirmation that you have created a requisition and the number associated.



Step 9 You will be on the Vendor page. You can let purchasing select a vendor for your request or you can uncheck the box and select a vendor.

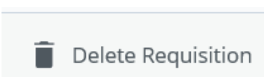
To select a vendor start typing the vendor's name. A dropdown will appear and you can scroll through to pick the correct vendor.



Note: At this time only one vendor email may be entered.

Once you have your vendor selected click the Next button to move to the next section.

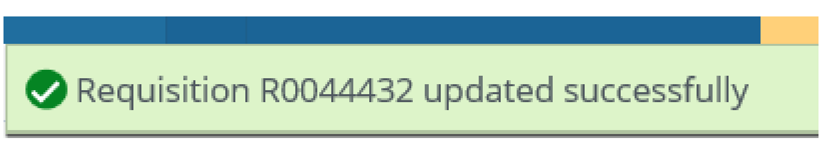
You can save your requisition at this point by pressing the Save as Draft button.



You can click the Delete Requisition button to cancel your request and start over.

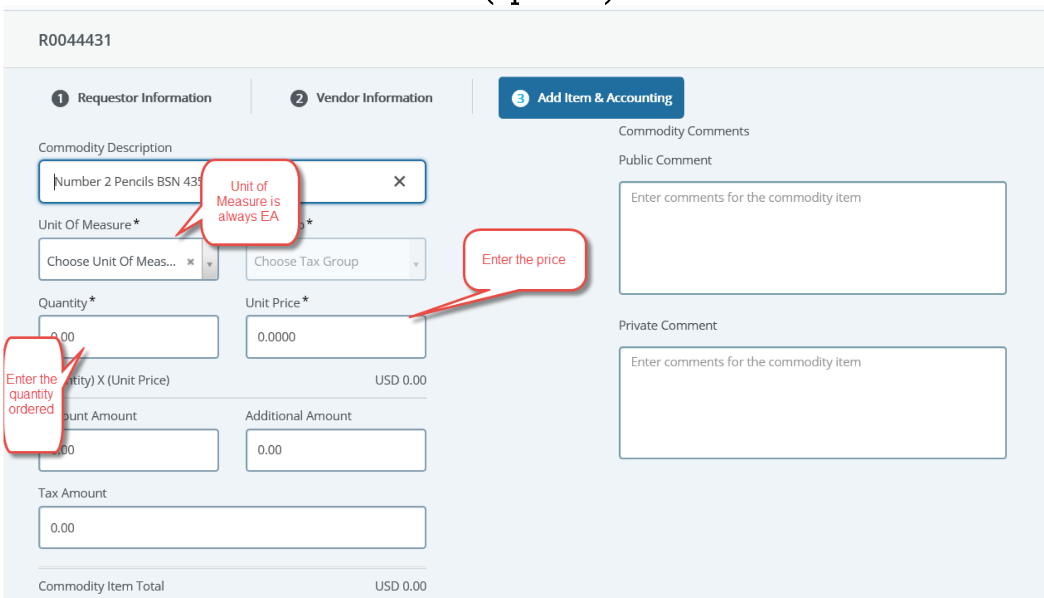
You can click the View as PDF button to view your requisition as a PDF.

Once you click the Next button on the Vendor page you will receive a confirmation that the requistions was updated.

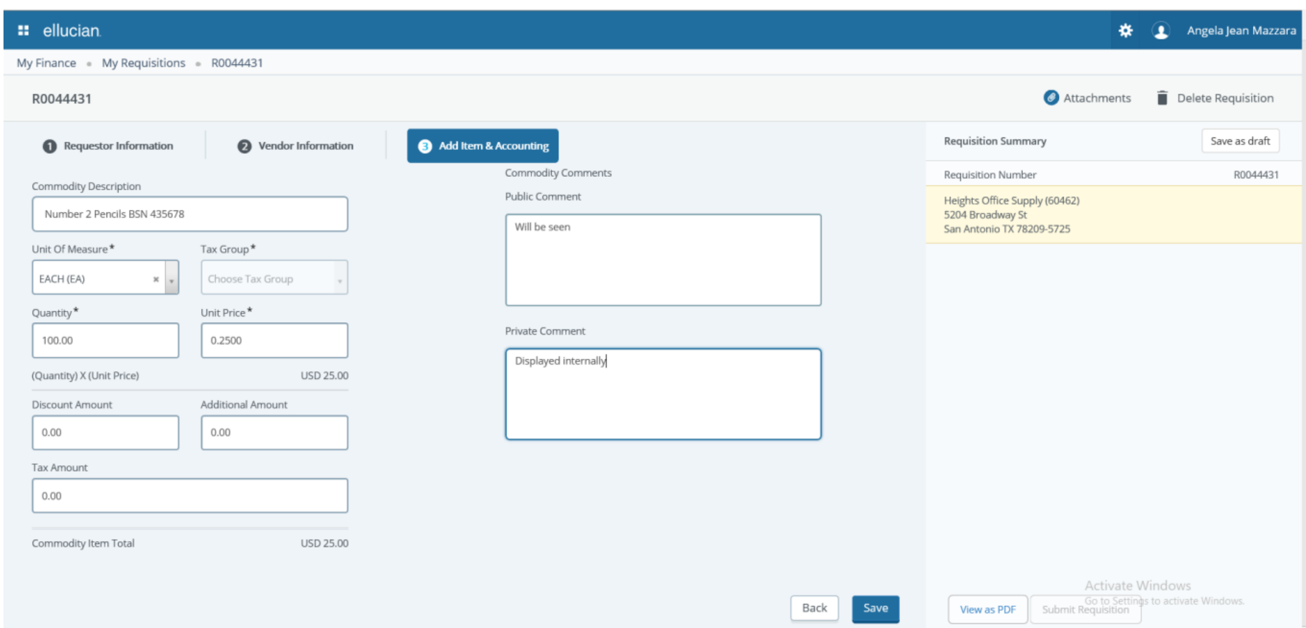


Step 10 The Commodity page. Enter the following information:

- Description of the item or service to be ordered
- (U/M)Unit of Measure – always EA
- Quantity of items
- Price per item
- Private or Public Comments (optional)



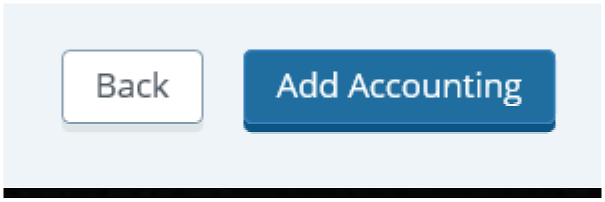
Click the Save button. At this point, you can either enter another description for another item or click the Add Accounting button to add the account information associated with the purchase.



Two buttons on this screen are optional.

- You can click the Delete Requisition button and completely cancel you requisition.
- You can click the Attachments button to add documentation to your request

Step 11 After all of your items or services are entered click the Add Accounting button.

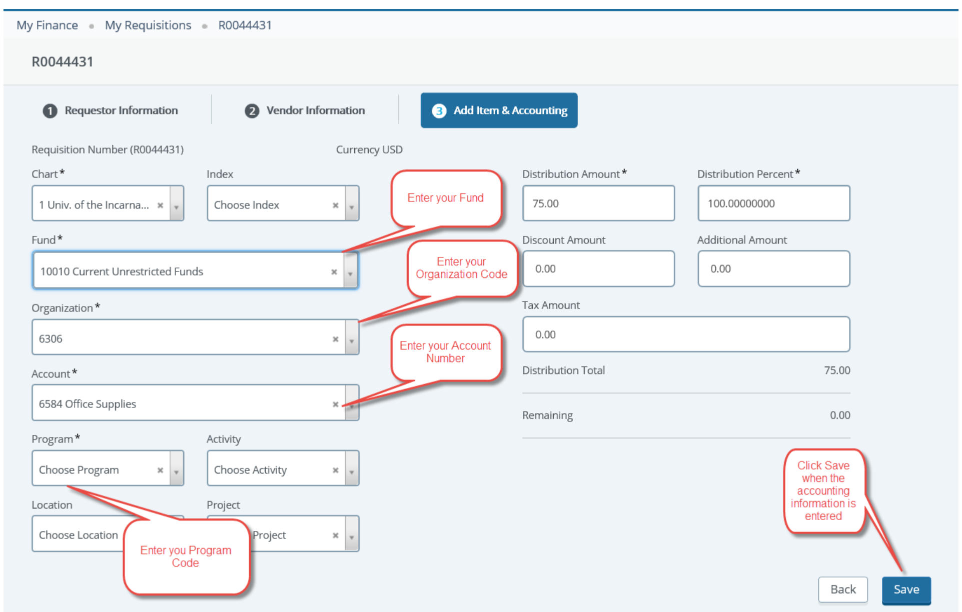


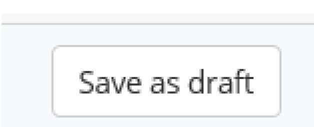
Step 12 Accounting Page you will enter the following:

- Enter the Fund, ORG, ACCT, and Program codes. You can search on any of these fields if you don't remember the number you need to use

Note: If you need to split the cost between Funds, ORGS, ACCT you will need to change the Distribution Percent field and add the additional accounting information.

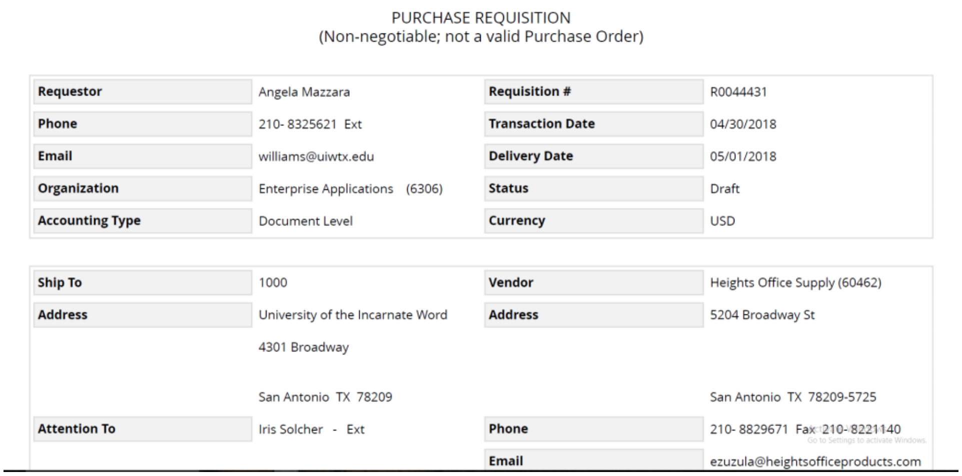
Step 13 Click Save





Allows you to save where you are and come back to make changes or continue.

View as a PDF gives you a finished look that your requisition. We recommend waiting until you are ready to complete your requisition to print a copy as a PDF. (Optional) Example of PDF is below.



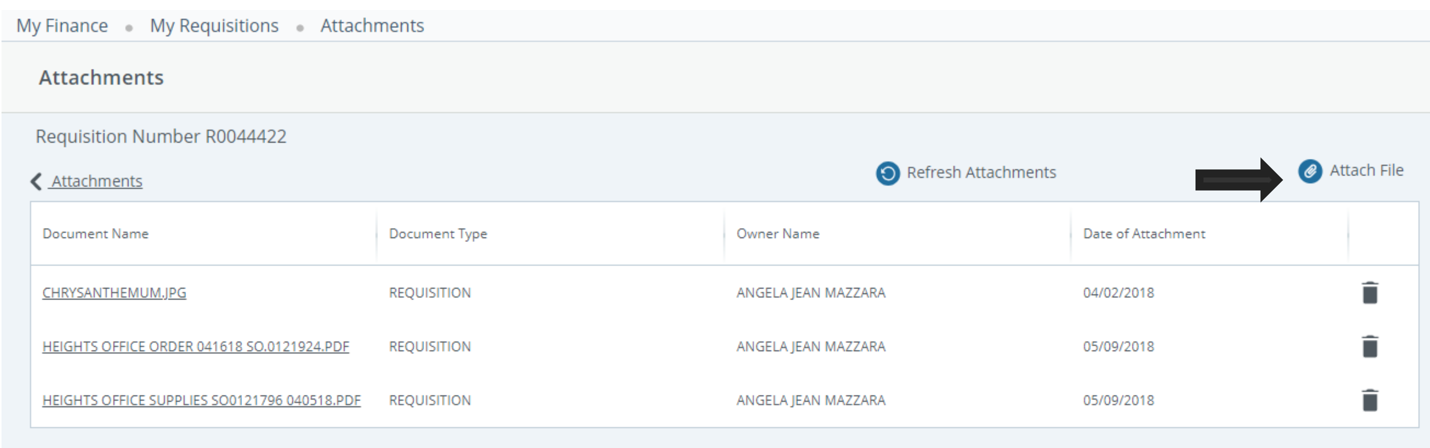
PURCHASE REQUISITION
(Non-negotiable; not a valid Purchase Order)

Requestor	Angela Mazzara	**Requisition #**	R0044431
Phone	210- 8325621 Ext	**Transaction Date**	04/30/2018
Email	williams@uiwtx.edu	**Delivery Date**	05/01/2018
Organization	Enterprise Applications (6306)	**Status**	Draft
Accounting Type	Document Level	**Currency**	USD

Ship To	1000	**Vendor**	Heights Office Supply (60462)
Address	University of the Incarnate Word 4301 Broadway San Antonio TX 78209	**Address**	5204 Broadway St San Antonio TX 78209-5725
Attention To	Iris Solcher - Ext	**Phone**	210- 8829671 Fax 210- 8221140
		Email	ezuzula@heightsofficeproducts.com

After you click "Save" button, you will receive a confirmation message that you accounting was added to your requisition.

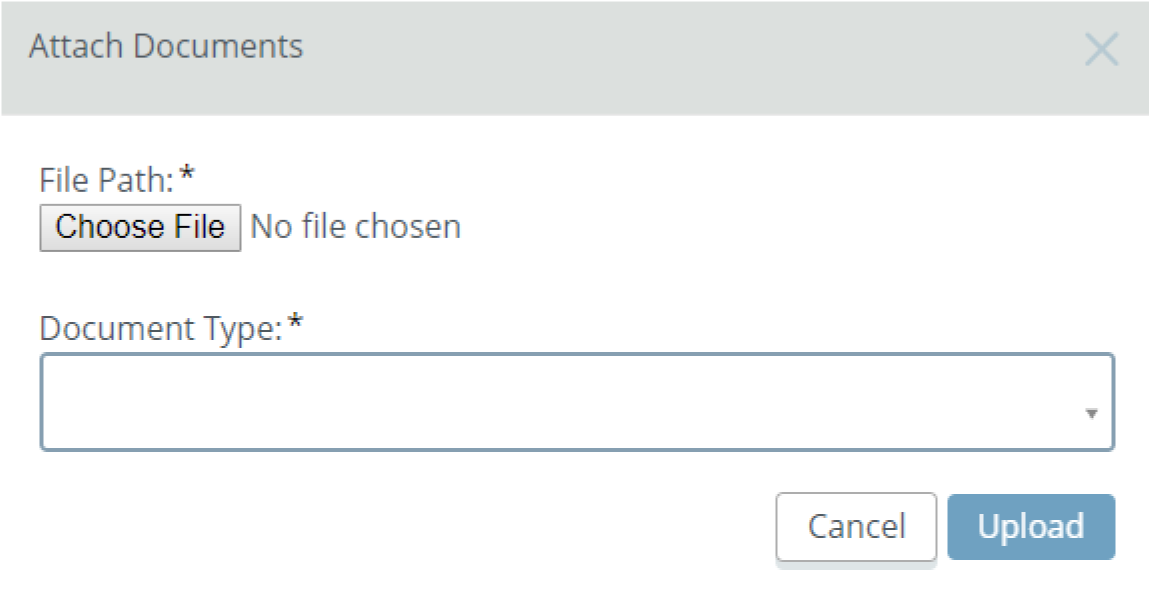
Step 14 Once you add your accounting information, you can add any attachments by clicking the Attachments button.



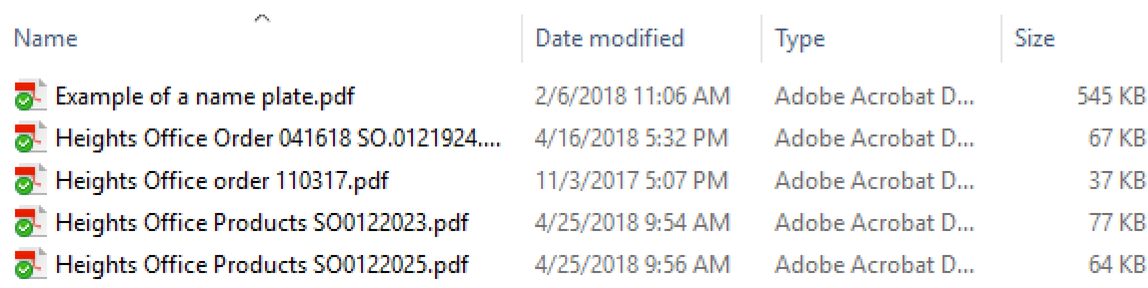
Document Name	Document Type	Owner Name	Date of Attachment	
CHRYSANTHEMUM.JPG	REQUISITION	ANGELA JEAN MAZZARA	04/02/2018	
HEIGHTS OFFICE ORDER 041618 SO.0121924.PDF	REQUISITION	ANGELA JEAN MAZZARA	05/09/2018	
HEIGHTS OFFICE SUPPLIES SO0121796 040518.PDF	REQUISITION	ANGELA JEAN MAZZARA	05/09/2018	

Click **Attach File** to select from saved documents on your computer.

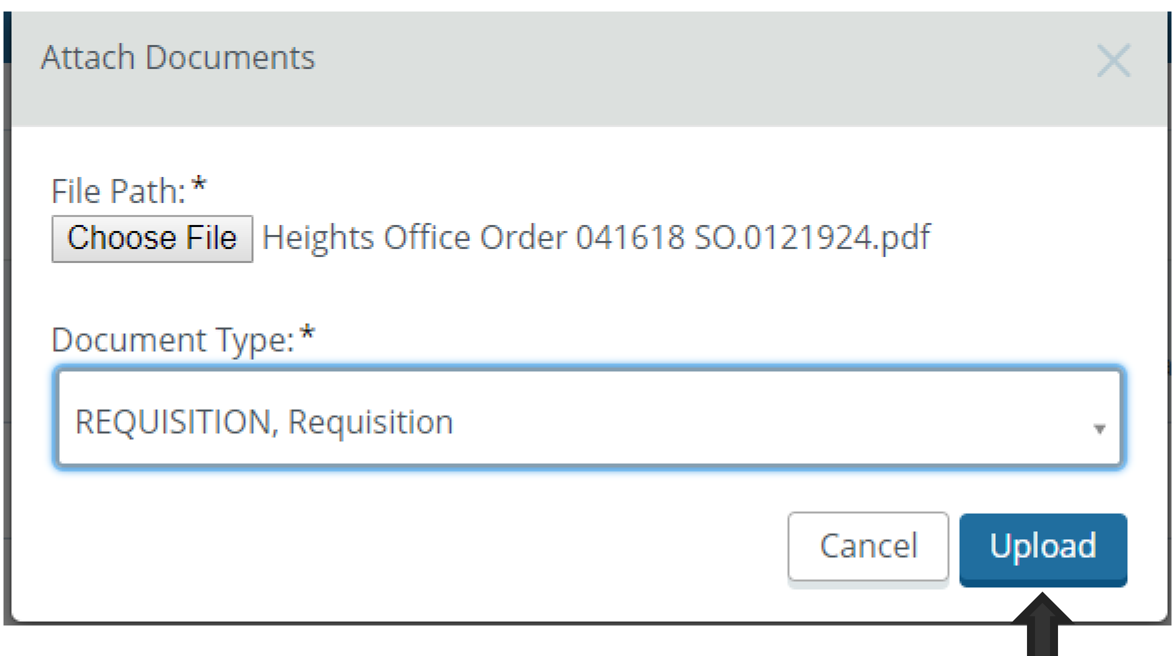
Click the **Choose File** button



Select your file to uploaded

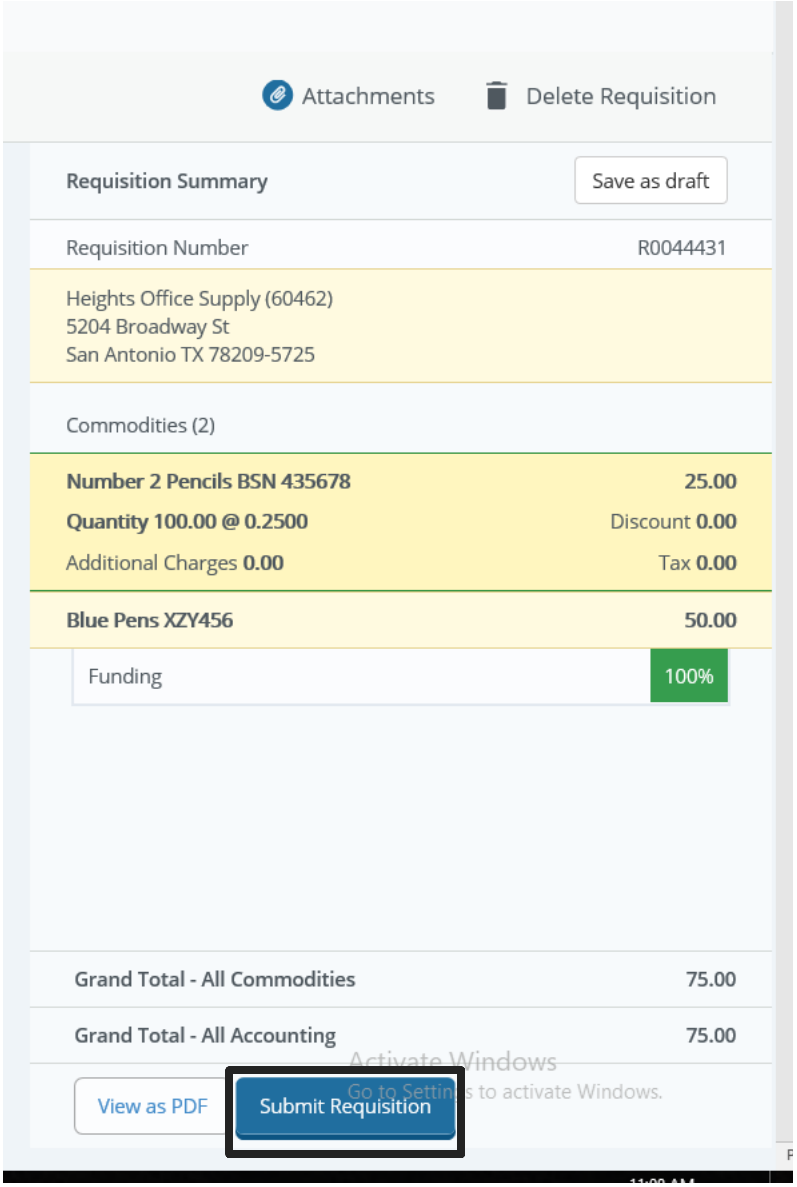


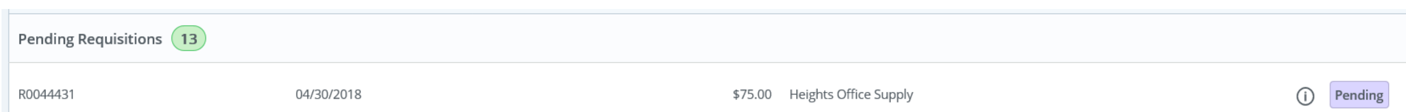
Add the **Document Type** from the dropdown box. It will always be **Requisition** for this process.



Click the UPLOAD button to attach your document.

Step 15 After you have added your attachments and your accounting is at 100% you are ready to submit your requisition by clicking the Submit Requisition button. By submitting your requisition, you are starting the process of approvals.

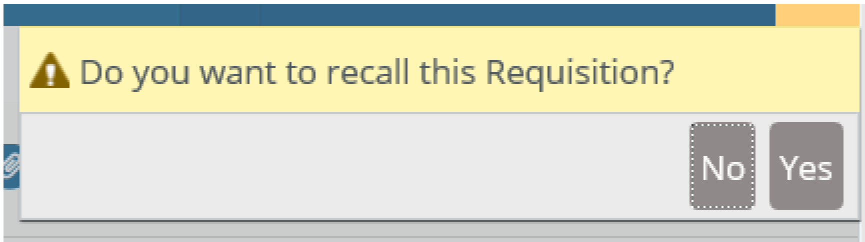




Your requisition is now on your My Requisition Dashboard as Pending. The requisition is pending approval. While your requisition is in a pending status, you can recall the requisition for changes, delete the requisition once recalled and view attachments added to the requisition.

Once you have opened a pending requisition you can view the documents attached by pressing the View Attachment button. This will open a new tab with Xtender to display the document.

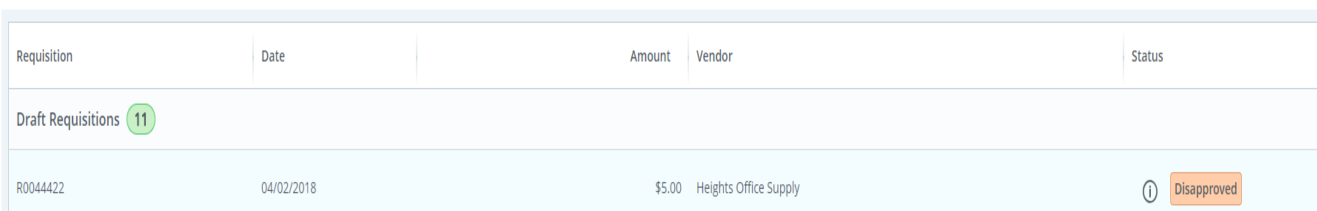
In addition, while in a pending status you can recall your requisition. You will receive a message confirming that you want to recall the requisition before it happens. Recalling returns the requisition to a Draft status. You can then make changes as needed or delete the requisition if necessary.



Step 16 Go back to Step 6 to do your next requisition or click the person icon and exit the Self-Service session.

Receiving a disapproved requisition back

When you log back in to My Requisition, your dashboard will display any requisitions returned (disapproved) for correction.



Click on the Disapproved button to open the requisition. Use the **Next** and **Back** button to navigate through the requisition and make necessary changes. When the changes are completed, click the **Submit Requisition** button.

Additional Available Functions

<u>Copy a requisition</u>

You can copy a completed requisition and use it as a template for a new requisition.

Steps:

1. On the My Requisition dashboard page, click the completed requisition you want to copy. The requisition opens on the Requestor Information page.

2. Click Copy Requisition.

3. On the copy prompt, choose the appropriate option.

Yes - The system copies the requisition and creates an identical new requisition that you can edit.

No - The system cancels the copy.

4. Edit the requisition as appropriate, just as you would a new requisition.

Delete a requisition

You can delete any requisition that is in a Draft status.

Steps:

1. On the My Requisitions dashboard page, click the requisition in Draft status you want to delete.

The requisition will open in the Requestor Information page (tab).

2. Click Delete Requisition.

3. On the dele prompt, choose the appropriate option.

Yes – The system deletes the requisition

No – The system cancels the delete.

Edit a requisition

You can edit requisitions in Draft status. To edit a requisition in Pending status, you must recall the requisition.

Steps

1. On the My Requisition dashboard page, click Draft in the Status column for the requisition that you want to edit.

2. Using the Next and Back Button s, edit the Requestor Information, Vendor Information and Add item & accounting pages as necessary.

3. Click Save as draft if you want to return to the requisition before submitting or submit requisition to send the requisition for approvals.

Recall a requisition

You can recall requisitions that are in pending status.

1. On the My Requisition dashboard page, open the pending requisition that you want to recall.

2. Click Recall My Requisition.

3. On the recall prompt, choose the appropriate option.

Yes – The system recalls the requisition, The My Requisition dashboard page loads with the recalled requisition placed in the draft requisition section with a draft status.

No – The system cancels the recall.

Notes:

Using Account 7640:

When using Account 7640 in the third set of your budget account, please put your item under the Description section of your requisition. Any other items would go under "Public Comment box", Use Public Comments instead of additional line items under the description section.

End of the Fiscal Year:

Use June 1 on requisition as we draw near to the end of May. If you do not require expenses, be paid from the current fiscal year than you would date your requisition 6/1/XX so that those expenses are paid out of the next fiscal year.

PRE-PAID expenses are things being purchased and delivered out of the next fiscal year's budget. Airfare also being taken out of the next year's budget is consider pre-paid and charged to account 1751.

Enter in the accounting information as you would for any regular requisitions but use the account 1751 for pre-paid expenses. Under the Public Comments, put the complete budget account to charged, so the accounting department can make journal entries.