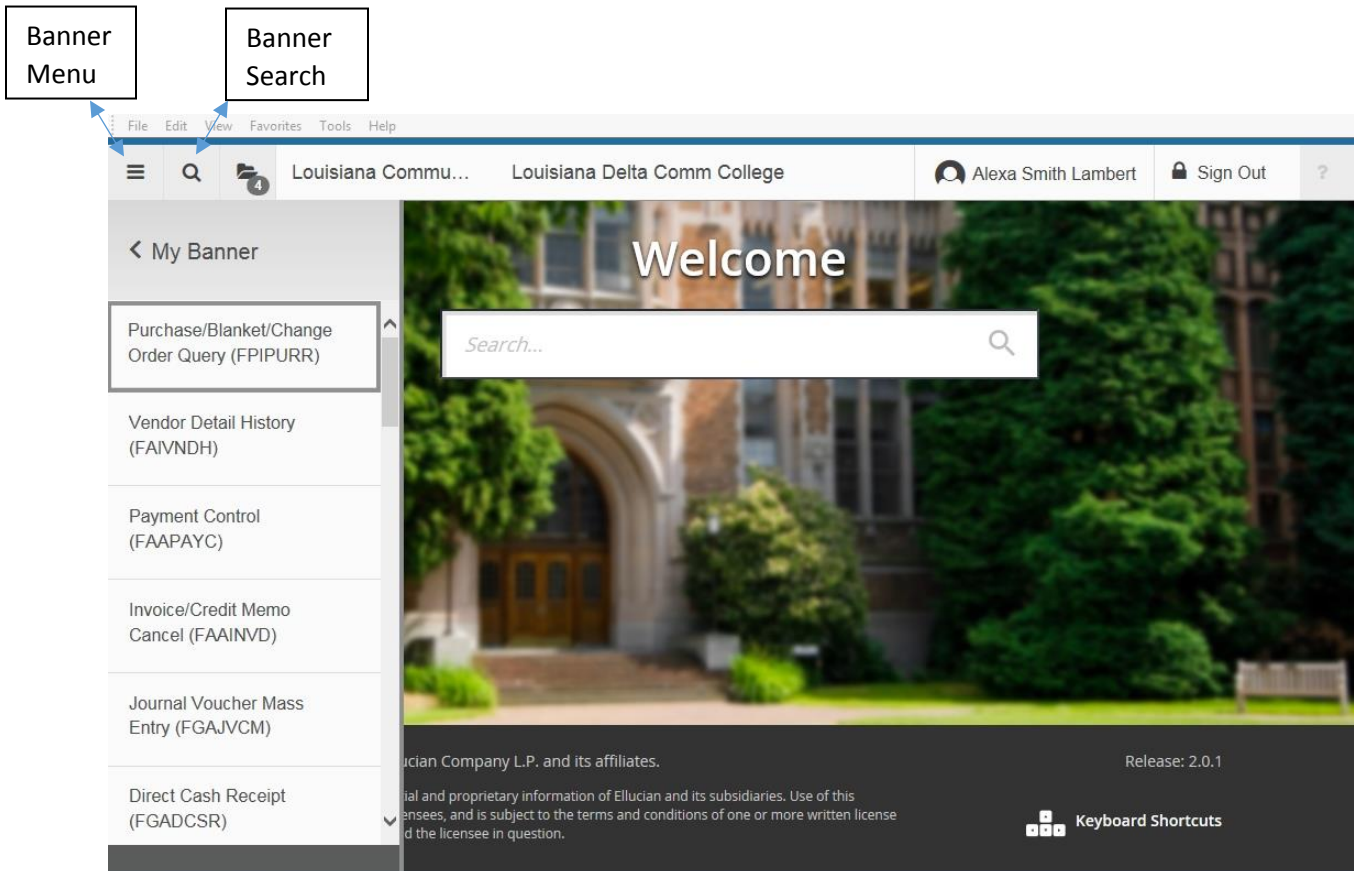


Creating a Requisition

BANNER XE – 9 (Application Manager)

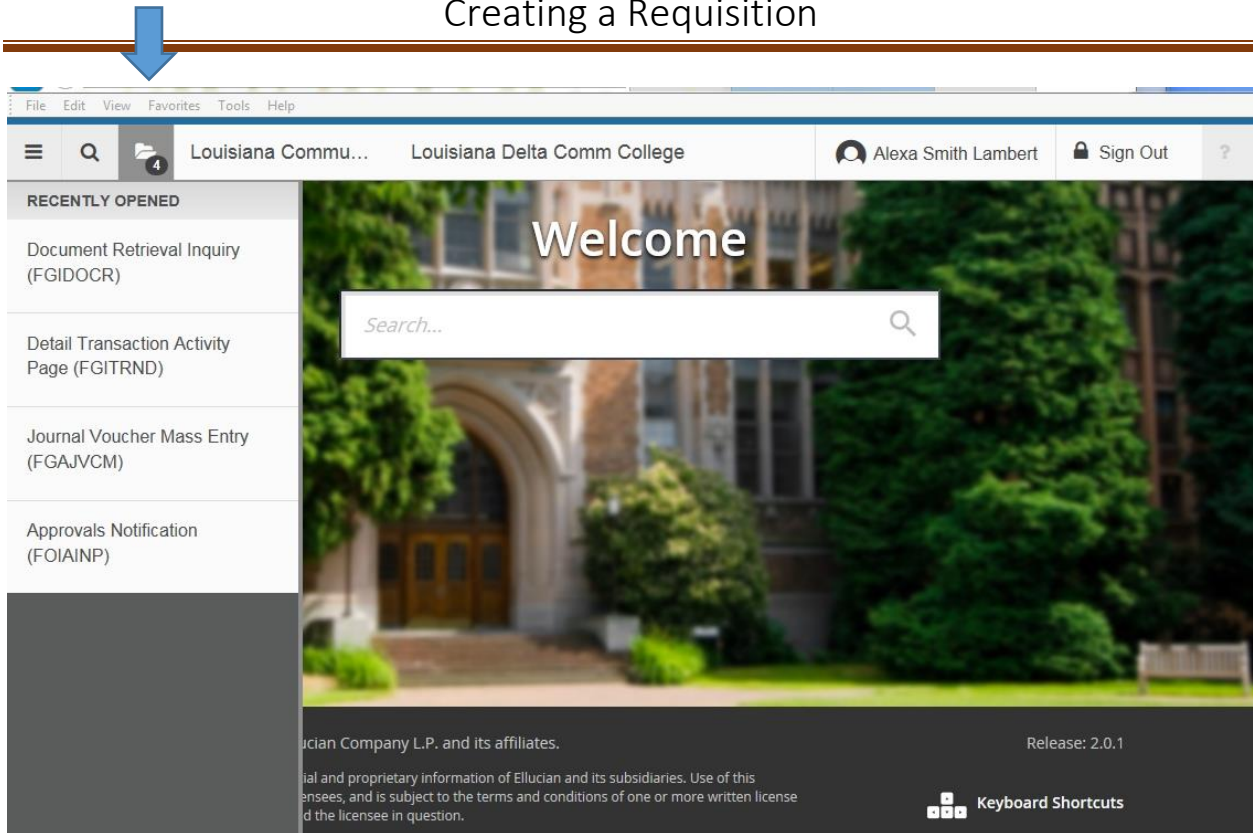
Navigation Information



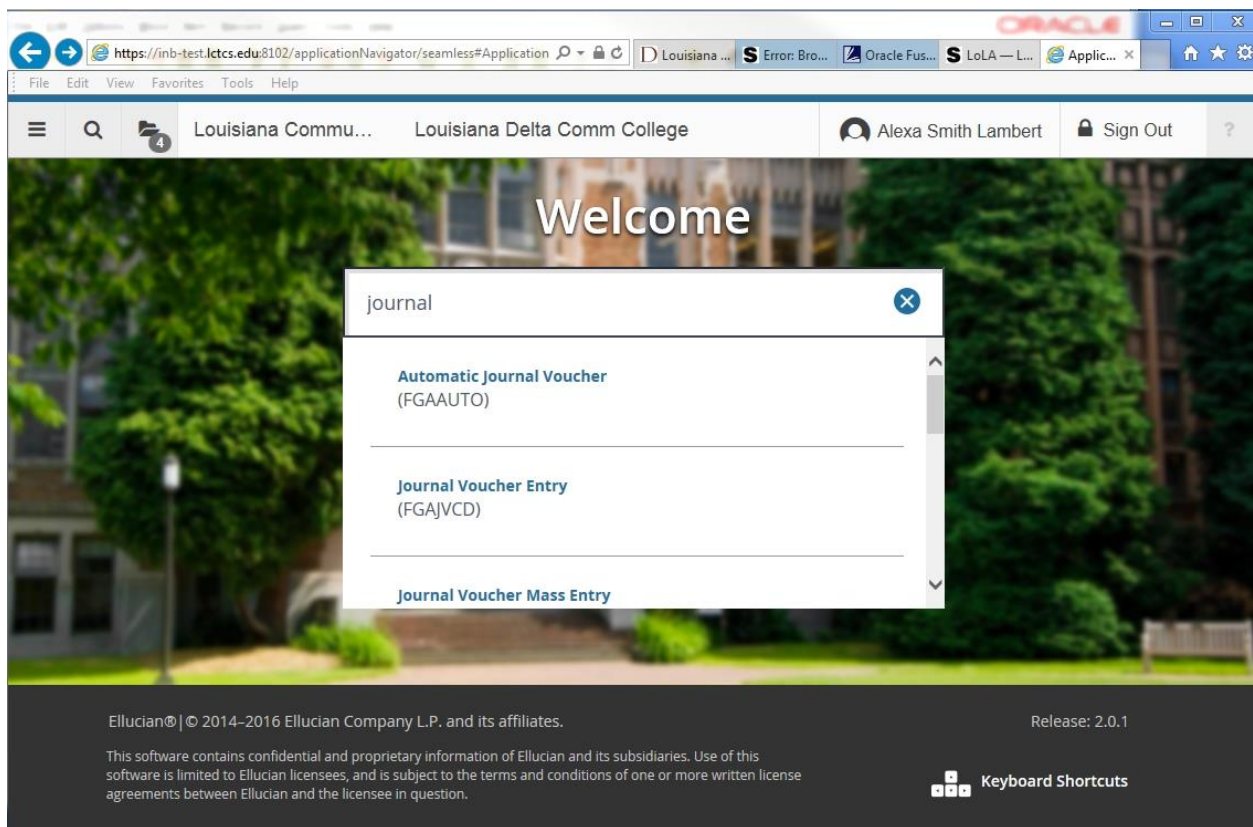
After logging into Banner XE this screen will be displayed. Clicking the **Banner Menu** button under Banner will bring up a list of all Banner Menu forms or under My Banner will bring up a personalized list.

Banner Search gives you the option to search by form name or by a word that appears in a form name, and gives similar results as the search window under the Welcome.

Creating a Requisition



Clicking the **Recently Opened Folder** icon will provide a list of your most recently used forms.



Example of using the Search window under the Welcome bar.

Creating a Requisition

CREATING A REQUISITION-OPTION 1 – Document Level Accounting

To enter a Requisition, either type in FPAREQN and choose it or type in 'Requisition' and choose the form FPAREQN. The following screen will appear.

Requisition:

Get Started: Fill out the fields above and press Go.

EDIT Record: 1/1 KEY_BLOCK.DISPLAY_RQST_CODE [1] ellucian

Type **'NEXT'**, in the **Requisition box** and then click the **'Go' button**. The **'Go' button** has replaced **'next block'** for this part of the form.

If you have a repetitive type order and want to duplicate it, you can use the **Copy Button** to pull up a completed Requisition and edit, as needed, changing dates and anything else that may need editing.

NOTE: TO VIEW MORE OF BANNER SCREEN TRY HOLDING DOWN THE CTRL KEY ON YOUR KEYBOARD AND USING THE SCROLL ON YOUR MOUSE TO MAKE FONT SMALLER OR BIGGER. A SMALLER FONT ALLOWS YOU TO SEE MORE OF THE SCREEN WITHOUT HAVING TO USE SCROLL BARS WITHIN BANNER TO MOVE LEFT AND RIGHT.

Creating a Requisition

Requisition: NEXT

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT

Comments: shipping to be added

Order Date*: 04/13/2017

Transaction Date*: 04/13/2017

Delivery Date*: 04/21/2017

Commodity Total: 0.00

Accounting Total: 0.00

In Suspense

Document Text

Document Level Accounting

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

REQUESTOR/DELIVERY INFORMATION

Requestor*: Alexa Lambert

Organization*: 630007 Comptroller's Office

COA*: L LCTCS

Email: [Redacted]

Street Line 2: [Redacted]

Street Line 3: [Redacted]

Contact: [Redacted]

Down Arrow/Next Block

SAVE

EDIT Record: 1/1 FPBREQH.FPBREQH_EMAIL_ADDR [1] ellucian

Tab through the form entering the necessary items (noted by an asterisk) and also any other helpful information. The Delivery Date must be the same or later than the order date. If your name doesn't default as Requestor enter your name. COA should default to L for LCTCS Chart of Accounts. Enter your Organization (Department) code. Be sure to choose a Ship To Code from the drop down list. Info will default once you enter and tab once. Click the **Down Arrow** to move to the Vendor Information Tab. **Up and Down Arrows replace the Next Block/Previous Block buttons.**

Creating a Requisition

The screenshot shows the LCTCS Requisition Entry: Requestor/Delivery screen. The browser address bar shows the URL: https://inb-test.lctcs.edu:8102/applicationNavigator/seamless#Requisition. The page title is "Louisiana Commu... Louisiana Delta Comm College". The user is logged in as "Alexa Smith Lambert" and can "Sign Out". The requisition is identified as "Requisition FPAREQN 9.3 (conv0210) (DELTA):DELTA". The screen displays a "Requisition: NEXT" status with a "Start Over" button. The "REQUISITION ENTRY: REQUESTOR/DELIVERY" section includes fields for Requisition (NEXT), Order Date (04/13/2017), Transaction Date (04/13/2017), Delivery Date (04/21/2017), Comments (shipping to be added), Commodity Total (0.00), and Accounting Total (0.00). There are checkboxes for "In Suspend", "Document Text", and "Document Level Accounting". The "Vendor Information" section is active, showing Vendor (00023056 Staples Business Advantage), Vendor Hold, Address Type (AP), and Sequence (1). A "SAVE" button is visible at the bottom right. A blue arrow points to the "Vendor ID" field, and another blue arrow points to the "SAVE" button with the text "Select, Cancel, Save appear, when applicable".

Either enter the Vendor Number or Lookup the Vendor using the (...) icon next to vendor cell. If you choose the Lookup, use the SELECT button at the bottom right to choose it. An address should default. If you need to change it, use the (...) icon to lookup the various addresses for that vendor. Use the SELECT button at bottom right to choose it. **Use the Arrow Down/Arrow Up icons** at bottom left of screen to perform the Next Block/Previous Block functions used in Banner 8.

On the Commodity/Accounting Screen, as well as other screens, you can either tab through or click on the cell in which you want to enter information. The cell in which your cursor is located will be highlighted white.

Tab through the 'Commodity' cell; LCTCS does not use this space. Enter the Description (include vendor item #), U/M, Qty, and Unit Price. Then tab through the Extended Amount through Document Total cells allowing Banner to auto-calculate. NOTE: If you need additional room for Description, you may add Item Text. See section below "Adding Text to any Purchasing Document".

Tab until your cursor is back in the Description cell. **If you wish to add a line, use the down arrow on your keyboard to insert another line.** Tab to Description cell and add the information for the second item and continue through, as before.

Using the Delete button in the Commodity/Accounting section with a line highlighted will delete that line only.

Creating a Requisition

Requisition: R0004244

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Additional	Commodity
2		#564229 Post It Notes 14 pads/pk	EA		1.00	16.3200				
3		#108985 Swingline Staples 1/4"...	EA		1.00	1.3900				

Extended Amount: 16.32 Tax: 0.00
 Discount: 0.00 Commodity Total: 16.32
 Additional: 0.00 Document Total: 17.71

ACCOUNTING

Seque...	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspense
1	L	17		110001	630007	7201JA	600					

% USD

Up Arrow (Previous Block)/Down Arrow (Next Block)

SAVE

When all lines are entered, click the **Down Arrow** to perform the Next Block function. This brings you to the Accounting portion of the Commodity/Accounting tab where the FOAPAL (Accounting Coding) is entered.

The COA (L) for Chart of Accounts-LCTCS should default, as well as Year (Fiscal Year). Enter the Fund. Org should default, but can be overridden, if you are ordering for another area besides your department. Enter the Expense Account code. The Program Code should default, but may be overridden, if your budget requires it. An Activity Code is used with some funds. LDCC does not use Locn or Proj codes at this time.

Use the **scroll bar** at the right of your screen to view the lower portion of the Commodity/Accounting tab. Check that the Extended Amounts, FOAPAL Total and Document Total matches. Click the **Arrow Down** to continue to the Completion/Balancing Tab.

Creating a Requisition

Requisition: R0004244

ACCOUNTING

Seque...	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspense
1	L	17		110001	630007	7201JA	600				<input type="checkbox"/>	<input checked="" type="checkbox"/>

Record 1 of 1

	%	USD
Extended Amount	<input type="checkbox"/>	17.71
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		17.71
Document Total		17.71
Remaining Commodity Amount		0.00

SAVE

EDIT Record: 1/1 FPRREQA:FPRREQA_NSF_OVERRIDE_IN... ellucian

Note that on this document the NSF Suspense box is checked. If this appears on your document, please check the coding for errors, check budget and request a budget revision, if needed, before completing the document. You have the option to save as 'In Process' on the next screen.

Creating a Requisition

Requisition: R0004244

Insufficient budget for sequence 1, suspending transaction.

Vendor Hold

Exchange Rate

COA

Commodity Record Count

Requestor

Input Amount

Organization

Converted Amount

AMOUNTS Insert Delete Copy Filter

	Input	Commodity	Accounting	Status
Approved Amount	<input type="text" value="17.71"/>	<input type="text" value="17.71"/>	<input type="text" value="17.71"/>	<input type="text" value="BALANCED"/>
Discount Amount	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="BALANCED"/>
Additional Amount	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="BALANCED"/>
Tax Amount	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="BALANCED"/>

Complete In Process

SELECT, CANCEL, SAVE MAY APPEAR HERE

SAVE

Banner provides messages to users in yellow for 'warning', green for 'item processed successfully' and red for 'Critical Error', similar to a STOP light. Some may also be blue for informational messages.

Note that on this screen there is a SAVE button at the bottom right. On some screens you may see in this location SELECT and CANCEL buttons, as well.

On the Completion tab please note that the dollar amounts in the Input, Commodity and Accounting columns are all the same and it has a Status of 'Balanced'. This should be the case for all documents before you complete them.

Use the **Complete** or **In Process** button at bottom left to complete or save document for later editing and completion.

Creating a Requisition

The screenshot shows a web browser window with the following elements:

- Browser address bar: Louisiana Commu... Louisiana Delta Comm College
- User profile: Alexa Smith Lambert, Sign Out
- Page title: Requisition FPAREQN 9.3 (conv0210) (DELTA)::DELTA
- Navigation buttons: CHANGE, ADD, RETRIEVE, RELATED, TOOLS
- Form field: Requisition: [input field] [Copy button]
- Message box: Document R0004244 completed and forwarded to the Approval process
- Footer: EDIT, Record: 1/1, KEY_BLOCK.DISPLAY_RQST_CODE [1], ellucian

If there had been budget available and the document was completed successfully the message in green above would pop up after clicking the COMPLETE button. Note your Requisition Number on your paperwork for following up on your order.

Click on the 'X' by form name to exit the form.

TO DELETE AN 'IN PROCESS' DOCUMENT

If you want to actually delete the document, choose the Delete button in the document's header screen. A message will pop-up asking if you want to delete and instruct you to click the Delete button again. Using the Delete button in the header will delete the document completely.

START OVER BUTTON

I would not use the Start Over button, except in the case that you are in the middle of entry and don't have time to complete the requisition. Banner will ask you if you want to save your information. Choosing 'Yes' gives you a requisition number and you can come back later to complete it. Choosing 'No' does not Delete the document, it just will not save what you have most recently entered on current screen and still assigns a Requisition Number.

Creating a Requisition

Adding Text to a Requisition Document

ADDING ITEM TEXT

Once all required fields have been entered for a line item, you may add **Item Text**.

1-With your cursor in the completed Line Item Description cell, select Item Text (FOAPOXT) from the Related menu drop down box. The Text Type, Code, and Vendor information will default into the header block from the document.

2-Click the GO button to move into the Text Block.

3-Add the text you would like to enter. If more than one line is needed use your down arrow on your keyboard to add another line of item text.

4-To return to the document, click the SAVE button at bottom right of screen and then Exit by clicking the 'X' to the left of the FOAPOXT form name at top left.

5-You will notice the Item Text box will be checked when the related line item is highlighted.

ADDING DOCUMENT TEXT

Once all required fields have been entered in the requisition, you can add **Document Text**, if needed.

1-Select Document Text (FOAPOXT) from the Related button menu. The Text Type, Code, and Vendor information will default into the header block from the document.

2-Click the GO button to move into the Text Block.

3-Add the text you would like to enter. Use the down arrow on your keyboard to add another line of document text, if needed.

4-To return to the document, click the SAVE button at bottom right of screen and then Exit by clicking the 'X' to the left of the FOAPOXT form name at top left.

5-You will notice the Document Text box will be checked in the upper right.