

# Banner 9 – Create a Requisition

by

The WVM Purchasing Department



1. From the Welcome screen, type **FPAREQN** in the search bar (this shortcut also carries over from Banner 8 if you have My Banner set up – you'll see this option in the Applications menu item.)



2. On the following screen, type the word **NEXT** in the Requisition field and click **Go**.

The screenshot shows a web application interface with a dark sidebar on the left containing navigation icons. The main content area has a blue header bar with the text "Requisition FPAREQN 9.3.6 (DEVL0723)" and several action buttons: "ADD", "RETRIEVE", "RELATED", and "TOOLS". Below the header, there is a "Requisition:" label followed by a text input field. A red box highlights the input field, and a red arrow points from the word "NEXT" in the instruction above to this field. To the right of the input field is a "Copy" button. Further right is a green "Go" button, with another red arrow pointing from the word "Go" in the instruction above to this button. Below the input field, a grey bar contains the text "Get Started: Fill out the fields above and press Go." The bottom of the screen shows a scroll bar.

3. Complete the **Delivery Date**, **Organization**, and **Ship To** fields and click the **Next Section** button in the lower left corner.

The screenshot shows a web-based requisition entry form for 'Requisition FPAREQN 9.3.6 (DE /L0723)'. The form is divided into several sections. The 'REQUISITION ENTRY: REQUESTOR/DELIVERY' section contains fields for 'Requisition' (NEXT), 'Order Date' (10/18/2018), 'Transaction Date' (10/18/2018), 'Delivery Date' (highlighted with a red box), 'Comments', 'Commodity Total' (0.00), 'Accounting Total' (0.00), 'In Suspense' checkbox, and 'Document Text' checkbox. The 'REQUESTOR/DELIVERY INFORMATION' section contains fields for 'Requestor' (Susan Rios), 'Organization' (310700, highlighted with a red box), 'COA' (D), 'Email' (susan.rios@wvm.edu), 'Phone Area Code', 'Phone Number', 'Phone Extension', 'Fax Area Code', 'Fax Number', 'Fax Extension', 'Ship To' (highlighted with a red box), 'Street Line 1', 'Street Line 2', 'Street Line 3', 'Contact', 'Attention To', 'Building', 'Floor', 'City', 'State or Province', 'Zip or Postal Code', 'Nation', 'Area Code', 'Phone Number', and 'Extension'. A red arrow points from the 'Next Section' button in the bottom left corner to the 'Delivery Date' field. Another red arrow points from the 'Next Section' button to the 'Organization' field. A third red arrow points from the 'Next Section' button to the 'Ship To' field. The bottom of the form shows a navigation bar with 'EDIT', 'Record: 1/1', 'FPBREQH.FPBREQH\_REQH\_DATE [1]', 'SAVE', and the 'ellucian' logo.

4. On the next screen, enter your **vendor code** in the **Vendor** field. If you don't know your vendor code, you can look up the code by clicking the ellipses icon (...) to the right of the Vendor field box. To find your vendor, select **Entity Name**.

The screenshot shows a software interface for requisition entry. The main window is titled "Requisition FPAREQN 9.3.6 (DEVL0723)". Below the title bar, there are tabs for "Requestor/Delivery Information", "Vendor Information", "Commodity Accounting", and "Balancing/Completion". The "Vendor Information" tab is active, showing a "Vendor" field with an ellipsis icon (...). A red box highlights this field, and a red arrow points from the text in the instruction above to it. Below the "Vendor" field, there are fields for "Address Type", "Sequence", "Street Line 1", "Street Line 2", "Street Line 3", "City", "State or Province", "Zip or Postal Code", and "Nation". A dialog box titled "Option List" is open in the foreground, showing two options: "Entity Name/ID Search (FTIIDEN)" and "Vendor Maintenance (FTMVEND)". A red box highlights the "Entity Name/ID Search (FTIIDEN)" option, and a red arrow points from the text in the instruction above to it. The dialog box also has a "Cancel" button. At the bottom of the screen, there is a status bar with "EDIT", "Record: 1/1", "GS\_OPT\_BLOCK.OPT\_SEL [1]", and "ellucian" logo.

5. From the **Add Another Field** drop down menu, find your vendor by **Last Name**.

Entity Name/ID Search FTIIDEN 9.3.6 (DEVL0723)

ADD RETRIEVE RELATED TOOLS 1

ENTITY NAME/ID SEARCH

Vendors  Proposal Personnel  Agencies

Terminated Vendors  Financial Managers  All

Grant Personnel  Terminated Financial Managers

DETAILS

Last Name Contains Apple

Add Another Field ...

Case Insensitive Query Case Sensitive Query

SEARCH Record: 1/1 SPRIDEN.SPRIDEN\_ID [1] CANCEL SELECT ellucian

6. Type in any portion of the vendor name with a **percent sign** to populate all of the applicable vendors to choose from and click **Go**.

The screenshot displays the 'Entity Name/ID Search' interface. The search criteria are set to 'Last Name' with the operator 'Contains' and the value 'Apple%'. The 'Go' button is highlighted with a red arrow, indicating the next step in the process. The interface also includes a 'Clear All' button and a 'Case Sensitive Query' option.

Entity Name/ID Search FTIDEN 9.3.6 (DEVL0723)

ENTITY NAME/ID SEARCH

Vendors  Terminated Vendors  Grant Personnel  Proposal Personnel  Financial Managers  Terminated Financial Managers  Agencies  All

DETAILS

Last Name  Contains

Add Another Field ...

Case Insensitive Query  Case Sensitive Query

SEARCH Record: 1/1 SPRIDEN.SPRIDEN\_ID [1] CANCEL SELECT ellucian

7. On the next screen, hover over and highlight the vendor you need. **Double click** to select or click the **Select** button in the lower right corner of the screen.

Entity Name/ID Search FTIIDEN 9.3.6 (DEVL0723)

ENTITY NAME/ID SEARCH

Vendors  Proposal Personnel  Agencies  
 Terminated Vendors  Financial Managers  All  
 Grant Personnel  Terminated Financial Managers

DETAILS

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
1812426	Apple	Margaret		Person	ID	Yes	No	No	No	No	
G01612...	Apple	Margaret		Person		Yes	No	No	No	No	
1710584	Apple	Torie	Jean	Person	ID	Yes	No	No	No	No	
G01710...	Apple	Torie	Jean	Person		Yes	No	No	No	No	
1575233	Apple Computer Inc.			Corporation	ID	Yes	No	No	No	No	
G01575...	Apple Computer Inc.			Corporation		Yes	No	No	No	No	
G01575...	Apple Inc.	APPLE INC.		Person	Name	Yes	No	No	No	No	
1476001	AppleOne Employmen...			Corporation	ID	Yes	No	No	No	No	
G01476...	AppleOne Employmen...			Corporation		Yes	No	No	No	No	
G01679...	Appleman	Ashley	Marie	Person	Name	Yes	No	No	No	No	

Record 1 of 10

Case Insensitive Query  Case Sensitive Query

CANCEL SELECT

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8. Click inside the **Vendor** box and hit Return on the keyboard, which will populate your vendor name and address, then click the **Next Section** button in the lower left corner of the screen.

The screenshot shows a web application interface for requisition entry. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. The main content area is divided into sections: 'REQUISITION ENTRY: REQUESTOR/DELIVERY' and 'VENDOR INFORMATION'. The 'VENDOR INFORMATION' section contains various input fields for vendor details, including 'Vendor', 'Address Type', 'Sequence', 'Street Line 1-3', 'City', 'State or Province', 'Zip or Postal Code', 'Nation', 'Contact', 'Email', 'Phone Area Code', 'Phone Number', 'Phone Extension', 'Fax Area Code', 'Fax Number', 'Fax Extension', 'Discount', 'Tax Group', and 'Currency'. A red arrow points to the 'Vendor' field, and another red arrow points to the 'Next Section' button in the lower left corner. The bottom status bar shows 'EDIT', 'Record: 1/1', 'FPBREQH.VENDOR\_SPRIDEN\_ID [1]', and the 'ellucian' logo.

Field	Value
Requisition	R0018271
Order Date	10/18/2018
Transaction Date	10/18/2018
Delivery Date	10/18/2018
Commodity Total	0.00
Accounting Total	0.00

**VENDOR INFORMATION**

Field	Value
Vendor	[Redacted]
Vendor Hold	<input type="checkbox"/>
Address Type	[Redacted]
Sequence	[Redacted]
Street Line 1	[Redacted]
Street Line 2	[Redacted]
Street Line 3	[Redacted]
City	[Redacted]
State or Province	[Redacted]
Zip or Postal Code	[Redacted]
Nation	[Redacted]
Contact	[Redacted]
Email	[Redacted]
Phone Area Code	[Redacted]
Phone Number	[Redacted]
Phone Extension	[Redacted]
Fax Area Code	[Redacted]
Fax Number	[Redacted]
Fax Extension	[Redacted]
Discount	[Redacted]
Tax Group	CAD California Sales Tax
Currency	[Redacted]

Next Section

9. Enter the description of the goods you're purchasing in the **Description** field. Enter the unit of measure in the **U/M** field. Enter the quantity in the **Quantity** field. Enter the price in the **Unit Price** field.

Requisition: R0018271

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requestion: R0018271  
Order Date: 10/18/2018  
Transaction Date: 10/18/2018  
Delivery Date: 10/18/2018

Comments:   
Commodity Total: 0.00  
Accounting Total: 0.00  
 Document Level Accounting

In Suspense  
 Document Text

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
				CAD			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount:   
Discount:   
Additional:

Tax:   
Commodity Total:   
Document Total:

Distribute

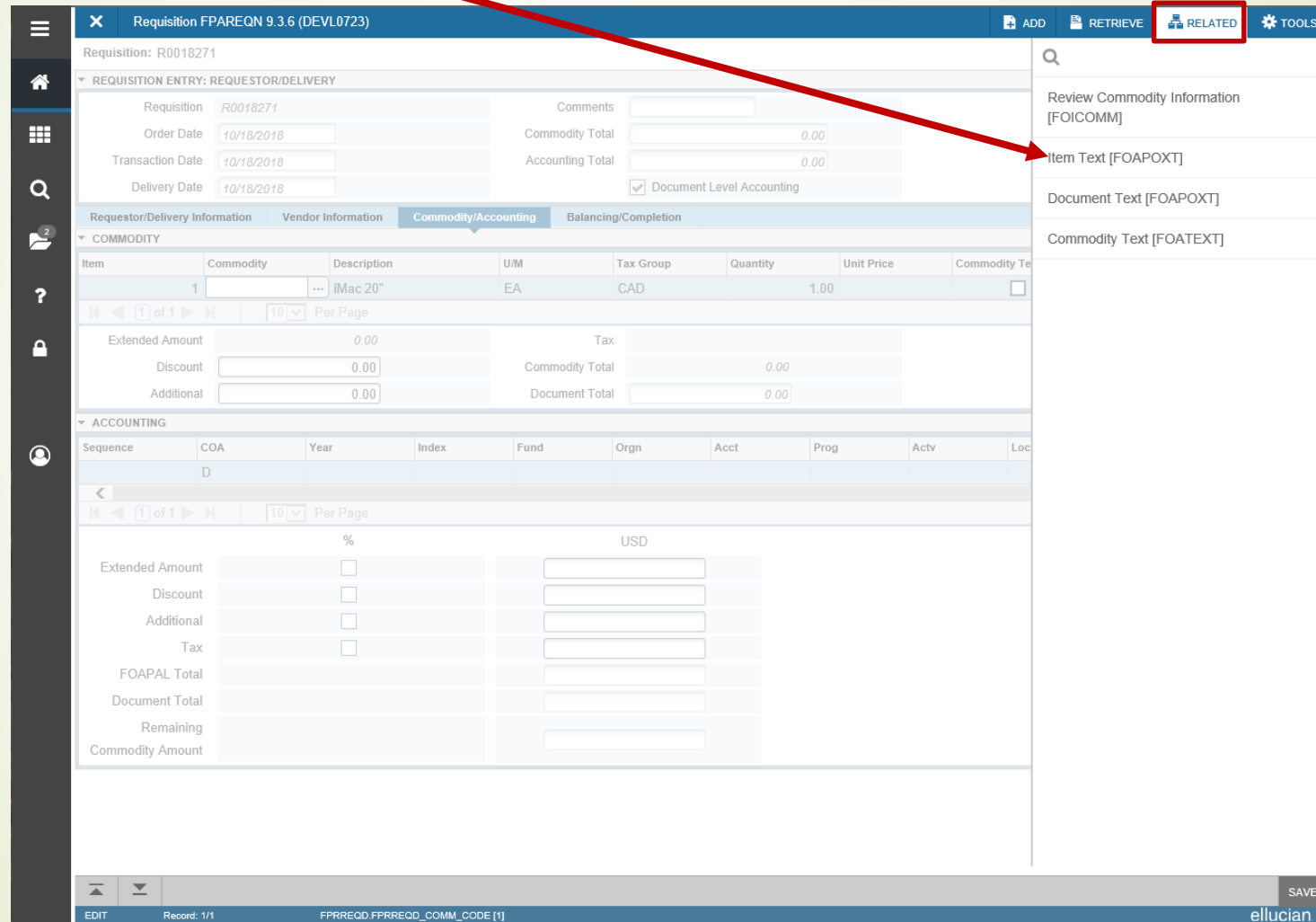
ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NS
	D										<input type="checkbox"/>	

Extended Amount:   
Discount:   
Additional:   
Tax:   
FOAPAL Total:   
Document Total:   
Remaining:   
Commodity Amount:

SAVE  
ellucian

10. If your description does not fit in the description field, you can enter additional information in the **Item Text**. From the Related tab in the upper right corner of the screen, select **Item Text**.



The screenshot displays a requisition system interface for Requisition FPAREQN 9.3.6 (DEVL0723). The main window shows details for Requisition R0018271, including fields for Order Date, Transaction Date, and Delivery Date, all set to 10/18/2018. The 'COMMODITY' section lists an item 'iMac 20"'. The 'ACCOUNTING' section shows a table with columns for Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Actv, and Loc. A red arrow points from the 'Item Text' label in the text above to the 'RELATED' tab in the top right corner of the interface. The 'RELATED' tab is highlighted with a red box, and a dropdown menu is open, showing options: 'Review Commodity Information [FOICOMM]', 'Item Text [FOAPOXT]', 'Document Text [FOAPOXT]', and 'Commodity Text [FOATEXT]'. The 'Item Text [FOAPOXT]' option is selected.

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Loc
D									

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Te
1		iMac 20"	EA	CAD	1.00		

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Loc
D									

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

11. From the item text screen, click **Go** in the upper right corner.

The screenshot shows a web application interface for 'Procurement Text Entry FOAPOXT 9.3.6 (DEVL0723)'. The interface includes a top navigation bar with buttons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. A 'Go' button is located in the top right corner, highlighted with a red arrow. The main content area contains the following fields:

- Text Type: REQ
- Code: R0018271
- Change Sequence:
- Item Number: 1
- Vendor: G01575233 Apple Computer Inc.
- Commodity: iMac 20"
- Description
- Modify Clause: [input field]
- Copy Commodity:
- Text
- Default Increment: 10

A message bar below the fields reads: 'Get Started: Fill out the fields above and press Go.' The bottom status bar shows 'EDIT', 'Record: 1/1', 'KEY\_BLOCK.KEYBLOK\_DTYP\_CODE [1]', and the 'ellucian' logo.

12. Type your additional description in the **Text** field and click **Save** in the bottom right corner of the screen. To go back to the previous screen, click **Select** in the bottom right corner.

The screenshot shows the 'Procurement Text Entry' interface. At the top, there is a header bar with the title 'Procurement Text Entry FOAPOXT 9.3.6 (DEVL0723)' and several action buttons: 'ADD', 'RETRIEVE', 'RELATED', 'TOOLS', and a count of '1'. Below the header, there is a status bar with 'Text Type: REQ', 'Code: R0018271', 'Change Sequence: Item Number: 1', 'Vendor: G01575233', 'Apple Computer Inc.', and 'Commodity Description:'. A green message box indicates 'Query caused no records to be retrieved. Re-enter.' Below this, there is a section for 'PROCUREMENT TEXT ENTRY' with a table. The table has columns for 'Text', 'Clause Number', 'Print \*', and 'Line'. The 'Text' column contains a red-bordered input field. Below the table, there are buttons for 'Cancel', 'Save', and 'Select'. At the bottom right, there are buttons for 'CANCEL', 'SELECT', and 'SAVE'. The 'ellucian' logo is visible in the bottom right corner. Red arrows point from the text above to the 'Text' field and the 'SAVE' and 'SELECT' buttons.

Text	Clause Number	Print *	Line
		<input checked="" type="checkbox"/>	

Record 1 of 1

EDIT Record: 1 / 1 FOBTXT.FOBTXT\_TEXT [1]

CANCEL SELECT SAVE ellucian

13. To add additional items, **arrow down**, or click the **Insert** button, or press the **F6** key. Select the **Next Section** button in lower left corner, or press **ALT+PageDown** to proceed to next step.

The screenshot shows a software interface for requisition entry. At the top, it displays 'Requisition FPAREQN 9.3.6 (DEVL0723)' and 'Requisition: R0018271'. Below this is a 'REQUISITION ENTRY: REQUESTOR/DELIVERY' section with fields for Requisition, Order Date, Transaction Date, Delivery Date, Comments, Commodity Total (1,635.00), Accounting Total (0.00), and checkboxes for Suspense, Document Text, and Document Level Accounting. A 'Start Over' button is in the top right.

The 'Commodity/Accounting' tab is active. The 'COMMODITY' section contains a table with one item:

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1		iMac 20"	EA	CAD	1.00	1,500.0000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below the table are fields for Extended Amount, Discount, Additional, Tax, Commodity Total, and Document Total (1,635.00). A 'Distribute' checkbox is also present.

The 'ACCOUNTING' section shows a table with columns for Sequence, CO, Year, Index, Fund, Orgn, Acct, Prog, Actv, Locn, Proj, NSF Override, and NS. The Fund is 110819, Orgn is 310700, Acct is 640001, and Prog is 678000.

At the bottom left, there are navigation buttons: a left arrow, a right arrow, and a 'Next Section' button (represented by a downward arrow). At the bottom right, there is a 'SAVE' button and the 'ellucian' logo.

Two red arrows are overlaid on the image: one points from the 'Insert' button in the 'COMMODITY' section to the 'Next Section' button at the bottom left, and another points from the 'Next Section' button to the 'Insert' button.

14. Enter your accounting information in the **Accounting** fields (**Fund, Orgn, Acct, and Prog**) and hit the **Tab** button to bring in the amount information. Then click on the **Next Section** button to proceed to the next screen. If you entered additional item text, you'll notice the **Item Text** box is now checked.

The screenshot shows a requisition entry form for Requisition R0018271. The form is divided into several sections: REQUISITION ENTRY, COMMODITY, and ACCOUNTING. The COMMODITY section contains a table with one item: iMac 20". The ACCOUNTING section contains a table with columns for Fund, Orgn, Acct, and Prog. The 'Item Text' checkbox in the COMMODITY section is checked. The 'Fund, Orgn, Acct, Prog' fields in the ACCOUNTING section are highlighted with a red box. Red arrows point from the text in the instruction to these specific fields and the 'Item Text' checkbox. The 'Tab' button is located at the bottom left of the form.

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1		iMac 20"	EA	CAD	1.00	1,500.0000		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NS
	D											<input type="checkbox"/>

	%	USD
Extended Amount	<input type="checkbox"/>	<input type="text"/>
Discount	<input type="checkbox"/>	<input type="text"/>
Additional	<input type="checkbox"/>	<input type="text"/>
Tax	<input type="checkbox"/>	<input type="text"/>
FOAPAL Total		<input type="text"/>
Document Total		<input type="text"/>
Remaining Commodity Amount		<input type="text" value="1,635.00"/>

15. On the next screen, you have two options – you can **Complete** the requisition or select **In Process** if you are not ready to submit for approval.

The screenshot displays a web-based requisition entry system. The main window is titled "Requisition: R0018271" and includes a "Start Over" button. The interface is divided into several sections: "REQUISITION ENTRY: REQUESTOR/DELIVERY", "BALANCING/COMPLETION", and "AMOUNTS".

The "REQUISITION ENTRY: REQUESTOR/DELIVERY" section contains fields for Requisition (R0018271), Order Date (10/18/2018), Transaction Date (10/18/2018), and Delivery Date (10/18/2018). It also shows a Comments field, a checkbox for "In Suspense", a "Document Text" field, and a checked checkbox for "Document Level Accounting".

The "BALANCING/COMPLETION" section includes fields for Vendor (G01575233, Apple Computer Inc.), Currency, Exchange Rate, Commodity Record (1), Count, Requestor (Susan Rios), and Organization (310700, Information Systems). It also has an "Input Amount" field with the value 1,635.00 and a "Converted Amount" field.

The "AMOUNTS" section is a table with columns for Input, Commodity, Accounting, and Status. The data is as follows:

	Input	Commodity	Accounting	Status
Approved Amount	1,500.00	1,500.00	0.00	COM/ACCT
Discount Amount	0.00	0.00	0.00	BALANCED
Additional Amount	0.00	0.00	0.00	BALANCED
Tax Amount	135.00	135.00	0.00	COM/ACCT

At the bottom of the "AMOUNTS" section, there are two buttons: "Complete" and "In Process". A red box highlights these buttons, and a red arrow points from the text in the instruction above to the "Complete" button.

The footer of the interface shows "Record: 1/1", "POSTING\_BLOCK.MARK\_COMPLETE\_BTN [1]", and the "ellucian" logo.