



TEXAS SOUTHERN UNIVERSITY

Office of Information Technology

Banner 9: Online Requisition Handbook

Banner 9: Online Requisition Handbook

Entering a Requisition in Banner

Log in to Banner to enter a requisition. Access the requisition form by typing “**FPAREQN**” in the **Welcome** field and select the **Enter** key on your keyboard. This will take you to the Requisition Form Header.

Requisition Header

1. You can leave the **Requisition** field **blank** or enter “**Next**” in the requisition box.
2. Select **Go**.

Note: Do **not** put a number in this box unless you have previously started and not finished a purchase requisition. In that case, enter the **exact** requisition number (ie R0001234) and select **Go** to access the requisition detail.



Requisition Requestor/Delivery Information Section

You will enter the requestor and delivery information in this section of the form. You can tab between fields or place your cursor in the field you want to update.

1. **Order Date** and **Transaction Date** will automatically populate with today’s date.
2. Enter the **Delivery Date**. This is the date you expect the goods/services to be delivered.
3. The **Document Level Accounting** indicator box is checked by default.

Note: It is important to determine if Document Level Accounting will be used at this point. You cannot go back and change the indicator on you tab past it. The bulleted items below explain whether or not to have this box checked or unchecked.

- If you have only one item, or all items have the same account number (other than fixed asset), leave the **Document Level Accounting** box checked on this screen. This will allow you to use same FOAP for all items.
- If you are ordering items that need to be charged to different account numbers, or you need to order fixed asset(s), then uncheck this box.

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Requisition: NEXT

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT

Order Date * 06/05/2019

Transaction Date * 06/05/2019

Delivery Date * 06/12/2019

Comments

Commodity Total 0.00

Accounting To * 000

In Suspense

Document Text

Document Level Accounting

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

REQUISITION/DELIVERY INFORMATION

4. The **Requestor** will default to the name of the person entering the requisition based on the Banner user ID.
5. Tab or place your cursor in the **Organization** field and enter the org number. If you do not know your organization number, you can search for it by clicking the *ellipses (...)* to access a query form to search for the department you would like to use.
6. You can fill out the **Email** and **Phone** fields with your information.
7. The **Ship To** code should default to **TSUWRE Warehouse Dan McCormick**. If the Ship To code is not populated, type in "TSUWRE" or search for the code by clicking on the *ellipses (...)*
8. Once this section is completed, you can navigate to the **Vendor Information** section of the requisition. To do this you can select the **Vendor Information tab** or navigate to the Next section by selecting the down arrow at the bottom left of the screen.

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

REQUISITION/DELIVERY INFORMATION

Requestor * Gigi Cupp

Organization * 31200 Information Technology & Systems

Organization * Texas Southern University

Email gigi.cupp@tsu.edu

Phone Area Code

Phone Number

Phone Extension

Fax Area Code

Fax Number

Fax Extension

Ship To * TSUWRE

Street Line 2 3715 Blodgett St

Street Line 3

Contact Dan McCormick

Attention To * Dan McCormick

Building Warehouse

Floor

City Houston

State or Province TX

Zip or Postal Code 77004

Nation

Area Code 713

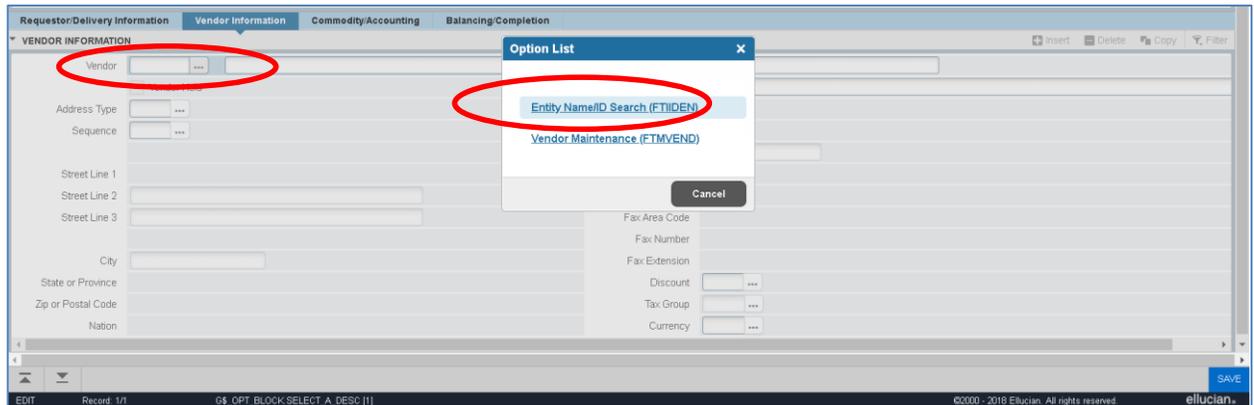
Phone Number

EDIT Record 1/1 FPBREQH FPBREQH-ATTENTION_TO (1) ©2000 - 2018 Ellucian. All rights reserved. ellucian. SAVE

Requisition Vendor Information Section

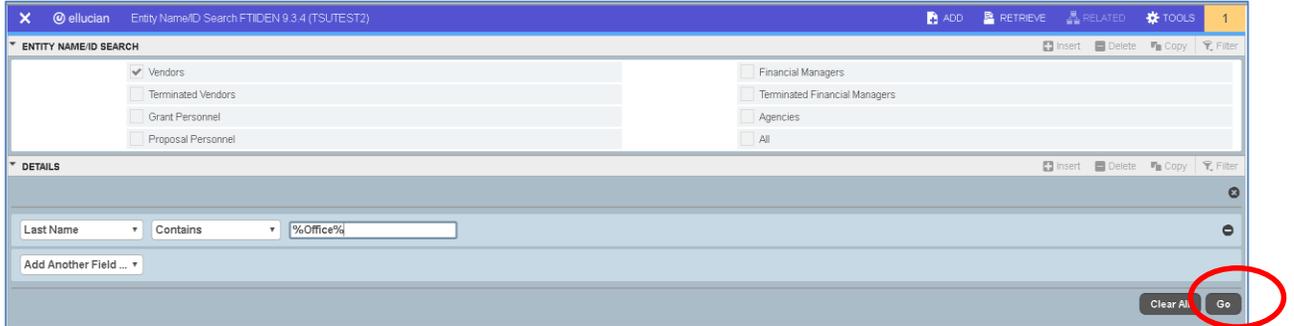
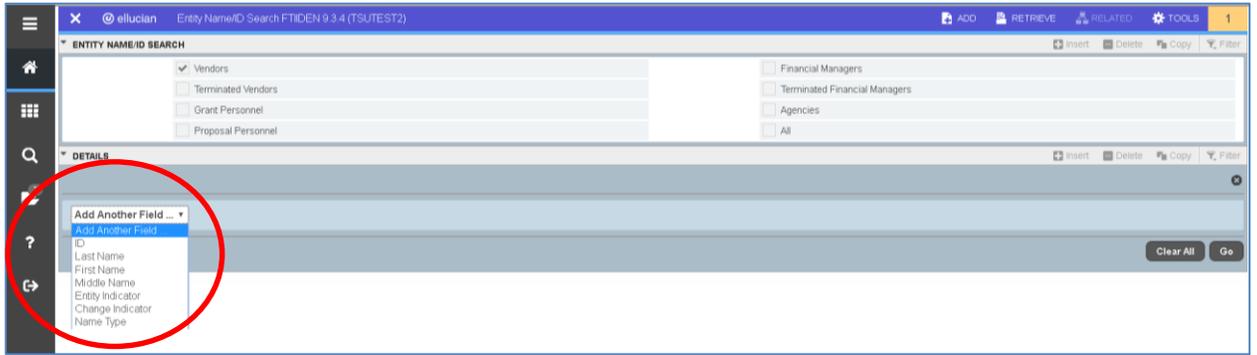
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9. If you know the **vendor number**, you can enter it in the **Vendor** field.
10. If you do not know the vendor number, select the **ellipses (...)** next to the **Vendor** field.
11. An Options List will appear. **Select Entity Name/ID Search (FTIIDEN)**.
12. The **FTIIDEN Entity Name/ID Search** will be displayed. You will query for the vendor on this form.

The screenshot shows the Banner 9 Vendor Information form. The 'Vendor' field is circled in red, and the 'Option List' dialog box is also circled in red. The dialog box contains two options: 'Entity Name/ID Search (FTIIDEN)' and 'Vendor Maintenance (FTMVEND)'. The 'Entity Name/ID Search (FTIIDEN)' option is selected. The form includes fields for Vendor, Address Type, Sequence, Street Line 1, Street Line 2, Street Line 3, City, State or Province, Zip or Postal Code, Nation, Fax Area Code, Fax Number, Fax Extension, Discount, Tax Group, and Currency. The status bar at the bottom indicates 'Record: 1/1' and '©2000 - 2018 Elician. All rights reserved. elucian'.

13. Click on the down arrow next to **Add Another Field** and select the **Last Name** option.
 - For person vendor, you search by Last and First name
 - For non-person vendor, you search the company name by Last Name.
14. You can begin a vendor search by entering only part of the vendor name. Put a **% sign** around each word in the name. If you know the full business name you can type the name.
 - For example: When you type “**%Office%**”, it will bring up every single vendor with word “**Office**” in its name.
 - If you type “**%Office Depot%**”, the query will only return vendor with name that has “**Office Depot**” in the exact order.
15. Select **Go** to start the query.
16. If your vendor does not come up, try searching again. If you still can't find the vendor, then the vendor does not exist in Banner and Purchasing department will have to set up the vendor in Banner for you to be able to use the vendor in your requisition.

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17. If your vendor comes up in the search, double click on their **Vendor ID number** and the vendor information will populate the requisition.

Note: If multiple vendor IDs come up, please be sure to select the one that is not Terminated.

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
532663954	Office Depot			Corporation		Terminated	No	No	No	No	
650274114	Office Depot			Corporation		Terminated	No	No	No	No	
650459579	Office Depot			Corporation		Terminated	No	No	No	No	
159265395	Office Depot			Corporation		Terminated	No	No	No	No	
1592663954	Office Depot			Corporation		Yes	No	No	No	No	
592663594	Office Depot			Corporation		Terminated	No	No	No	No	
142663777	Office Depot #2224			Corporation		Terminated	No	No	No	No	
153266954	Office Depot File #91587			Corporation		Terminated	No	No	No	No	
592663954	Office Depot Inc			Corporation	Name	Terminated	No	No	No	No	
592663954	Office Depot Inc			Corporation		Terminated	No	No	No	No	

18. The vendor information will populate the requisition form.

Note: If the default vendor address is not same as on your quote, you can click on the ellipses (...) next **Sequence** field and scroll through all the addresses on record. If you went through all the addresses and still do not see the address you need, Purchasing will need to set up the new address for this vendor in Banner.

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

VENDOR INFORMATION

Vendor 159266395 Office Depot

Address Type BU

Sequence 1

Street Line 1 6225 West by Northwest Blvd.

City Houston

State or Province TX

Zip or Postal Code 77040

Contact

Email

Phone Area Code

Phone Number

Phone Extension

Fax Area Code

Fax Number

Fax Extension

Discount

Tax Group

Currency

Requisition Commodity/Accounting Section

19. Select the **Commodity/Accounting** tab.

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text

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

COMMODITY

Extended Amount

Discount

Additional

Tax

Commodity Total

Distribute

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Prej	NSF Override	NSF Suspense
	C											

Extended Amount

Discount

Additional

USD

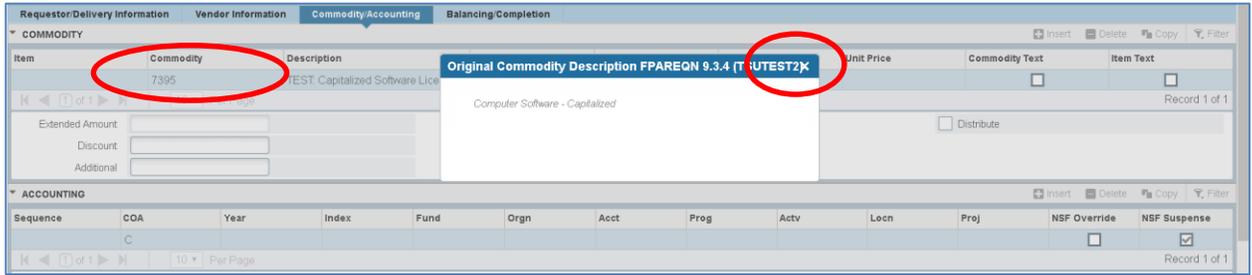
SAVE

20. Enter the **Commodity** Code. If you don't know the code, click on the ellipses (...) and search for the code you need to use.

21. Click or Tab to the **Description** field and enter the description. When you change the description, you will receive a message which indicates that the description you entered is different than the default description for the commodity.

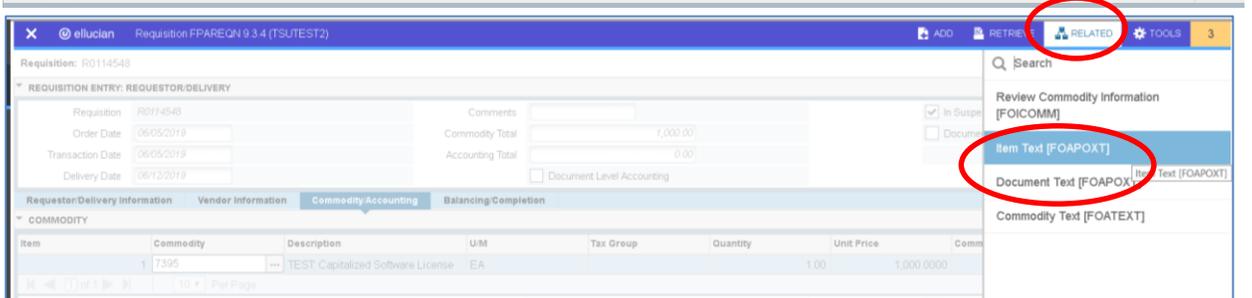
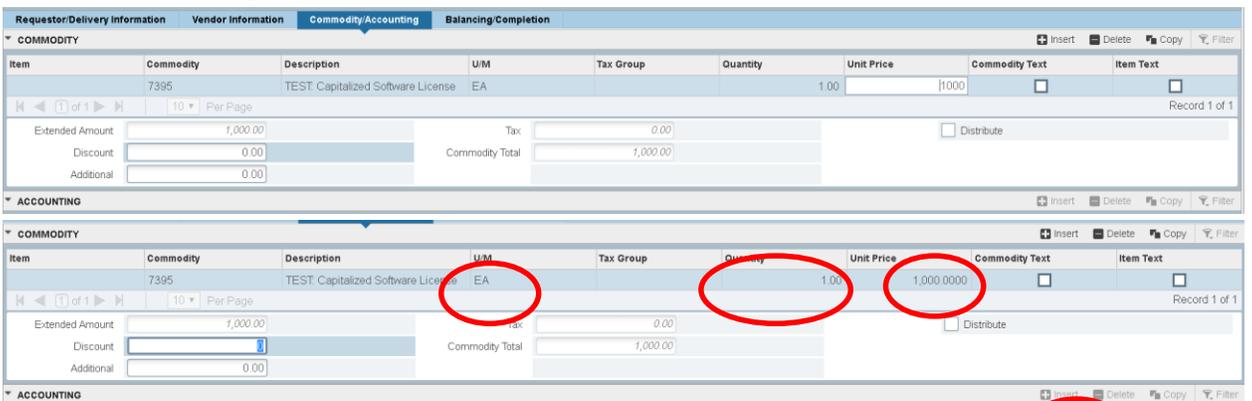
22. Click on the X on top right hand corner of the message box to dismiss.

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23. Enter the **U/M** (unit of measure). EA is for each. There are other codes that you can use. Click on the ellipses (...) to view them all and select one.

24. Tab to enter **Quantity** and **Unit Price**.



25. Click on Related on top right hand corner of the page to add **Item/Document/Commodity Text**.

26. Select **Go**.



27. Enter your text. If you run out of space on the line, click the down arrow on your keyboard (↓) to add a new line. If you have more than one commodity/item, then click the down arrow on your

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keyboard (↓) to add a new line. Repeat the process until you finished entering all your commodities.

28. Once done, click **Save**. After your text is saved, click **X** on the top left hand corner of the page to exit the form.

Text	Clause Number	Print	Line
TEST Item text line 1		<input checked="" type="checkbox"/>	10
TEST Item text line 2		<input checked="" type="checkbox"/>	

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
1	7395	TEST Capitalized Software License	EA			1.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	7300	Printing Paper	BOX				<input type="checkbox"/>	<input type="checkbox"/>

! IMPORTANT: If you selected the **Document Level Accounting** box, you can enter all line items and then enter the FOAPAL information. If you did NOT check that box, you are doing **Commodity Level Accounting** and you will need to go to next block to enter the FOAPAL for each commodity/line item and click **Save** after you enter the accounting information. Then previous block back to the commodities to enter your remaining line items and their accounting information.

- Next go to the Accounting section and fill in your departmental FOAPAL.
- In the Accounting section, you can enter more than one FOAPAL to pay for a commodity/line item.
 - Click on the commodity/line item you want to enter. If you wish to split the cost between multiple FOAPALS,
 - Then go to the next block, and enter the 1st FOAPAL
 - Then go to the lower portion and enter the amount you want to charge
 - Then go back to the Accounting section, enter the 2nd FOAPAL and repeat the process.

For example: I want to pay for the commodity 7395 by 2 FOAPALS. 1st FOAPAL for \$600 and 2nd FOAPAL for \$400. After entering the desired FOAPALS, please be sure to click Save.

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Requisition: R0114548 Start Over

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
1	7395	TEST Capitalized Software License	EA		1.00	1,000.0000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	7300	Printing Paper	BOX		5.00	59.9900	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount 1,000.00 Tax 0.00 Distribute

Discount 0.00 Commodity Total 1,000.00

Additional 0.00

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
1	C	19		0001	31200	7395	30677				<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	C	19		0247	11001	7395	20				<input type="checkbox"/>	<input checked="" type="checkbox"/>

Extended Amount % USD 600.00

Discount 0.00

Additional 0.00

Tax 0.00

FOAPAL Total 400.00

Commodity Total 1,000.00

Remaining 0.00

Commodity Amount 0.00

Requisition: R0114548 Start Over

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
1	7395	TEST Capitalized Software License	EA		1.00	1,000.0000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	7300	Printing Paper	BOX		5.00	59.9900	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount 1,000.00 Tax 0.00 Distribute

Discount 0.00 Commodity Total 1,000.00

Additional 0.00

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
1	C	19		0001	31200	7395	30677				<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	C	19		0247	11001	7395	20				<input type="checkbox"/>	<input checked="" type="checkbox"/>

Extended Amount % USD 400.00

Discount 0.00

Additional 0.00

Tax 0.00

FOAPAL Total 400.00

Commodity Total 1,000.00

Remaining 0.00

Commodity Amount 0.00

29. When all of your information is entered, next block or click on the **Balancing/Completion** tab.

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

BALANCING/COMPLETION

30. If everything looks correct, and all the Status reads Balanced, select **Complete**.

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The screenshot shows the Banner 9 Balancing Completion screen. The 'BALANCING/COMPLETION' tab is active. The Vendor field is highlighted with a red circle. Below the form is a table with columns for Input, Commodity, Accounting, and Status. The 'Complete' button is also highlighted with a red circle. The Status column contains three 'BALANCED' buttons, each highlighted with a red circle.

	Input	Commodity	Accounting	Status
Approved Amount	1,299.95	1,299.95	1,299.95	BALANCED
Discount Amount	0.00	0.00	0.00	BALANCED
Additional Amount	0.00	0.00	0.00	BALANCED
Tax Amount	0.00	0.00	0.00	BALANCED

If you need demo, please refer to <https://banner9.tsu.edu/tutorials.html> for list of recorded tutorials.

The screenshot shows the TSU website's Tutorials page. The navigation menu includes HOME, FAQs, REFRESHER SESSIONS, BANNER 9 GUIDE, TUTORIALS (highlighted with a red circle), and MYTSU. The page features a large banner with the word 'TUTORIALS' and a background image of server racks. Below the banner, there is a paragraph of text: 'The Office of Information Technology has put together some tutorial videos that you can refer to at your own convenience. We will keep updating this page with more videos. Please be sure to check back regularly for more videos.'