SOUTH TEXAS COLLEGE

# BANNER 9

## On-Line Requisition Manual

Purchasing Department
Phone: 956-872-4681 * Fax: 956-872-4688

August 7, 2018

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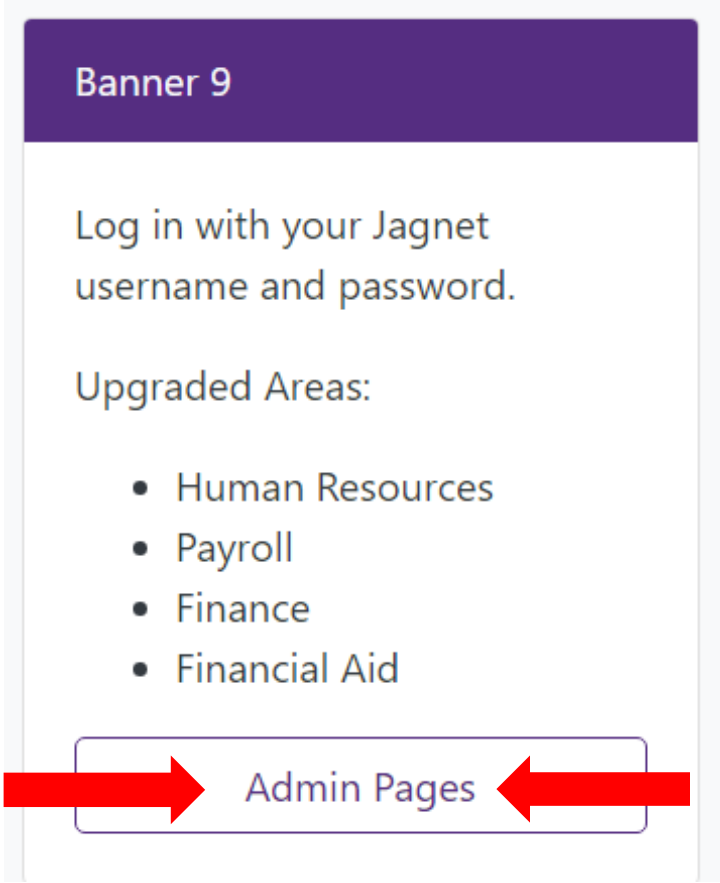
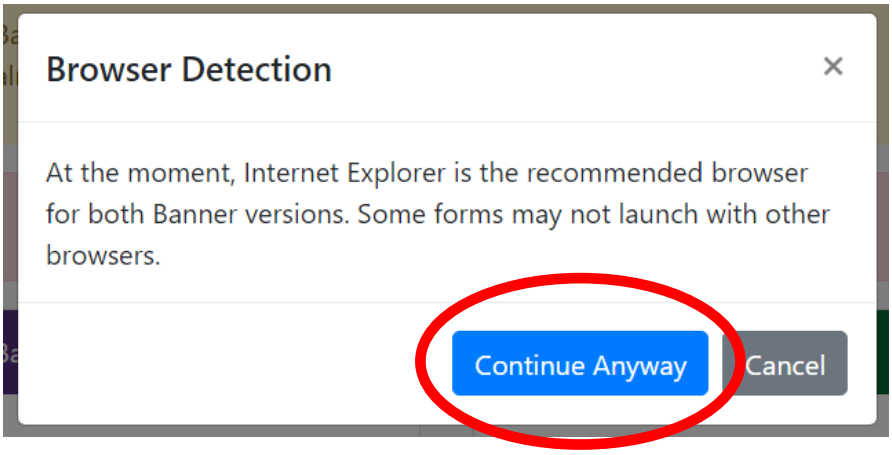
# 1. Banner 9 Log In

1) **Go to the following link to open Banner 9:**
   **https://banner.southtexascollege.edu/home.html**
   **(Recommended Browsers: Chrome or Firefox)**

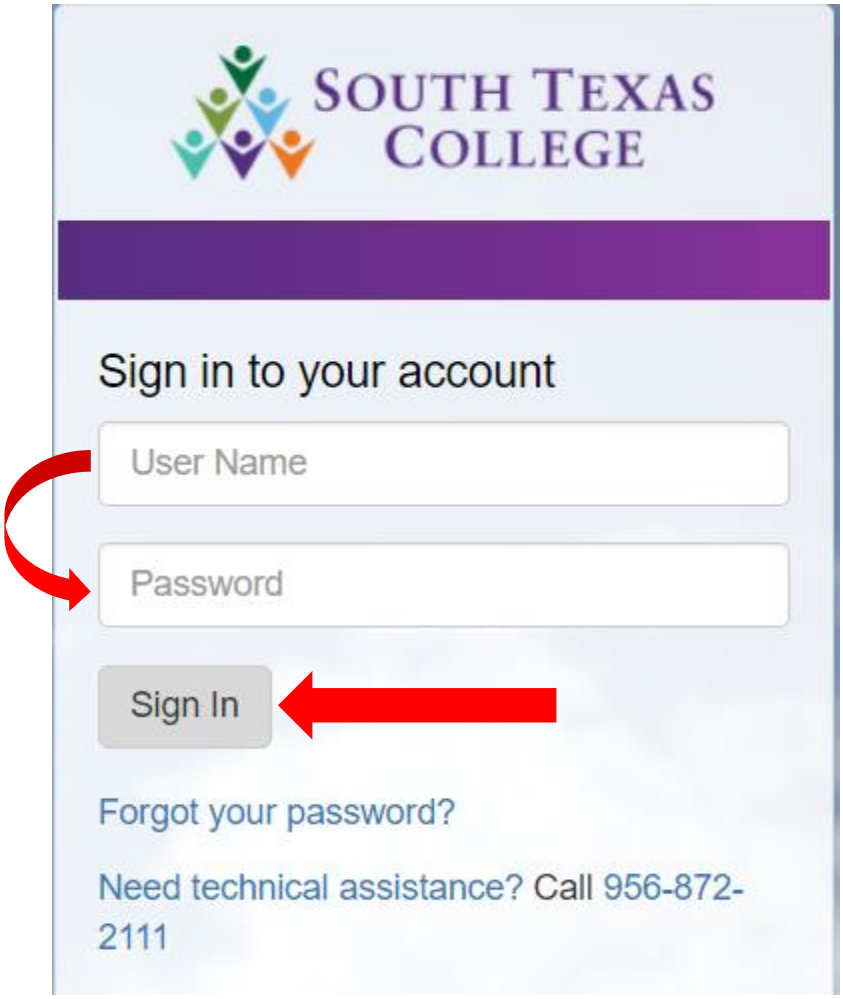
2) **Under Banner 9, Click on "Admin Pages" to open log-in screen**



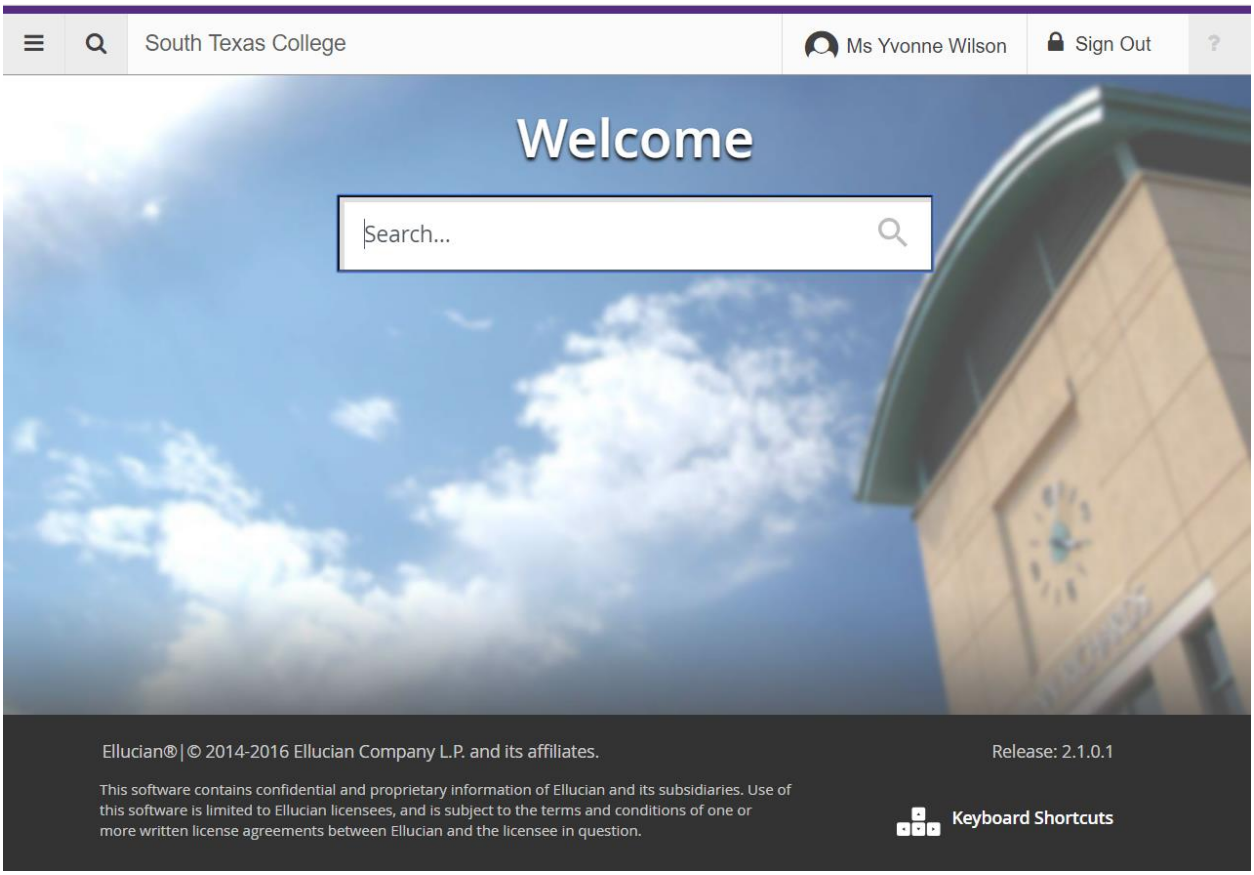
***Alert: Browser Detection will appear, Select "Continue Anyway"***



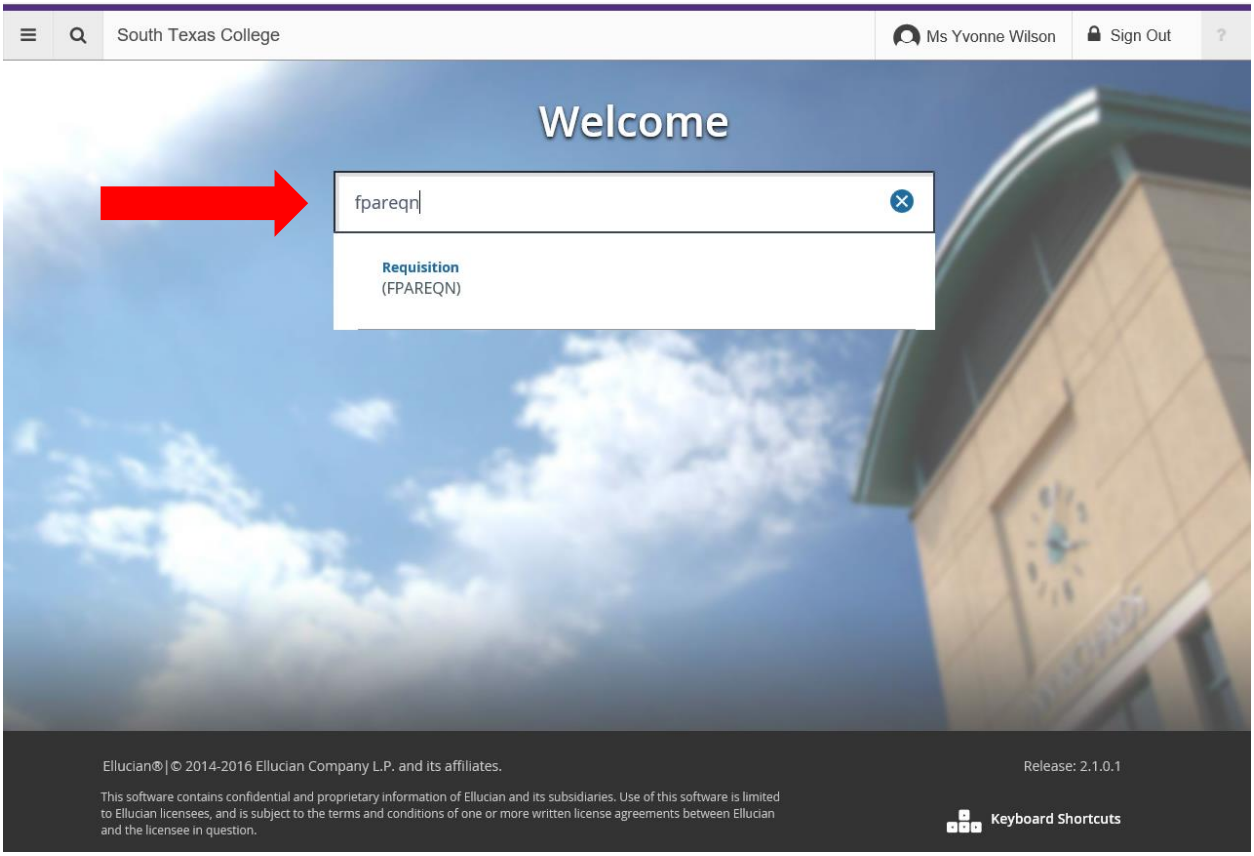

**3) Enter Jagnet Credentials & Click "Sign In" to access Banner 9**



# 2. New Banner 9 Home Page



# 3. Create a Banner Requisition




******Start a Banner Requisition**

**Step 1: Request the Requisition Page:**

**~Type "FPAREQN" Then press enter**

**OR**

**~Type "Requisition" Then select from the drop down list.**

# Requisition Page



******Create a new requisition or re-open a previously created requisition:**

**New Requisition: leave the requisition field blank**

**OR**

**Re-open an incomplete or "disapproved" requisition using an existing requisition number**

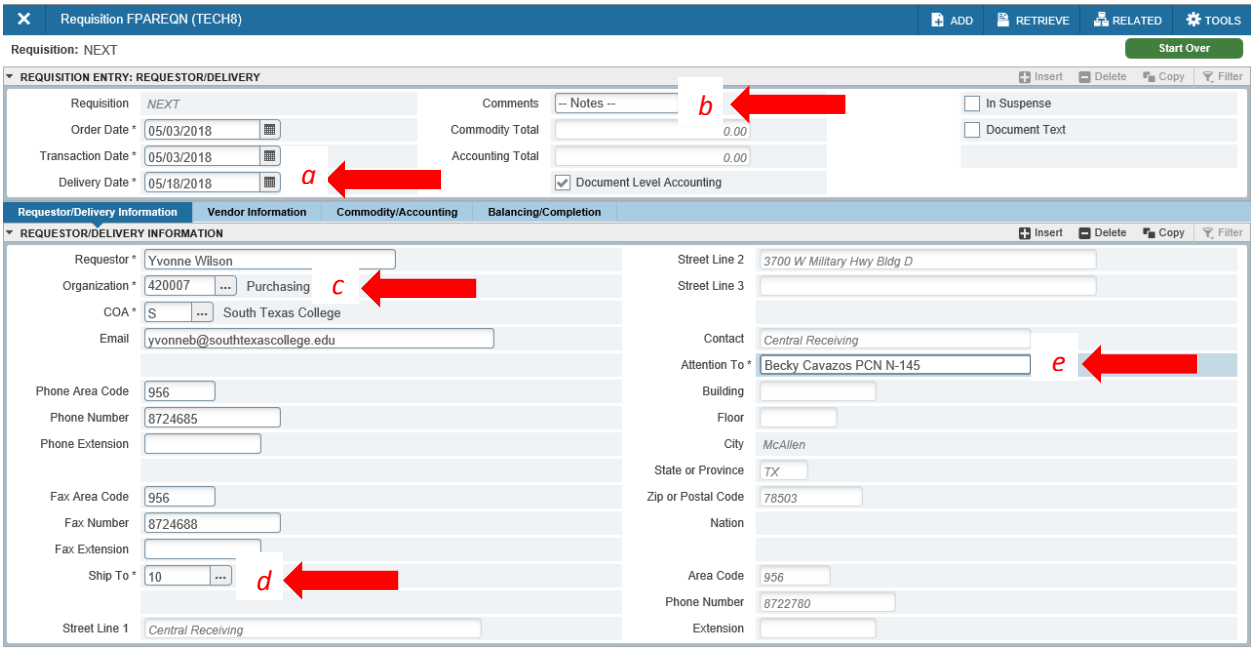
**NOTE: Please be careful when typing in an existing Requisition # to avoid creating a new requisition number.**

**Then Click green "GO" button (at the top right)**

**OR**

**Click "Next Section" which is located at the bottom left corner of the page (Atl+Page Down)**

# 3a. Requestor/Delivery Information





**The Order Date, Transaction Date and Requestor's information fields are populated when the next page displays.**

**1: The following information is required in the appropriate fields. (Use the Tab key for navigation)**

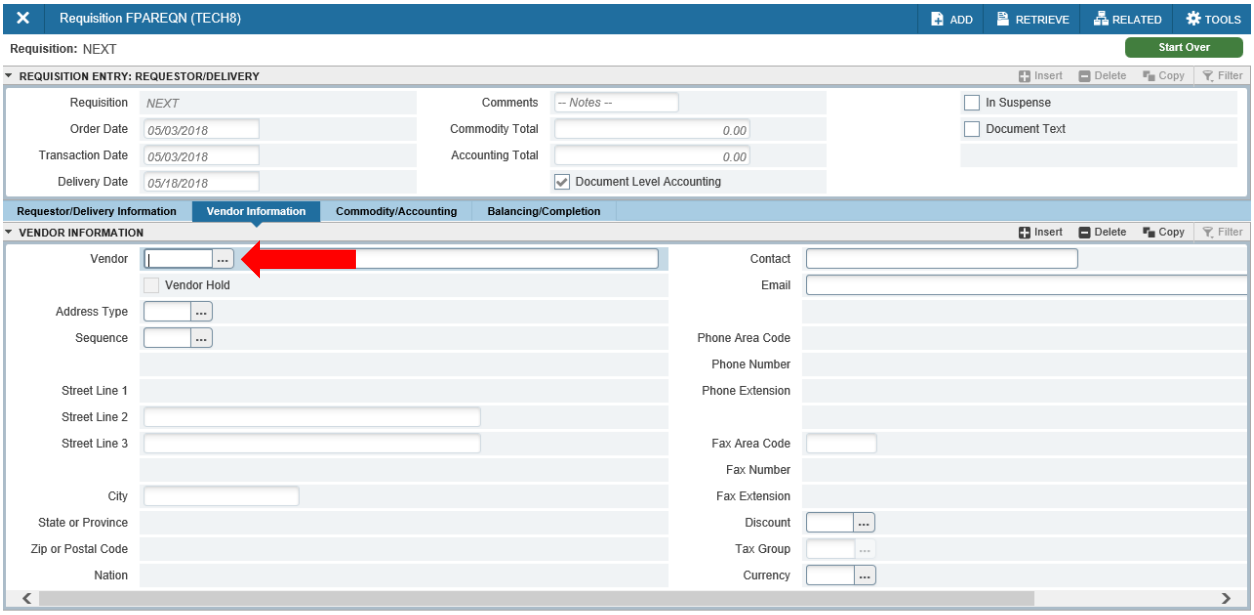
a) **Delivery Date* - The date must be reasonable and later than the Transaction Date. (Required)**
b) **Comments* - Notes for Purchasing (ex: Prepayment, Rush, Quote/Invoice#)**
c) **Organization* - Input organization which will be used for the expenditure**
d) **Ship To* - The Central Receiving information will be populated**
**If not, the Ship To Code will ALWAYS be 10. (Required)**
e) **Attention To* - Input the Requestor's First & Last Name, Campus, Bldg. & Rm#.**
**Example: Becky Cavazos/PCN N145 (Required)**

**(The attention to information is for Receiving Dept. to deliver items)**

**To proceed to the next section:**

**Click the "Vendor Information" tab OR Next Section (located at the bottom left corner)**

# 3b. Vendor Information





**Option 1:**

**If Vendor ID is known, input the A# in the vendor field and press Tab. The vendor's address and contact information will populate. (Vendor search not needed using this option)**

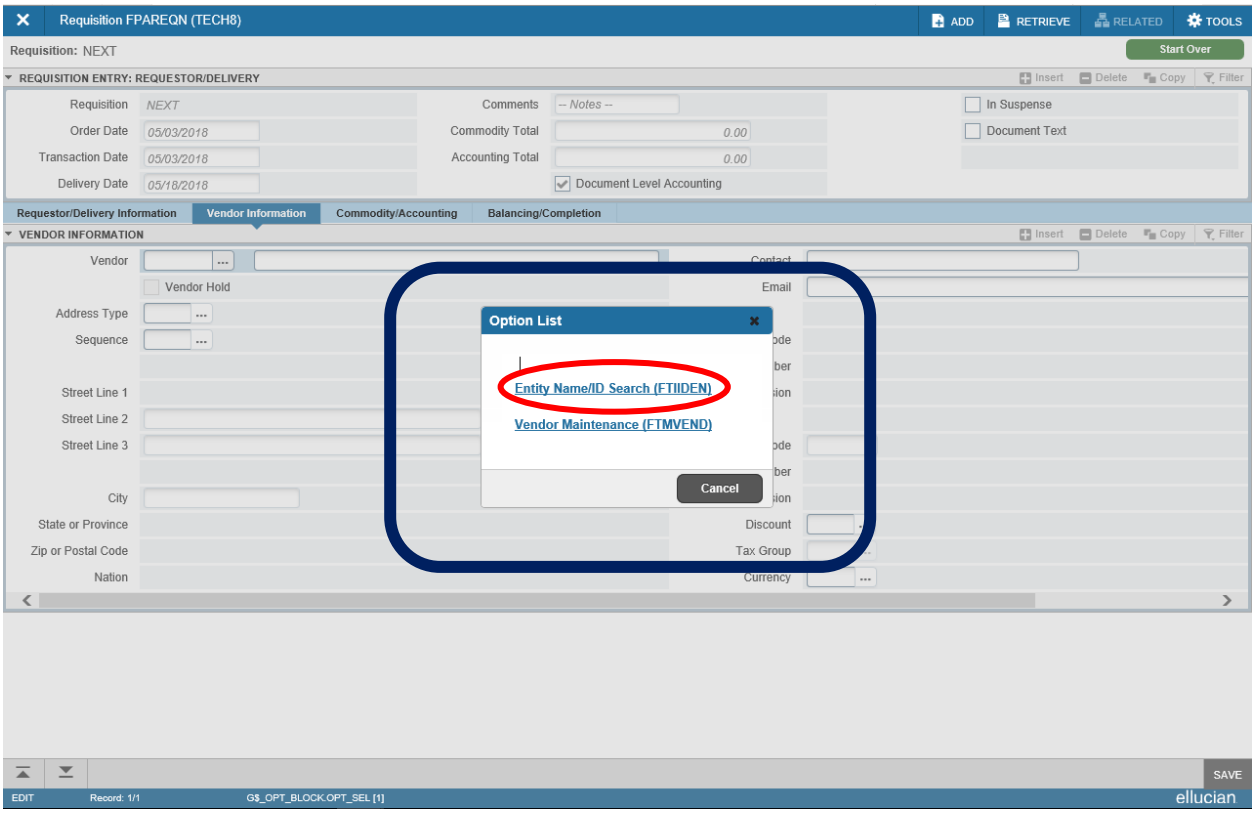
**OR**

**Option 2:**

**To find the vendor that is needed:**

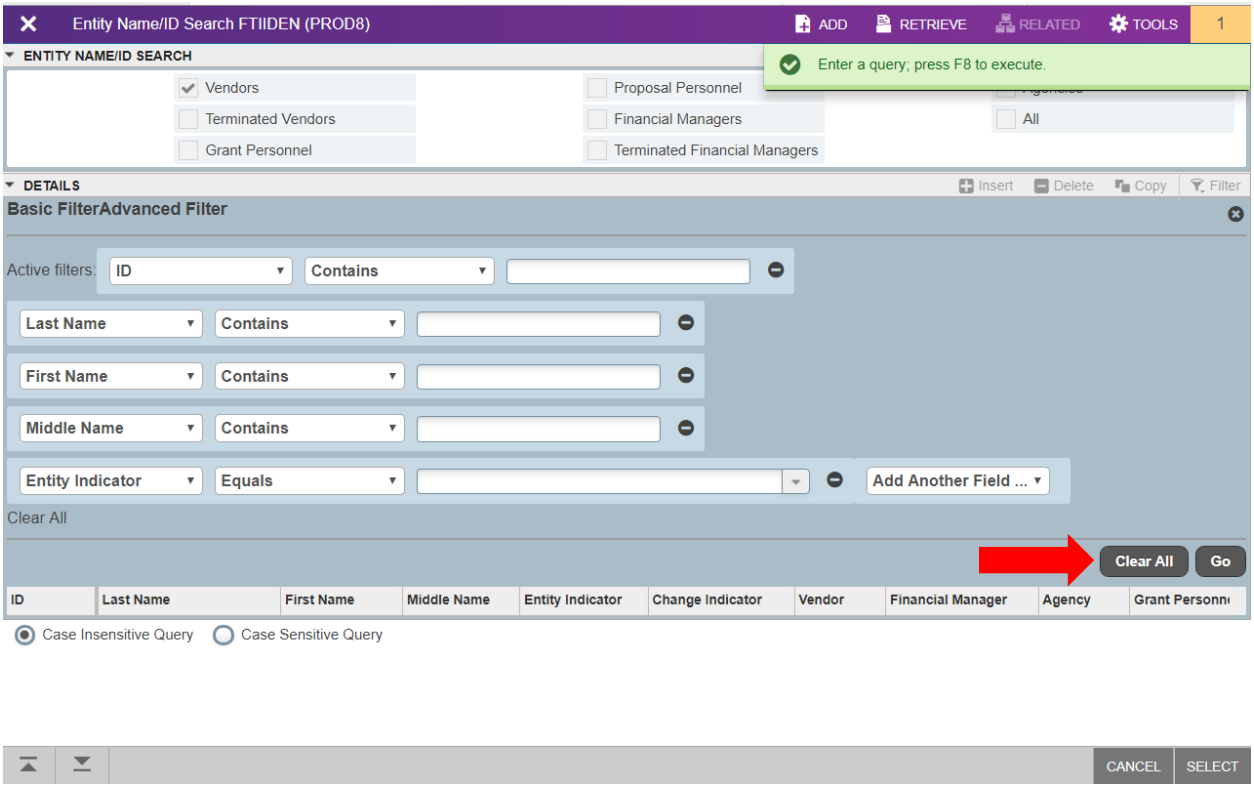
**Click the three dots ... next to the vendor field**

# The Option list box will appear




**Click on the Entity Name/ID Search (FTIIDEN) to find the vendor of choice.**

# Filter Search

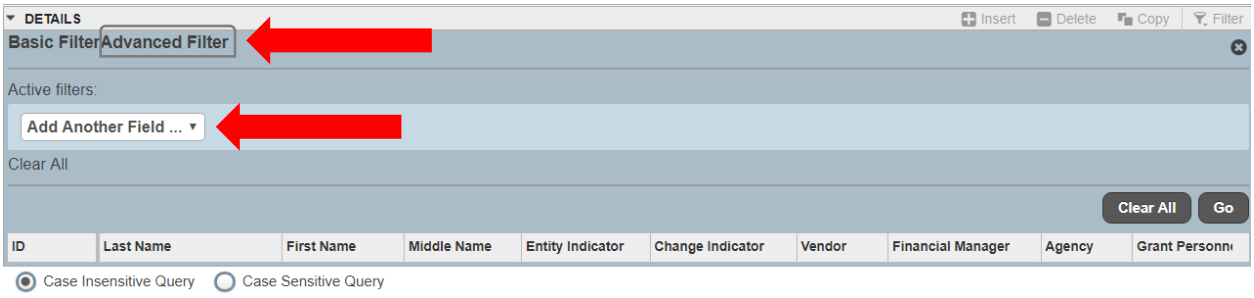






**This page will appear next:**

**First, click on Clear All to remove all filters.**

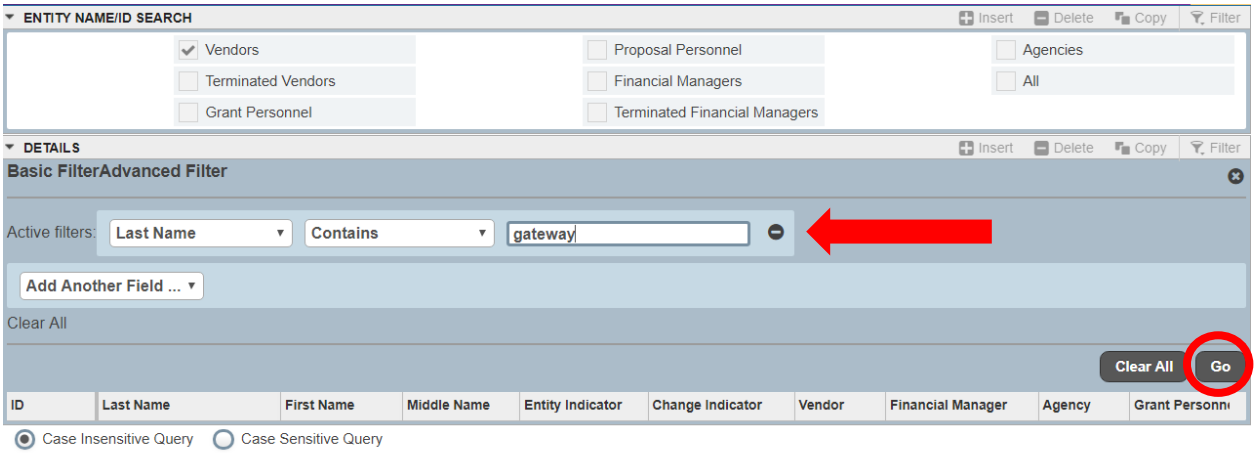



**Second, click on the Advanced Filter under "Details"**

**-Under Active Filters:**

**Click on the drop down arrow in the "Add Another Field" box**

# Searching Vendor




**-Select Last Name**

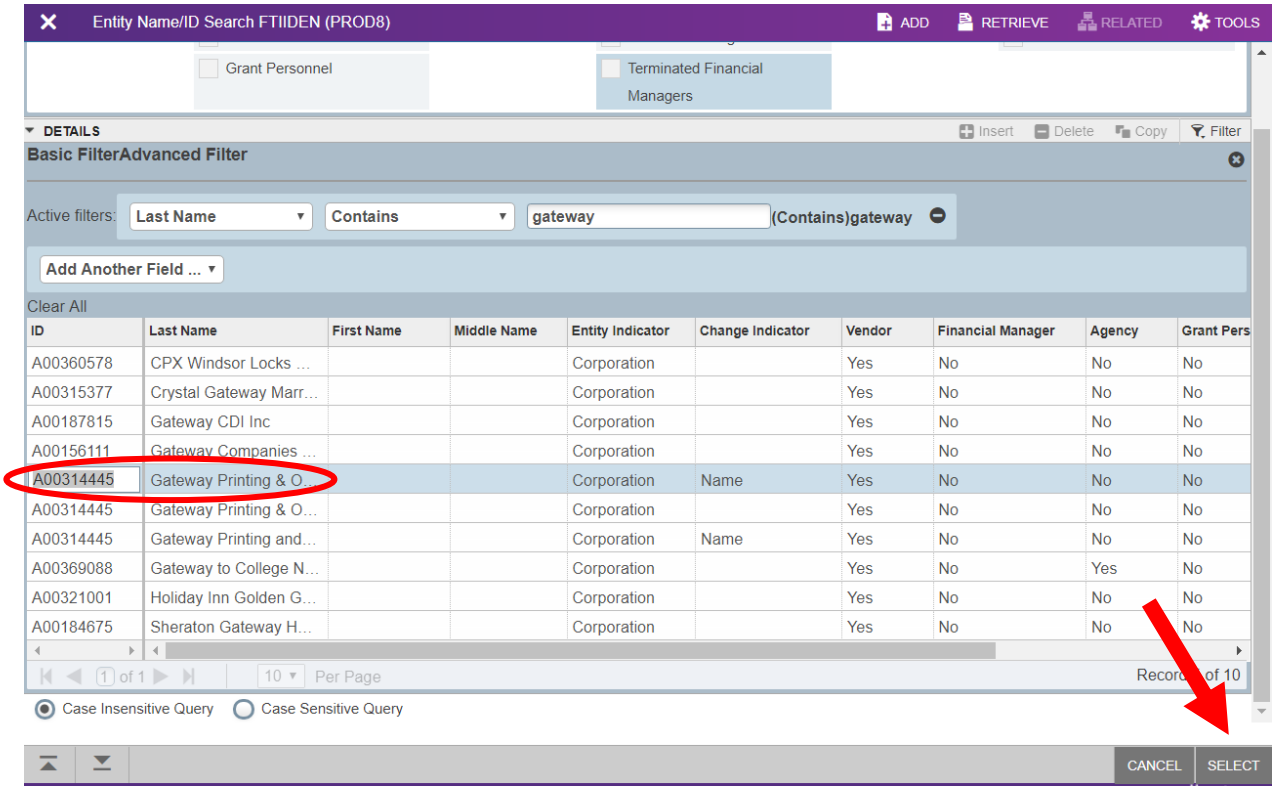
**-Contains will populate in the next field**

**-Type in the name of the desired vendor. (Example: "Gateway Printing")**

*****Note: Name is not case sensitive and % is not used to search**

**-Click "GO" located at the right side next to "Clear All" or press "Enter" to begin the search and view vendor results.**

# Selecting Vendor

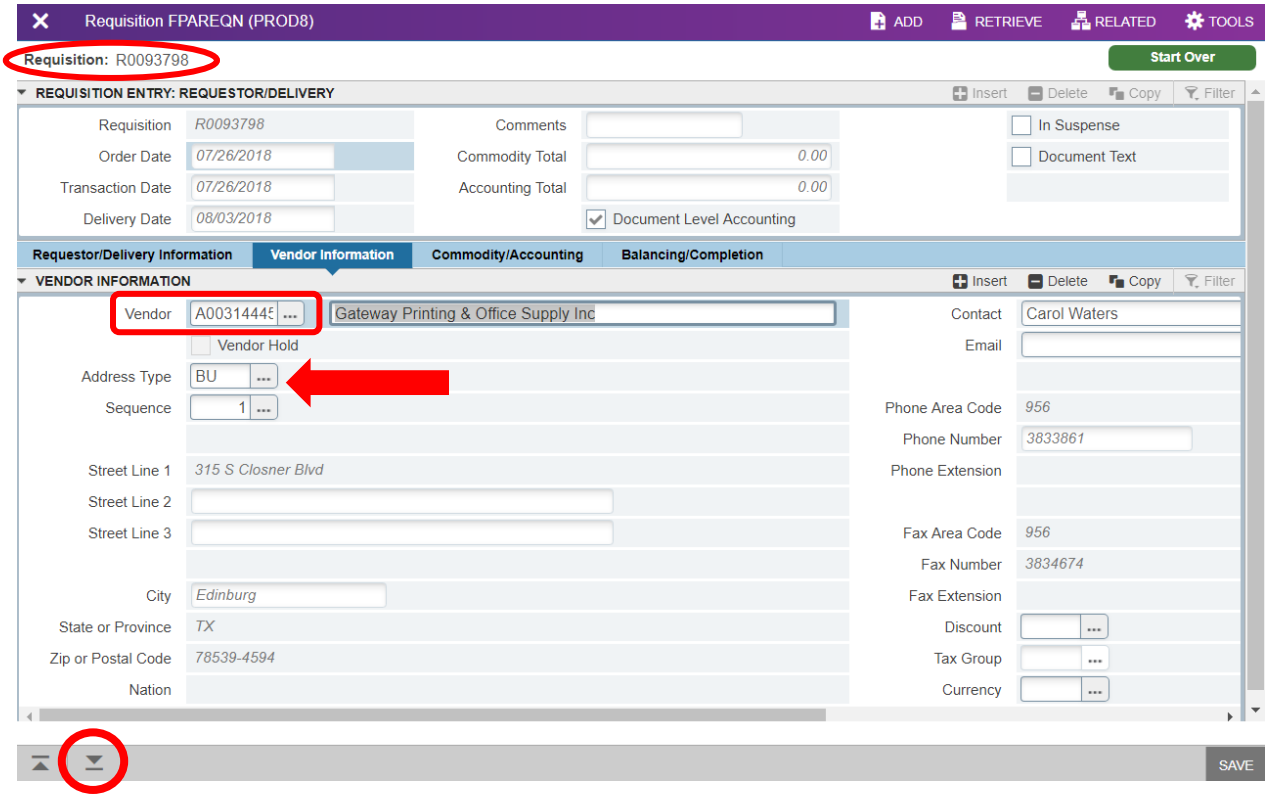



**Select the desired vendor then double click on the vendor name**

**OR**

**Click on the Vendor ID (A#) and then click on "SELECT" which is located at the bottom right corner of the page.**

# Vendor Information




**Vendor ID# will populate under the vendor information tab.**

**The display will also include the vendor's address and contact information.**

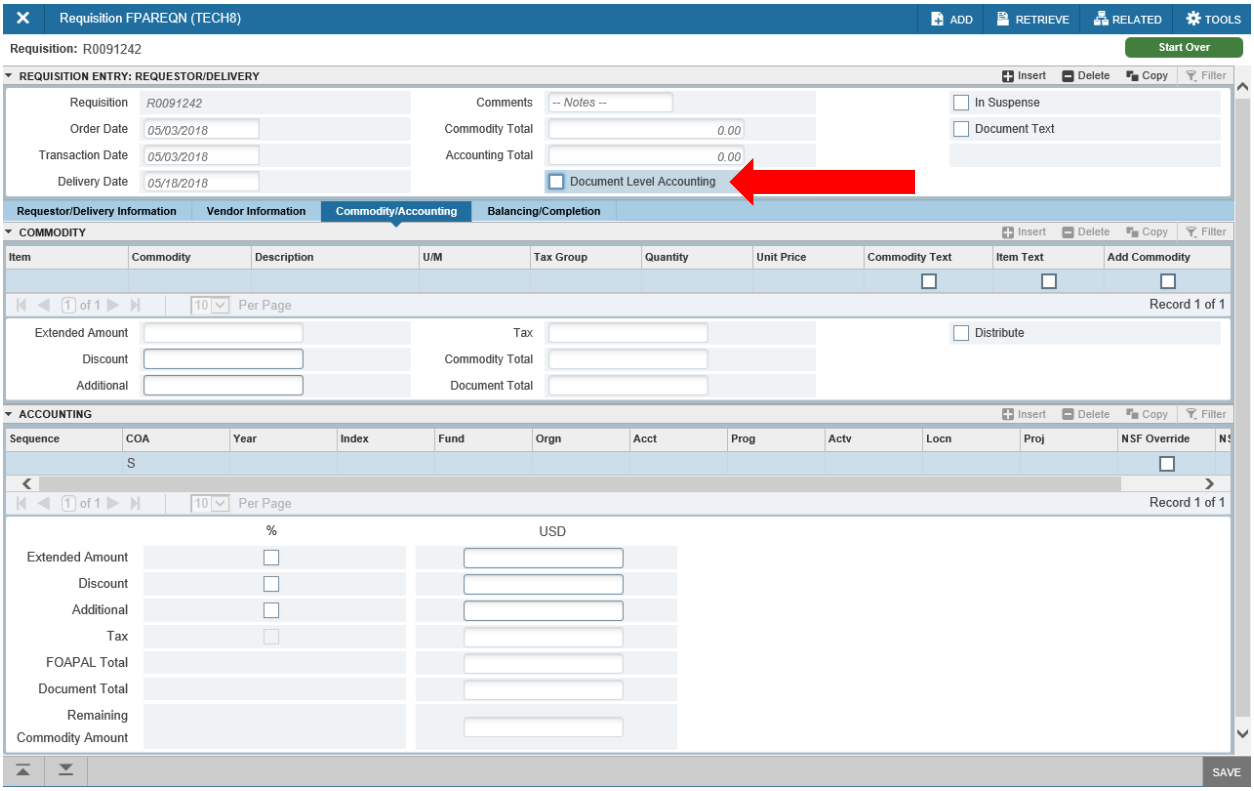
**Note: The Address Type should always be "BU".**

***** Banner will assign a requisition on this page. Record the assigned Requisition Number listed at the top left corner of page for your information or future reference.**

**To proceed to the next section:**

**Click the "Commodity/Accounting" tab OR "Next Section" located at the bottom left corner**

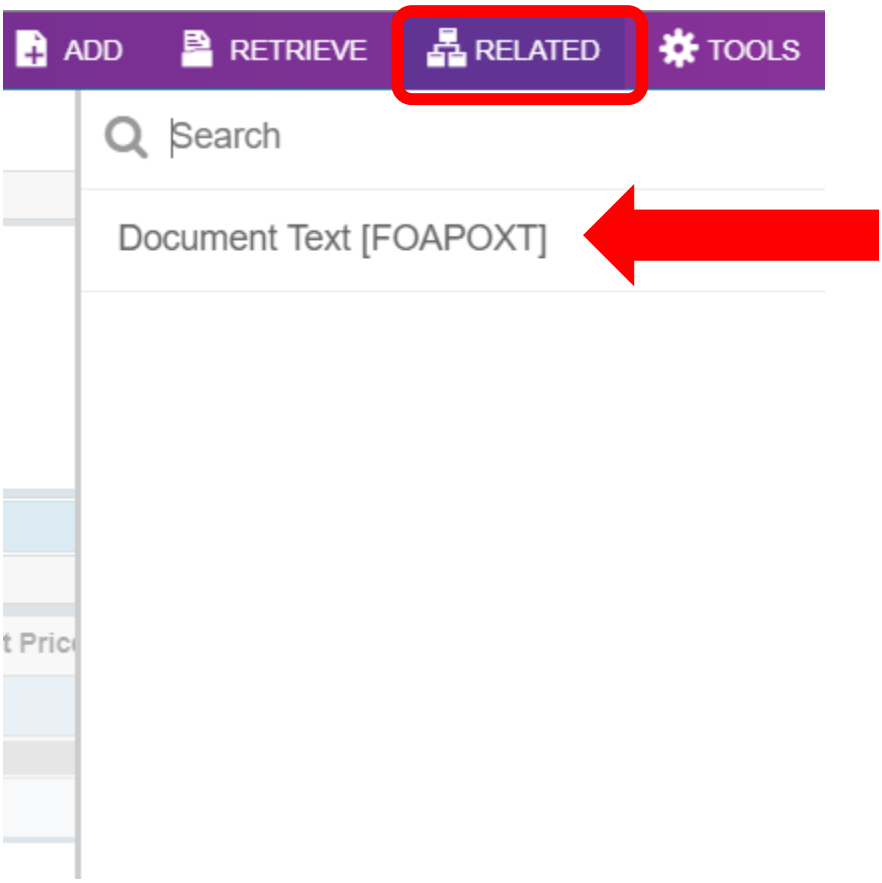
# 3c. Commodity/Accounting



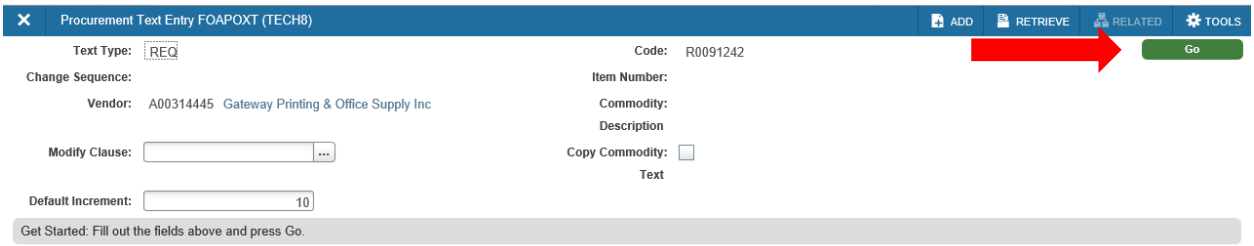

***** On this page, the Document Level Accounting <u>must</u> be unchecked.**

**Note: Before adding description lines, please provide a justification for the purchase in Document Text first.**

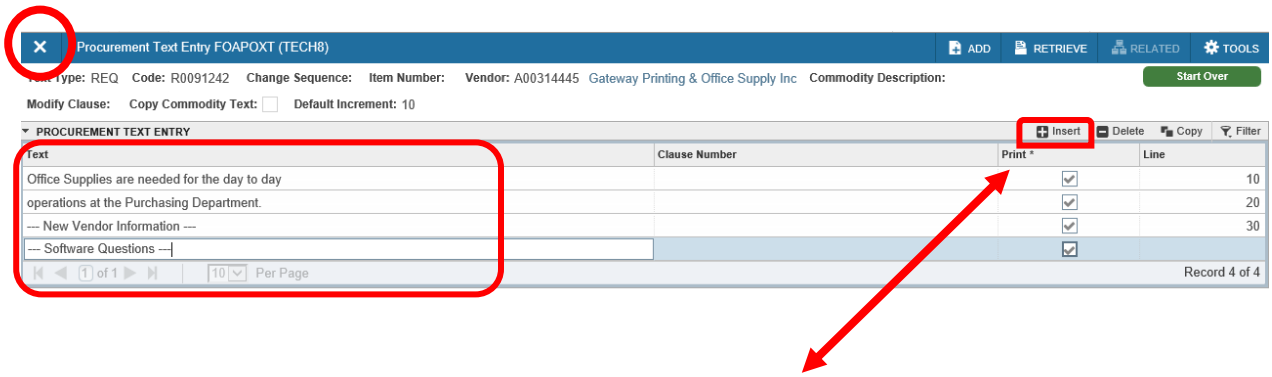
# Document Text




- **Go to the Menu bar located at the top right corner of the page and click on "RELATED" then select "Document Text"**
- **The Procurement Text Entry Page will appear.**




**Click "GO" to proceed to the Procurement Text Entry**




***** <u>To add a new line for additional information:</u>***

***Press the down arrow key on your keyboard OR click "Insert" located to the top right next to "+"***

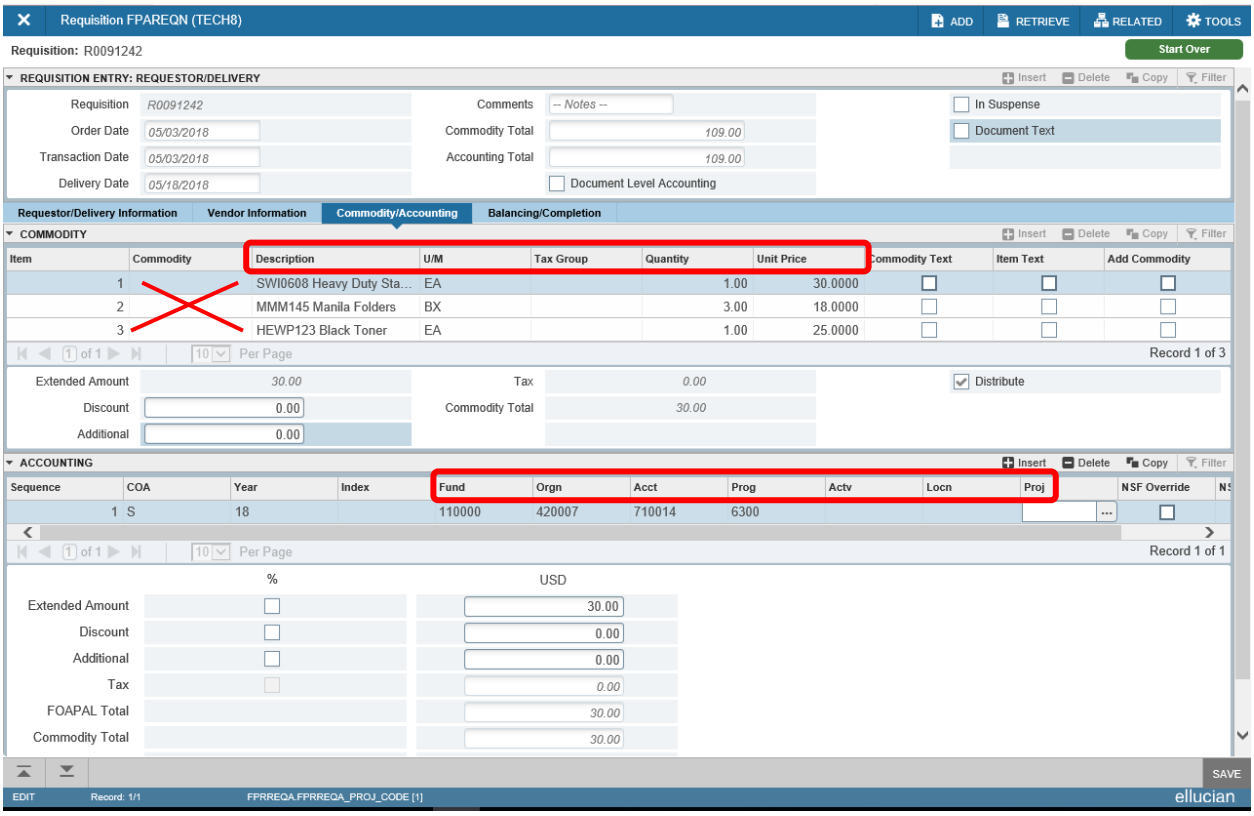

**Under the Text Section:**

**Required Information: Provide a complete justification explaining purpose of requested items, new vendor contact information (when vendor not set up in banner), software questions when requesting software/software license, delivery instructions, etc.**

**When done entering required information: Click "SAVE" located at the bottom right side of the page.**

**To Exit the Page: Click the "X" located at the top left corner of the page.**

# Commodity/Accounting




**Note: Do not populate the Commodity Field (must be left blank)**

1. **Description: Tab to the field and enter the Item Description, Model, & Part #. Note: For Gateway Requisitions only, provide the Item# first followed by brief description.**

2. **Unit of Measure (U/M): Tab to the field and click … to Search;**
   **The Unit of Measure List (FTVUOMS) appears.**
   **Double-click the unit of measure desired to populate the U/M field.**
   **Example: EA (each), LOT (lot), CS (case), etc.**

3. **Quantity: Tab to the field and enter the quantity of the item(s) ordering.**

4. **Unit Price: Tab to the Unit Price field and enter the price of the items.**

5. **Tab through the field until you return to the Description field to proceed to the Accounting Section.**

**Note: If further description items are needed, select "Item Text" from the Related menu. (Repeat steps from page 15 & 16 for the Procurement Text Entry)**

**Example:**

**For Open purchase orders: provide authorized users & period in "item text"**

7. **To add additional item use ↓ (down arrow key on the keyboard) or click "Insert" (at the top right of the page) to place your cursor in the next Description field and repeat the steps 1-5 from above.**

**Requisition Entry: The Accounting Section:**

1. **Click Next Section or press Alt + Page Down to move to the Accounting Section.**

2. **Tab to the Acct Column to enter the Account Code.**

***Account Code list can be found at the Business Office Accounts Payable Link below:***
https://finance.southtexascollege.edu/businessoffice/forms/ap/Account_Classifications.pdf

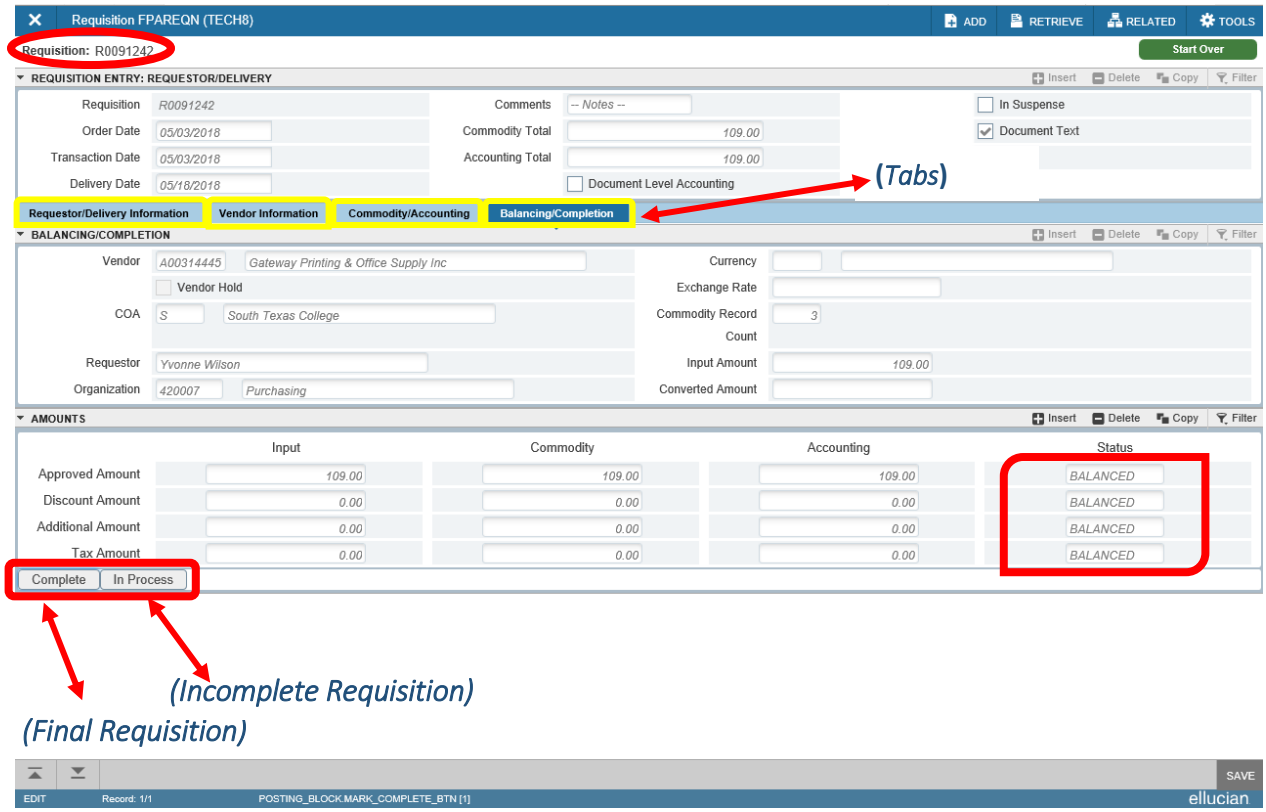
3. **Tab to the extended box for the total. If more than one Organization is needed, the cursor needs to be in the Extended Box and the correct dollar amount must be entered. Then press Tab.**

4. **Press the ↓ (down arrow key on keyboard) to enter the second Organization & repeat the steps above.**

5. **Verify that the dollar amounts are in balance.**

**After you have completed all the items and funding sources, click the "Balancing/Completion" tab OR Next Section located at the bottom left corner**

# 3d. Balancing/Completion




**1. Check that the Input Amount, Commodity Amount, and Accounting Amount are all in balance. The status column will also confirm that the requisition is in balance.**

- **The Input, Commodity and Accounting columns must all contain the same amount. The Status column must say Balanced in every row.**
- **Note: Banner will NOT allow the completion of a requisition if all areas are not in balance.**
  **You can always go back to each "Tab" to make any corrections or additional information needed before completing requisition.**

**2. If you haven't already, record the Requisition# before you leave the page.**

**3. Click "Complete": You must click complete to submit the requisition for Purchasing's review. It will remain in suspense if it is not complete and will not be forwarded for approvals.**

**4. Once requisition is completed, it will be forwarded as follows:**
- **Purchasing for Review**
- **Business Office for Budget Availability**
- **Financial Manager Approval**

# 4. Additional Information

1. **Requisition Approval History can be viewed at FOIAPHT. Review Banner messages daily using GUAMESG (no longer receive notification).**

2. **Items at no charge must be part of "item text" on the last line ordered. (Do Not use All caps for item description)**

3. **Banner requisitions cannot exceed <u>99</u> lines in order for the purchase order to be processed.**

4. **Please send any information related to the requisition to the Purchasing Department staff email or via fax (956) 872-4688.**

5. **Annual Requisition Deadlines:**

   **a. Capital items deadline April 30th.**
   **b. Operating items deadline May 31st.**