Navigating Banner 9

Completing a Requisition

Type FPAREQN in the search bar on the Welcome page.

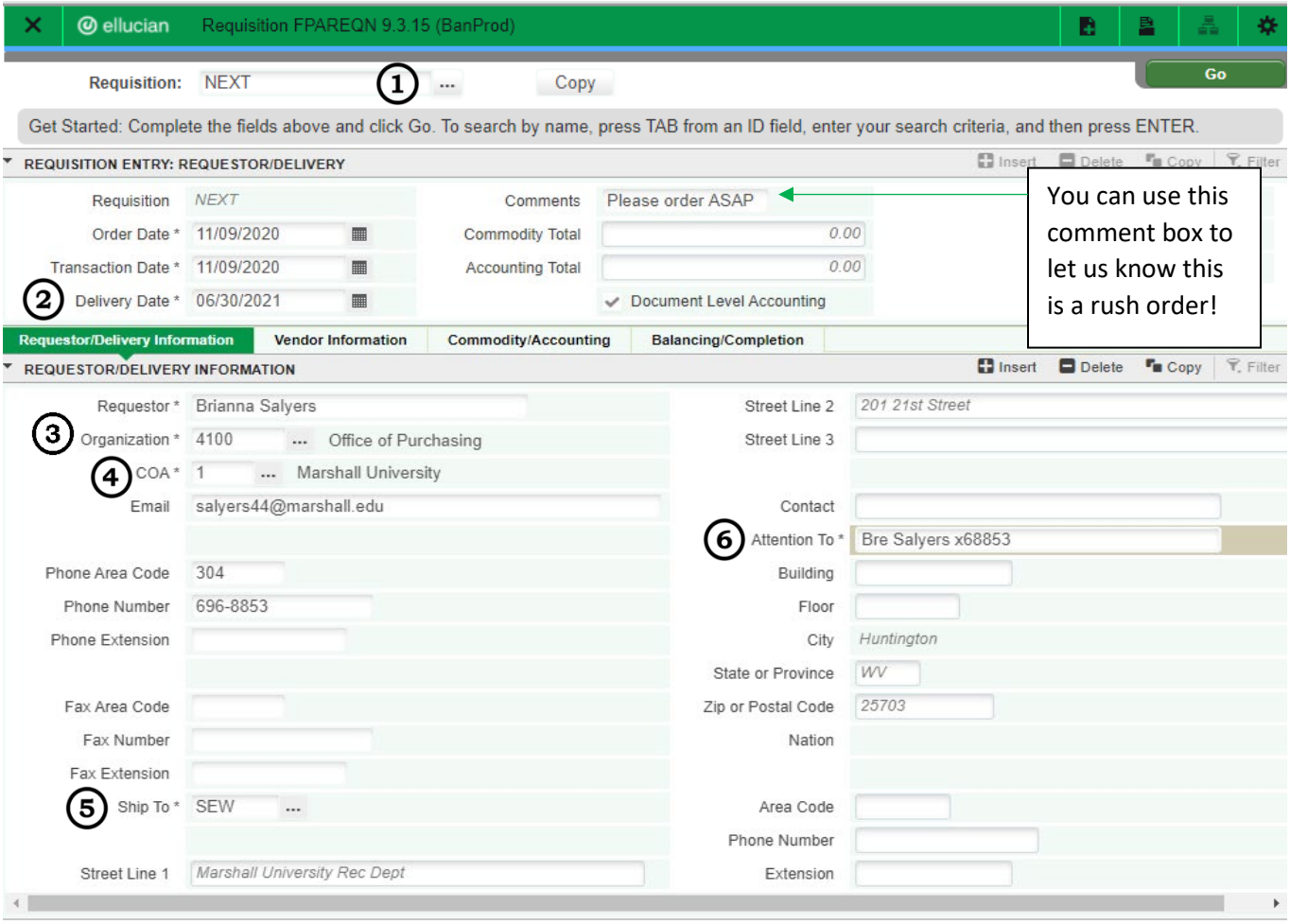
1. In the 'Requisition' box, type **NEXT** then Alt + Page Down or click 'Go'.
2. Enter the Delivery Date as the end of the fiscal year (ex: 06/30/2021), as that allows the Requisition to remain open and active during the year. If this order is a rush, you can use the 'Comments' box to let us know, or by emailing your agent.
3. Type in the Organization (Org) code associated with this purchase.
4. If you are using State Funds, leave the Chart of Accounts (COA) box as 1. If you are using MURC funds, change the COA box to 2.
5. This is the 'Ship To' address. Most purchases will be delivered straight to the Receiving Department, so type **SEW** for that address. If you have a purchase that will be delivered to the Biotech Center, type **BIOTEC** for that address.
6. The 'Attention To' box is where you will put your contact information, or the contact information of the person who this order is for. Then Alt + Page Down.

8. If you have an email address for the vendor, type it in the 'Email' box. This helps with allowing us to contact the vendor if we have questions, or to be able to send them a scanned copy of the PO.
9. The Commodity section begins here, which is where you will add all of your items that are being purchased. Under the 'Description' box, type the description of the good/service being purchased as found on the quote, proposal or agreement. (You are allowed up to 50 characters per line before you will have to add additional item text lines. See below on page 5 for further explanation on how to add item text.)
10. This is the U/M box, where you select the unit of measure. Type in the code you want to use or use the  icon for more options.
11. These two boxes are where you will type in the quantity you are purchasing and the unit price.
12. To add additional line items, click the 'Insert' button that is lit up in the commodity section. To delete line items, click the 'Delete' button. Only add line items if you have more than one item being purchased.

HINT: If you have requisition documents to upload, follow the separate guide starting on page 10 that walks you through uploading documents. Once you are finished with adding line items, Alt + Page Down.

13. The COA should automatically be set to match the number that was input in Step 4. Update that if necessary.
14. The 'YR' box stands for the Fiscal Year.
15. The 'Fund' and 'Org' box is where you will enter your funding information.

16. The 'Acct' code box stands for the accounting code. This is the 5 digit number that helps classify what the items are that's being purchased. Refer to the 'Banner Account Codes with State Narratives' guide if you need help identifying which account code to use.
17. The 'Prog' box is the program. (This should prepopulate, but if it does not, refer back to an older PO that has been entered using the same fund/org information to get the program code.)
18. The 'Extended' Amount box is where you will see how much money is to be paid on that particular sequence line. If that box is empty, manually add the money that should be on that line.
19. If you need to add an additional accounting line, click the 'Insert' button that is lit up in the Accounting section. When you are finished with the Accounting section, Alt + Page Down. **HINT:** If you get a message that says 'Insufficient budget for sequence 1, suspending transaction' this means your requisition is Non-Sufficient Funds (NSF). Double check that the correct funding information has been used, then contact the Budget Office to resolve.
20. If the Commodity and Accounting section balanced out, you will be directed to the Balancing/Completion screen. Click 'Complete' if the requisition is ready to move to Purchasing. Click 'In Process' if the requisition is not ready to move to Purchasing. If your requisition has an NSF status, you can either complete it or leave it in process.



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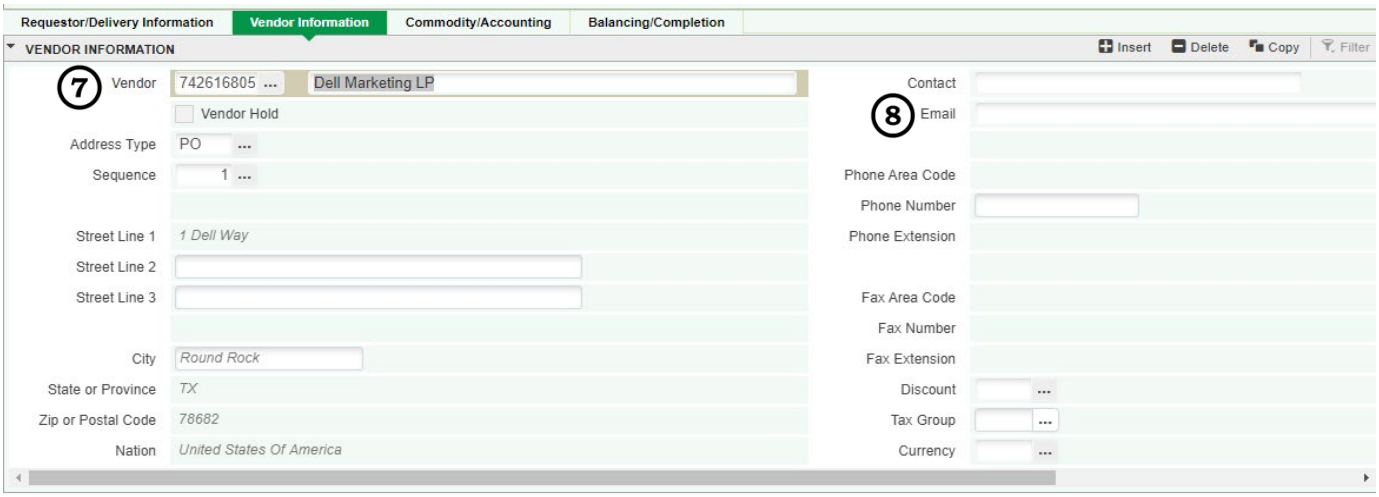
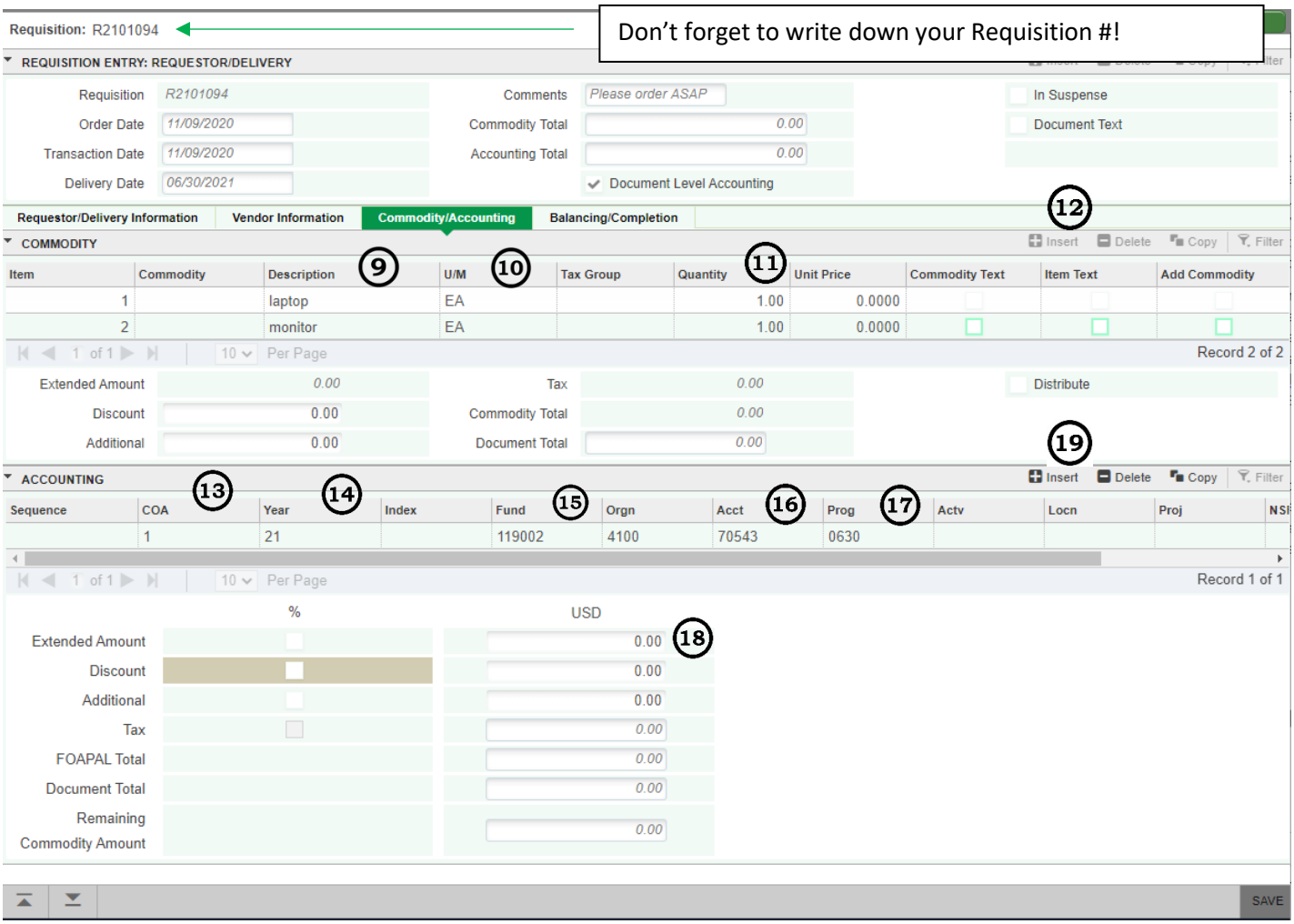
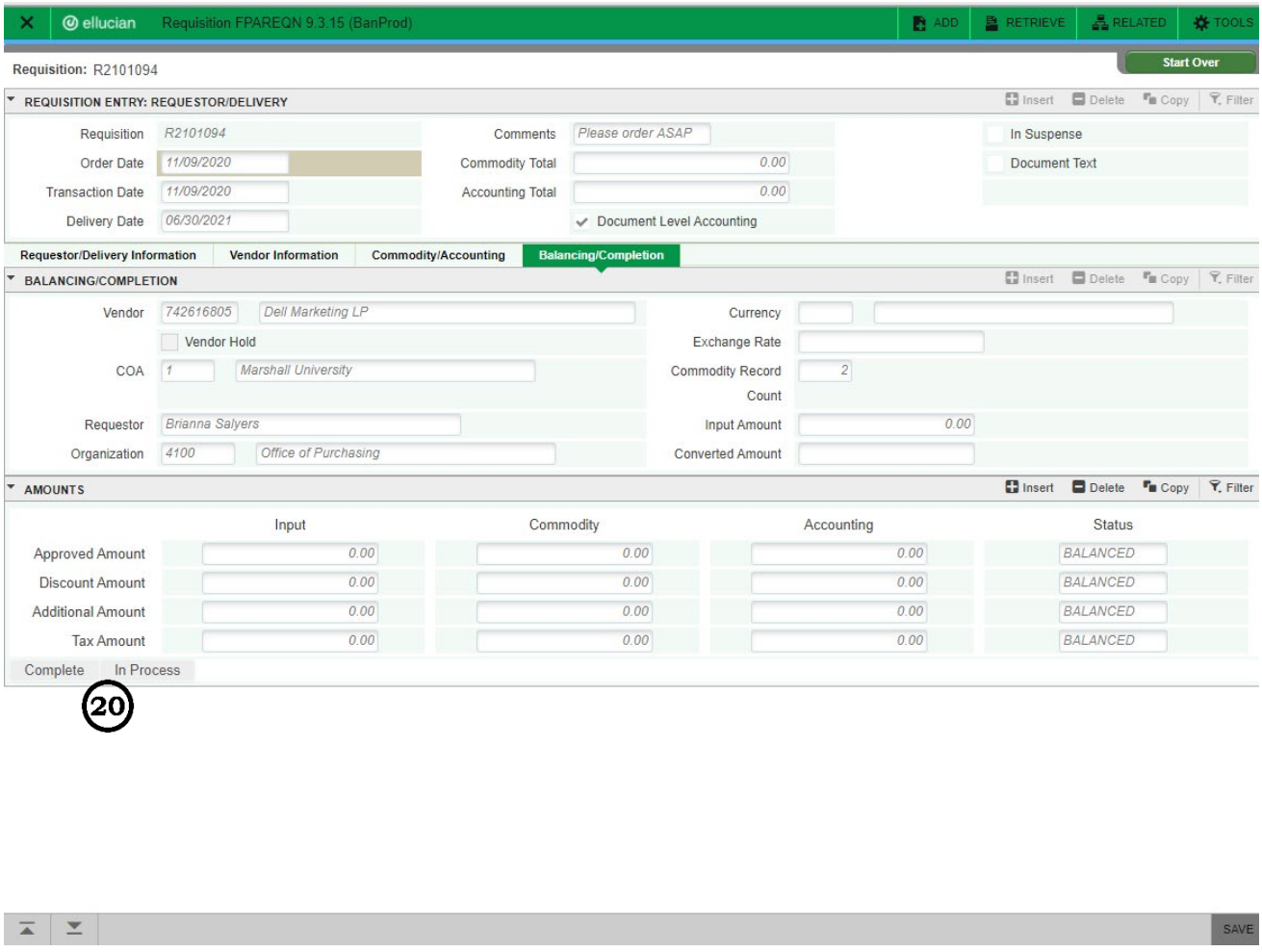




HINT:


ADD
RETRIEVE
RELATED
TOOLS
1
Insufficient budget for sequence 1, suspending transaction.
Insert
Delete
Copy
Filter


ellucian
Requisition FPAREQN 9.3.15 (BanProd)
ADD
RETRIEVE
RELATED
TOOLS
Start Over
Requisition: R2101094
REQUISITION ENTRY: REQUESTOR/DELIVERY
Insert
Delete
Copy
Filter
Requisition R2101094
Order Date 11/09/2020
Transaction Date 11/09/2020
Delivery Date 06/30/2021
Comments Please order ASAP
Commodity Total 0.00
Accounting Total 0.00
Document Level Accounting
In Suspense
Document Text
Requestor/Delivery Information
Vendor Information
Commodity/Accounting
Balancing/Completion
BALANCING/COMPLETION
Vendor 742616805 Dell Marketing LP
Vendor Hold
COA 1 Marshall University
Requestor Brianna Salyers
Organization 4100 Office of Purchasing
Currency
Exchange Rate
Commodity Record Count 2
Input Amount 0.00
Converted Amount
AMOUNTS
Input
Commodity
Accounting
Status
Approved Amount 0.00 0.00 0.00 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
Complete
In Process
20
SAVE

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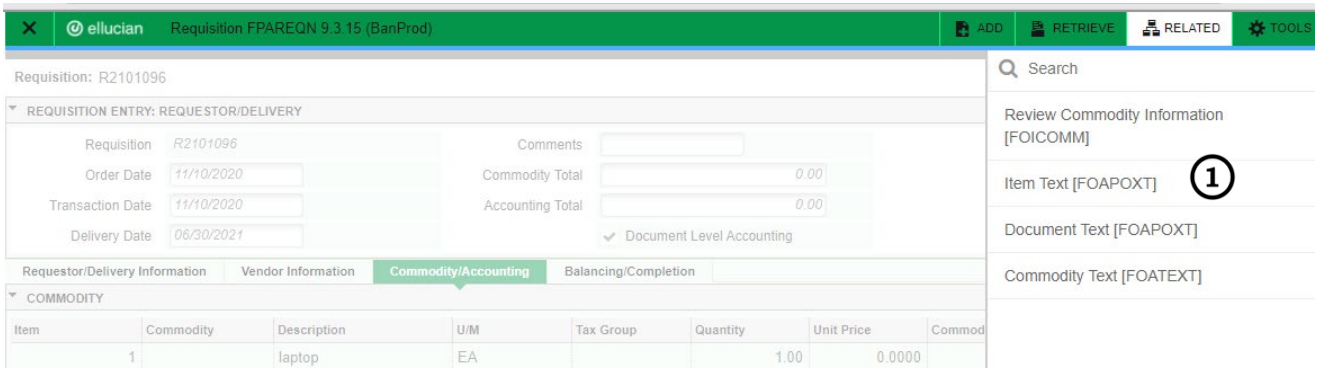
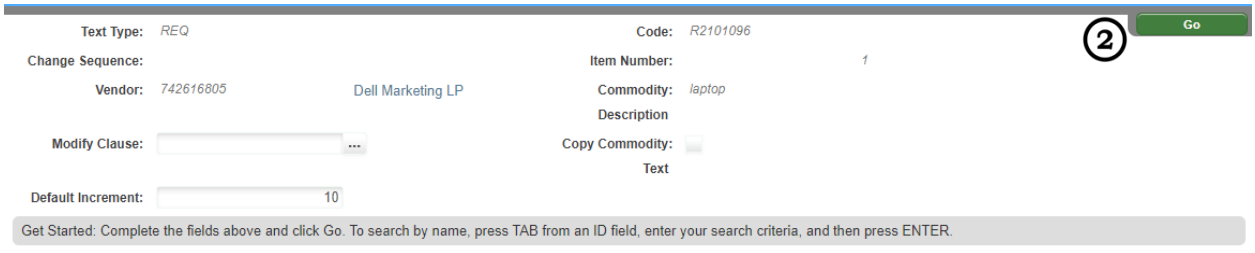
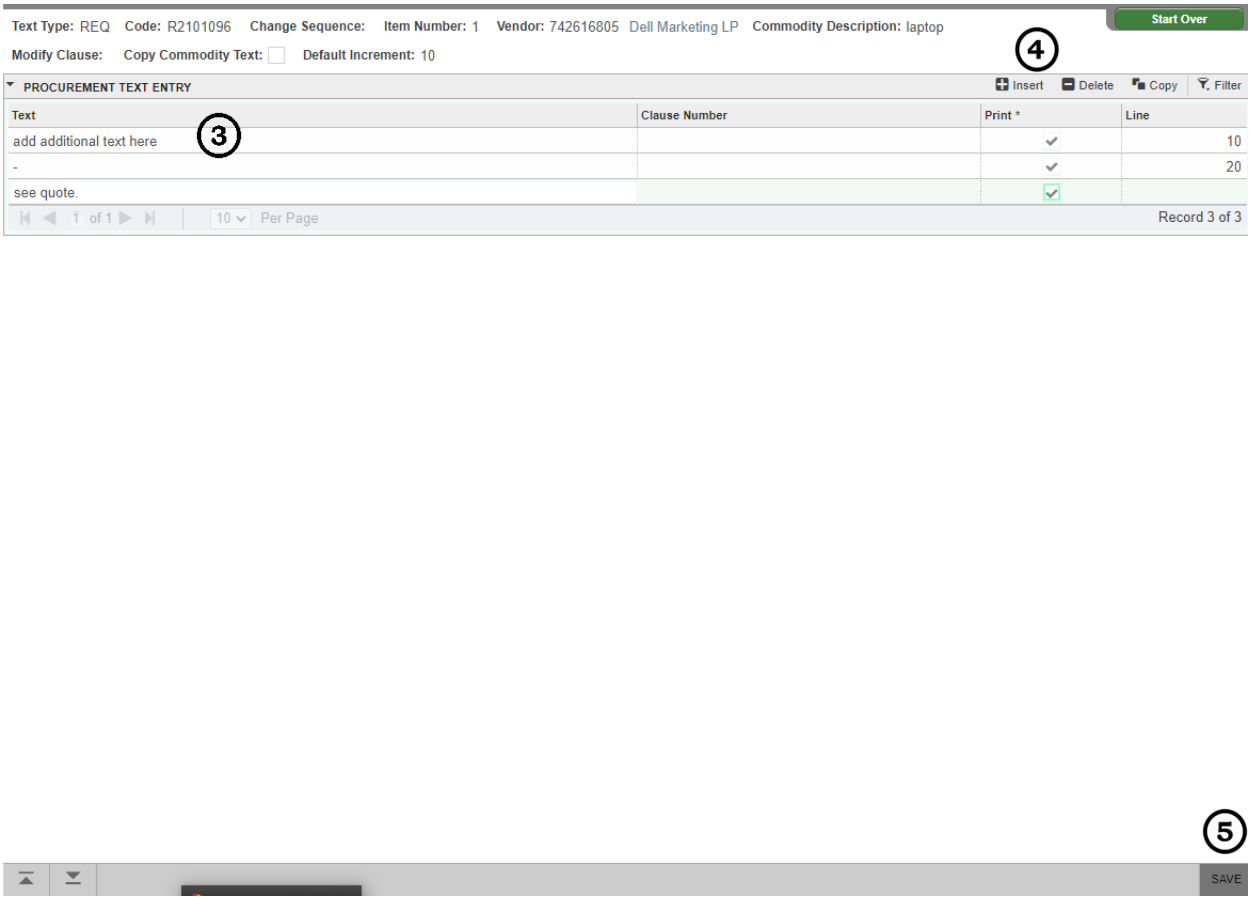
Adding Item Text

1. Make sure you are on the line item you want to add additional text to. On the Upper right hand side of the page, click 'Related' then click 'Item Text [FOAPOXT]'.
2. Once in the FOAPOXT form, Alt + Page Down or click 'Go'.
3. One line will be provided for you to add additional text. You are allowed up to 50 characters per line before it cuts off. The text doesn't automatically roll to the next line so be careful when typing away.
4. To add an additional row, you can either arrow down on the keyboard, or click the 'Insert' button on the right hand side of the page.
5. Click save once all item text has been added.







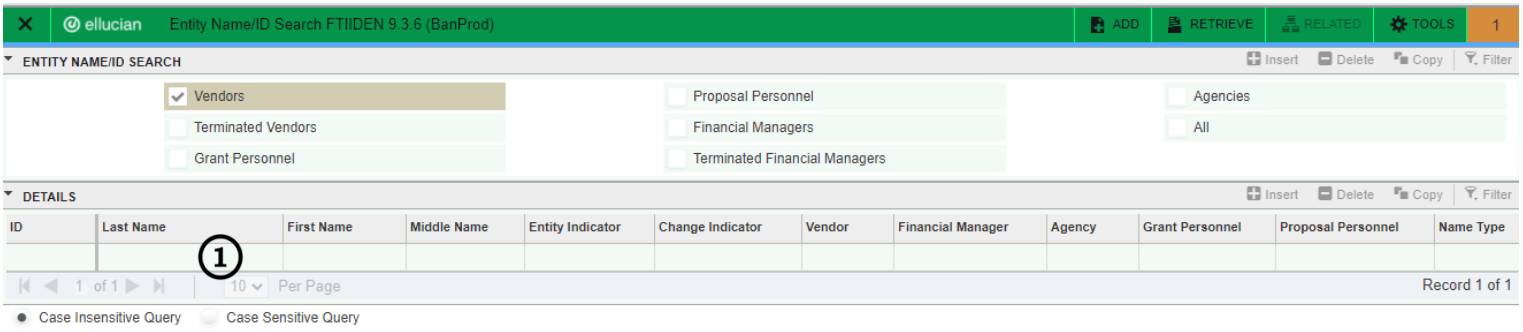
Looking up a Vendor FEIN

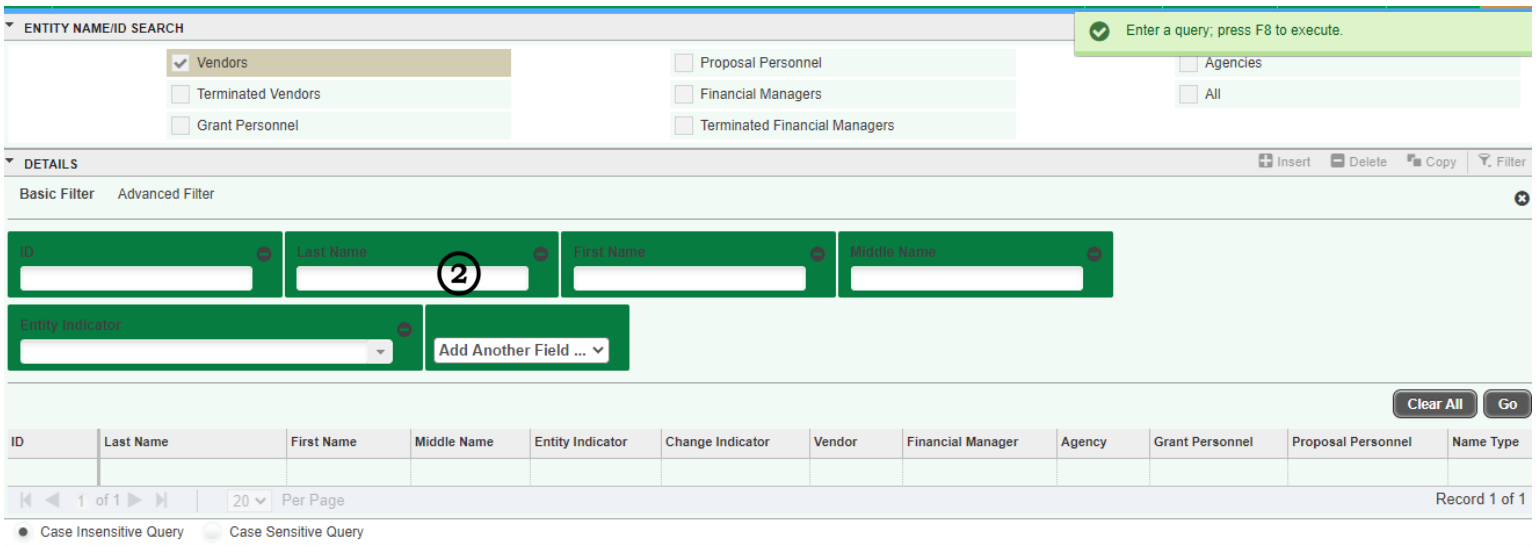
To look up a Vendor FEIN # in Banner:

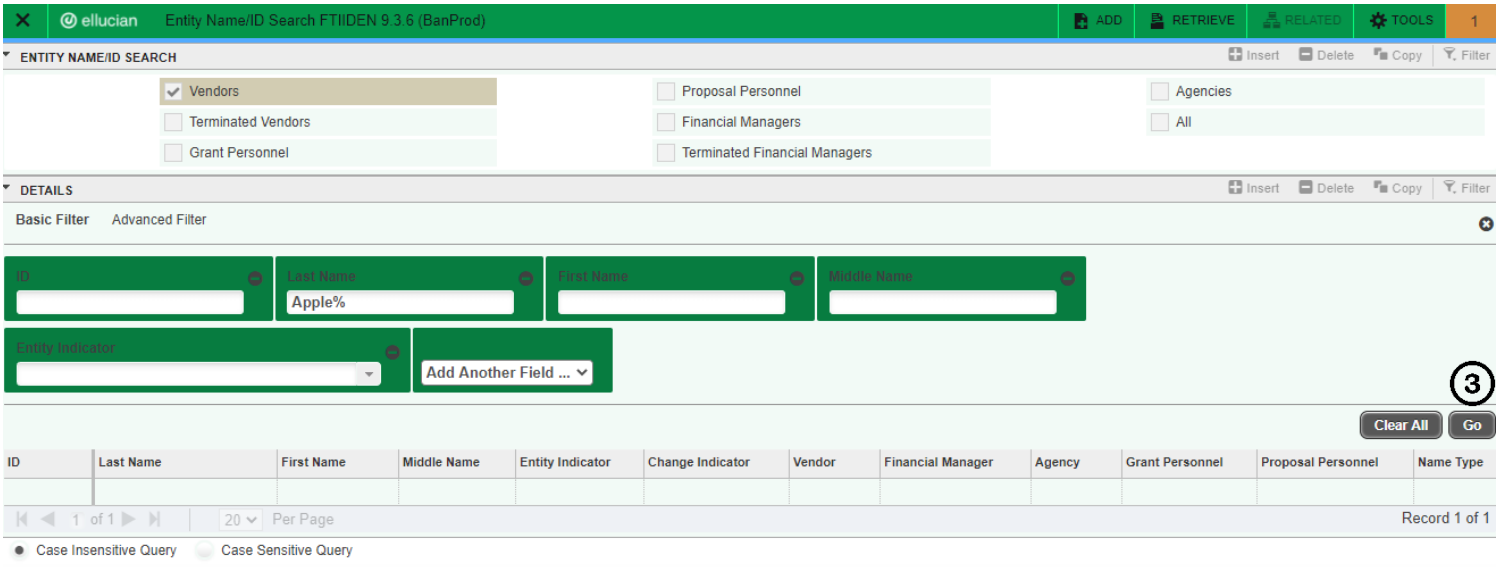
Enter FTIIDEN in the search bar on the Welcome Page.

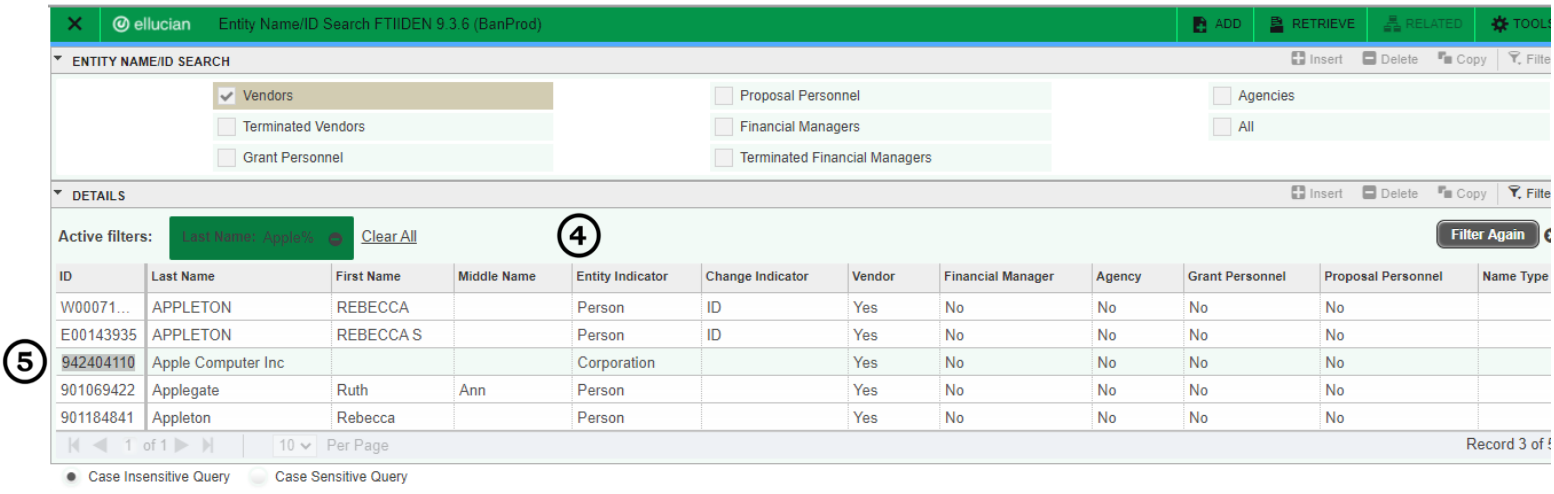
1. Click on the light green box under the 'Last Name' field
2. In the 'Last Name' box, type the Vendor's name.
   Hint: If you are unsure of the exact name, you can try a variation of what you think it may be and type the wildcard, %, after the name. It will pull up all ID's in Banner that have those characteristics.
3. Hit F8, or click 'Go'
4. It will populate all the options with your search criteria

5. The FEIN # can be located in the ID box.









Looking up a Vendor Address

If you don't already have the Vendor's FEIN, follow the instructions for Looking up Vendor FEIN

Enter FTMVEND in the search bar on the Welcome Page.

1. In the Vendor Box, type in the FEIN #. Alt + Page down or select 'Go'.

2. Click on the top tab for 'Address'. You will be able to scroll through the various addresses (if applicable), by using the navigation arrows.

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