

BANNER QUICK VERSION GUIDE TO CREATING A REQUISITION

October 2008

FROM THE BANNER GENERAL MENU SCREEN

1. [Go To...]: Type FPAREQN (enter)
2. [Requisition]: Type 'NEXT'
3. PAGE DOWN
4. [Delivery Date]: Type desired date of delivery (must be later than transaction date)
5. [Organization]: Type your 3-digit organization code.
6. [Phone Ext]: Type your 4-digit number.
7. [Ship To]: Click on the drop down menu (or press F9), then click in field next to % sign - key in the last 4 letters of the last name of person the item is going to. Scroll down until you find the correct name. Highlight the name and click OK. The name is brought over into the form.

IF YOU HAVE A NOTE FOR PROCUREMENT OR VENDOR go to step 8

If not, PAGE DOWN and go to step 9

8. *DOCUMENT TEXT- this can be used for any notes to Procurement/ Buyer, vendor addresses, phone numbers, special instructions, etc.*

CLICK on the Options menu at the top and choose Document Text. Press PAGE DOWN and enter any notes. (This does not wrap- arrow down to get to the next line)

SHIFT+F6 saves the message. Ctrl+q takes you back to Requisition screen - PAGE DOWN

9. To enter vendor:
Click on the drop down menu or push F9.
Press Tab to [Last Name]. Type a word from the vendor's name surrounded by wildcards (%); ex: %Office%; (PLEASE NOTE: this field **IS** case sensitive); press F8. BANNER will display a list of all vendors matching the characters you specified. To select vendor, click on your selection; press Shift+F3. The Vendor information will be brought over to the form.

If not found, Press Ctrl+q TWICE to bring you back to Requisition. Tab to the second box to the right next to [Vendor:] and type in vendor name. You will need to let Procurement know in Document Text (step 8) the address, phone and fax numbers, etc.

PAGE DOWN- You now should be on the Commodity/ Accounting Screen

10. [Description]: type in the item being ordered (If you need more space, choose the Options menu at the top of the page and select Item Text. Enter Item Text, just as you would Document Text (Step 8). Shift+F6 to save and Ctrl+q to exit text box.
11. [U/M]: (unit of measure) type 'EA' for each, 'LOT'. etc...
12. [Quantity]: type amount of items being ordered
13. [Unit Price]: type dollar amount of item (no need for \$ signs or commas)

IF THERE IS ONLY ONE ITEM TO BE ORDERED, PAGE DOWN

IF MORE ITEMS- ARROW DOWN AND REPEAT STEPS 10 THRU 13.

WHEN ALL ITEMS ARE ENTERED- PAGE DOWN and continue with step 14

You should now be on the Requisition Accounting Data Screen

14. [INDEX]: type in you 6-digit index
15. [ACCT]: type in the account to be used.

NOTE: If only one index is being charged PAGE DOWN - if multiple indexes are being used, see below.

Multiple Index(es)/Account charges (two options):

1. Charge by percent: After step 15, click on check box next to [Extended]. Type the percentage amount you wish charged to this particular Index/Account, press Tab. BANNER will compute the dollar amount. Press down arrow to bring up next accounting sequence form. Repeat steps 14 and 15 as well as this step, until total amount has been distributed. Press PAGE DOWN. Continue with step 16.
2. Charge by amount: Press Tab to the field under USD. Type in the dollar amount you wish charged, press down arrow to bring up the next accounting sequence form. Repeat steps 15 and 16, until entire amount of Requisition has been charged. Press PAGE DOWN. Continue with step 16.

Charge by Line Item: As you complete each line item of the Requisition, you must press PAGE DOWN and complete the Accounting Data following steps 14 and 15. Then press Page Up and then down arrow to type the next line item. Repeat the process to type the accounting data. When all line items and accounting information have been entered, press PAGE DOWN. Continue with step 16.

You should now be on the Balancing Completion Screen

16. Cursor displays over top of block next to [In Process].

1. To Save as Incomplete: Select the box next to [In Process]. You will be able to complete the Requisition at a later time.
2. To Complete the Requisition: Once you have reviewed and decided to complete the Requisition, select the box next to [Complete]. The Auto Hint line displays: 'A Document Rxxxxxxx completed and forwarded to the approval process' will be displayed. Please make a copy of the Requisition number (Rxxxxxxx) for your files.

WARNING: Once you complete a Requisition no changes are permitted. Prior to closing the Requisition, please review each window of the form by pressing PAGE DOWN to cycle through the form.

[Contact Webmaster](#)

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