WINTHROP UNIVERSITY

Banner 9 Admin Pages

PURCHASE REQUISITION

TRAINING MANUAL

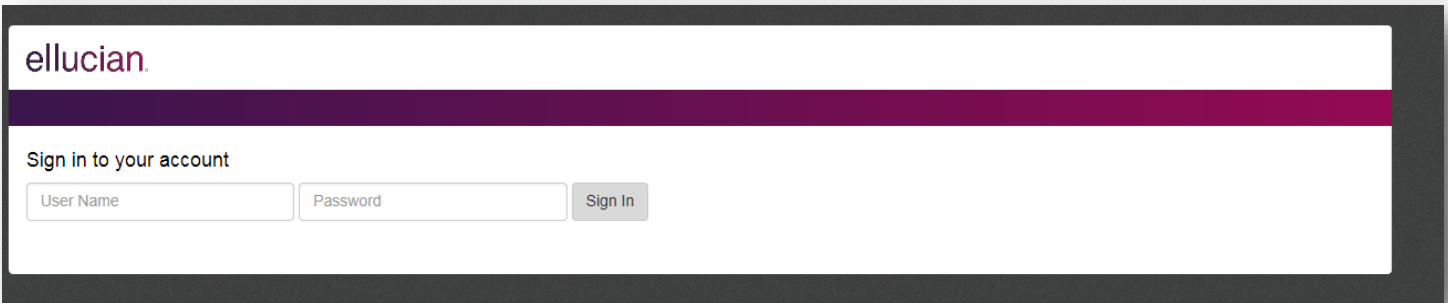# TABLE OF CONTENTS

Signing in/out
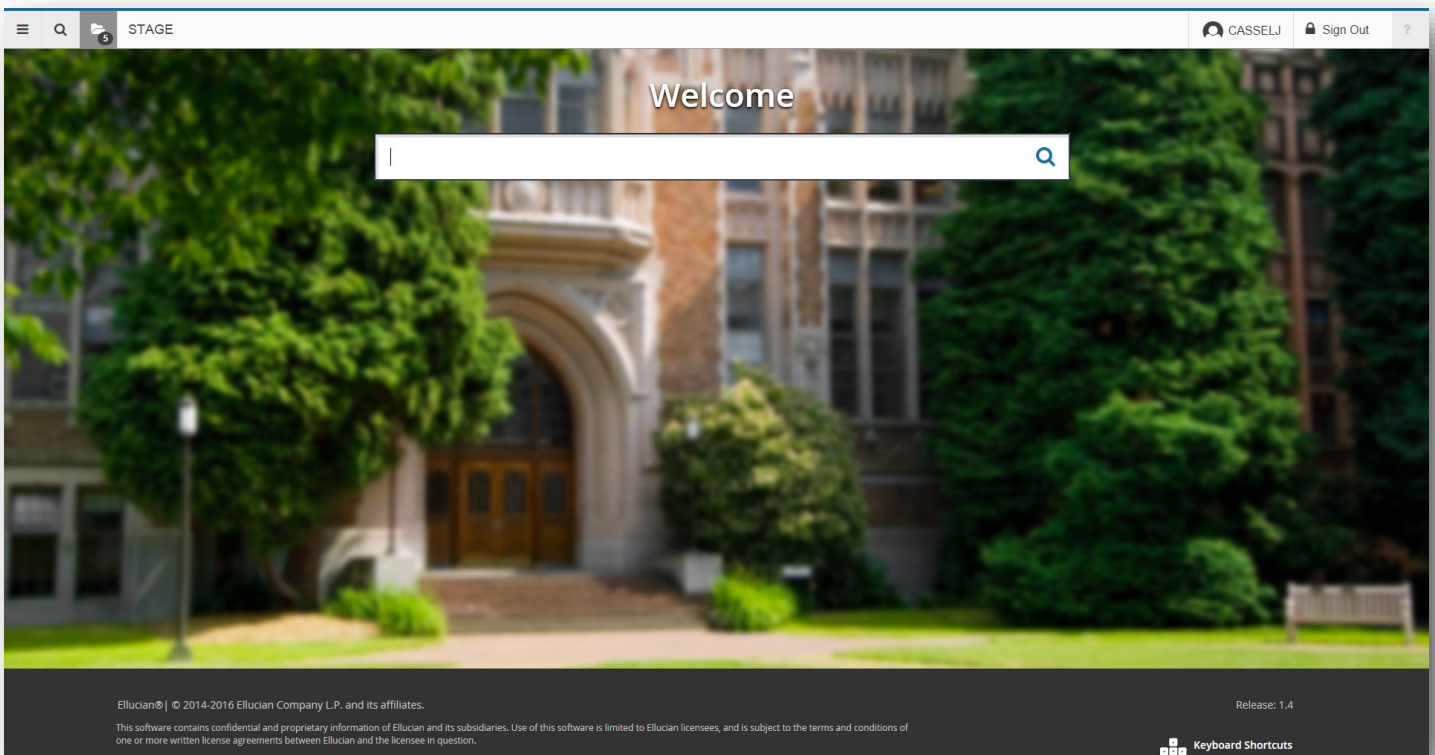
Go to http://bannerlinks.winthrop.edu:9090/ and click on Banner 9 <<ENTER SCREEN SHOT>>

A new tab will open, please enter your Winthrop windows credentials, and click "Sign in". You will then be taken to the Banner homepage.

To Sign out click the "Sign Out" button on the upper right hand corner.

ENTERING A REQUISITION

FPAREQN

Input "FPAREQN" into the search field and press "Enter" on your keyboard.

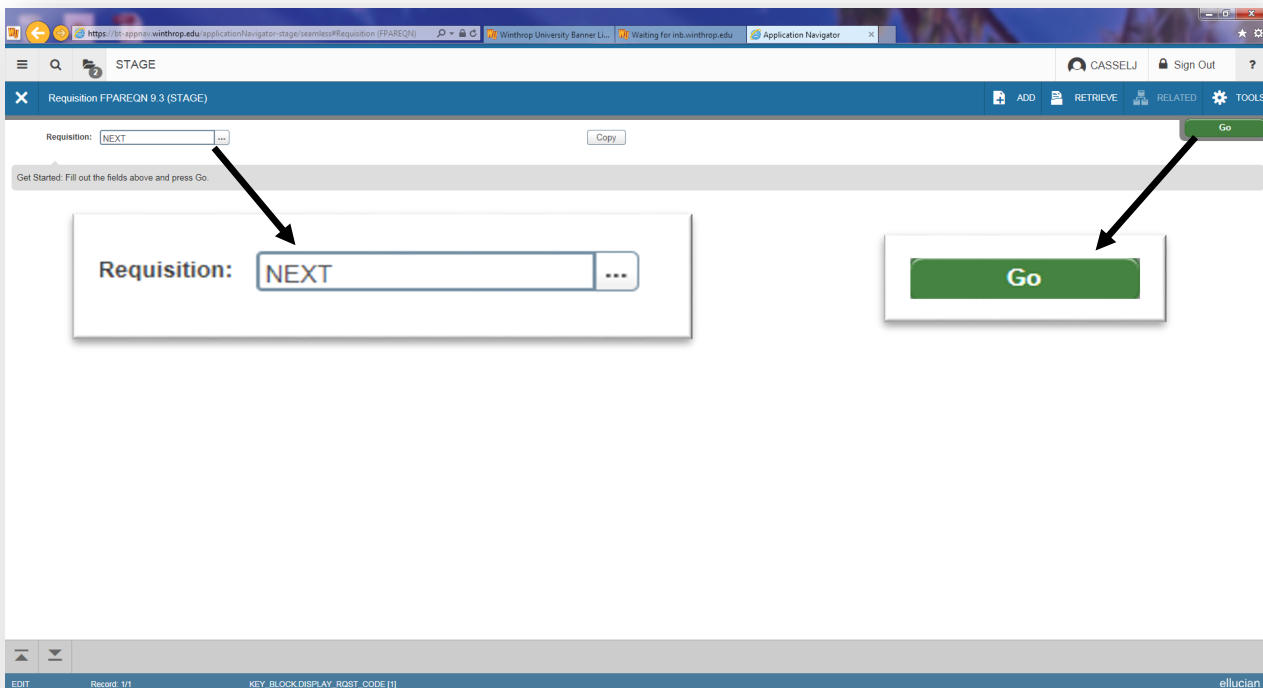You will then be taken to the Requisition screen.
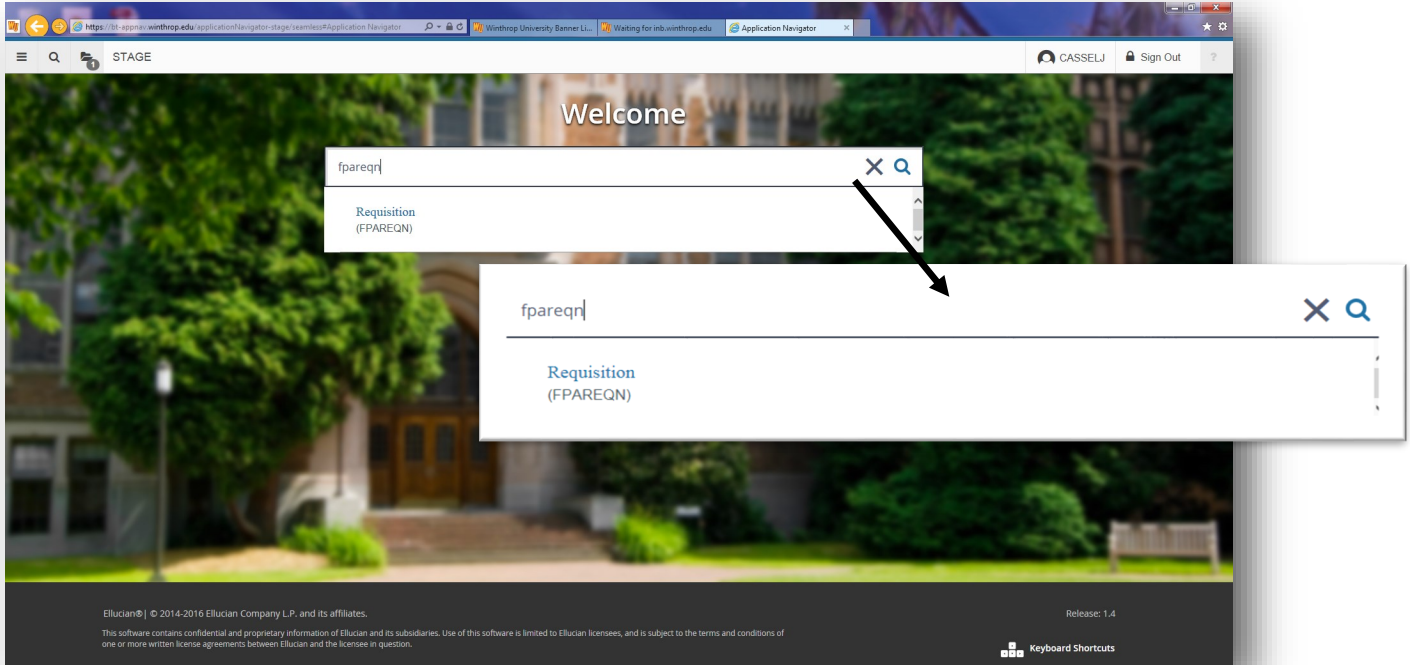
Type "NEXT" into the field and press "Go".

Requestor/Delivery Information

Enter the "Order Date", "Transaction Date" and "Delivery Date" and then move to the bottom section.

Enter your name into the "Requestor" field (format: Last name, First name), your four (4) digit ORG in the "Organization" field and your email in the "Email" Field.

IMPORTANT: YOU MUST ENTER YOUR EMAIL IN THE EMAIL FIELD OR YOU WILL NOT GET A COPY OF THE PURCHASE ORDER.

Enter your "Phone Area Code" = 803, "Phone Number" = 323xxxx (NO DASHES).

Enter the appropriate name in the "Attention To" field (format: Last name, First name)

Vendor Information

Click on the "Vendor Information" tab to get the vendor information screen.

Click on the three ellipses (…) to search for a vendor, or enter the vendor number in the "Vendor" field.

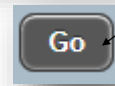If searching for a vendor, a pop-up will appear. Choose "Entity Name/ID Search (FTIIDEN)".

You will then be taken to the "Entity Name/ID Search FTIIDEN screen.
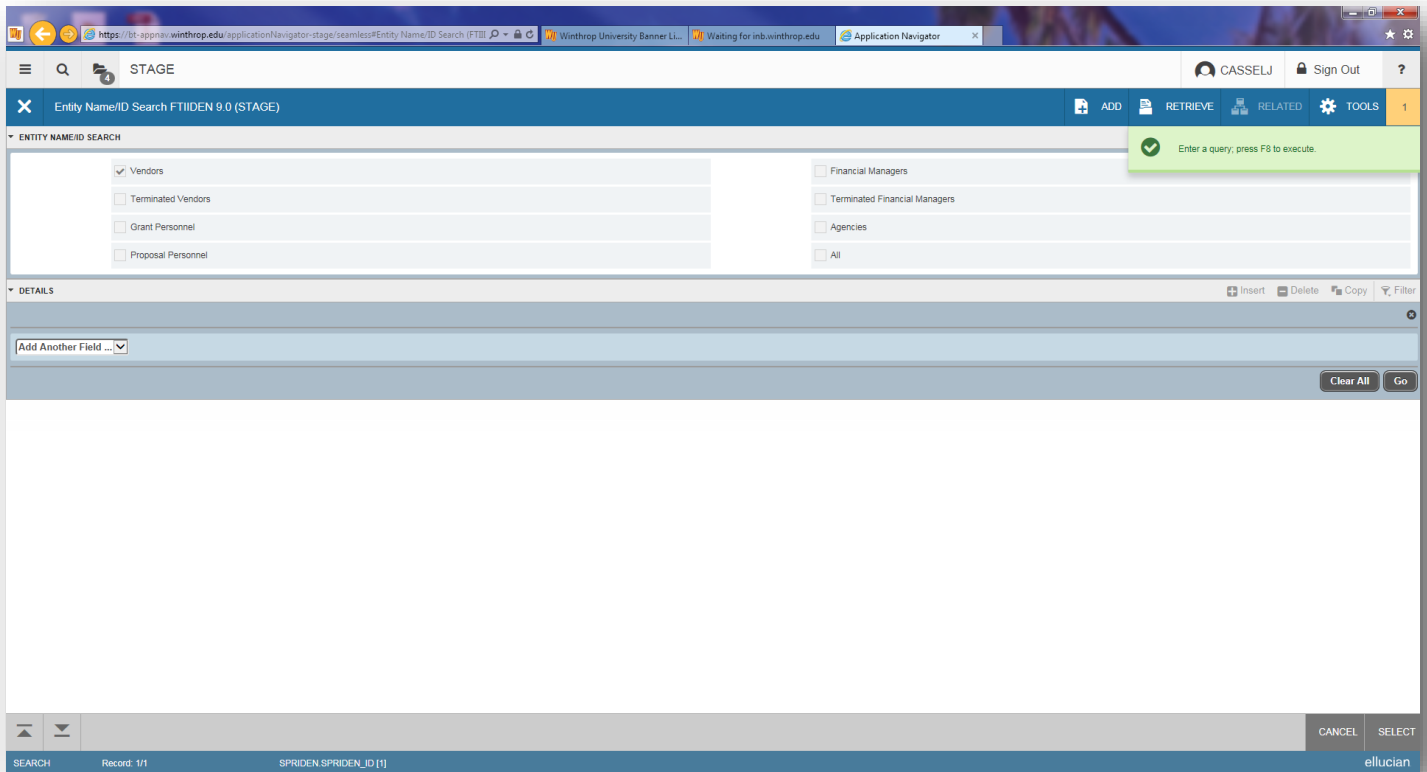
Choose "Last Name" from the drop down field under "DETAILS".
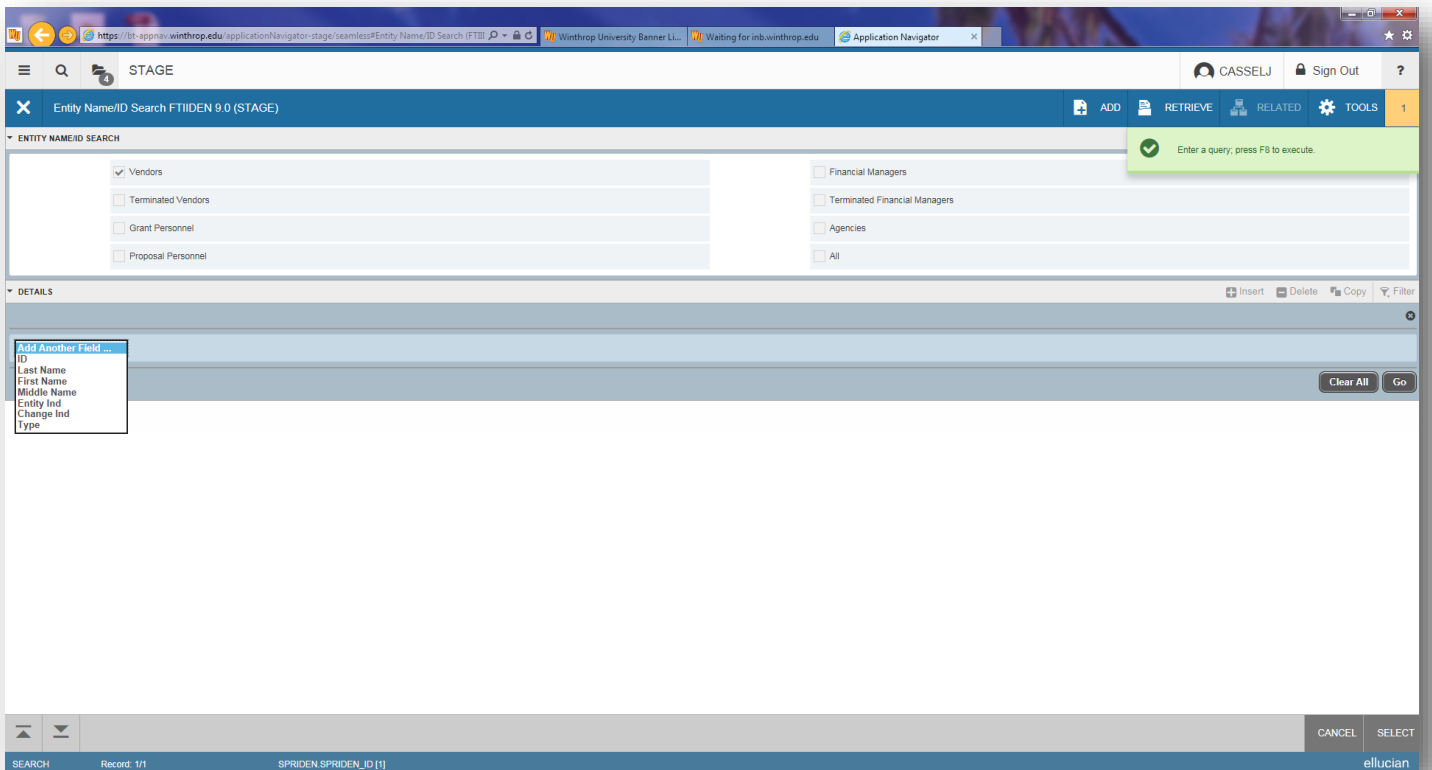
After choosing "Last Name", a search field will be populated. Please enter the name of the appropriate vendor in the search field, then press "Go".

DETAILS	Insert	Delete	Copy	Filter

Last Name ▾ Contains ▾ [   ]

Add Another Field ... ▾

Clear All   Go

DETAILS	Insert	Delete	Copy	Filter

Last Name ▾ Contains ▾ Aramark

Add Another Field ... ▾

Clear All   Go

Go

A list of available vendors will populate. Double click on the appropriate vendor name. You will be taken back to the "Vendor Information" tab and the appropriate vendor information will populate for you.

ID	Last Name	First Name	Middle Name	Entity Ind	Change Ind	V	F	A	G	P	Type
W30000035	Aramark			C		Y	N	N	N	N	

◀ ◀ 1 of 1 ▶ ▶   10 ▾ Per Page   Record 1 of 1

V - Vendors F - Financial Managers A - Agencies G - Grant Personnel P - Proposal Personnel

VENDOR INFORMATION	Insert	Delete	Copy	Filter

Vendor W3000003 ... Aramark

Vendor Hold

Address Type VN ...

Sequence 1 ...

Street Line 1 Thomson Cafeteria

Street Line 2 Winthrop Campus

Street Line 3 [   ]

City Rock Hill

State or Province SC

Zip or Postal Code 29733

Nation United States of America

Contact Nancy Nelms

Email [   ]

Phone Area Code 803

Phone Number 3232119

Phone Extension

Fax Area Code 803

Fax Number 3232482

Fax Extension

Discount [   ] ...

Tax Group SCG ... South Carolina Tax Group 7 Percent

Currency [   ] ...

Commodity/Accounting

Click on the "Commodity/Accounting" tab.

Press "Tab" once to get to the "Description" field and enter the line item information into the field. This information must match the vendor quote.

If more space is needed to input the **line item** description, then you must click on the "Related" box in the upper right hand corner. Then choose "Item Text [FOAPOXT]".

Item Text [FOAPOXT]

After choosing "Item Text [FOAPOXT]" you will be taken to the "Procurement Text Entry FOAPOXT" screen.

Click "Go".

Enter additional line item text. To add additional lines press the down arrow key.

Press "SAVE".
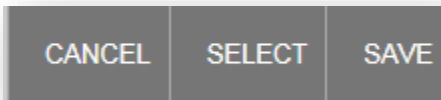
Then close the text entry screen to get back to the requisition entry form.
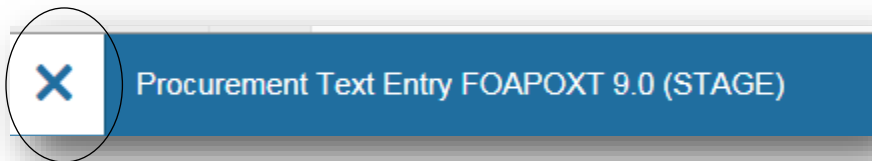
Tab once to get to the "U/M" or Unit of Measure field. Type in U/M if known, or click on the three ellipses (…) to search for the appropriate U/M.

If searching for a U/M, a pop up will appear.

Choose the appropriate U/M and click "OK".

Tab once more to get to the "Tax Group". Enter the tax group if known or click the three ellipses (...) to search for a tax group. If searching for a tax group, a pop up will appear. Choose the appropriate tax group and press "OK".

Tab over once to enter the "Quantity" and the "Unit Price".

If you have more than one line item to enter, please press the down arrow key to populate.

Tab again to populate the document total. Then click in to the "Accounting" section and enter the budget information.
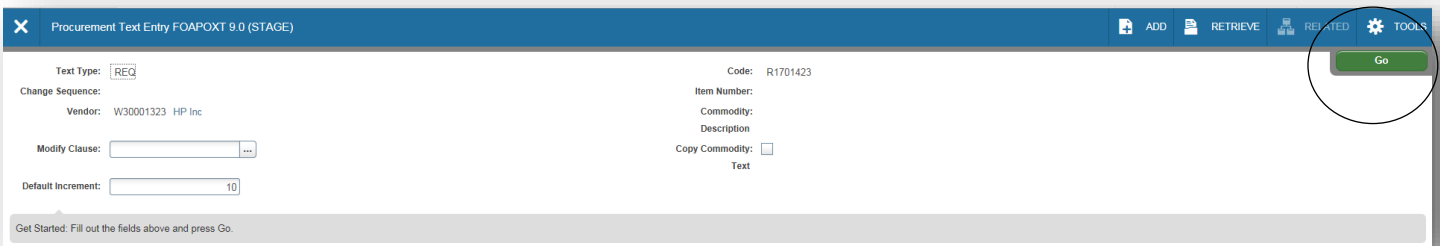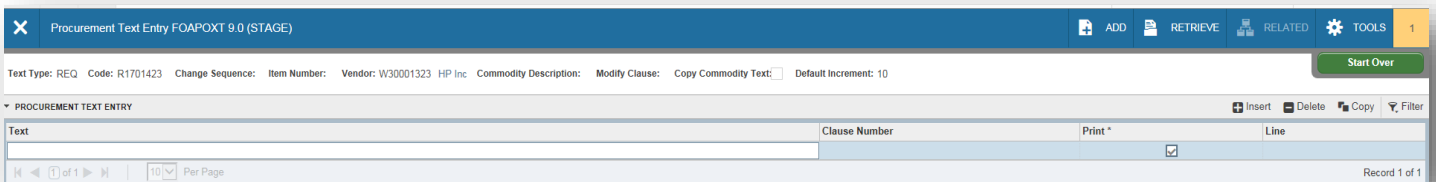
Document Text

After entering in the appropriate accounting information , click on the "Related" box in the upper right hand corner, then choose "Document Text [FOAPOXT]"
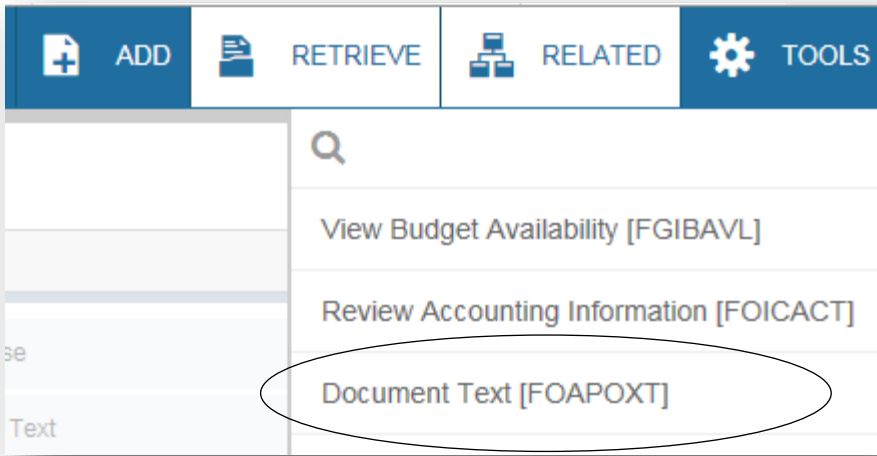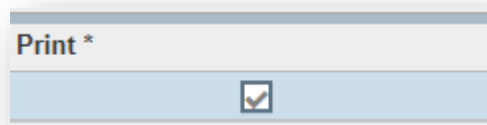

You will then be taken to the "Procurement Text Entry FOAPOXT" screen. Press "Go".

After clicking "Go" you will be taken to the screen below:

Enter your document text in the appropriate "Text" field. If you run out of space, you will need to arrow down to arrow down for more lines. If you do not want the information you are inputting to print on the purchase order, then uncheck the "Print" box. After entering, click "save" and exit the procurement text entry form by clicking the x in the upper left hand corner.

Important information to include on the document text: justification for purchase (uncheck the print box); quote number; quote date; customer number, etc.

Balancing/Completing

Click on the "Balancing/Completing" tab.

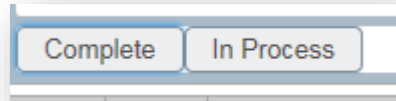| Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
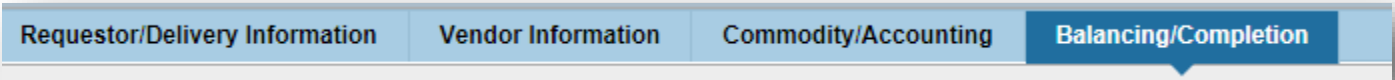
On the lower left hand corner click on the "Complete" button to complete the requisition, or the "In Process" button to save your requisition for completion at a later date.
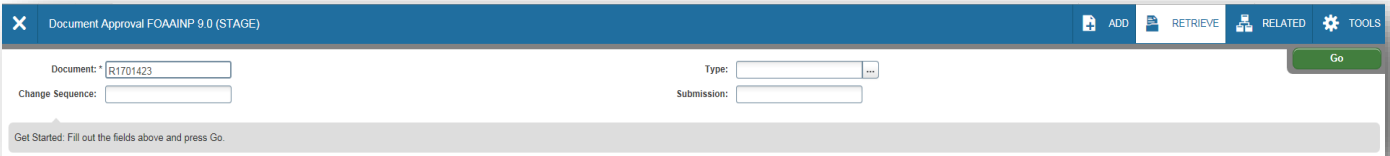
Complete	In Process

Whichever option you choose, a pop-up will appear notifying you of the requisition number. Please write this number down.

Document R1701411 completed and forwarded to the Approval process
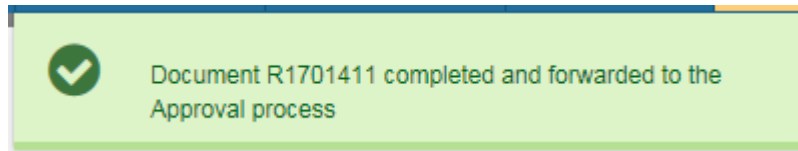
APPROVING REQUISITIONS—FOAAINP

After completing a requisition, it MUST be approved. It is the job of the person entering the requisition to notify each approver.
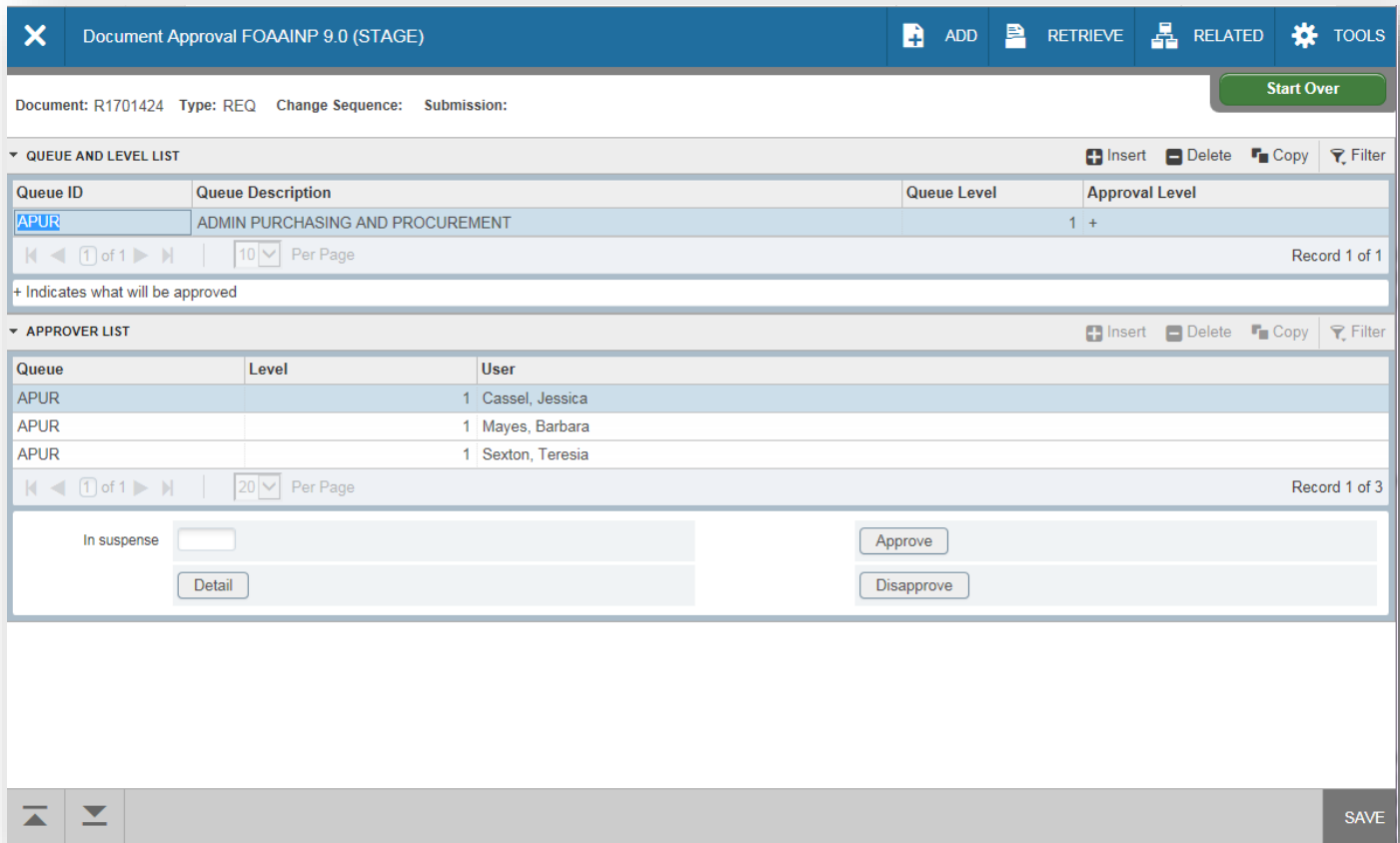
Go to FOAAINP—Documents Approval from the home screen.

Enter the requisition number in the "Document" field, then press "Go". You will be taken to the Document Approval screen. Here you can approve the document by pressing the "Approve" document and see who is in the approval que to approve next. You must email the approvers with the requisition information to have them approve the document.

Once it has been approved it will automatically routed to the Procurement & Risk Management department. You must send an email to your appropriate Procurement Officer with a scan of all documentation and the requisition number.