

WINTHROP UNIVERSITY

Banner 9 Admin Pages

PURCHASE REQUISITION
TRAINING MANUAL

TABLE OF CONTENTS

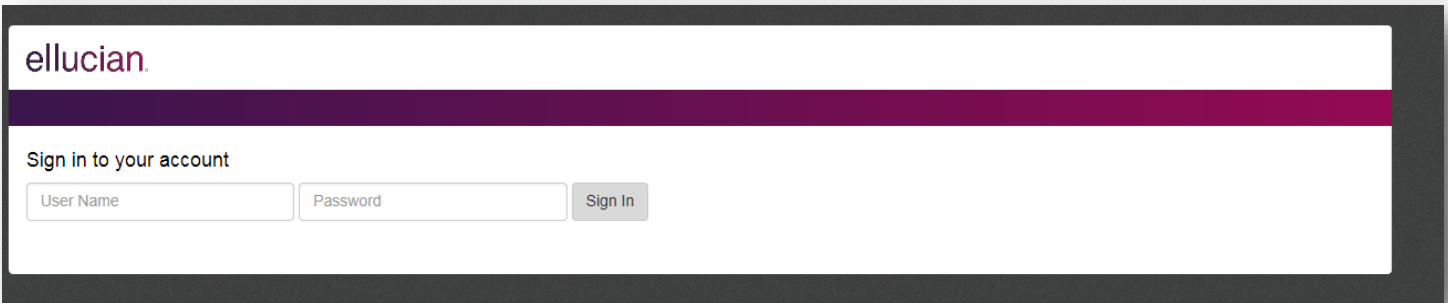
SIGNING IN/OUT	3
ENTERING A REQUISITION.....	4—15
Requisition Screen/FPAREQN.....	4
Requestor/Delivery Information.....	5
Vendor Information.....	6—8
Commodity/Accounting.....	9—13
Document Text.....	14
Balancing/Completion.....	15
APPROVING REQUISITIONS.....	16

SIGNING IN/OUT

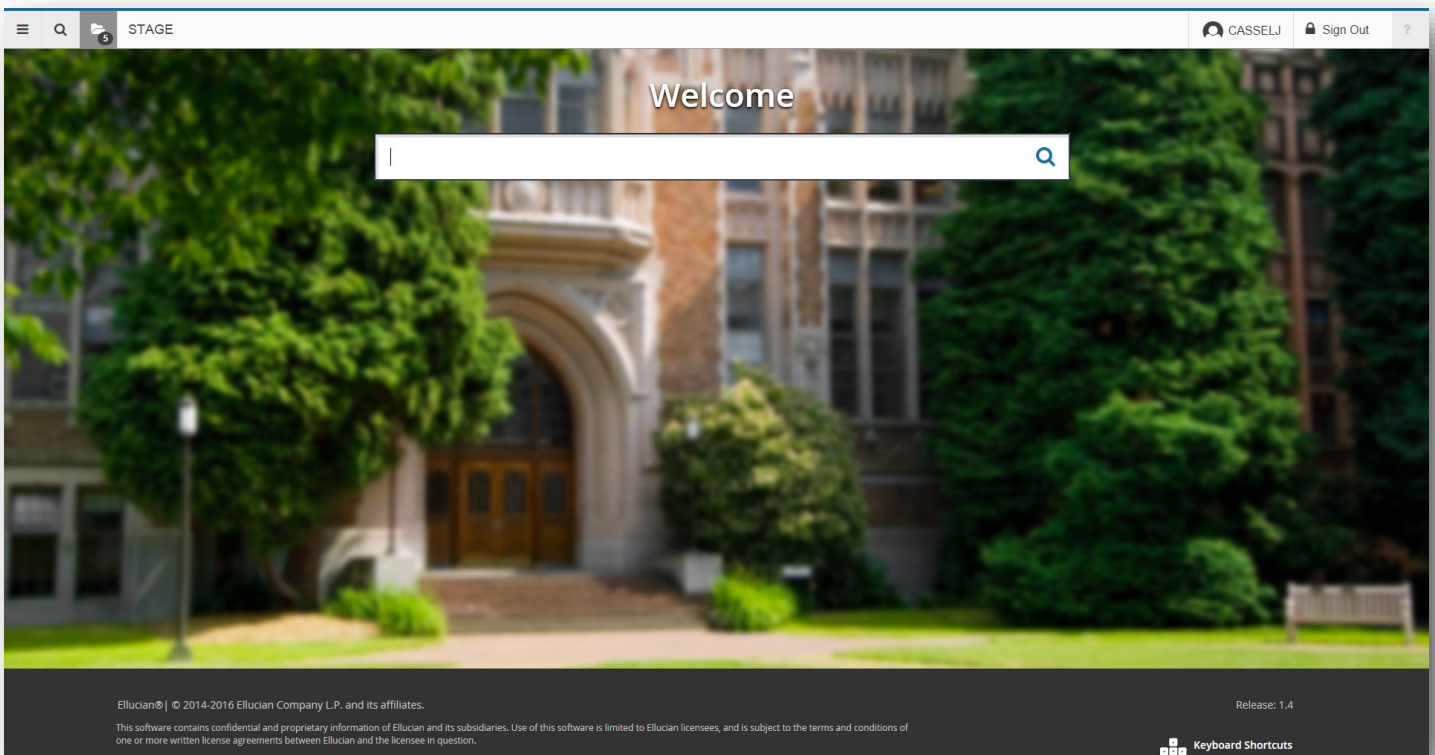
Go to <http://bannerlinks.winthrop.edu:9090/> and click on Banner 9 <<ENTER SCREEN SHOT>>

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.



The screenshot shows the login interface for the ellucian system. At the top left, the word "ellucian." is displayed in a purple font. Below this, a horizontal purple bar spans the width of the page. Underneath the bar, the text "Sign in to your account" is centered. There are two input fields: "User Name" and "Password", both with light gray borders. To the right of the "Password" field is a gray button labeled "Sign In".



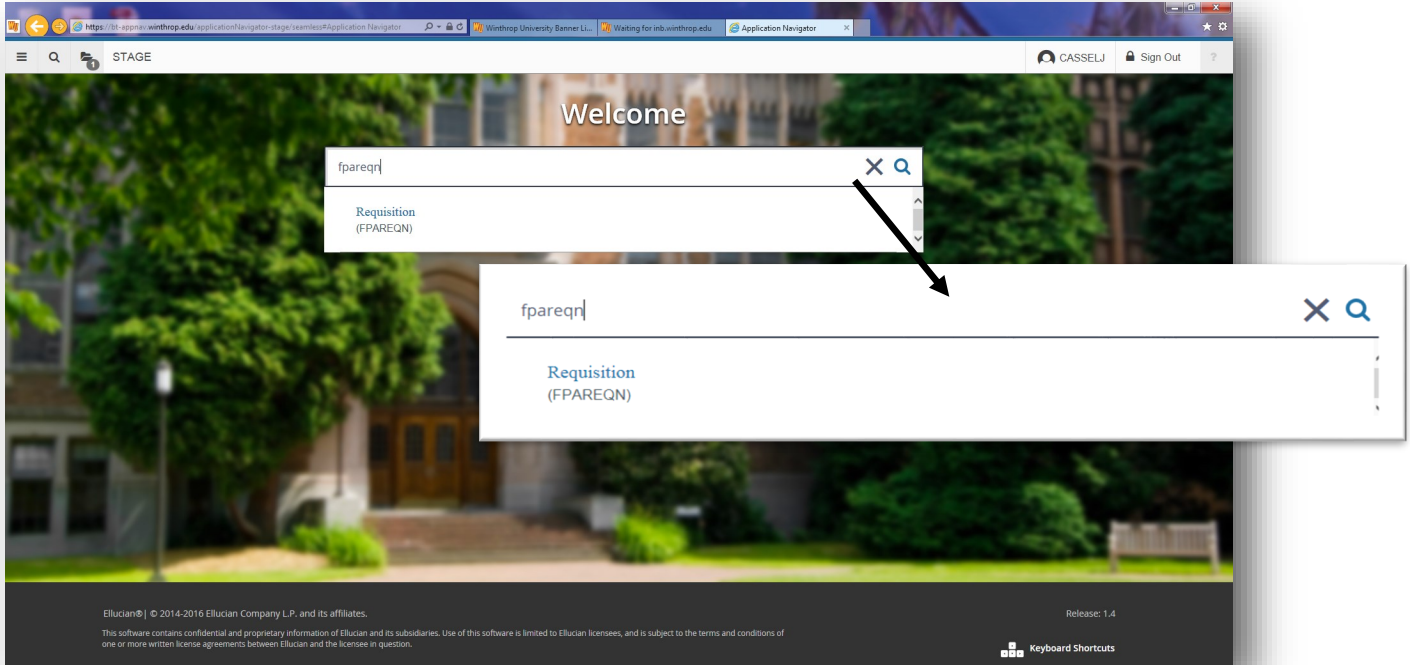
The screenshot shows the Banner homepage. At the top, there is a navigation bar with a hamburger menu icon, a search icon, the word "STAGE", a user profile icon labeled "CASSELJ", a "Sign Out" button, and a question mark icon. The main content area features a large background image of a brick building with a prominent arched entrance, surrounded by green trees. The word "Welcome" is centered in white text over the image. Below "Welcome" is a white search bar with a magnifying glass icon on the right. At the bottom of the page, there is a dark gray footer containing copyright information: "Ellucian® | © 2014-2016 Ellucian Company L.P. and its affiliates." on the left, "Release: 1.4" on the right, and a "Keyboard Shortcuts" icon and text on the far right.

ENTERING A REQUISITION

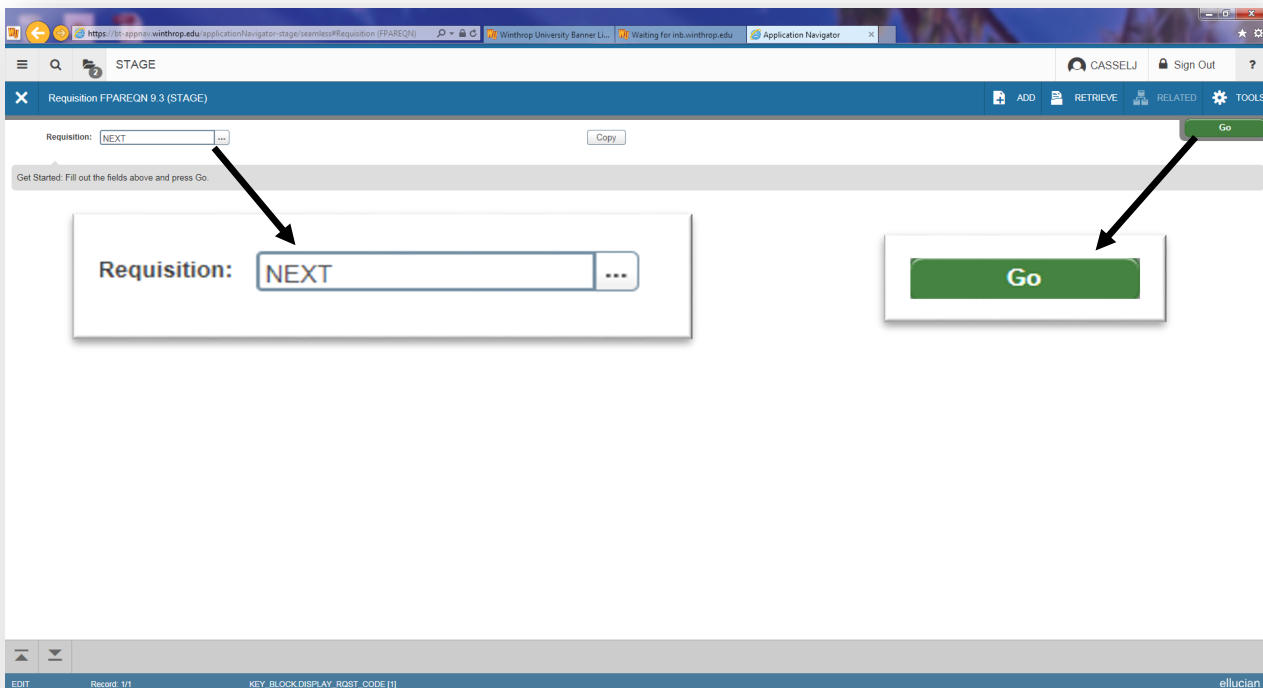
FPAREQN

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.

The screenshot shows the 'Requestor/Delivery Information' section of a web application. The 'Order Date', 'Transaction Date', and 'Delivery Date' fields are highlighted with a red circle. A callout box shows the values: Order Date: 02/01/2017, Transaction Date: 02/01/2017, and Delivery Date: 02/02/2017.

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)

The screenshot shows the 'Requestor/Delivery Information' section of a web application. The 'Attention To' field is highlighted. The 'Requestor' field contains 'Cassel, Jessica', the 'Organization' field contains '6110 Purchasing', and the 'Email' field contains 'casselj@winthrop.edu'. The 'Attention To' field contains 'Cassel, Jessica'.

Vendor Information

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

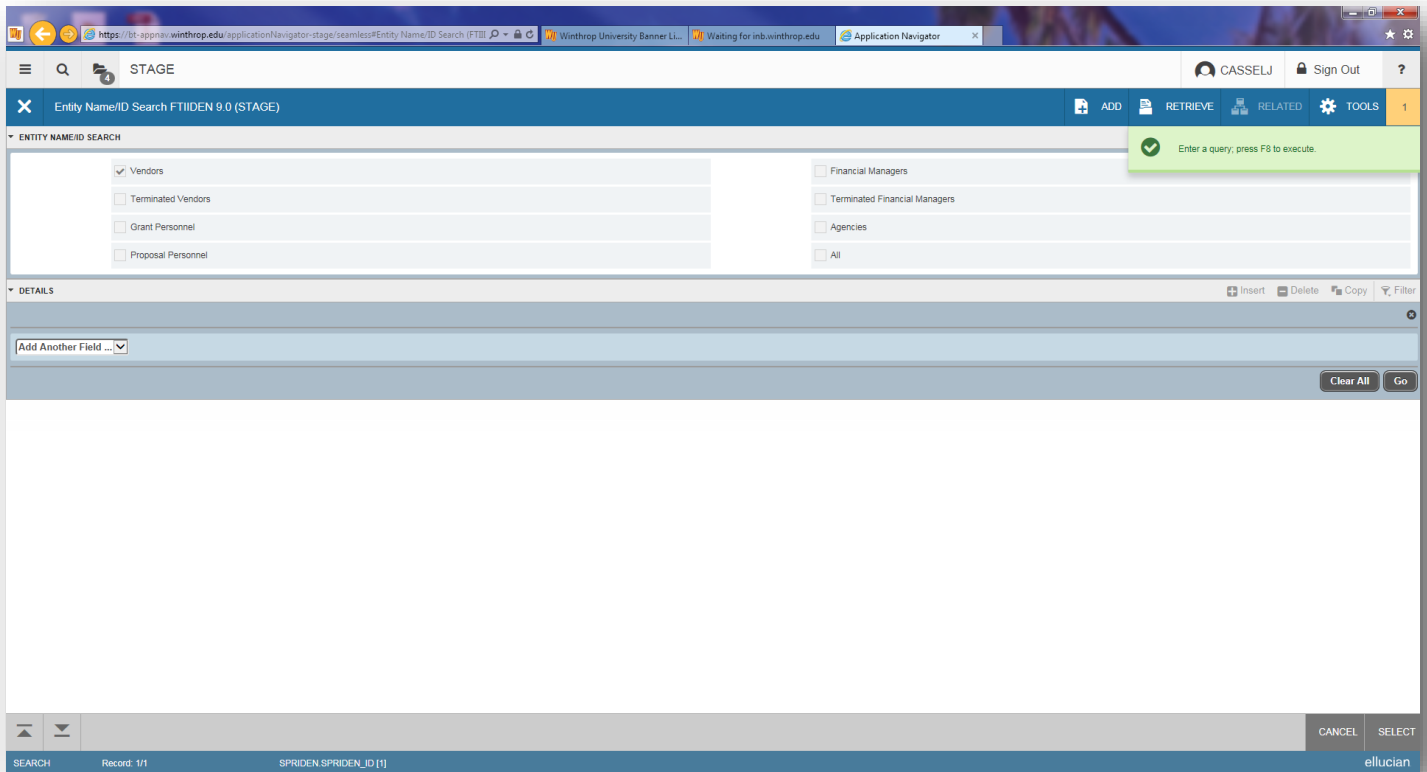
The screenshot displays the 'Vendor Information' tab within a requisition form. The form includes fields for Requisition (R1701411), Order Date (02/01/2017), Transaction Date (02/01/2017), and Delivery Date (02/02/2017). It also shows Commodity Total (0.00) and Accounting Total (0.00). The 'Vendor Information' section contains a 'Vendor' field with three ellipses (...), which is circled in red. An arrow points from this field to a pop-up window titled 'Vendor' with a search field and three ellipses (...). Other fields include Vendor Hold, Address Type, Sequence, Street Line 1-3, City, State or Province, Zip or Postal Code, Nation, Contact, Email, Phone Area Code, Phone Number, Phone Extension, Fax Area Code, Fax Number, Fax Extension, Discount, Tax Group (SCG), and Currency.

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

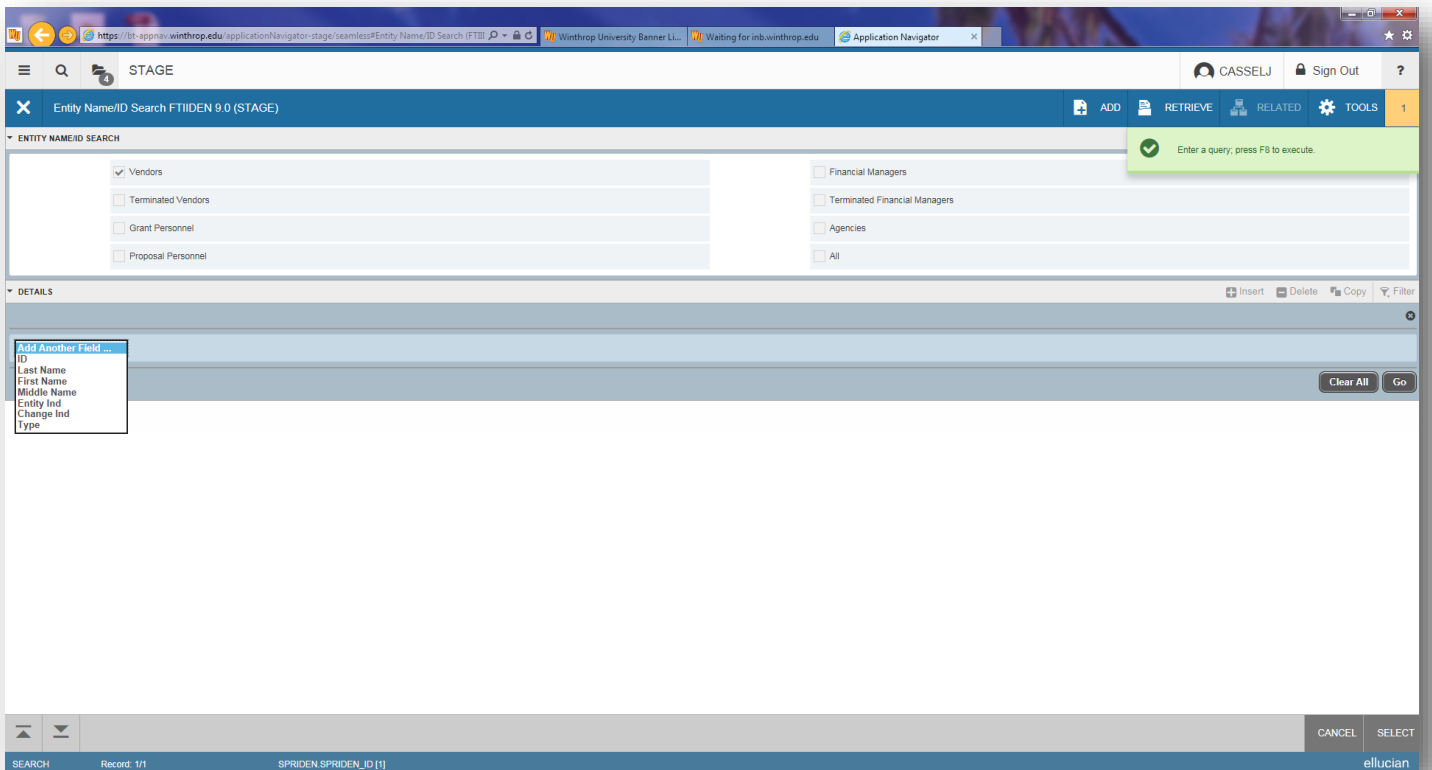
If searching for a vendor, a pop-up will appear. Choose “Entity Name/ID Search (FTIIDEN)”.

The 'Option List' pop-up window features a blue header with the title 'Option List' and a close button (X). The main area contains two options: 'Entity Name/ID Search (FTIIDEN)' and 'Vendor Maintenance (FTMVEND)', both in blue text. At the bottom right, there is a 'Cancel' button.

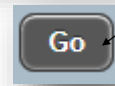
You will then be taken to the “Entity Name/ID Search FTIIDEN screen.



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”.



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	

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

Commodity/Accounting

Click on the “Commodity/Accounting” tab.

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

Requisition: R1701411

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requestion: R1701411
Order Date: 02/01/2017
Transaction Date: 02/01/2017
Delivery Date: 02/02/2017

Comments:
Commodity Total: 0.00
Accounting Total: 0.00
 Document Level Accounting

In Suspende
 Document Text

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
				SCG			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount:
Discount:
Additional:

Tax:
Commodity Total:
Document Total:

Distribute

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspense
	W										<input type="checkbox"/>	<input checked="" type="checkbox"/>

Extended Amount:
Discount:

Record: 1/1 FPRREQD.FPRREQD_COMM_CODE [1] ellucian

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.

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
				SCG			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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”.

Procurement Text Entry FOAPOXT 9.0 (STAGE)

Text Type: REQ

Change Sequence:

Vendor: W30107380 Ellucian Company LP

Modify Clause: []

Default Increment: 10

Code: R1701412

Item Number: 1

Commodity: items to purchase per the quote

Description

Copy Commodity:

Text

Go

Get Started: Fill out the fields above and press Go.

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

PROCUREMENT TEXT ENTRY

Text	Clause Number	Print *	Line
This is where you enter additional LINE item info		<input checked="" type="checkbox"/>	

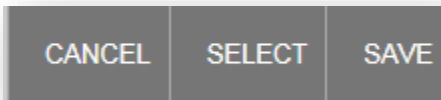
Record 1 of 1

PROCUREMENT TEXT ENTRY

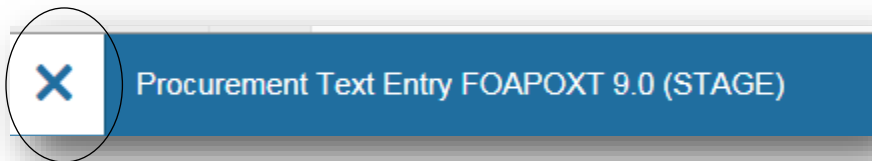
Text	Clause Number	Print *	Line
This is where you enter additional LINE item info		<input checked="" type="checkbox"/>	10
		<input checked="" type="checkbox"/>	

Record 2 of 2

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.

The screenshot shows the 'Commodity/Accounting' tab of a software application. The main table has columns for 'Item', 'Commodity', 'Description', and 'U/M'. The first row shows '1' in the 'Item' column and 'Adding item text that matches quote' in the 'Description' column. The 'U/M' column contains a text box with three ellipses (...). A callout box labeled 'U/M' is positioned over this field, showing a search interface with a text box and three ellipses (...). Below the table, there are fields for 'Extended Amount', 'Discount', and 'Additional'. The 'Per Page' dropdown is set to '10'.

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

The screenshot shows the 'Unit of Measure List (FTVUOMS)' pop-up window. It has a search criteria field at the top. Below it is a table with the following data:

Code	U/M Description	Eff Date	Term Date	Last Activity Date
BG	BAG	10/01/1988		07/27/2009
BL	BALE	10/01/1988		07/27/2009
BTL	BOTTLE	10/01/1988		07/27/2009
BX	BOX	10/01/1988		07/27/2009
BXS	BOXES	10/01/1988		07/27/2009
C	HUNDRED	10/01/1988		07/27/2009
CAN	CAN	10/01/1988		07/27/2009
CEN	CENTIMETER	10/01/1988		07/27/2009
CON	CONTAINER	10/01/1988		07/27/2009
CS	CASE	10/01/1988		07/27/2009

At the bottom of the window, there are 'Cancel' and 'OK' buttons. The 'Per Page' dropdown is set to '50' and it shows 'Record 1 of 79'.

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".

The screenshot shows a software interface with four tabs: "Requestor/Delivery Information", "Vendor Information", "Commodity/Accounting" (selected), and "Balancing/Completion". Below the tabs is a section labeled "COMMODITY" containing a table with columns: "Item", "Commodity", "Description", "U/M", and "Tax Group". The first row has "1" in the "Item" column, "Adding item text that matches quote" in "Description", and "LOT" in "U/M". The "Tax Group" column has a dropdown menu open, showing a search box and a list of options. Below the table are fields for "Extended Amount", "Discount", and "Additional". To the right are "Tax", "Commodity Total", and "Document Total" fields.

The screenshot shows a "Tax Group List" dialog box with a search criteria field and a table of tax groups. The table has columns: "Code", "Tax Group Description", "Tax Rate", "COA", and "Eff Date". The table contains the following data:

Code	Tax Group Description	Tax Rate	COA	Eff Date
NT	Student Refund No Tax Code	0	W	10/01/19
NTG	No Tax Group	0	W	10/01/19
SCA	SC Tax Plus Accom Tax 9 Percent	9	W	10/01/19
SCG	South Carolina Tax Group 7 Percent	7	W	10/01/19
SCH	SC Tax Plus RH Hosp Tax 9 Percent	9	W	10/01/19
SCS	SC Base Tax Without Local Option	7	W	10/01/19
SCU	South Carolina Use Tax 7 Percent	7	W	10/01/19

At the bottom of the dialog box are "Cancel" and "OK" buttons. The dialog box also includes a search criteria field, a table with 7 records, and a "Record 1 of 7" indicator.

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

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion				
COMMODITY							
Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	
1		Adding item text that matches quote	LOT	SCG	1.00		3.00
◀ ◀ 1 of 1 ▶ ▶ 10 ▼ Per Page							

Quantity	Unit Price	
1.00		3.00

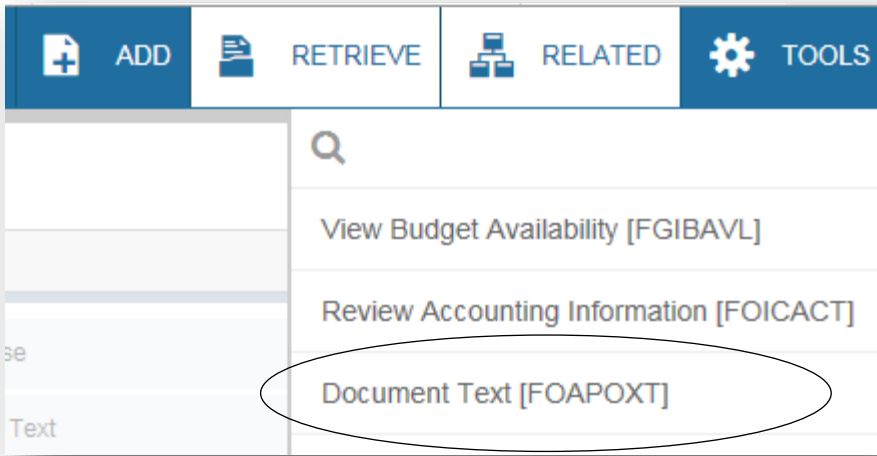
If you have more than one line item to enter, please press the down arrow key to populate.

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

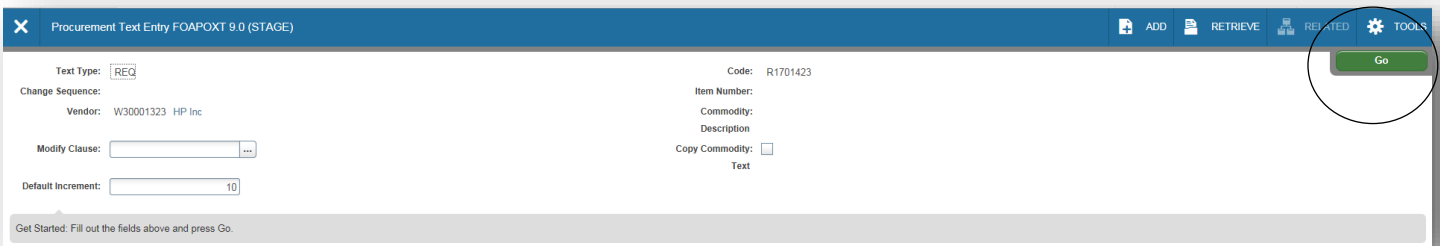
ACCOUNTING							
Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog
	W						
◀ ◀ 1 of 1 ▶ ▶ 10 ▼ Per Page							

Document Text

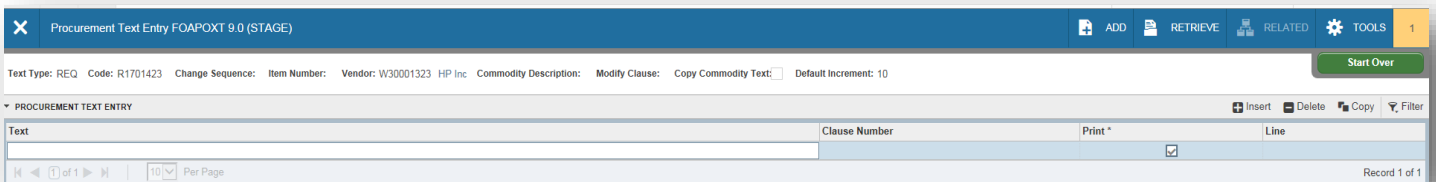
After entering in the appropriate accounting information , click on the “Related” box in the upper right hand corner, then choose “Document Text [FOAPOXT]”



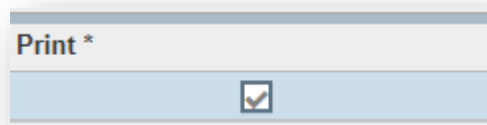
You will then be taken to the “Procurement Text Entry FOAPOXT” screen. Press “Go”.

A screenshot of the 'Procurement Text Entry FOAPOXT 9.0 (STAGE)' screen. The top bar contains 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons, with a 'Go' button circled in black. The main area contains several input fields: 'Text Type: REQ', 'Change Sequence:', 'Vendor: W30001323 HP Inc', 'Modify Clause:', 'Default Increment: 10', 'Code: R1701423', 'Item Number:', 'Commodity Description:', 'Copy Commodity: Text', and a 'Go' button.

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

A screenshot of the 'Procurement Text Entry FOAPOXT 9.0 (STAGE)' screen showing the data entry table. The top bar contains 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons, with a 'Start Over' button. The main area contains a table with columns: 'Text', 'Clause Number', 'Print *', and 'Line'. The table has one row with a checked box in the 'Print *' column. The bottom of the screen shows 'Record 1 of 1'.

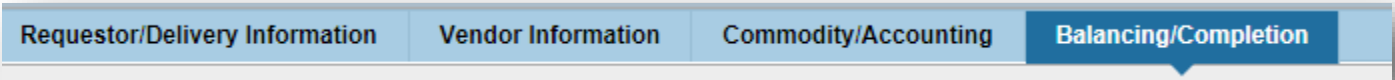
Enter your document text in the appropriate “Text” field. If you run out of space, you will need to arrow down to arrow down for more lines. If you do not want the information you are inputting to print on the purchase order, then uncheck the “Print” box. After entering, click “save” and exit the procurement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

A close-up screenshot of the 'Print *' checkbox. The checkbox is checked, and the text 'Print *' is visible above it.

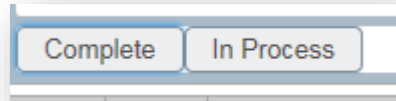
Important information to include on the document text: justification for purchase (uncheck the print box); quote number; quote date; customer number, etc.

Balancing/Completing

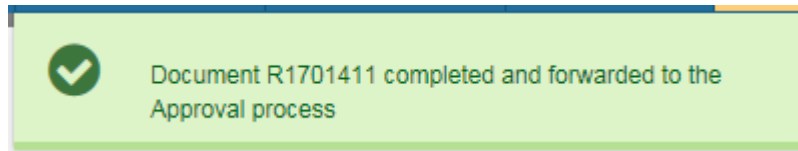
Click on the “Balancing/Completing” tab.



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.



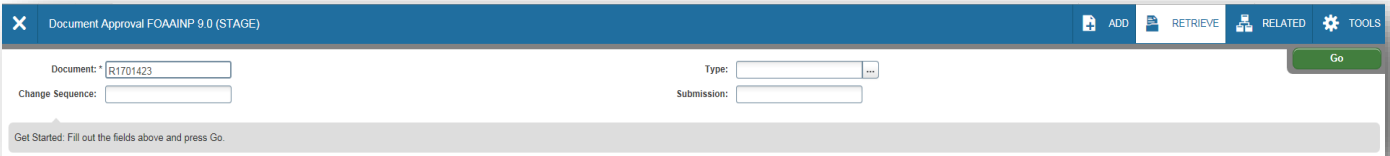
Whichever option you choose, a pop-up will appear notifying you of the requisition number. Please write this number down.



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.

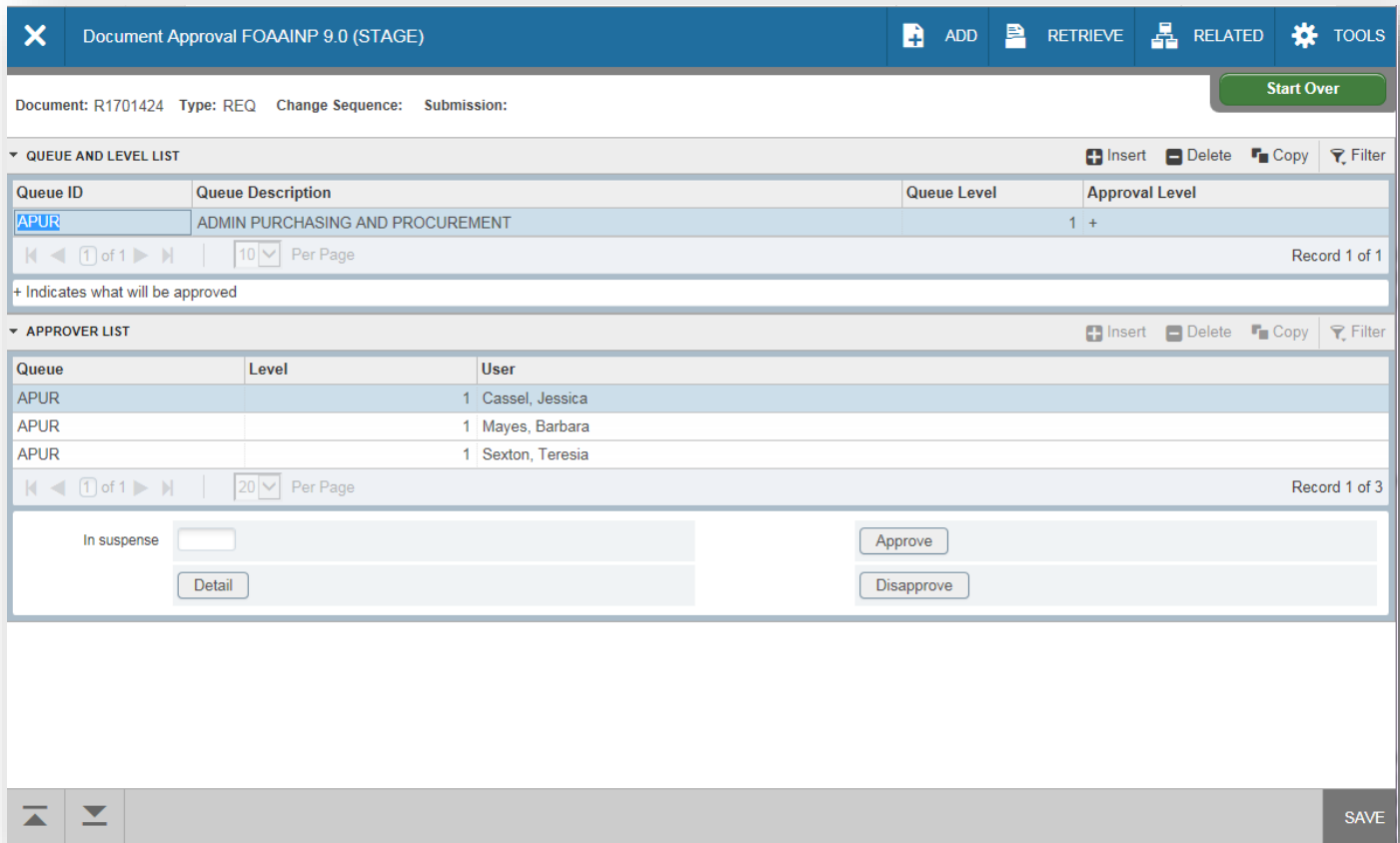
Go to FOAAINP—Documents Approval from the home screen.



Document: R1701423 Type: ...
Change Sequence: Submission: ...
Go

Get Started: Fill out the fields above and press Go.

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 queue to approve next. You must email the approvers with the requisition information to have them approve the document.



Document: R1701424 Type: REQ Change Sequence: Submission: Start Over

▼ QUEUE AND LEVEL LIST

Queue ID	Queue Description	Queue Level	Approval Level
APUR	ADMIN PURCHASING AND PROCUREMENT		1 +

+ Indicates what will be approved

▼ APPROVER LIST

Queue	Level	User
APUR	1	Cassel, Jessica
APUR	1	Mayes, Barbara
APUR	1	Sexton, Teresia

In suspense Approve
Detail Disapprove

SAVE

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.