CREATE A REQUISITION IN BANNER

When entering a requisition, there are four (4) tabs that have to be completed. Listed below are the instructions on what information must be entered into the four (4) tabs and how to enter the information to create the requisition.

The first thing you will need to do is log into Banner on website http://inb1.cacc.edu:9090. On the General Menu Screen, type in the form name FPAREQN, then hit the enter key. Click on Next Block and this will direct you to the first tab of the requisition which is the Requestor/Delivery Information Tab.

1. Requestor/Delivery Information
   - Delivery Date: Enter current date or date of expected delivery.
   - Comments Box: Always include your bid number or state approved contract number if applicable.
   - Ship To: If the Ship To tab does not have an address listed, click on the arrow by the Ship To tab. It will bring up all the ship to addresses. Double click the ship to address you need and it will populate the address into the field.
   - Attention To: Enter name of person receiving shipment.
   - Next Block to the second tab.

*All but the Comments field must be completed before you can Next Block to the second tab of the requisition.
2. **Vendor Information**

- Click on the arrow by the *Vendor* tab. Next click on *Entity Name/ID Search* to enter the vendor name.
- On *Last Name* and in **ALL CAPS**, key the following: % the first few letters of the Vendor Name%. Then click on the tab *Execute Query* and it will pull up a list of vendor names. Double click on the vendor name you need and it will populate the vendor name and the address into the field.
- *Next Block* to the third tab.

*The Vendor name and Address must be populated into the field before you can *Next Block* to the third tab of the requisition.*

3. **Commodity/Accounting**

- Tab to *Description* and key the description on the first line. If you do not have enough room to key all the description on the first line, go to *Options* and click on *Item Text*. Hit *Next Block* or click onto the lines on the left of the page and continue to key your description. *Item Text* should provide sufficient information for the approver to know the details of the purchase such as, full description of purchase, purpose of the purchase, and bid number or state approved contract number if applicable. Next, click the *Save Tab*. After the information is saved, click the bold *black X* on the top right side of the page and you will be directed back to the *Commodity/Accounting* block. Make
sure that there is a check mark in the **Item Text**. If there is a check mark, then the information has been saved and will print on the purchase order.

- Key in the **U/M (Unit of Measure)**. Click on the arrow beside **U/M** and double click the unit of measure that you need, then tab.
- **Quantity** – Enter the quantity you need, then tab.
- **Unit Price** – Enter the unit price, and then tab, and the money will populate into the **Document Commodity Total** field.
- If you have more than one item to enter, click on **Description** on the second line and follow the prior four steps before continuing to the **Document Accounting Total** block.
- **Next Block** – you are now in the next block and can enter the budget information.
- **Tab to**: **Fund, Orgn, Acct and Prog** and enter the budget number.
- Continue to tab until the money populates into the **Document Accounting Total** field.
- **Next Block to the fourth tab.**

### 4. Balancing/Completion

- Check the **Input, Commodity and Accounting** fields. If all three are in balance, hit the **Complete** button and the requisition will be completed and forwarded to the approval process. You can scroll down to the bottom of the page and it will give you a message that states the requisition has been completed and forwarded to the approval process.
- If you are not ready to complete the requisition, hit the **In Process** button and you can go back later and complete the requisition.
- Click the bold black X to get out of the form.
### Requisition Details:
- **Requisition:** A008522
- **Order Date:** 16-OCT-2015
- **Delivery Date:** 5-OCT-2015
- **Commodity Total:** $260.00
  - **Accounting Total:** $260.00

### Vendor Information:
- **Vendor:** 06930523, THE HOME DEPOT
- **COA:** 1000, Central Accounts CC
- **Organization:** 1000, Fiscal Management
- **Requestor:** Linda Williams
- **Vendor Hold:**

### Commodity Accounting:
<table>
<thead>
<tr>
<th>Input</th>
<th>Commodity</th>
<th>Accounting</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>$260.00</td>
<td>$260.00</td>
<td>$260.00</td>
<td>BALANCED</td>
</tr>
<tr>
<td>$9.00</td>
<td>0.00</td>
<td>0.00</td>
<td>BALANCED</td>
</tr>
<tr>
<td>$9.00</td>
<td>0.00</td>
<td>0.00</td>
<td>BALANCED</td>
</tr>
<tr>
<td>$9.00</td>
<td>0.00</td>
<td>0.00</td>
<td>BALANCED</td>
</tr>
</tbody>
</table>

### Complete Status:
- Complete: [ ]
- In Process: [ ]