

## Banner for Purchasing Arrives Soon!

The Purchasing Department staff is excited about the implementation of Banner! We are taking this opportunity to introduce the campus community to the Banner purchasing module, and provide a brief overview of the functions within Banner.

First, Banner is user-friendly and easily accessed within your computer's browser, just as you would access the internet. Second, Banner will replace the current Financial Reporting System. Banner will bring the changes needed to assist the University in becoming more efficient at conducting business with the university community.

Components of the Banner for Finance module include the chart of accounts, accounts payable, accounts receivable, approvals, purchasing, research accounting, and fixed assets. Most capabilities in the current financial system will be carried forward to Banner.

### Highlights of Banner for Purchasing

- Banner is a web-based relational database management system with access to Purchasing through Self Service Banner (SSB) or Internet Native Banner (INB).
- All Requisitions must be submitted electronically. Paper Requisitions will no longer be accepted.
- Requisitions will be submitted through the electronic approval process. All Requisitions must receive the appropriate electronic approval prior to being forwarded to Purchasing.
- Emergency Requisitions will be identified easily by using "RUSH" in the document text line and change order requests will use "CHANGE" in the document text line.
- All Requisitions require an Account Number, referred to as a FOAPAL, which consists of a Fund,

Organization, Account, Program, and Location Activity code.

- Manuals will be provided for training. Electronic Requisitions can be submitted daily.

### Self-Service Banner Highlights

Departments will enter and approve Requisitions in Self-Service Banner. A Requisition may be entered; however, budget funds must be available.

- A one page scroll-down screen simplifies the entry process.
- Provides the use of templates for repetitive requests.
- Limits Requisition to 5-line item entries. Provides for document text, such as delivery or special handling requirements, to print on the Purchase Order. Also provides for non-printing text to be used for internal notes and comments.
- Departmental copies of Requisitions and Purchase Orders may be printed.

### Internet Native Banner Highlights

Power users of INB can:

- Enter more detailed or complex Requisitions.
- Enter up to 20-line item entries.
- Perform a requisition-to-requisition copy from a previously entered Requisition.
- Use standard phrases or "clauses."
- Leave a Requisition pending only to return to complete the document at a later time.
- Access forms that are the equivalent of screens in the current financial system.

We look forward to the enhancements offered by Banner and are here to assist you through the transition period.