

Alabama A&M University
Purchasing Compliance &
Requisition Training
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THE JOURNEY TO REQUISITION ENTRY

WHAT TO DO BEFORE REQUISITIONS ARE ENTERED

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Business Process Improvement Team
Division of Business & Finance



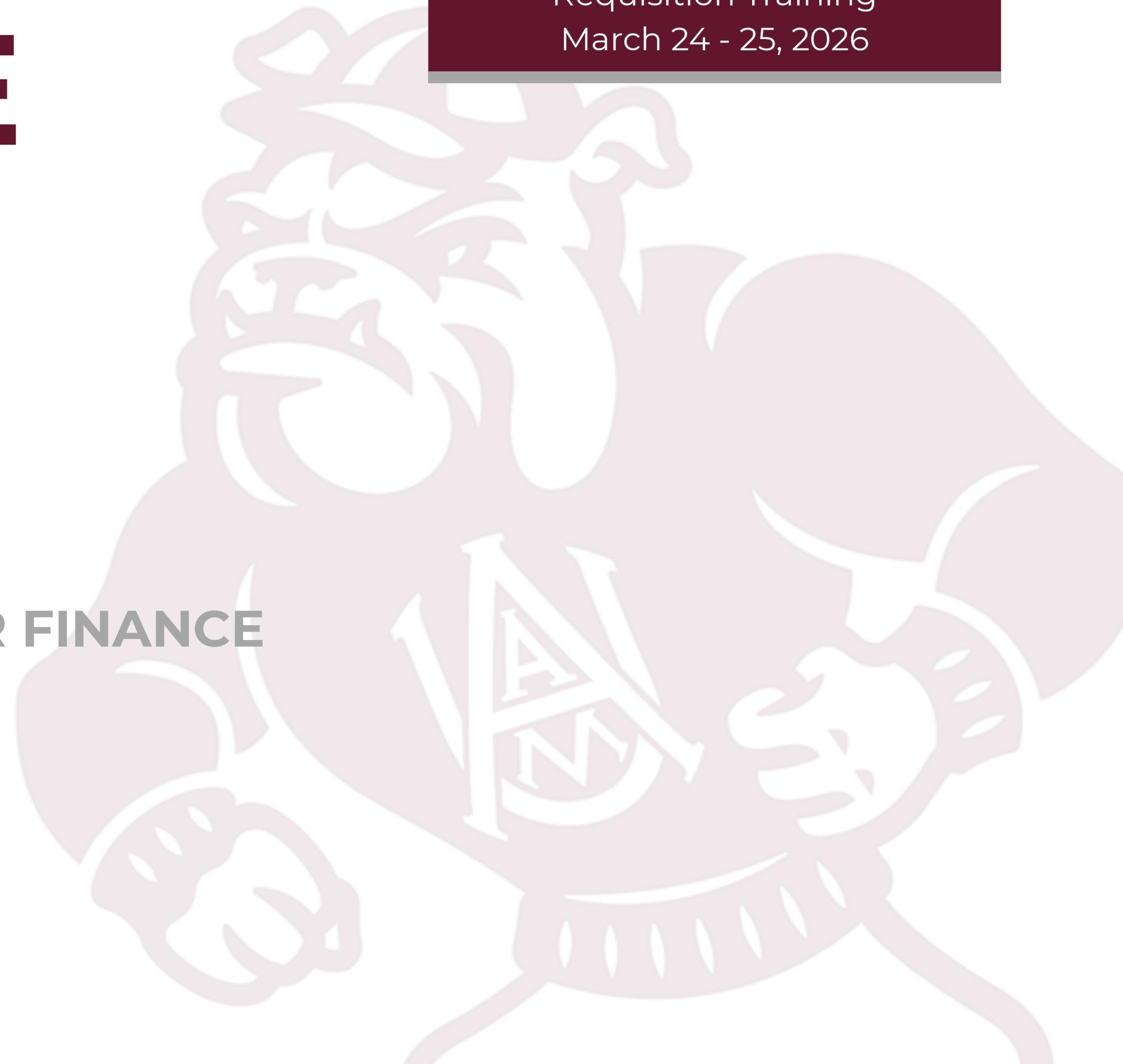
THE JOURNEY TO REQUISITION ENTRY

- 1** Where the Journey Begins: Understanding Banner Finance
- 2** Getting Your Access Pass: Requesting Banner Finance Access
- 3** Passing the Checkpoints: Approval Routing at AAMU
- 4** Preparing the Path: Establishing Approval Queues
- 5** Avoiding Roadblocks Along the Way: Common Form Mistakes

WHERE THE JOURNEY BEGINS



UNDERSTANDING BANNER FINANCE



UNDERSTANDING BANNER FINANCE

What is Banner?

Ellucian Banner is the University's enterprise resource planning (ERP) system used to manage core university business operations across multiple departments.

Banner Modules at AAMU

- Finance
- Human Resources
- Student
- Financial Aid

UNDERSTANDING BANNER FINANCE

Data Stewards & Access Governance

Each Banner module has a designated Data Steward responsible for approving access and ensuring appropriate use of data within their area.

Banner Modules & Data Steward Depts at AAMU

- Finance - Business Process Improvement
- Human Resources - Human Resources
- Student - Registrar's Office
- Financial Aid - Financial Aid & Scholarships

UNDERSTANDING BANNER FINANCE

Banner Finance oversight includes:

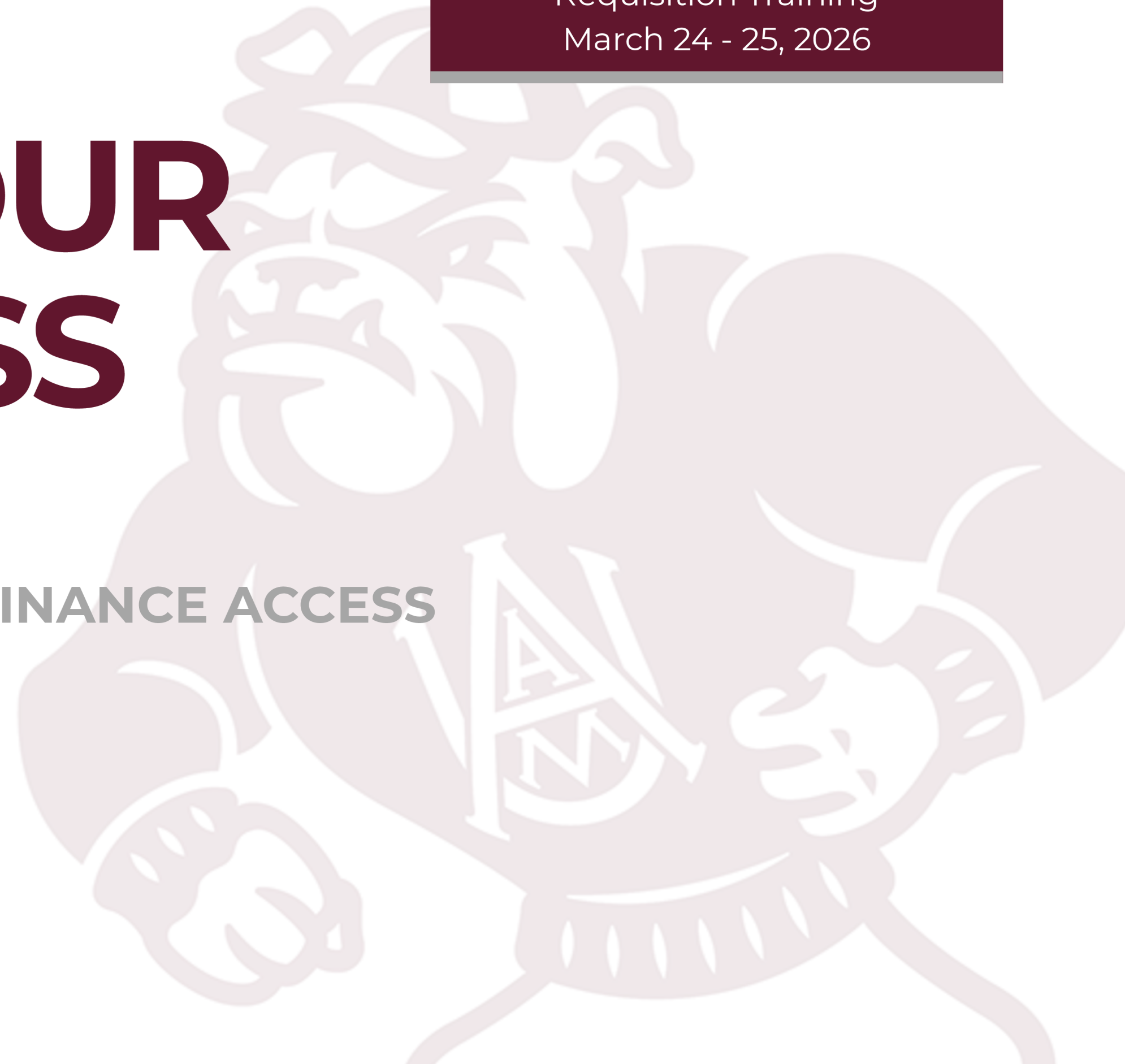
- Finance (“F” forms)
- Budgeting (“F” forms)
- Payroll (“P” forms; not HR)
- Accounts Receivable (“T” forms)



GETTING YOUR ACCESS PASS



REQUESTING BANNER FINANCE ACCESS



REQUESTING BANNER FINANCE ACCESS


THE BANNER ACCESS REQUEST FORM ROUTES AS FOLLOWS:



REQUESTING BANNER FINANCE ACCESS

REQUESTOR SECTION

Banner Access Request Form

 ALABAMA
A&M
UNIVERSITY

Confidentiality Agreement | Requester Information

Requestors Information
To Be Completed by Employee

A#*

First Name*

Last Name*

MI

Email*

Official AAMU @aamu.edu email address

This data is used
to help determine
what type of
access is needed.

REQUESTING BANNER FINANCE ACCESS

REQUESTOR SECTION

Phone Number*

Title

Department*

Division*

- Academic Affairs
- Athletics
- ITS
- Cooperative Extension System
- Finance and Administration
- General Counsel
- Marketing, Communications & Advancement
- NACEE
- President
- Research and Economic Development
- Student Affairs
- Government Affairs

This data is used to help determine what type of access is needed.

REQUESTING BANNER FINANCE ACCESS

REQUESTOR SECTION

This data is used to help determine what type of access is needed.

Affiliation *

- Staff
- Faculty
- Student
- Temp
- Other

Type of Access *

- New (Banner/Oracle ID Creation)
- Add (Additional Access Requested)
- Fund & Org (Add or Remove)

Justification

Employee needs access to perform the following job function(s):

REQUESTING BANNER FINANCE ACCESS

REQUESTOR SECTION

Supervisor/Department Head/Dean/Director

Name*

Email*
Official AAMU @aamu.edu email address


Phone Extension*

This data
determines
where your form
goes next.

REQUESTING BANNER FINANCE ACCESS

SUPERVISOR SECTION

Banner Access Request Form

 ALABAMA
A&M
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Requester Information | **Supervisor**

Access Requested
To Be Completed by Employee's Supervisor

To be completed by the Employee's Department Head/Supervisor: Please check Banner Module (only one) & Function(s) to be accessed.

NOTE: Only one Banner Module can be selected per form. A separate Request for Access form is required for each Banner Module.

Banner Module *

- Finance, Budgeting or Accounts Receivable ←
- Financial Aid
- Human Resources
- Student
- Public Safety

This data determines where your form goes next.

REQUESTING BANNER FINANCE ACCESS

SUPERVISOR SECTION

Functions

NOTE: Access cannot be granted to enter AND approve Requisitions

- Enter Encumbrances & Requisitions
- Approve Encumbrances & Requisitions
- Query Data Only

REQUESTING BANNER FINANCE ACCESS

SUPERVISOR SECTION

Fund and Org Access
Enter the fund and org codes needed. If none are needed enter N/A.

What Org and Funds will be accessed by employee *

You may list multiple valid fund/org code combinations.

PASSING THE CHECKPOINTS



APPROVAL ROUTING AT AAMU



APPROVAL ROUTING AT AAMU

What is approval routing?

Approval routing is the function in Banner Finance that determines who must review and approve transactions before they move forward in Banner. At AAMU, routing is based on both a fund and organization code combination.

Why is approval routing important?

Approval routing helps the University ensure:

- the correct people review transactions
- spending follows university policy
- fund and organization activity is properly monitored

APPROVAL ROUTING AT AAMU

When should a department review approval routing for their fund/org combination?

- A new fund is created (i.e. restricted fund)
- A new organization is created
- An approver is hired, changes roles, or separates
- Departmental responsibilities change

APPROVAL ROUTING AT AAMU

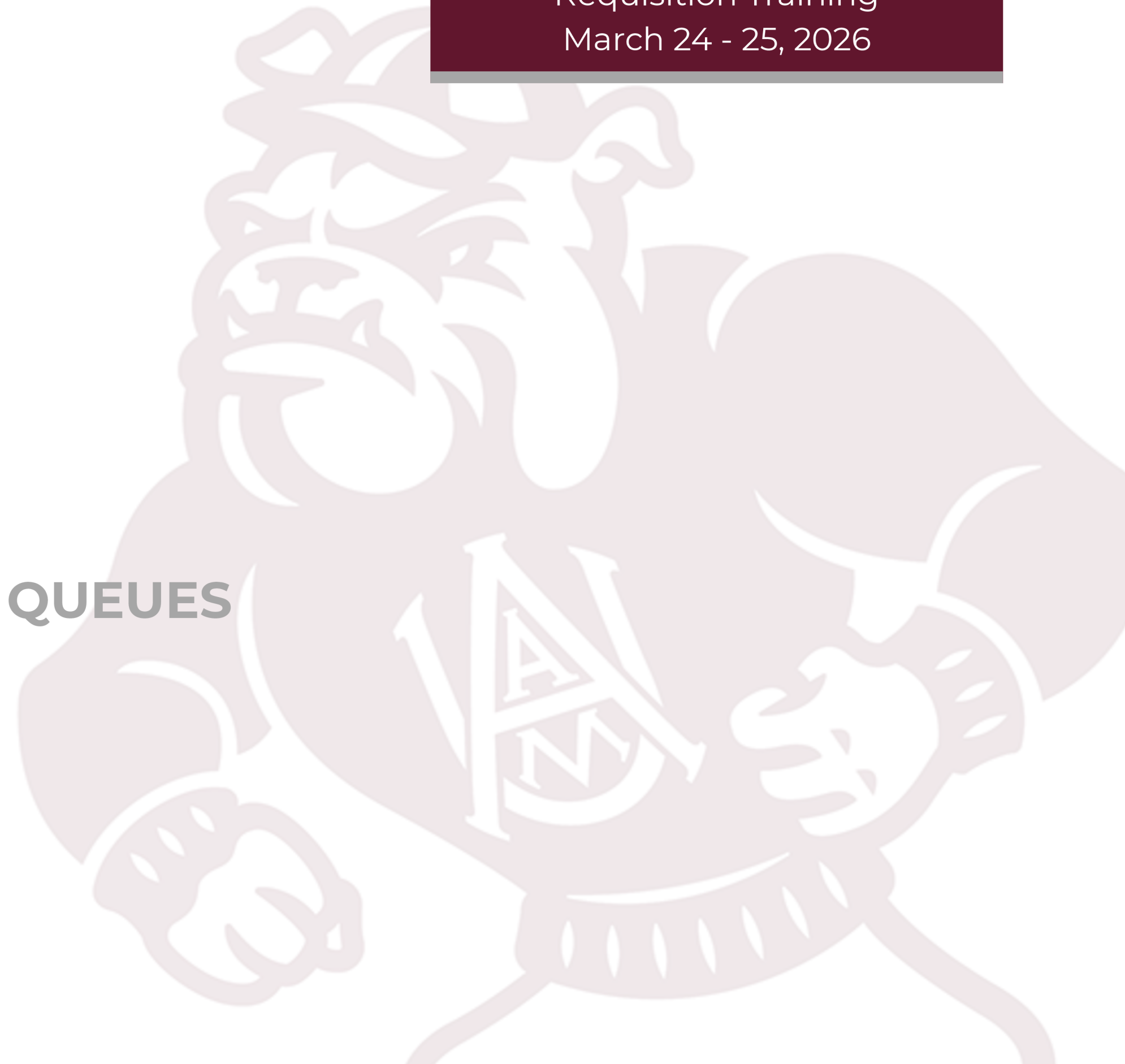
If approval routing is not established for your fund/org combination:

- the requisition cannot move forward for approval
- the requisition sits in Banner and does not process
- the department must pause work and request routing to be created
- the purchase is delayed — sometimes significantly

PREPARING THE PATH

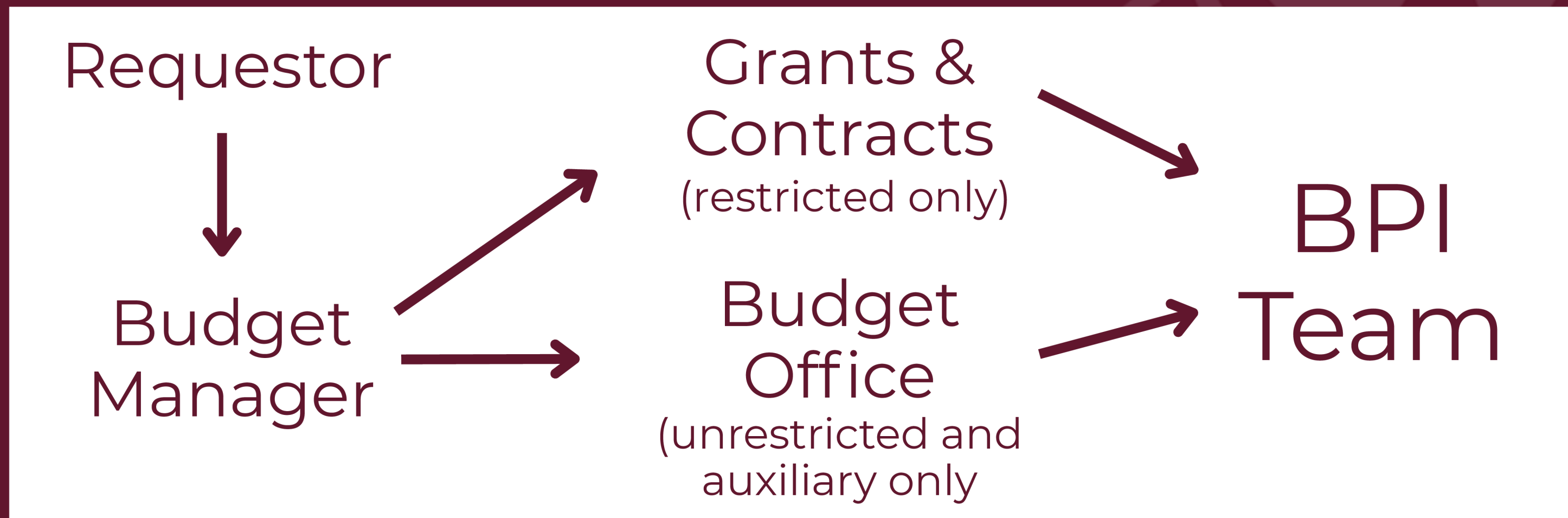


ESTABLISHING APPROVAL QUEUES



ESTABLISHING APPROVAL QUEUES

THE BANNER APPROVAL QUEUE SETUP FORM ROUTES AS FOLLOWS:



ESTABLISHING APPROVAL QUEUES

Banner Approval Queue Setup Form

- Paper forms will not be processed.
- The official form is located in Laserfiche (AAMU Dashboard).
- Each form overrides the last.
- No one person can serve as requisitioner and approver.
- Form must be fully processed before requisitions are entered.

ESTABLISHING APPROVAL QUEUES

Section 2 - Fund and Org Details

Fund Type * Restricted Unrestricted Auxiliary

Fund Code *

Org Code *

Department Name *

College or Division *

Fund Type - Ensures the form routes appropriately.

All other fields help determine routing path.

ESTABLISHING APPROVAL QUEUES

Section 3 - Banner Requestor Details

This sections gathers information on who will enter the encumbrances and requ

Name *

Job Title *

User ID

EX: john_smith

The team member
entering
requisitions is
listed here.

ESTABLISHING APPROVAL QUEUES

Section 4 - Banner Approver Details

This sections gathers information on who will approve encumbrances and requisitions. Having an approver is critical. If no approver is listed, requests are held up because an approver is unavailable. Do not enter names below, that a

UserID *

EX: john_smith

Job Title *

Role *

Approver
information is
listed here.

ESTABLISHING APPROVAL QUEUES

Budget Manager Information

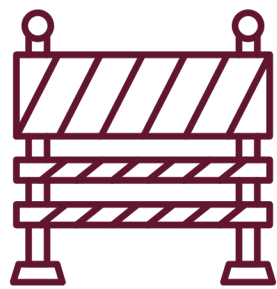
Name *

Email *

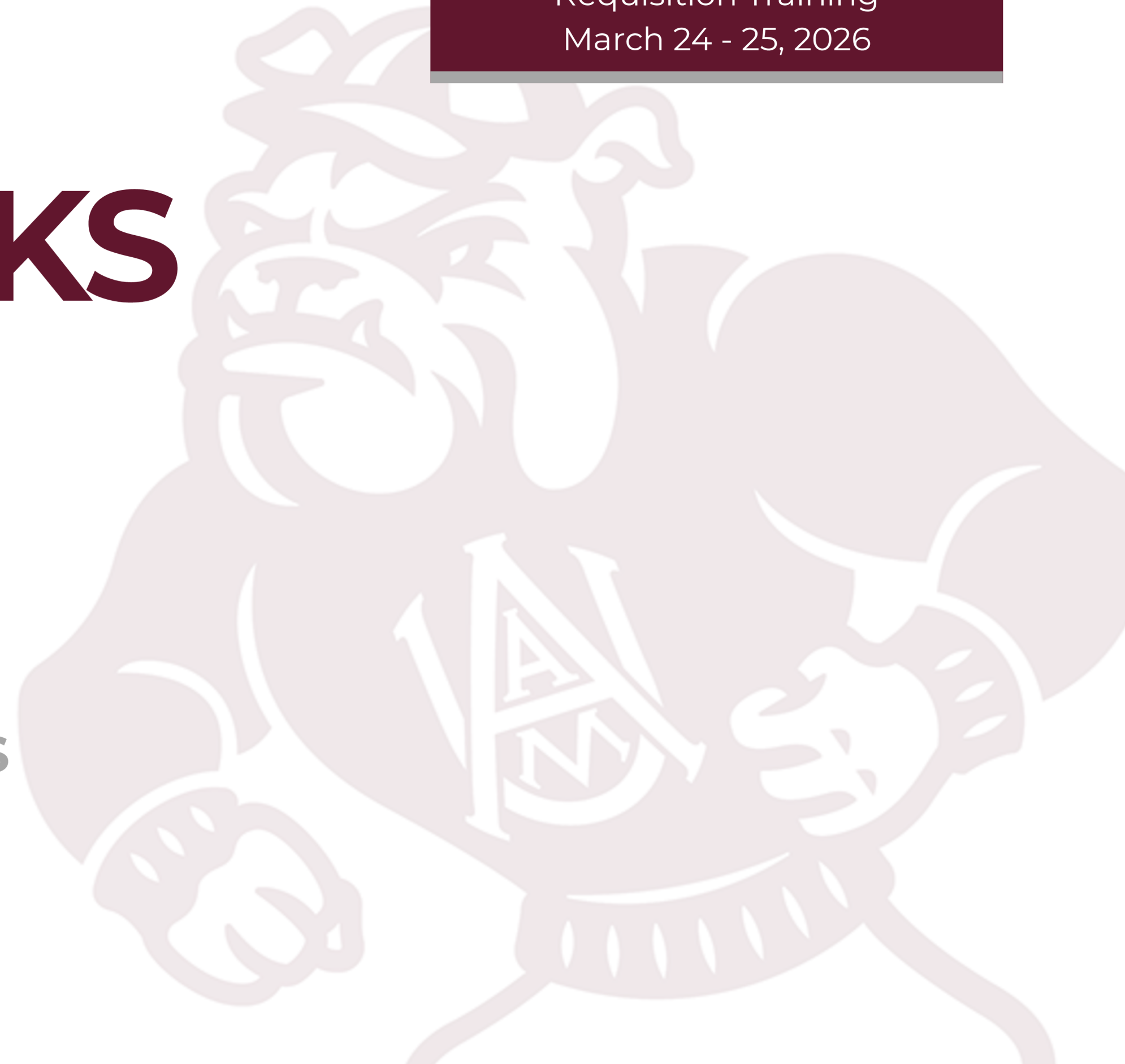
Official AAMU @aamu.edu email address

This data
determines where
your form goes
next.

AVOIDING ROADBLOCKS ALONG THE WAY



COMMON FORM MISTAKES



COMMON FORM MISTAKES

BANNER APPROVAL QUEUE SETUP FORM

- The incorrect fund type is selected.
 - Restricted funds often start with “2” and “6”
 - Auxiliary funds start with “3”
 - Unrestricted fund codes are 100001 and 110000

COMMON FORM MISTAKES

BANNER APPROVAL QUEUE SETUP FORM

- Incomplete or incorrect fund/org combination.
 - Fund codes are six digits
 - Org codes are five or six digits
- Entering a user as both requisitioner and approver.

COMMON FORM MISTAKES

BANNER ACCESS REQUEST FORM

- Email instead of user ID
(firstname_lastname)
- Completing one form for multiple module requests.
- Selecting the wrong Banner module.
(EPAFS = HR module)

THANK YOU FOR TRAVELING WITH US TODAY!

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Business Process Improvement

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