# Creating a Requisition in BANNER

Purchasing Department



Alabama A&M University Normal, Alabama 35762

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This guide is designed to be used in conjunction with attendance in training classes provided by the Purchasing Department

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## Objectives:

The objectives of this guide is to educate those of the AAMU End-User community responsibile for creating requisitions of the required requisition procedures.

#### Intended Audience:

All those responsible for requisition creation and approval.

## **Pre-Requisites:**

In order to attend this class, one must have the following pre-requisites:

- Basic Keyboard & Mouse Skills
- Basic Internet Native Banner Navigation

## Icon Key:

E Important Info

Must know information.



Nifty Note - nice to know information.

# Logging Into Internet Native Banner

Before you can create a requisition with Internet Native Banner, you must first login through the AAMU web page. This web page will be the entry point for anything internally related to AAMU and by which you will gain access to all Banner service.

Banner can be accessed at anytime from any computer anywhere with an Internet connection.

#### To login to Internet Native Banner:

- 1. Go to the internet
- Type in htp://prod-as.aamu.edu:9099/forms/frmservlet?config=prodjpi or
   Go to AAMU website
   IT Services, click Services, click Banner
- 3. Sign in using your ID and Password

You should be taken to the INB Main Menu screen, as shown below.



### Creating a Single Line Requisition

A number of employees will be required to create requisitions as part of thier position at AAMU. Basic Internet Native Banner (INB) Navigation and Creating a Requisition classes are required for all those creating requisitions.

#### To complete a single line requisition:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Enter FPAREQN in the Direct Access bar, then press <Enter>.

👷 General Menu GUAGMNU	
Go To FPAREQN	
My Banner	
Banner	4
Student [*STUDENT]	
🗋 Financial [*FINANCE]	
Human Resources [*HRS]	
Generation Financial Aid [*RESOURCE]	
🗋 General [*GENERAL]	

3. Perform a **Next Block** function to access the Requisition Entry Requestor/Delivery Information screen. Next blocking will force Internet Native Banner to assign the requisition number for you.



Do not type anything in the Requisition field on the Requisition Form (FPAREQN). INB will automatically generate the next consecutive requisition number for you when you perform a Next Block function.

4. Change the order date, which defaults to the current date, in the Order Date field, if appropriate.

Requisition Entry: Pe	questor/Delvery Information FFAFEQ V 7.4.0 1 (FFCO) 16-MSV-2006 02-67 PM
Requisition:	210
Order Date:	In Suspense
Delivery Date:	22-MAY-2009 Comments: Document leve
Commodity Total:	106.00 Accounting Total: 138.00
	✓Document Level Accounting
legistratie en jee	Vendor information Commodity/Accounting Balancing/Completion
Requestor:	Latistis Jones COA: at Clabarya and University
Organization:	20508 Merchanical Engineering Ermail:
Phone:	Extension: Fax: Extension:
Ship To:	PM •
Street Line 1:	Naciona 28M Property Mgint
Street Line 2:	3409 Mendiar Street
Street Line 3:	
Building:	Floor:
City:	Huntswig
State or Province:	AL Zip or Postal Code: 35911
Nation:	United States of america
Telephone:	255 23255.44 Extension:
Contact:	Jeffrey Robinson
Attention To:	lettrey Roberson

- 5. Press **<Tab>** to move past the transaction date, which defaults to the current date. Make any necessary changes in the Transaction Date field, if appropriate.
- 6. Press **<Tab>** to enter a delivery date in the Delivery Date field.

You can enter any date in the format of MM/DD/YYYY and INB will convert it to DD/MM/YYYY format.

If the Delivery Date is in the same month as the Order Date, you can simply type in the number that represents the day of the month then press <Tab> and INB will populate the full Delivery Date for you.

The Delivery Date must be the same as, or later than, the Order Date.

- 7. Press **<Tab>** to enter special instructions in the Comments field, if applicable. (For example, Need by Fall Term.)
- 8. Press **<Tab>** to enter the requestor in the Requestor field, if different than defaulted requestor.
- 9. Press **<Tab>** to the COA (Chart of Accounts) field which will default to the COA for AAMU, which is the letter "N".
- Press <Tab> to accept default Organization code in the Organization field, or enter Organization code if blank. If the Organization code is unknown click the Search icon to select the correct code from Organization Code Validation Form – Finance (FTVORGN).
- 11. Press **<Tab>** to enter Requestor's e-mail address, if blank or different than default.
- 12. Press **<Tab>** to enter Requestor's phone number, if blank or different than default, in the Phone fields.
- 13. Press **<Tab>** to enter Requestor's fax number, if blank or different than default, in the Fax: fields.
- 14. Press **<Tab>** to the Ship To field. If you need to change the default Ship To address click the Search icon to select a new ship to address from Ship –To List (FTVSHIP).

If you select a different shipping address from the FTVSHIP form than the default Ship To information, the Address, Phone and Contact fields will fill in automatically.

15. Press **<Tab>** to the Attention To field and enter the contact name, department, building, and room number where the product is to be delivered.

Geessince Entry, Fe	auentor/Delivery Information FFAFEC v 7.1011 (FFCD) 16-MAV-2003-02.07 FM
Requisition:	210
Order Date:	Transaction Datus of Man and
Delivery Date:	22-MAY-2029 S Contraction Date: 15:MAY-2019 A In Suspense
Commodity Total:	Let Contribution Tet de Let Document let 1
	Document Level Accounting
and a state of the second	Vendor information Commodity/Accounting Balancing/Completion
Requestor:	Lansha Joney
Organization:	20508 Detri Danical Epoteeroa
Phone:	Extension: Fax: Extension:
Ship Io:	P/A •
Street Line 1:	Alconna Stat Property Mont
Street Line 2:	3409 Mendiar Street
Street Line 3:	
Building:	Floor:
City:	Munitsy: 6/
State or Province:	AL Zip or Postal Code: 35811
Nation:	United States of America
Telephone:	256 37:254+ Extrosion:
Contact:	Jeffrey Roomson
Attention To:	lettiny Roberson

16. Perform a Next Block function to access the Vendor Information block.

Requisition:	NEXT					
Order Date:	14-FEB-2007	2]	Transaction Date:	14-FEB. 2007		
Delivery Date:	19-FEB-2007	j.	Comments:	1		in Suspense
Commodity Total:		.00	Accounting Total:	1 	.00	Document lext
				3		Document Level Accounting
equestor/Delivery Ir	nformation	Vendor Inform	nation		1. S. R. C. S.	
			Cor	minouicy/account	ng	- Balancing/Completion
Vendor:	1					
The second second second second	and the second second					
Address Type:		Sequence:				
Street Line 1:				N		
Street Line 2:				15		
Street Line 3:						
City:		100 BOO				
State or Province:		Zip or l	Postal Code:	N	ation:	
Phone:		Extension:				
Fax:		Extension:	And the second second second			
Contact:			the set of a second			
Email:			which can be been set of Paper I and an average to straining straint store			and the second
Discount:						
Tax Group:						

The header of the Vendor Information screen will automatically be filled in for you.

Currently this action is not available.

17. To find the appropriate Vendor ID click the Search icon in the Vendor field, and click on Entity Name/ID Search (FTIIDEN) to perform a vendor search.

Vendor Maintenance	(FTMVEND)
	(Cancel)

18. Press **<Tab>** to Last Name field to enter a search for the Vendor.

E Versianse	GRADE POTAD	nost i j	Second States	nagen		1	60100	Ê.			
🖓 7) enna den venders 👘 Scopetal Berrahoel			Terminated Floring following or a								
D Number	Last Name	First Name	Middle Name	Entity Ind	Change Ind	v	F	A	G	Ρ	Type
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- 19. Type in a meaningful portion of the Vendor name, using mixed case with the wild card "%" before and/or after, as necessary. (For example, if I were searching for the Vendor ID for Ace Plumbing Supply, I could type in Ace% or %Plumbing%.)
- 20. Execute the query by pressing **<F8>** or select **Query>Execute** from the Menu bar.

- 21. When the Vendor is found, double click on the Vendor number to select.
- 22. Confirm that the Vendor information displays correctly in the Vendor Information screen of the FPAREQN form.

equestor/Delivery In	Vendor Information	Commodity/Accounting Balancing/Completion	18
Vendor:	N00401031 Ace Plumbing Supply		
Address Type: Street Line 1:	PO Box 550829		
Street Line 2:			
Street Line 3:			
City:	Jacksonville		
State or Province:	FL Zip or Postal Code: 33	2255-0829 Nation:	
Phone:	904 7372611 Extension:		
Fax:	904 6369378 Extension:		
Contact:	John Ward		
Email:			
Discount:			
Tax Group:	×		
Currency:	•	Valid Mitrada ana may ago	

- 23. Perform a Next Block function.
- 24. Confirm Requisition Entry: Commodity/Accounting appears on Title bar of form.

Requisition:	R0021227	~							
order Date:	14-FEB-2007		Transactio	on Date:	14-FEB-20	07		In Susapase	
elivery Date:	19-FEB-2007		Comment:	51	1.000	and the second		Document Text	
ommodity Total:	1	.00	Accountin	a Total;		.00		oncoment rext	
								Document Level	Accounting
uestor/Delivery I	nformation	Vendor Info	mation	Con	nmodity Acc	ounting	Balar	nang/Completion	2
em of	0	U /	M Ya	Group	Quantity	Unit Pr	ce		
						x		Extended:	
Commodity		Descriptio	0	1				Discount:	
					-			Additional:	
energia de la compañía de compañía de la compañía d					Comm	ity Text		Tax:	
				And Address of the Ad	Item Te:	ct	Comm	odity Line Total:	
					Add Com	modity			
and water a stranger and the second	a a Martine a constant y magazita Na Martine	a ta ang ang ang ang ang ang ang ang ang an	and a second second	and an array of the second	Distribul	1 <b>8</b>	e te miner de la consecu	والمحافظة المركب والمركبة المركبة والمحافظة المحافظة المحافظة المركبة المحافظة المحافظة المحافظة المحافظة المحاف	-
DADAL of	Re	maining Commo	dity Amount:			NSF C	verride	90	USD
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	x Fund	Oron Acct	Prog	Actv	Locn	Proi		Discount:	
DA Year Inde				<u> </u>				Additional:	
DA Year Inde					1			Tax	
DA Year Inde								i uz.	
DA Year Inde							FO	APAL Line Total:	

25. Verify that the check box is checked in the Document Level Accounting field

Requisition Entry: F	equestor/Celivery Information	FPAREQN	200000000000000000000000000000000000000	£ ×
Requisition: Order Date: Delivery Date:	R0021227 14-FEB-2007 14-FEB-2007	Transaction Date: Comments:	14-FEB-2007	In Suspense Document Text
Commodity Total:	.00	Accounting Total:	.00	- Document Level Accounting

#### B IMPORTANT!

The Document Level Accounting checkbox must be checked before continuing with the requisition.

If a requisition is processed without the Document Level Accounting check displayed, the requisition will be disapproved by the Approver or the Purchasing Department.

26. Your cursor should be located in the Commodity field. Move tab to the Description area.

and the second se	U/M	Tax Group	Quantity	Unit Price		
tem of 0		L. S. S. S.	X		= Extended:	
					Discount:	
Commodity	Description				Additional:	
			Commod	ity Text	Tax:	
	alitette opplaat in teaster op die alitetet		Item Tex	t Comn	nodity Line Total:	
			Add Com	modity		
			Distribute	P		

31. Type the actual description of the product you wish to purchase in the Description field.



The correct format for entering the commodity description is product name, manufacturer, full description, including any colors that are pertinent, manufacturer number and vendor part number, if applicable. Also include quote/proposal numbers, if applicable.

Example - Stapler, Swingline, Commericial Stapler, Black, Model 67, SW10601

If the description is too long to fit within the Description field, see Chapter 6 for detailed instructions.

32. Press **<Tab>** and enter the appropriate unit of measure in the U/M field. (Each, Box, Package, etc.)

If you are unsure of the appropriate unit of measure, click the Search icon in the U/M field to select the appropriate one.

33. Press **<Tab>** and enter the quantity of items being requested in the Quantity field.

34. Press <**Tab**> and enter the unit price of the commodity in the Unit Price field.

You must enter a unit price on the requisition without the use of text characters, such as commas or dollar signs. If the item(s) you are purchasing is(are) at no cost, you will need to enter the information in the document text/item text field. You cannot enter a line item with a zero in the cost field.

35. Press **<Tab>** and enter appropriate discount in the Discount field, if applicable.

36. Press **<Tab>** and enter any additional fees in the Additional field, if applicable.

37. Press **<Tab>** to the Commodity field.

Confirm the Commodity Line Total has been filled in by Banner.

38. Perform a Next Block function. The FOAPAL elements block will become active.

FOAPAL	of	0 F	Remaining	Commodi	ty Amount:		50.00	NSF O	verride
								CINSE-SI	ispens
COA Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	
U 07	250001	250001	603000	731002	46				

- 39. Press **<Tab>** to advance past the COA (Chart of Accounts) field, which will default to "N" for AAMU.
- 40. Confirm the correct fiscal year appears in the Year field.

The Fiscal Year will default based on the transaction date.

- 42. Press **<Tab>** to enter fund number in Fund field.
- 43. Press **<Tab>**to bypass the default organization number in the Orgn field.
- 44 Enter account code in Acct field.
- 45. Press <**Tab**> to enter program number in Prog field.
- 46. Press **<Tab>** three times. This will take you past the Activity (Actv) field, Location (Locn) field, and Project (Proj) field.

AAMU does not use Location or Project fields at this time.

47. Press **<Tab>** through the Extended field, Discount field, and Additional field. This will populate the appropriate accounting information in these fields.



48. Perform a Next Block function.

49. Confirm that Status column reads "BALANCED" for the Approved, Discount, Additional and Tax amounts.

Requisition.	80021227			
Order Date:	14-FEB-2007	Transaction Date: 14 55	P 2007	C
Delivery Date:	19-FEB-2007	Comments:	II	n Suspense
Commodity Total:	50.00	Accounting Total	50 00	ocument lext
,		Accounting Futur.	50.00 D	ocument Level Accounting
questor/Delivery Ir	formation Vendor Ir	formation Commodity,	Accounting Balancin	ng/Completion
n				eracs Homilton
vendor:	100401031 Ace Plumbing Supp	ly	Requestor: Ch	CICSO HOHINDU
Vendor: h 	100401031 Ace Plumbing Supp 1 University of North Florida	ly	Requestor: Ch	eresa nanniton
Vendor: COA: L COA: L Organization: éé	100401031 Ace Plumbing Supp J University of North Florids 103000 OR.SP	ly	Requestor: Ch	
Vendor: COA: Organization: Currency:	UD0401031 Ace Plumbing Supp University of North Florids 03000 ORSP	ly 	Requestor: Ch	eresa Hanimuu
Vendor: COA: Organization: Currency: Exchange Rate:	V00401031 jAce Plumbing Supp J University of North Florids 03600 OP.SP Corr	Imodity Record Count: 1	Requestor: <sub>3</sub> Ch	erese rannium
Vendor: COA: COA: COA: COA: COA: COA: COA: COA	200401031 jAce Plumbing Supp J. University of North Florids 03000 ORSP Com 50.00 Con	imodity Record Count: 1 verted Amount:	Requestor: <sup>c</sup> h	erese naminum
Vendor: p COA: L Organization: (c Currency: Exchange Rate: Input Amount:	200401031 jAce Plumbing Supp J University of North Florids 03000 ORSP Com 50.00 Con	imodity Record Count: 1 verted Amount:	Requestor: Ch	
vendor: n COA: L Drganization: é Currency: Exchange Rate: Input Amount:	100401031 [Ace Plumbing Supp J University of North Florids 1036000 [ORSP Com 50.00 Com Input	imodity Record Count: 1 verted Amount:	Requestor: Ch	Status
Vendor: n COA: L Organization: é Currency: Exchange Rate: Input Amount: Approved Amount:	100401031 [Ace Plumbing Supp J University of North Florids 1036000 [ORSP Com 50.00 Com Input 50.00	imodity Record Count: 1 verted Amount: Commodity 50.00	Requestor: ch	Status BALANCED
Vendor: p COA: L Organization: (c Currency: Exchange Rate: Input Amount: Upproved Amount: Discount Amount:	100401031 jAce Plumbing Supp J. University of North Florids 103000 ORSP Com 50.00 Con 1. Input 50.00 .00	imodity Record Count: 1 verted Amount: Commodity 50.00 00	Requestor: Ch Accounting 50.00	Status BALANCED BALANCED
Vendor: p COA: t Organization: e Currency: Exchange Rate: Input Amount: Approved Amount: Discount Amount: Additional Amount:	00401031  Ace Plumbing Supp J. University of North Florids 03000 ORSP Com 50.00 Con Input 50.00 .00 .00	verted Amount: 1 Commodity Solution Sol	Accounting           50.00           .00           .00	Status BALANCED BALANCED BALANCED

If you do not see "BALANCED" in the Status column an error message will pop up at the bottom of the screen and you will be directed to the area where the error occurred.

- 50. Once confirmed, click the **Complete** button to send the requisition to the electronic approval process.
- 51. Write down the requisition number that appears on the AutoHint line (bottom left of screen) for future reference.

Document R00	01569 com	pleted and forwarded	to the Approval process
Record: 1/1	5d		<0SC>

52. Click the Exit icon to exit FPAREQN.

## Creating a Multiple Line Requisition

In many case, multiple items need to be purchased on a requisition. Internet Native Banner easily allows you to create a multiple line requisition.

#### To complete a multiple line requisition:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Enter FPAREQN in the Direct Access bar, then press < Enter>.

Calla Welcom		
GO TO IFPAREQN	 	
My Banner		
Banner		R
Student [*STUDENT]		
Financial [*FINANCE]		
🗋 Human Resources [*HRS]		
Einancial Aid [*RESOURCE]		
General [*GENERAL]		

3. Perform a **Next Block** function to access the Requisition Entry Requestor/Delivery Information screen. Next blocking will force Internet Native Banner to assign the requisition number for you.



Do not type anything in the Requisition field on the Requisition Form (FPAREQN). INB will automatically generate the correct requisition number for you when you perform a Next Block function.

4. Change the order date in the Order Date field, if appropriate. (Order date should default to current date.)

	y and a						
Requisition:	210						
Order Date:	<u>ar na ana</u> (20)	Transa	ction Date:	15-MAY-2009	E.	In Suspense	
Delivery Date:	22-MAY-2009	Comm	ents:			Document Text	
Commodity Total:	156.00	Accour	iting Total:		139 00		
						Document Level Ac	counting
terreter a terr	Vendor In	formation	Commod	ity/Accounting	Ba	alancing/Completion	the state of the second state of the state of the
Requestor:	Latistia Jones				COA: N	· Alabama sett University	
Organization:	20508 Merchanic	ai Engineering			Ethad:	- 1 10 1 1	
Phone:	Ext	ension:			Ғах:	Extension:	e
Ship to:	PM -						
Street Line 1:	Alabama Aste Property Mgn	2					
Street Line 2:	3409 Meridian Street						
Street Line 3:							
Building:	F	por:					
City:	Huntsville						
State or Province:	AL Zip or Post	al Code: 35511					
Nation:	United States of America						
elephone:	256 3725546 E	tension:					
Contact:	Jeñrey Roguison						

5. Press **<Tab>** to change the transaction date in the Transaction Date field, if appropriate.

6. Press <**Tab**> to enter a delivery date in the Delivery Date field.

X You can enter any date in the format of MM/DD/YYYY and INB will convert it to DD/MM/YYYY format.

If the Delivery Date is in the same month as the Order Date, you can simply type in the number that represents the day of the month then press <Tab> and INB will populate the full Delivery Date for you.

The Delivery Date must be the same as or later than the Order Date.

- 7. Press **<Tab>** to enter special instructions in the Comments field, if applicable. (For example, "Rush" or "Need by Fall Term".)
- 8. Press **<Tab>** to enter the requestor in the Requestor field, if different than defaulted requestor.
- 9. Press **<Tab>** to the COA (Chart of Accounts) field which will default to the COA for AAMU which is the letter "N".
- Press < Tab> to accept default Organization code in the Organization field, or enter organization code if blank or if it is different than the default Organization code, or click the Search icon to select the correct Organization code from Organization Code Validation Form – Finance, (FTVORGN).
- 11. Press <Tab> to enter requestor's e-mail address, if blank or different than default.
- 12. **Tab>** to enter requestor's phone number, if blank or different than default, in the Phone fields.
- 13. < Tab> to enter requestor's fax number, if blank or different than default, in the Fax fields.
- 14. Press **<Tab>** to the Ship To field. If you need to change the default Ship To address click the Search icon, to select a new ship to address from Ship –To List (FTVSHIP).

If you select a different shipping address from the FTVSHIP form than the default Ship To information, the Address, Phone and Contact fields will fill in automatically.

15. Press **<Tab>** to the Attention To field and enter the contact name, department, building, and room number where the product is to be delivered.

a series and that the	setter Devery Introducer, FF122	ICN 7.401 (9805)	15-MAY-2009-02	7 MA - 2. 2. 2010 1000 1000	<b>.</b>
Requisition	2:0				
Order Date:	I Real Provide The	Transaction Date:	35-M48-2005 (V)	In Suspense	
Delivery Date:	22-MA7-0422 [27]	Comments:		Document lest	
Commodity Total:	100.00	Accounting Total:	134	Countrie in the second s	
				Document Leve	el Accounting
مر مرجون <del>مرجود مر</del> وود .	Vendor information	n Commod	ity/Accounting	Balancing/Completion	
Requestor:	Larist-a zones		COA	• -	
Organization:	20508 TANIC In Fright		Email		
Phone:	Extension:		Гах:	Extension	
Ship to:	pra • 1				
Street Line 1:	Alabema Alist Property Mgint				
Street Line 2:	3409 Merican Street				
Street Line 3:					
Building:	Fluor:				
City:	Huntsy 6				
State or Province:	AL Zip or Postal Code	: (581)			
Nution:	Under States of America				
Telephone:	256 3725546 Extension	۱:			
Contact:	Jethey Poblesun				
Attention for	Jetney Fotorson				

16. Perform a Next Block function to access the Vendor Information block.

Requisition:	NENT					
Order Date:	14-FEB-2007	<u> </u>	Transaction Date:	14-FE8-2007	200 J	In Suspense
Delivery Date:	19-FEB-2007	120	Comments:			Document Text
Commodity Total:		.00	Accounting Total:		.00	
						Document Level Accounting
anuartar Dalivaru i						
squestor/Delivery.If	indimation	Vendor Infor	notion Com	modity/Account	ng	Balancing/Completion
Vendor:		•				
Address Type:	( <b>•</b> )	Sequence:				
Street Line 1:						
Street Line 2:	1			5		
Street Line 3:			A Manufacture of Concession			
City:						
State or Province:	<u></u>	Zip or	Postal Code:		ation	
Phone:		Extension			deron.	
Fax:		Extension:	and the second sec			
Contact:	a contraction of a second second second second					
Email:		and the second segment of the later				art art - 10 Martine and and the second state and and a second state
Discount:						
Tax Group:						
Chemino on						

The header of the Vendor Information block will automatically be filled in for you.

17. To find the appropriate Vendor ID click the Search icon in the Vendor field.

teouisition:	HEX1			
Order Date:	14-FE6-2007 [1]	Transaction Dat	e: 14-FEB-2007 1	in Suspense
Delivery Date:	19-FE6-2007	Comments:		Document Text
Commodity Total:	.00	Accounting Tota	l:	
				Document Level Accounting
equestor/Delivery In	formation ven	for Information	Commodicy/Accounting	Balancing/Completion
Vendor:	1 1			-
	X			
Address Type:	• s	quence:		
Street Line 1:		1	12	
Street Line 2:				
Street Line 3:				
City:				
State or Province:		Zip or Postal Code:	Nation:	
Phone:	E	xtension:		
Fax:	E	xtension:		
Contact:			the second state of the second	
Email:				
Discount:	<b>_</b>			
Tax Group:	*		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Currency:	•			

18. Click on Entity Name/ID Search (FTIIDEN) to perform a vendor search.

Vendor Maintenance	(FTMVEND)
	Cancel

This funtion is not currently available for use.

Print out current Vendor Listing and type in the appropriate vendor number. Continue at number 23.

19. Press **<Tab>** to Last Name field to enter a search for the vendor.

Do Number Last Name First Name Name Ind Change Ind V F A G P Type	<ul> <li>Bit Don't</li> </ul>	14 <sup>2</sup> 4 <sup>-16</sup> (142)		Adda of the	discourt?			1 decem	415			
D Number Last Name First Name Middle Entity Change Ind V F A G P Type	and a state of the second	i ka ini katalari ka	et annol	teration, d	$e_{1,1}^{2}$ , $e_{2}^{2}$	nut na starty		3.1				
	D Number	Last Name	First Name	Middle Name	Entity Ind	Change Ind	V	F	A	G	P	Type
		•					L. L		-	2		
			• • • • • • • • • • • • • • • • • • •	- 1000 - 1000 - 10					-	5		
			•••		[	12-1					_	
					_	-			-		-	
			\		-	-	_		-	-	-	
			-		-	_		-		and a second		[
				and a second		-		-	<u></u>	-		

- 20. Type in a meaningful portion of the vendor name, using mixed case with the wild card "%" before and/or after, as necessary. (For example, if I were searching for the Vendor ID for Ace Plumbing Supply, I could type in Ace% or %Plumbing%).
- 21. Execute the query by pressing **<F8>** or select **Query>Execute** from the Menu bar.
- 22. When the Vendor is found, double click on the Vendor number to select.
- 23. Confirm that the Vendor information displays correctly in the Vendor Information screen of the FPAREQN form.

Requestor/Delivery In	formation Vendor Information Commodity/Accounting Balancing/Completion
Vendor:	N00401031 Y Ace Plumbing Supply
Address Type:	Sequence: 1 💌
Street Line 1:	PO Box 550829
Street Line 2:	
Street Line 3:	
City:	Jacksonville
State or Province:	FL Zip or Postal Code: 32255-0829 Nation:
Phone:	904 7372611 Extension:
Fax:	904 6369378 Extension:
Contact:	John Ward
Email:	
Discount:	
Tax Group:	
Currency:	

- 24. Perform a Next Block function.
- 25. Confirm Requisition Entry: Commodity/Accounting appears in the Title bar of form.
- 26. Verify that the check box is checked in the Document Level Accounting field

Pequisition Entry: R	equestor/Delivery Informat	bon FPAREQN		ana ang ang ang ang ang ang ang ang ang
Requisition: Order Date: Delivery Date: Commodity Total:	R0021227 14-FEB-2007	Transaction Date: Comments: Accounting Total:	14-FEB-2007	ii In Suspense Document Text
				Document Level Accounting

## IMPORTANT!

The Document Level Accounting checkbox must be checked before continuing with the requisition.

If a requisition is processed without the Document Level Accounting check displayed, the requisition will be disapproved by the Approver or the Purchasing Department.

27. Your cursor should be located in the Commodity field. Move tab to the Description area.

ैख़ Requisition Entry: (	Commodity/Accour	nting FPAREQN	8.0 (NFTR)				
Requisition:	R0002579						
Order Date:	07-APR-2009		Transaction Da	ate:	07-APR-2009	In Suspense	
Delivery Date:	21-APR-2009		Comments:			Document Text	
Commodity Total:		0.00	Accounting Tot	tal:		00.0	
Enternancia de la construcción de la						Document Level .	Accounting
Requestor/Delivery I	nformation	Vendor Inform	ation	Com	modity/Accounting	Balancing/Completion	
the state of		U/M	Tax Group	Qua	antity Unit	Price = Extended:	Free Contract Street
Item of	0	U/M	Tax Group	Qua	antity Unit	Price = Extended: Discount:	
Item of Commodity	0	U/M Description	Tax Group	Qua	antity Unit	Price = Extended: Discount: Additional:	
Item of Commodity	D	U/M Description	Tax Group	Qua	antity Unit	Price = Extended: Discount: Additional:	
Item of Commodity	0	U/M Description	Tax Group	Qua	Commodity Text	Price = Extended: Discount: Additional: Tax: Commedity Line Total:	
Item of Commodity		U/M Description	Tax Group	Qua	Commodity Text	Price = Extended: Discount: Additional: Tax: Commodity Line Total:	
Item of Commodity		U/M Description	Tax Group	Qua	Commodity Text Item Text Add Commodity Distribute	Price = Extended: Discount: Additional: Tax: Commodity Line Total:	

32. Type the actual description of the product you wish to purchase in the Description field, overwriting the generic default description, if different from default.

	U/M	Tax Group	Quantity Uni
Item of O	EA .		X
commodity	Description		
Natural Gas	Cylinders, Model RX3003		Commodity Text
			Item Text
			Add Commodity
			Distribute

The correct format for entering the commodity description is product name, manufacturer, full description – including any colors that are pertinent, manufacturer number and vendor part number, if applicable. Also include quote/proposal numbers, if applicable.

Example: Stapler, Swingline, Commercial Stapler, Black, Model 67, SW10601

If the description is too long to fit within the Description field, see Chapter 6 for detailed instructions.

33. Press **<Tab>** and enter the appropriate unit of measure in the U/M field. (Each, Box, Package, etc.)

If you are unsure of the appropriate unit of measure, click the Search icon in the U/M field to select the appropriate one.

34. Press <**Tab**> and enter the quantity of items being requested in the Quantity field.

35. Press <Tab> and enter the unit price of the commodity in the Unit Price field.

You must enter a Unit Price on the requisition without the use of commas or dollar signs. If the item(s) you are purchasing is/are at no cost, you will just type in the item description in the item text field on the last item on the requisition.

36. Press **<Tab>** and enter appropriate discount in the Disc field, if applicable.

37. Press **<Tab>**and enter any additional fees in the Addtl field, if applicable.

38. Press <**Tab**> to the Commodity field.

Confirm the Commodity Line Total has been filled in by Banner.

39. Perform a Next Block function. The FOAPAL element block will become active.

OAPAL	of	0 <b>R</b>	emaining	Commodi	ity Amount:		50.00	NSF ON	erride
t								T NSF Se	ispans
OA Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	
•	•	•	•	•	•		•	•	
J 07	250001	250001	603000	731002	46				

- 40. Press **<Tab>** to advance past the COA (Chart of Accounts) field, which will default to "N". for AAMU.
- 41. Confirm the correct fiscal year appears in the Year field.

- 43. Press **<Tab>** to enter fund number in Fund field.
- 44. Press **<Tab>** to bypass the default Organization number in the Orgn field.
- 45. Enter the appropriate account number in the Acct field.
- 46. Press **<Tab>** to enter program number in Prog field.
- 47. Press **<Tab>** three times. This will take you past the Actv (Account) field, Locn (Location) field, and Proj (Project) field.

48. Press **<Tab>** through the Extended field, Discount field, and Additional field. This will populate the appropriate accounting information in these fields.



49. To input the next line item on the multi-line requisition, perform a **Previous Block** function. This will take your cursor back to the Commodity code field.

	1	and a second		U/N	1 T	ax Group	Quantity	Unit Price				
Item 1	of	1		EA	•		1	X 5	0 =	Extended:		50
Commod	ity		Des	cription						Discount		
1				•						Additional:	a service a	-
11103	Natur	al Gas Cy	linders, Mod	el RX3003	1994 - D. 194		Commod	lity Text		Tax:		
<b></b>							Item Tex	t	Commodit	y Line Total:		50
7							Add Com	modity				
4						Contraction of the second second	1001 0 11	5.				
1	l Stanson Styr	water of the	an an an Anna Anna Anna Anna Anna Anna	ti a constance	a.**	Production of the second second	VDistribut	e		t ne zanan ee zije natije je ge	an a star a s	(5. k.) (4 <sup>*</sup> **
FOAPAL	1 1 of [	1	Remaining	Commodi	ty Amoun!	enter anter a se	- Distribut	e Costante	crale	e, ío	usd USD	(5.4.)(s <sup>44</sup> )
FOAPAL -	1 1 of [	1	Remaining	commodi	ty Amoun!	ran		e Elizate Gov NSF Sus	crude pense Ex	مە tended:	USD	50.
FOAPAL	1 of T	L I	Remaining O <u>rg</u> n	Commodi A <u>cc</u> t	ty Amoun P <u>rog</u>	L A <u>ct</u> v	- Distribut .00 Locn	e Zask Gov NSF Sus P <u>roj</u>	critie pense Ex Di	ª‰ tended: SCOunt:	USD	50.
FOAPAL	1 of	Tund	Remaining Organ	Commodi Acct	ty Amount Prog	L. Actv	.00 Locn	e NSF Sus Proj	criti- pense Ex Di Ad	مە tended: scount: lditional:	USD	50.
FOAPAL COA Year	1 of Index 250001	1 Fund	Remaining Orgn 603000	Commodi A <u>cc</u> t 731002	ty Amouni Prog	Actv		e E Asik Ove NSF Sus Proj	onde pense Ex Di Ad Ta	<del>%</del> tended: scount lditional: x:	USD	50.
FOAPAL -	1 of Index 250001	1 Fund 7 250001	Remaining Orgn 603000	Commodi A <u>cc</u> t 731002	Prog	Actv		e Asir Two NSF Sus Proj	onde pense Ex Di Ad Ta FOAPA	% tended: scount (ditional: x: L Line Total:	USD	\$0.

50. Press the down arrow key on your keyboard. This will take you to the next blank commodity line on the requisition. You will repeat previous steps to add additional commodities.

Requisition:	10011127								
Order Date:	14-115-2007	1	Tran	action Date:	14-111-201	· · · · · · ·		In European	
Delivery Date:	19-140-2001		(			· · · · · · · · · · · · ·		in Suspense	
Commodity Total		200 GD	Arra	unting Total:		50.00		Document Text	
								Document Lave	Accounting
wowester/Entering 1	10mation	Vendor tr	comation	5. NT	n od to Augo	ur-tin J	8-44-7	nortokano / antar	
			11/M	Tax Group	Quantity	Limit #	rice	منواتي تشامل محمد تماري محمد	and a second
tteni / of			(4 ·	100.00	1	x		Extended:	¢.60
Commodity		Descript	lon					Discount	.06
-	0.000000000	•						Is acithha	
771362	atural Gas Linn	ders, Madet 9 -	2200		Commod	ty Text		lax'	
771864	- of A Chunker S	ernce		1999 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	tien lext		( isome	metitu tion totalı	
the second provided of			en en ar Br				Contin	ioning chie rotal.	5,66
					ABG COM	andit 4			
					Distribute				
	ii Pa							n gan an a	
FC)APAI		moning china	TODINTY AND	iunt:	6.00	1654	DAstuds		- 1543
FOAPAI ut							and the set of	Extended:	69.6
FOAPAL ut		()roon 4.0	rt Pre	ig Acts	1 ora	Proj		Discount:	на
COA Year Inde	k hund		• ! •	•	•1	-1		Additional;	.86
COA Year Inde	K Fund		_	1000					
COA Year Indr 1 1 25000	K Fund 2509-01	±00060 7716	106 46		Second Street in	and the second		Terri	a para mangana ang paggana
COA Year Indr	K Fund 250901 1	- \$63860 7710						Tex:	00
COA Year Indr	K Fund 	<u>-</u> \$53860 7710					FO	Tex: APAI Line Yotal:	00 •

- 51. When finished adding all line items, perform a Next Block function.
- 52. Confirm that Status column reads "BALANCED" for the Approved, Discount, Additional and Tax amounts.
- 53. Once confirmed, click the **Complete button** to send the Requisition to the electronic approval process.

Vendor:	N0040103	1 Ace Plumbing Supply		Requestor: Chere	sa Hamilton
COA:	U Univers	sity of North Florida			
Organization:	603000	ORSP	Contractions, Contractor Product Contractor Contractor		
Currency:	[]				
Exchange Rate:		Commo	dity Record Count: 2		
Input Amount:		56.00 Convert	ed Amount:		$\frown$
		Inout	Commodity	Accounting	Status
Approved Amoun	nt:	Input 56.00	Commodity 56.00	Accounting 56.00	Status BALANCED
Approved Amoun Discount Amount	nt:	Input 56.00 .00	Commodity 56.00 .00	Accounting 56.00	Status BALANCED BALANCED
Approved Amoun Discount Amount Additional Amoun	nt:	Input 56.00 .00	Commodity 56.00 .00 .00	Accounting 56.00 .00 .00	Status BALANCED BALANCED BALANCED
Approved Amoun Discount Amount Additional Amoun Tax Amount:	nt:	Input 56.00 .00 .00 .00	Commodity 56.00 .00 .00 .00	Accounting 56.00 .00 .00 .00	Status BALANCED BALANCED BALANCED BALANCED

54. Write down the requisition number that appears on the AutoHint line (bottom left of screen) for future reference.

					No. of Lot of Lo
Document R0(	01569	com	pleted and forwarde	d to the Approval process	191210-1915
Record: 1/1	5			<osc></osc>	and and
1012 ( 100 ) 100 (	C. P. Barrowski	199 (B) 24	이 것 같아요. 그 같이 아이지 않는 것 같아. 말 것 같아. 말 것 같아. 말 것 같아.		0.00

54. Click the Exit icon to exit FPAREQN.

#### Requisition Approval Using FOAUAPP

To view a list of requisitions awaiting your approval, follow these steps:

1. Go to the FOAUAPP form.

Any time you have requisitions waiting for approval, the Approvals Notification Form (FOIAINP) will appear the first time you access any Banner form. This form shows how many requisitions are on your approval list.

Exit Button

2. Click on the Exit button to close the FOIAINP form.



3. When the FOAUAPP form opens, you must click on the **Next Block** button to see the requisitions waiting for your approval.

Coracle Developer Forms Runtime - Web: Open > FOAUAPp Elle Edit Options Block Item Record Guerry Tools Help     D	Click the Next Block button to view your list.
User ID: RBROWN Robert Brown	Each requisition awaiting your approval appears on this list.
Document Document Change NSF Type Number Sequence Submission Originadi REQ R0001254 Approve: Disapprove: Detail:	Document Queue N ng User Апточик Туре Арр 1,634.00 DOC
Requisition Creator Document Document Change NSF Type REO REO REO R0001254	Requisition Value Becument Ampoint

#### **Review a Requisition**

1. To review a requisition for approval, click the **Detail** button in the document listing. This opens the Requisition Approval form (FOQRACT).

NSF	Document Type	Document Number	Change Sequence	Submission	Originating Use	r Document r Amount
	REQ	R0001254			SWORLEY	1,634.0
Approve:		Disapprove	: 8	Detail:	Que	eue: 2 Click the Detail button to view details of this requisition.

The FOQRACT form shows the vendor information, FOAPAL information and dollar amount.

- 2. To view more detailed information, select Requisition Query from the Options menu. This opens the Requisition Inquiry (FPIREQN) form.
- 3. The FPIREQN form will display the requisition number that you chose to review. Click the **Next Block** button to view the requisition.

Source Developer Forms Runtime - Web: Open > FOAUAPP - FOQRACT - FPIREQN
Eile Edit Options Block Item Rec <del>ord Q</del> uery Tools Help
Requisition Query FPIREQN 7.0 (BAN7) 2000/2000/2000/2000/2000/2000/2000/200
Next Block button
Requisition: R0001254
8

This above step will reveal a "read only" copy of the requisition. If there are any corrections that need to be made, you must **Disapprove** the requisition so it can be fixed by the person who created it.

4. Navigate through the information blocks using the **Next Block** and **Previous Block** buttons as required to review the entire requisition.

Requisition Approval

#### Reviewing a Requisition (continued)

Requisition:	ms Runtime - Web: Open a lock Item <u>Becord Sp</u> ery Document Information FP R0001254	> FOAUAPP - FOQRACT - FPIREQN Tools Help 副 図   ①   昌   ※ ※   〇   中   ① IREQN 7.0 (BAN7)	X
Delivery Date: Commodity Total:	02-MAR-2006 02-MAR-2006 1634.00	Transaction Date: 02-MAR-2006 Comments: Accounting Total: 1634.	C In Suspense ⊂ Deciment Text 00 When you have finished reviewing the requisition, click
		buttons to move through the requisition.	the Exit button to close the form.

- 5. When you have finished reviewing the requisition, you can click the **Exit** button to close the form. This will return you to the FOQRACT form.
- 6. Click the Exit button again. This will return you to the FOAUAPP form.

#### Approving a Requisition

Once you have reviewed the requisition you can approve it on the FOAUAPP form.

1. To approve a requisition, click the Approve button in the requisition listing.

Eile Edit ( File Edit ( File Edit ( File Edit () File Edit ()	Detions Block	Item <u>R</u> ecord	Query Tools	Help D B	x x +	© X		
User ID:	RBROWN	Robert	Brown		Docu	ment:	Next App	rover
NSF Approve	Document Type REQ	Document Number R0001254 Disappro	Change Sequence	Submission	Originating U SWORLEY	ser ueue: D	Document Amount 1,634.00	Queue Next Type Approver DOC Y
			Select the approve the	Approve bu e requisition	tton to			

2. A Requisition Approval message box will appear. Click the OK button to approve the requisition.

泡 Document Appro	val FOAUAPP 7	.0 (BAN7)		SHE X RX
Type: REQ	Number:	R0001254	Submission:	
Change Sequence	2:			
DOCUMENT IS APP	ROVED			
			(ок (	Cancel )

3. Another small window will appear, click the OK button to finalize the approval.

#### **Disapproving a Requisition**

To disapprove a requisition, follow these steps:

1. Click the Disapprove button in the requisition listing

	REQ	R0001254			SWORLE	Y	
Approve:	$\checkmark$	Disapprove:	ø	Detail:	e	Queue:	5
					Click the <b>Di</b> disapprove	sapprove button to the requisition.	

- 2. A Requisition Disapproval message box will appear.
- 3. You must add text that explains why the requisition was not approved. This text will explain to the requestor what needs to be corrected in order for this requisition to be approved.

Document Disappro	oval Text Entry FOAUAPP 7.0	(BAN7) 1993-1995 ビアロ
Type: REQ	Number: R0001254	Submission:
change Sequence:		
DOCUMENT IS DISAPI number 712050.	PROVED-Incorect account numb	er. Please use account
		(OK) (Cancel)

- 4. Click the OK button to disapprove the requisition.
- 5. Another small window will appear. Click the OK button to finalize the disapproval.
- 6. Logout of Banner after you have completed the approval process for the requisitions on your list.

## Splitting Commodities Across Multiple FOAPALS

There are times when creating a requisition that commodities may need to be split between two or more FOAPAL elements. You would need to do this when the commodities being purchased need to be charged to differing Funds/Orgs.

For example, a printer is being purchased to be used by two departments and the requisition needs to reflect a split in the commodity cost between the two departments.

#### To split commodities among multiple FOAPALS:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Follow the directions for creating a requisition in Chapters 2 or 3 only through step 37.
- 3. Enter the FOAPAL elements for the first commodity in the FOAPAL block.
- 4. <**Tab**> to the Extended field.
- 5. Enter the amount that is being charged to the *first* FOAPAL element.
- 6. Press **<Tab>** key until you return to the Chart of Accounts field.
- 7. Press Down Arrow key to the next blank line.
- 8. Enter the *next* set of FOAPAL elements in the FOAPAL block.
- 9. Repeat steps 4 8 for each additional FOAPAL that is be charged for this commodity item.
- 10. Perform a Next Block function and confirm the Status column reads "BALANCE".

11. Once confirmed, click the **Complete button** to send the requisition to the electronic approval process.

	Input	Commodity	Accounting	Status
Approved Amount:	56.00	56.00	56.00	BALANCED
Discount Amount:	.00	00.	.00	BALANCED
Additional Amount:	.00	.00	.00	BALANCED
Tax Amount:	.00	.00	.00	BALANCED
Complete	10.0			
South La	In Process:			

12. Write down the requisition number that appears on the AutoHint line (bottom left of screen) for future reference.

Document R0001569 completed and forwarded	I to the Approval process
Record: 1/1 3	<osc></osc>
القصيري المشهرة المستقد المشارعين المتركر فتركره المستعران والمنهيات المستعربان والمنازل والمستعر المستعد المست	A server of the second s

13. Click the Exit icon to exit FPAREQN.

# Creating a Requisition Using the Copy Function Process

The Copy Requisition process enables you to copy data from a <u>posted</u> requisition to a new requisition document.

Only requisitions that are fully completed, approved and posted through Purchasing Department may be copied.

#### To create a requisition using copy function:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Access the Requisition Form (FPAREQN).
- 3. Click the Copy icon.



4. Confirm that the Copy From screen opens.

Copy From			
Requisition: 🔍 🔍			
	(	ок	(Cancel)

5. Enter the requisition number that you wish to copy in the Copy From Requisition field.

If you do not know the requisition number you wish to copy, click the search icon and search for it.

## IMPORTANT!

The copy functionality will not check or update available balance until you navigate entirely through the form

- 6. Press **<Tab>** to populate the Vendor field, if necessary.
- 7. Click OK.

Copy FPAREQN		
Copy From		
Requisition:	R0000899	
Vendor:	N00400756	Atlantic Self Storage-Kernan

If you are not able to populate the Vendor Name or proceed, check the status line for a message stating that the "Document is not completed, approved or posted." Only requisitions fully completed, approved and posted through Purchasing may be copied.

- 8. Confirm the information from the old document appears in the Requisition Entry: Requester/Delivery Information block.
- 9. Make note of the *new* requisition number in the Requisition field in the upper, left corner of Requisition Entry screen.
- 10. Confirm the In Suspense box contains a check mark.

	R0021290	Transaction Date:	18-FEB-2007	1	10	Suspense	
Drder Data	A STREET CONTRACTOR	Comments:		·	Do	Coment Tex	
Commodity Total:	405.00	Accounting Total:	40	5.00		$\times$	
Commonly Total.			14		Do	cument Level Accou	inting
equestor/Delivery In	formation Vendor Info	rmation Co	mmodity/Accounting		Balancing	g/Completion	-
Requestor:	Barbara Lanz		co	A: U	University	of North Florida	
Organization:	610300 Mathematics &	Statistics	Em	ail: blan	z@unf.edu		
Phone:	904 6202653 Extensio	on:	Fax	904	6202818	Extension:	
Ship To:	CENTRL						
Street Line 1:	University of North Florida						
Street Line 2:	4567 St Johns Bluff Road S						
Street Line 3:	Central Receiving - Bldg 6						
Building:	Floor:						
City:	Jacksonville	1					
State or Province:	FL Zip or Postal Co	de: 32224					
Nation:							
Telephone:	Extens	sion:					
Contact:	1						

The suspended mode of this copied Requisition will be removed once you have navigated fully through all the screens and clicked the Completed button.

- 11. You may make any necessary changes to the copied requisition. This can include the following:
  - □ Requestor
  - Vendor
  - □ Commodity
  - □ Accounting information

12. Change the order date in the Order Date field, if appropriate.

13. Press  $\langle Tab \rangle$  to change the transaction date in the Transaction Date field, if appropriate.
14. Press **<Tab>** and enter a delivery date in the Delivery Date field.

The Delivery date must be the same as or later than the Order date.

15. Press **<Tab>** and enter special instructions in the Comments field, if applicable.

16. Press  $\langle Tab \rangle$  to change the requestor in the Requestor field, if appropriate.

17. Press <**Tab**> twice.

18. Change the organization, if appropriate.

If you don't know the Organization, click the Search icon and search for the correct Organization from the list.

19. Press <Tab> and enter requestor's e-mail address, if blank or different than default.

20. Press **<Tab>** and enter requestor's phone number, if blank or different than default.

21. Press **<Tab>** and enter requestor's fax number, if blank or different than default.

36. Press **<Tab>** and enter new Ship To information if different than default.

If you need to change the default Ship To address, click the Search icon and select the correct Ship To address from the list. When you select a Ship to address the Address, Phone, Contact and Attention fields will fill in automatically.

37. Change the Attention To field if blank or different than default.

rie quantition.	510					
Order Date:			Transaction Date:	15-MAN-2004 ST	lu Eusennu s	
Delivery Date:	22-MAY-2009		Comments:		Decimal test	
Commodity Total:		138.00	Accounting Total:	135.00	Doublem Text	
			5 Disease		<ul> <li>Document Level Accounting</li> </ul>	
مرد و روا و <del>م</del> انو <del>و</del>	·····	Vendor Informa	son Commo	dity/Accounting	alanong/Completion	
Requestor:	Latista Jones			<b>E()</b> A.	•	
Organization:	20 S0 R	* Merchanical Eng	14 50 10.7	Ethai -	Aubaro Aba Oriversity	
Phone:		Extensio	n:	Fax:	Extension:	
Ship to:	PM .	- 1				
Street Line 1.	Alauma A214	- ! Property Main				
Street Line 2:	3409 Meridian	Street				
Street Line 3:						
Building		Floor:				
City:	Huntselle					
State or Province:	AL	Zip or Postal Cod	le: 3591:			
Nation	Lander States 1	aniar ca				
elephone:	256 37755.4	Extensi	EXAMPLE 1			
:134100	Jeffrey Fobe so	1	20 - 20 - 20 - 20			
ttention To:	Jettres Popeso	a				

- 24. Perform a Next Block function.
- 25. Enter correct vendor information, if blank or different than default, in the Vendor information block.

If a different vendor is required, click the Search icon next to the Vendor field and select the correct vendor from the list. Once a vendor is selected, the remaining fields will fill in automatically.

If a NEW vendor is required, see Chapter 7.

- 26. Perform a Next Block function.
- 27. Change the commodity information in the Commodity and Description fields, if different than default.
- 28. Perform a Next Block function.
- 29. Change the FOAPAL information, if different than default.

a quicitian:	80021290										
rder Date:	18-FFB-2007	100		Transactio	on Date:	18-FEB-200	7 10	1.5	In Suspense		
alivery Date:	18-FEB-2007			Comment	s :	[			Document Te	×t	
ommodity Total:		405.00		Accountin	g Total:		405.00				
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OA Year Ind	250001					- 1 1			2		
U 07 25000	250001					1		FO	APAL Line To	tal:	405.00

## IMPORTANT!

To remove the requisition from In Suspense mode, you must navigate through each commodity row and FOAPAL row in the Commodity and FOAPAL blocks.

30. Perform a Next Block function.

31. Confirm the Status Field reads "BALANCED" for each amount.

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32. Click the Complete button.

	ceranding/completion			
Requisition:	R0021290			
Order Dote:	18-FE5-2007	Transaction Date:	18-FEB-2007 #	
Delivery Date:	18-FEB-2007	Comments:		Document Text
Commodity Total	405.00	Accounting Total:	405.00	o observe i car
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		партипогладон Сол	modity/Accounting Dal	Entition/Completion
Vendor:	N00400756 Atlantic Self	Storege-Kernen		
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Organization:	610300 Mathematics	& Statistics		
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Couldonal Amount	.00	0	0	0 BALANCED
	00	.0	0.0	BALANCED
		īτι		
Complete:	In Process			

33. Write down the requisition number that appears in the AutoHelp line (bottom left of window) for future reference.

Document RO	001569 comp	leted and forward	ed to the Approval process
Record: 1/1	43	10	<osc></osc>
and the first statement of the state	antes a la companya de la construcción	a la conserva conserva la fara conserva a serva a serva de la conserva de la conserva de la conserva de la cons	

34. Exit the form.

# Entering a Long Description

There will be times when the description of the item(s) you are purchasing does not neatly fit on the Description field of the FPAREQN form. In these cases, you will follow the steps below to add a long commodity item description.

#### To input a long description:

- 1. Complete steps 1-31 of Chapters 2 or 3.
- 2. Confirm that your cursor is in the Description field on the FPAREQN form.

Item 1 of 1			Tax Group
Commodity		Description	
771900 Rental of Bui	ldings		

- 3. Enter the long description of the commodity as needed in the Description field.
- 4. Select **Options** from the Menu bar.
- 5. Select Item Text (FOAPOXT)
- 6. Complete a Next Block function.
- 7. Enter the remainder of the item description in the Text field.

Text Type:	REQ	Code:	R0021290		Char	
Vendor:	N00400756 Atl	antic Self Sto	rage-Kernan		Char	ige sequence:
Commodity Description:					·	
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unit, #307, Renewal lease #2	17-for ORSP	i lene		The second secon		Line
			<u> </u>	Lat. Strandard and	v.	1

If you need extra space, press the down arrow key on your keyboard to type in additional rows of information.

- 8. Click Save button from Toolbar.
- 9. Click Exit button to close the Procurement Text Entry form (FOAPOXT).
- 10. When you return to the FPAREQN form, confirm that a checkmark has been placed in the Item Text checkbox.

Item 1 of 1	U/M EA	Tax Group	Quantity Unit Price
Commodity Tommodity Rental of Eui	Description T dings		
			✓ Item Text
			✓ Distribute

If an Original Commodity Description block appears on the screen – simply click and drag on title bar to move it, if needed. This block displays the original description of the commodity for reference.

# Requesting a New Vendor

Occasionally you may want to make a purchase from a Vendor that is not already listed in Banner as an approved AAMU Vendor. In these cases, you can request that a new Vendor be added by following the steps below:

## To request a new vendor:

- 1. Complete steps 1-16 of Chapters 2 or 3.
- 2. Confirm that your cursor is in the Vendor Name field on the FPAREQN form.

Information	Vendor Information	Commodity/Accounting
	Information	Information Vendor Information

3. Type the name of the new vendor requested.

Requestor/Delive	ery Information	Vendor Information	Commodity/Accounting
Vendor:		Bill Gates Public Speaking	Service

4. Select **Options** from the Menu bar.

- 5. Select **Document Text** (FOAPOXT).
- 6. Perform a Next Block function.

- 7. Enter the following information of the new requested vendor in the Text field.
  - a. Address
  - b. Phone Number
  - c. Fax Number
  - d. Any other information used to identify this vendor.

Text Type: Vendor:	REQ	Code: R0021290	~	Chan	ge Sequen
Commodity Description: Modify Clause:	•	г сару со	innodity Text	Defa	ult Increme
	C. S.L. Philipping Street and Articles of the	a the barb descent of a	and the second		
	Text		Clause Number	Print	Line
Contact: John Smith	Text		Clause Number	Print 🗸	Line
Contact: John Smith 123 Anyway Street	Text		Clause Number	Print マ	Line
Contact: John Smith 123 Anyway Street 904-620-1234(Phone)	Text		Clause Number	Print マ マ	Line

This process will provide the Purchasing department with the necessary information for them to manually input the new Vendor once approved.

- 8. Click Save button on Toolbar.
- 9. Click the Exit button to return to the FPAREQN form.
- 10. Confirm that the Document Text checkbox in the upper right corner of the screen is checked.



11. Complete requisition as needed.

# Placing a Requisition "In Process" (Suspending)

There may be times when you want to suspend a requisition temporarily and access it later for Completion. Instead of completing a requisition, follow the steps below to place it "In Process".

## To place a requisition "In Process":

1. Follow all steps for creating a Requisition up, but not including, the final completion step. Do not click the Complete button.

1,000.00	Accounting Total:	1,000	- Docu Docu	iment Text
ormation Vendor In	formation Com	modity/Accounting	Balancing/	Completion
Bill Gates Public Sp	eaking Service		Requestor: Chere	sa Hamilton
University of North Florida				
0300 Mathematics & Stati	stics			
Com	modity Record Count:	1		
1000.00 Con	verted Amount:			n a general second and a second s
1000.00 Con	verted Amount:		Accounting	Status
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2. Confirm that you are viewing the Requisition Entry: Balancing/Completion screen of the FPAREQN form.

3. Write down the Requisition number that appears in the Request field at top of screen.



# B IMPORTANT!

Make note of the Requisition number as stated in step 3 or you will need to search for it later when you wish to complete it.

4. Click the In Process button at bottom of screen.



5. Once you put the Requisition "In Process", you will be taken back to the beginning of the FPAREQN form.

Requisition FPAREQN	
Requisition:	Ð

The Requisition will stay "In Process" until you go back in and mark it Complete. To access a requisition that is in process, see Chapter 9.

6. Close the Form.

# Accessing a Requisition Still "In Process"

If a requisition has been marked "In Process" you may go back to complete it by following the steps below. You will be able to edit any of the fields in the requisition. You can not access a completed requisition through this process.

## To access a requisition "in process":

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Access the Requisition Form (FPAREQN).
- 3. Type the Number of the In Process Requisition in the Requisition field.

Requisition FPAREQN		
Requisition: R00212	290	

See the Important Information box in Chapter 8 about noting requisition numbers that are in process.

- 4. Perform a Next Block function.
- 5. Change any of the necessary fields and progress through the Requisition as usual.
- 6. When ready to complete the requisition, click the **Complete button**.

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Complete:		Sinkor,
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# Editing a Requisition

There may be times when you will need to edit a requisition after you have submitted it for approval. In order to edit a requisition the creator or the approver must first disapprove it so that it becomes "available" for editing. If the requisition has already been approved – Banner will not allow you to edit it and you will receive a message on the hint line stating "Request is approved – no changes are allowed."

## To edit a requisition:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Enter **FPAREQN** in the Direct Access bar, then press **< Enter>**.

GO TO FPAREON	
my Banner	
Banner	$\triangleright$
Student [*STUDENT]	.0
Financial [*FINANCE]	
Human Resources [*HRS]	
Financial Aid [*RESOURCE]	
General [*GENERAL]	

3. Type the requisition number to be edited in the Requisition field.

Requisition FPAREQN			
Requisition: R0021227			

4. Perform a **Next Block** function.

	R0021227	_	(M2)	
rder Date:	14-FEB-2007	Transaction Date:	14-FEB-2007	In Suspense
elivery Date:	19-FEB-2007	Comments:		Document Text
ommodity Total:	56.00	Accounting Total:	56.00	3
				Document Level Accounting
			and the second second	A second seco
questor/Delivery Ir	formation Vendor Info	mation Con	nmodity/Accounting	Balancing/Completion
Requestor:	Cheresa Hamilton		COA:	U University of North Florida
Organization:	603000 • ORSP		Email:	chamilto@unf.edu
Phone:	6202713 Extensio	n:	Fax:	Extension:
Ship To:	CENTRL			
Street Line 1:	University of North Floride			
Street Line 2:	4567 St Johns Bluff Road S	and any Cardinan Street Street		
Street Line 3:	Central Receiving - Bldg ó			
Building:	Floor:			
	Jacksonville			
City:	FL Zip or Postal Co	de: 32224		
City: State or Province:				
City: State or Province: Nation:				
City: State or Province: Nation: Telephone:	Extens	ion:		

5. Edit the necessary fields. Use **<Tab>** and **Next Block** to move around the form.

- 6. Save the form.
- 7. When you are finished editing the form, close the form. Click "Yes" to the prompt "Do you want to save the changes you have made?"

requisition.	R0021227				
Order Date:	1 m	Transaction Da	te: 14-FEB-2007	10	
Delivery Date:	19-FEB-2007	Comments:			
Commodity Total:	56.00	Accounting Tot	al	56.00	Elogenment rext
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questor/Delivery Ir	ionmation Vendor	Information	Commodity/Account	סחפר	Balancing/Completion
Requestor	Cheresa Hamilton	nner Millianskiege			
Organization:	603000 * ORSP				y bi Worth Horida
Phone:	6202713 E	Do you wa	nt to save the cha	nges you hav	e made? Extension:
Ship To:	CENTRL -				
Ship To: Street Line 1:	CENTRL • University of North Flor	· · · · · · · · · · · · · · · · · · ·			
Ship To: Street Line 1: Street Line 2:	CENTRL - University of North Flor 4567 St Johns Bluff Ro	• 	Yes No	)!Qa	ncel
Ship To: Street Line 1: Street Line 2: Street Line 3:	CENTRL • University of North Flor 4567 St Johns Bluff Ro Central Receiving - Bldg 6	• · · · · · · · · · · · · · · · · · · ·	Yes No	)[2a	
Ship To: Street Line 1: Street Line 2: Street Line 3: Building:	CENTRL University of North Flor 4567 St Johns Bluff Ro Central Receiving - Bldg 6 Fl		<u>Yes</u> <u>N</u> c	)[ <u>C</u> a	ncel )
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Ship To: Street Line 1: Street Line 2: Street Line 3: Suilding: City: State or Province:	CENTRL - University of North Flor 4567 St Johns Bluff Ro Central Receiving - Bldg 6 Fl Jacksonville FL Zip or Posta	Dor:	Yes No	)!Ca	ncel
Ship To: Street Line 1: Street Line 2: Street Line 3: Street Line 3: Street Line 3: Street 1: Street 3: Street 3: St	CENTRL - University of North Flor 4567 St Johns Bluff Ro Central Receiving - Bldg 6 Fl Jacksonville FL Zip or Posta	Door: 1 Code: 32224	Yes No	)!Ca	ncəl
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# Checking The Status OF A Requisition

## Native Banner Form FOIDOCH

- Log in to internet Banner 1.
- Use your ID and Pass word 2.
- On INB Main Menu Screen type FOIDOCH and enter 3.
- Type REQ in Document Type 4.
- Tab over to Document Code and click drop down Button, this displays all requisitions that are in 5. the Banner System
- Look for your requisition number check the approved and completed columns 6.

## **Requisition Status Breakdown:**

To assure that your requisition has fully processed, both columns Approved and Completed must read "Yes".

#### Approved:

Ves -	Requisition has been successfully submitted and has been approved.
No -	Requisition has not yet been approved or has been disapproved.

### Completed:

inpicica	
Yes -	Requisition has been successfully completed and submitted for approval.
No -	Requisition has not yet been successfully completed. The Requisition may have been
	intentionally or unintentionally suspended (put in process).
<blank> -</blank>	Requisition has been successfully completed and submitted for approval, but was
	disapproved.

### Scenarios:

Approved	Completed	Result
Yes	Yes	Requisition has been successfully completed, submitted and approved
INO	Yes	Requisition has been successfully completed and submitted, but not yet approved.
No	<blank></blank>	Requisition has been successfully completed and submitted, but was
No	No	Requisition has not been successfully completed, and therefore not approved as of yet.

For Requisitions listed as Yes/Yes – The Purchasing Department will be or has cut a purchase order for the products listed on the requisition and should arrive as scheduled.

For Requisitions listed as No/Yes – The one assigned as the Approver for this requisition has not yet approved it. You may wish to check with the Approver to inquire on when to expect approval.

For Requisitions listed as No/<blank> - The requisition was disapproved by the Approver. The one who created the requisition should have received correspondence about the disapproval status of the requisition and can now edit the requisition and resubmit as desired.

For Requisitions listed as No/No – The requisition was not successfully completed or submitted. Please check the requisition and if you still need the item on the requisition just complete the requisition and submit it for approval. If you do not want the requisition and need assistance in correcting or deleting a requisition in this condition, contact the Purchasing Department at ext. 5227 with a description of the problem for assistance

# Canceling a Requisition that has been Completed, Approved, and Posted

Canceling a requisition that has been completed, approved, or posted is used to reverse postings of the original requisition and cancel its availability for any further action in Banner. Before you can cancel a requisition, it must be completed, approved, and posted. Also, the requisition must be in an open window prior to subsequent activity (e.g., Bid, PO, Delivery Receipt, etc.), in order to cancel it. Otherwise, it cannot be cancelled.

#### To cancel a requisition:

1. Access the Requisition Cancel Form (FPARDEL).

Requisition Cancel FP	APDEL DECEMBER			
Request Code:				
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	NSF Checking			
equest Date:				
ansaction Date:				
equest Type:				
elivery Date:				
endor:				
rigin:	]			
Extended	Discount Amount	Tax Amount	Additional Charges	Net Amount
		+	+	=

2. In the Request Code field enter the requisition number for the requisition you wish to cancel and perform a Next Block function.

Request Code: RC	071214 Tracy Pistoria			
	<u>المحمد بالمحمد المراجع المراجعة المراجعة المراجعة المراجعة المراجعة المراجعة المراجعة المراجعة المراجعة المراجعة</u>	and the second		
Request Date:	✓ NSF Checking		anna an is an ann an an ann an an an an an an an a	#12,5%*77* (#12,228,557); 
ransaction Date:	14-FEB-2007			
equest Type:	P			
elivery Dote:	26-FEB-2002			
endor:	N00402135 Gov Connection	Inc	National Access of the	
ri <b>o</b> in:	EANNER			
Extended Amount	Dis count Amount	Tax Araovut	Additional	Net
131.49	.00	• 00	t inarges	Amount

## If you do not know the Request code, click the Search icon and perform a search to find the correct requisition number.

Banner displays the requisition detail in the Cancel Header block to help confirm correct selection of the requisition to be cancelled

3. Perform a Next Block function or select Access Cancel Date from the Options menu on the Menu Bar to go to the Cancel Date block.



The cursor is in the Cancel Date field, which displays the current date. You can enter another date, but it must be after the original Transaction date and in an open fiscal year period.

- 4. Double-click in the **Reason Code** field, and select the appropriate Cancellation Reason Code.
- 5. Select **Process Cancellation** from the Options menu on the Menu bar to cancel the requisition.
- 6. Click the Exit icon.

# Canceling a Requisition that is "In Process"

Canceling a requisition that is "In Process" is used to cancel its availability for any further action in INB Banner. To cancel a requisition "In Process", the requisition cannot be completed, approved, or posted. If the requisition is completed, approved, or posted, follow the steps outlined in Chapter 12.

## To cancel a requisition "In Process":

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Enter FPAREQN in the Direct Access bar, then press < Enter>.

N
45

3. Type the requisition number to be cancelled in the Requisition field.

Requisition FPAREQN	
Requisition: R0021227	1)

4. Perform a Next Block function.

Re E a manual and

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Requisition	210
Order Date: Delivery Date: Commodity Total:	Teansaction Date: ۲۵-Μ۸۳-2009 کا In Suspense 22-Mar-2009 کا Comments: Document Text ۱۱۵ تا Accounting Total: ۲۶۵ ۵۵
·******	Vendor Information     Commodity/Accounting     Balancine/Committien
Requestor: Organization: Phone:	Latistia Jones COA: 20 Datatara ekin university 20503: Merchanical Engineering Ernail: Extension: Fax: Extension:
Ship To: Street Line 1: Street Line 2: Street Line 3:	NA
Building: City: State or Province: Nitian: Telephone: Contact;	Floor: Huntswite AL Zip or Postal Code: 25911 United States of emerica 256 3725546 Extension: Jeffrey Pobelson
Allention To:	Inthey Poblesse

5. Select **Remove** from the Record menu on the main menu bar twice.



The Autohint line at the bottom of screen will indicate the need to delete the record again to complete the process.



6. Select **OK** to the All Commodity and Accounting records will be deleted dialog.



The following note will appear at the bottom left corner of the screen to confirm that the document has been deleted

Deletion of Requisition is completed

7. Click the Exit icon.

# Querying Completed and Approved Requisitions

Use the Requisition Inquiry Form (FPIREQN) to query and review the requisition information. Data can be viewed, but not changed, on FPIREQN.

<u>Note</u>: The Requisition Form (FPAREQN) initiated the procurement process. You defined the requestor; vendor, commodity, and accounting information. Once you complete a requisition, you cannot query the information from the Requisition Form (FPAREQN). You have to use the FPIREQN form for querying.

# To query completed and approved requisitions:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Access the Requisition Inquiry Form (FPIREQN).

Requisition:			

3. Enter an existing requisition number in the Requisition field. If you do not remember the number, click the **Search icon** to display all the requisitions, and select one from the list by double-clicking on the Request #.

4. Perform a **Next Block** function to access the Requisition Inquiry: Document Information block. View all desired information on this block.

equisition:	20002300					2
order Date:	17-AUG-2004	Transaction Date:	17-AUG-2004		The conference of	
nelivery Date:	24-AUG-2004	Comments:	BLANKET PO FOR MUI		Test in many set	
Commodity Total:	270.00	Accounting Total:	270.00			
erint Date:	e serence i	Cancel Date:		Closed Date:	26- AUG-2004	
ctivity Date:	17-AUG-2004	User ID:	N00007467			
ancel Reason:						
ocument Type:	PROCUREMENT					
Leguisition Copied	From:					
	DANNED					

This will take you to the Document Information window. Information can be viewed about whether the document was completed and approved; if it was printed; cancelled, or closed, and the date those activities happened.

5. Perform a **Next Block** function to go to the Requisition Inquiry: Requestor/Delivery Information block. View all desired information on this block.

lequisition: )rder Date: )elivery Date: :ommodity Total:	270.2004 17.AUG-2004 24.AUG-2004 270.00	Transaction Date: Comments: Accounting Total:	17-AUG-2004 BLANKET PO FOR MUI 270.00			"In Suspense " Broomedi fest	
Requestor: Organization: relephone:	Magdeline Steinbrecher 611100 Public Admin & Polit Science 904 6202977 Extension:		COA: Email: Fax Number:	U Un mstei 1904	iversity of Nort nbr@unf.edu 6202979	h Florida Extension:	
Ship To: Street Line 1: Street Line 2:	CENTRL University of North Florida 4567 St Johns Bluff Road South						
Street Line 3: Building: City: State or Province:	Bidg 6 Floor: Jacksonville FL Zip or Postal Code: 3	2224					
Nation: Telephone: Contact:	904 6202869 Extension Central Receiving	n:					
Attention To:	M. Steinbrecher 10/2425						

6. Perform a **Next Block** function to go to the Requisition Inquiry: Vendor block. View all desired information on this block.

Requisition:	R0002000				
Order Date: Delivery Date: Commodity Total:	17-AUG-2004 24-AUG-2004 270.00		Transaction Date: Comments: Accounting Total:	17-AUG-2004 BLANKET PO FOR MU 270.00	ī z
Vendor:	N00401920 Copy	tronics Inc			
Address Code:	PO Seque	ence Number:	1		
Street Line 1:	2461 Rolac Kd				
Street Line 2			-		
City:					
itate or Province: Nation:	FL Zip or Po	ostal Code: 3220	7		
elephone:	904 7315100	Extension			
ax Number:	904 7313225	Extension:			
ontact:	Rich Jonas	Extension:			

7. Perform a **Next Block** function to go to the Requisition Inquiry: Commodity/Accounting block. View all desired information on this block.

	R0002000							
der Dote:	17-AUG-2004		-			-		R
livery Date:	Jate: 24-AUG-2004				17-AUG-20	00-4	·	d
							All Aller Aller	
							Ne filteral gain	construction.
m 1 of		U/M T	ax Group	Quanti	ty	Unit Price		
	8 8	E A			1 X	270.0	1000	
ammodity							Extended:	270 00
	0 Day Market	Description					Discount:	.00
	maintenance	Contract-Service	,		1. There is	office for a	Additional:	
			-1		2 Carnet		lax:	!
					Street 1		Climmodity Line Total:	270.00
					a secola			
A data and a state of the second states	Contraction of the second	a marine and some a		Sector and				
						the second statement	and the second second second second second second	
PAL		Same	11 . <del>-</del>		 	<		USD
PAL								A CONTRACT OF A
PAL					1.1.1.20	(1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,1,	Extended	220.00
PAL 1 Year Index	Fund O	500			1 1 1 Sec	$\{[0,1],I^{(1)},I^{(1)}\}$	Extended: Discount	270.00
Year Index	Fund O	rgn Acct	Prog	Actv	Locn	Proj	Extended: Discount: Additional:	270 D0 00
Year Index	Fund O	rgn Acct	Prog	Actv	Lucn	Proj	Extended: Discount: Additional: Tax:	270.00 00 00
Year Index	Fund O	rgn Acct	Prog	Actv	Locn	Proj	Extended: Discount: Additional: Tox:	270.00 00 00 00

## 8. Select **Commodity Supplemental Information** from the Options menu on the Menu bar.

The Commodity Supplemental Information screen displays additional information regarding the selected commodity.

## 9. View all desired information on this block.

elivery Date:	G1-4A7-2005
ext Usage:	Standard
hip To:	CP.
ddress:	Alabama ABM Central Receiving
uilding:	
loor:	and an experimentary of the second
ontact:	Timothy Lemons
ssigned Buyer:	
id Assigned:	
ssigned to Purchase Order	
urchase Order Item Numb	er:

10. Click the **Close icon** to close this window.

11. Click the Exit icon.

# **Querying Document History**

The Document History Form (FOIDOCH) displays the processing history of purchasing and payment documents (i.e. from requisition number through check number for non P-card purchases). It identifies related documents and provides the status (i.e. approved, completed, cancelled, etc.) of all documents that are in the processing stream for the document that is being queried.

# Types of documents that can be viewed in the Document History Form (FOIDOCH):

	Doc Type List
СНК	Check Disbursement
FAA	Fixed Assets Accounting Adjustments
FAS	Fixed Assets Asset Tag
INV	Invoice
PO	Purchase Order
RCV	Receiving Documents
REQ	Requisition
RTN	Returns

	Document Statuses
A	Approved
С	Completed
F	Final Reconciliation
Р	Paid
R	Receipt Required
S	Suspended
0	Open
Х	Cancelled
V	Void
Н	Hold
Т	Tagged Permanently

#### To query document history:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Access the Document History Form (FOIDOCH).
- 3. Enter the type of document in the Document Type field (see Document Type chart on p.63)

0	ocument Type:					Document Code	. [	5
	Regulsition		<b>B</b> id	Status	Purchase Order	Status	155ues	Star
		Status	Check	Status	Return	Status	Receiver	Stati
1	Asset Tag	Status	Asset Adjustmen	it Status		F .		
1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.		<u> </u>		Ē				

4. Press **<Tab>** to go to the Document Code field and enter a document number or click Search icon to select one from Requisition Validation (FPIDTYP) list.



5. Perform a **Next Block** function. The cursor will go to the area that corresponds with the type of document that you are querying. For example, if you were querying the document history of a particular requisition, you will be placed in the Requisition block. The active block will be highlighted in blue.

ument History	RED C Seguisting				Document Code:	R.0001525	R.
ument type:		Bid	Status	Purchase Order	Status	issues	Status
Requisition	Status		_		17	11.11.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.	<u>_</u>
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Contraction in the state				210 0 00 1 000 0000	(T) (1)		
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	-						3
	1				~		
state of the state of the state of the	-			i and in the second sec			-
	-			Andres in print of the			1
	1	1					1
	100		F -		-		
		1	1.00				

6. Click on the document number in the appropriate area for which you wish to get more information.



- 7. Select Requisition Info [FPIREQN] from the Options menu on the Menu bar.
- 8. When finished viewing the history, click the Exit icon.

# Querying Completed and Approved Purchase/Blanket/Change Orders

You can query the orders you created from the Purchase/Blanket/Change Order Inquiry Form (FPIPURR) at any stage of completion, even those that have yet to be completed.

### To query completed and approved purchase/blanket/change orders:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Access the Purchase/Blanket Order Inquiry Form (FPIPURR).
- 3 Enter the purchase order number in the Purchase Order field.

Purchase Order:	P0000003 -	

If the purchase order number is unknown, click the Search icon on the FPIPURR form to search for correct purchase order from the Purchase Order Validation form (FPIPOHD).

You can search for a blanket purchase order in the same manner as a regular purchase order, except put the blanket order number in the Blanket Order number field.

4. Enter change number in the Change Sequence Number field if you want to review a specific change order. If not leave the field blank.

Purchase Order.	F0000003	Blanket Order:	 Change Sequence Number:

#### Perform a Next Block function. 5.

-

Purchase Order. Order Dote: Delivery Date. Cuminodity Tutal:	20000000 28-240-2004 30-2605 73-80	Blanket Order: Transaction Date: Comments: Accounting Total:	(4-AUG-2004 73.80	Change Sequence Number :
Print Date:	5			
Activity Date	05-40G-2004	Cancel Date: User 1D:	1400006052	Closed Date:
Cancel Reason:				Kegula)
Requisition Docum Buyer Cude: Nanket Order Term	ent Text; ination Date;	KLā Katinyn	Bomar	
Requisition Daturn Juyer Cude: Nanket Order Term	ent Text;	KLB Kathryn	Bomar	-
Requisition Difurni Suver Cude: Nanket Order Term urchase Order Cop	ent Text; ination Date; ied From;	KLB Kathryn	Bomar	-
Requisition Diction Auver Code: Nanket Order Term urchase Order Coo right:	ent Text; Ination Date; ind from;	KLA Kathryn Edwysa	Boms/	

Information entered on the order is displayed on this block, including the Order Date, Trans Date, Delivery Date, Comment fields and Document totals. You can also see whether the document was completed, approved, printed, cancelled or closed and the dates those activities occurred. The Activity Date and UserID will appear from the last time someone updated the document. If this document was cancelled, you can review the Cancel Reason code that was entered.

You can additionally see what the status of the NSF Checking, Deferred Editing and Purchase Order Copied From fields were on

6. Perform a Next Block function to access the Requestor/Delivery Information block to review the Requester and Ship To address. Spingerum + Fran ........

nier Date in Garantie Date in Suspence D	le qui sitani	i lu					Contraction of the
Line of the set	order Date: Helvery Date: Milliodos Jacob		ा हि	Comments:	-ML- 21/5	In Suspense	
Vector         Vector         Description           unit unit         inter unit         Extension         Extension           unit         Extension         Extension <td></td> <td></td> <td>i.t.vu</td> <td>Accounting Total:</td> <td>tua an</td> <td>Document Lear</td> <td></td>			i.t.vu	Accounting Total:	tua an	Document Lear	
Vendor (hormeson     Commodity/Accounting)     Brianony/Completion       operation     taxes     Cont		and the second second				- Document Level Accounting	
and and the species of the species o			Vendor Inforr	Commodity A	converting Bai	nonv/Completion	
Entension:     Entension:       # 10:     not       # 10:     not       ext Cone 1	Universion	tana ina. Tana	- January - P	ng na aring	LOA: ~	<b>A</b> 146.57 <b>A</b> 3.69 <b>B</b> 3.55	
ie En . Franziski - Ministration - Ministratio - Ministration - Ministration - Ministration - Ministration - M	inne.		Extens	(00)	Ernail: Fax:	Extension	
er (Lune 2)	np to Cetture j	na 💡					
Allen Terres	rent Line 2	- 40 M - 12 M - 12 M - 12	Deel				
Te NY Province - L ZH-or Postal Code: 2021) unit United Interest Panetre DRONG Nin (S. 10) - Fatterson Act. Jeffres Fictorson United Fictorson	ndiriq v		Floor				
pRone ====================================	te or Province:	n Zi	n or Postal Cr	ale: stari			
ation for the term type on	phone lact.	No. 12 Mars	Extens	0002			
	alam In-	b Gran Pargar and					

- 7. If document text exists (make note of Document Text checkbox), you can view the information by selecting **Document Text** from the Options menu on the Menu bar. This will display the Procurement Text Entry Form (FOAPOXT).
- 8. Perform a Next Block function to view current Vendor information.

Purchase Orden Order Date: Delivery Date:	28-JUN-200-2 28-JUN-200-2 30-JUN-2005	Blanket Order: Transaction Date: Comments:	04.403.200		Change Sequence Number: 1
Commodity Tatal:	73.60	Accounting Total:	7:	3.8u	
Vendue. Audress Code	NOO-OUISI Brink	since ence Number: 1			
treet Line 1:	10 w 2nd St				
treet Line 2					
treet Line 3:					
Titu:	lackspoxille				
tate or Province	FL ZID OF	Postal Code: 32206			
ation					
aloubone:	190a (153473)	Extension: 1223	-		
ereprinne.	1904 3534662	Extension	-		
an inclusion	Dean white		Email		
, unit a c c				1	
Discount	US Net . 40 Days	and the second second second			
OB Code	6 See Body of P.	urchase Order			
AN GRUUP	1			Construction data and	
Inss Code:	S Service Apreeme	ent		10 X #1 10 R	

#### Timportant Warning!

Retrieving a change order that has been posted only displays changes that were made to the items. Any items that were not changed will not display. You can see the amount the change order has been changed by, whereas when you entered the change order, you entered the amount you wanted the purchase order to be charged to. Make a note of this so you are aware of the differences in display.

9. Select **Commodity/Accounting Information** from the Options menu on the Menu bar to navigate to the Commodity/Accounting window.



This window shows the commodity and accounting information entered on any of the three order creation blocks. This window also includes the Original Commodity Description pop-up window, which allows you to see the commodity description as defined for the code, even if the description has been overwritten.

10. Select Commodity Supplemental Information from Options Menu on the Menu bar.

it_	Options	Block	ļtem	Record	Query	
1	Docume	nt Infor	mation	i.		
	Request	onDeliv	ery Inf	ormation		
hε	⊻endor Ir	nformat	เอก			In
a	Commod	tity Sup	pleme	ntal Inform	nation	He
5	0	and have a		N.	induon -	

11. Click **Close button** to close this window.

Delivery Date:	30-JUN-2005	
Text Usage:	Standard	
Ship To:	SEEBLW	
Address:	See Below	
Building: Contact:		Floor:
	7	Close

12. Click the Exit icon to exit the form.

## Querying Vendor Detail History

The purpose of this section is to explain the day-to-day or operational procedures for retreiving Vendor Detail History at Alabama A&M University. This process can also be used to retrieve invoice information by vendor and by the vendor's invoice num-

If the vendor consolidation (FACICON) option has been used for multiple invoices, then there can be several vendor invoices per Banner Finance Accounts Payable document (or 'I' number). The Vendor Detail History Form (FAIVNDH) identifies all vendor invoices associated with the queried vendor.

## To query vendor detail history:

- 1. Login to Internet Native Banner (Chapter 1).
- 2. Access the Vendor Detail History Form (FAIVNDH) to retrieve an existing vendor. Press **<Enter>.**

Yendor: Fiscal Year: 07								Selection: All	1.	L3
<u></u>			<u>ر منعث</u> ز	Indicato Credit	rs Open/	Charal	Vendor	Due Date	Check	Check
Vendor Invoice	Invaice	Approval	VIC	Memo	Pato	Cancer	Invoice Ame	Due Date	Date	Number
			<u></u>	<i>i</i> *	100					
				(see a		in a			of Sectors State and A 1999	
	i	-	-							

3. Do you know the Banner assigned Vendor ID number for the vendor that you want to query?

If <u>yes</u>, enter the vendor number in the Vendor field, press  $\langle Tab \rangle$  and go to step 8. If <u>no</u>, go to the next step. 4. Click the search icon next to the Vendor field to search for the desired vendor.



5. Click on Entity Name/ID Search (FTIIDEN) from the Option List to search for the desired vendor.



6. Click on the Last Name field. Enter in a portion of the vendor name, using mixed case with the wild card "%" before and after as necessary. Press F8 to execute the search.

a <sup>21</sup> a <sup>21</sup> 0 <sup>21</sup> 0 - 5, 4	; sadap misek 2	$z_{i}(\tilde{r}_{i}, \tilde{q}_{i})$ :	Shaa latin							
	an Burles - Children and A		a contract of the second second second				3 - "B" 1			
and the second			Sec. 20 (14)	$e^{i\omega} = e^{-i\omega t} e^{-i\omega t}$	and sectors of					
5		and the second secon	<u>an in the second</u>	Sec. Sugar	and and a				ю.,	
) Number	Last Name	Circle N.	Middle	Entity	Change					
	Never of Landster	rinst Name	Name	Ind	Ind	V	F	A		
	Dellisel		_							
					100		-	~~~~		
	the second se	-			-	100	11 M M			
				2	_					
	the second se	-								
		1		_						
	and the second sec		7							
						-		-		
Number of Street Street										

You can also perform a query for the ID Number, First Name, Middle Name, Entity Ind, Change Ind, V.F.A.G. P. and Type fields.

7. Scroll down, if necessary, to find the correct vendor desired for detail history.

2.4 A set of the se			The subject of the beauty of the									
- 11 J.	e e e e e e e e e e e e e e e e e e e	1 - 1 - 1 - 1	an e se al ca	en aj casi	1.111-11-1		$\alpha_{i},\alpha_{i}$					
ID Number	Last Name	First Name	Middle Name	Entity Ind	Change Ind	v	F	А	с	- р	Туре	
N00401738	Dell Marketing LP		[	c		.Ύ	11	N	N	N	<u></u>	
N00134603	Della Crosse	Casey	Reiph	P	Γ	Y	N	N	N	N		
N00020421	Dellacrosse	Anthony	Steph	P		Y	14	N	N	N		
N00185986	Delledonne	Jéné	Susan	P		T	N	IN	N	IN I		
N00403864	Oellie	Hannah		P		Y	11	'N	111	in		
N00440099	Dellinger	Christian	1	P	1	17	IN.	N	N	N	·	
N00036603	Dellinger	Lindsay	Ngelle	P		Y	N	N.	N.	N		
N00072246	O'Dell	Devid	Georg	P		Y	N	164	14	N	3 - C - S-	
N00119684	o'Dell	Tiffany	Lynne	P	[***	197	N	il.	Pv.	-N	-	
				10	1	13		1.1	100			

- 8. Double-click on the vendor name desired.
- 9. Perform a Next Block function.

Vendor: NOO4i Fiscal Year: .07	0eil /	Nerketing LP	-			Selection:					
Vendor Invoice		Approval	vic	Indicato Credit Memo	ors Open/ Paid	Cancel	Vendor Invoice A	mt	Due Date	Check Date	Check Numbe
TOTAL COLOR	10084201	17	N	N	P	N	1 1 1 1 1 1 2 1	56.98	03-JUL-2006	05-JUL-2006	1000853
NU 5674141	10084203	Ŷ	N	N	p	N	3,	347.25	03-JUL-2006	05-JUL-2006	1000853
1115670	10084204	<u>7</u>	N	N	0	Y	(	.01	03-300-2006		
00000	10034501	Y	N	N	P	N		489.00	05-JUL-2006	07-JUL-2006	1000899
10012001	10.084507	Y	N	N	19	IN	1,	\$99.58	105-JUL-2006	05-JUL-2006	000853
	10084503	- Y	IN	N	P	N		199.11	05-101-2006	05-JUL-2006	1000853
	10084966	Ŷ	ira	11	P	IN	29.	470.90	07-JUL-2006	07. JUL - 200e	1000899
1081-03UC	10054957	-	1	N	P	N		960.35	07.JUL-2006	07-JUL-2006	1000899
4/463364	10085053	1 7	N	N	P	N	ó,	195.70	07-JUL-2006	07-JUL-2006	1000099
158679775	10003022	-	N	N	P	N	. 1,	238.35	07-JUL-2006	07-JUL-2006	1000899
52019129	10033034	5			0	N		236 00	07-101-2006	07-JUL-2006	1000899
56449500	10085055	-	-	-	-		1	859 46	07-14h-2006	07-101-2006	1000899
155924775	10085056	Y.		N	<u> </u>	-		037.40	07 100 2000	07 JUL 2000	
V-5922296	10065058	(Y	11	N	P	N		205.98	07-JUL-2006	07-301-2006	1000899

All invoices associated with the selected vendor will display. The VIC Ind (indicator) on the FAIVNDH form indicates a Y (Yes) if there are multiple vendor invoices associated with the SCT Banner invoice.

10. Click the Exit icon to exit the form.

7. Scroll down, if necessary, to find the correct vendor desired for detail history.

5 7 F		Maneral as ing an				headle the s					
	n and the second se	- Norris - Alexandria	for many like a statement								
D Number	Last Name	First Name	Middle Name	Entity	Change Ind	v	<u>ــــــــــــــــــــــــــــــــــــ</u>	A	<u></u>	<u>р</u>	Type
V00401738	Dell Markening LP					17	67		-		
00134503	Della Crosse	Cestry	Dials in	-	-	-	14	12	N.	N	
00020921	Dellacrosse	hothopy	i-anpit	-		Y	N	N -	N.	N	
00185968	Delledonne		steph	2	_	N	N	N	N	N	-
00403864	Delle		Susan	<u> </u>		-Y	12	:10	10	N	-
00440099	Delligner			P	_	Y	N	N	10	14	8
00036603	Dellinger	Christian	-	p	_	N.	N	10	N	N	
00072296	0.0-11	Lindsey	Noclis	P	-	. V	N	- 150	13	IV.	
00119554	0.0-1	Devid	Georg	P		٢	14	13	N	N	
0.0553614		Titting	Lynne	2		Y	. 13	N	IN	N	
	Sylvan Dell Publishing			C	5	Y	IN	te	N	TN .	
						10.00	5 m		-		

- 8. Double-click on the vendor name desired.
- 9. Perform a Next Block function.

Vendor: NOGED1735 - Dell Marketing (5 Fiscal Year: 07 - 2							Selection					
Vendor Invoice	Invoice	Approval	VIC	Credit Memo	Ors Open/ Paid	Cancel	Vendor Invoice Amt	Dur Date	Check	Check		
CHICK COLOR	10084301	1 17	2.2			· · · · ·		000 0010	Date	· • [		
ce 5672121	10054202	1 7	N	13	12	N	56.99	03-JUL-2006	05-JUL-2006	10008535		
47:15570	1005470:		N	N	12	N	3,347.28	03-JUL-2006	05-JUL-2006	10000535		
460328D1	10066501		-	in	0	2	.01	03-JUL-2006	1			
46532136	10084501		N	*N	.P	N	489.00	05-JUL-2006	07-JUL-2006	10009996		
47305408	10054503	.*	14	N	. D	N	1,599.90	05-301-2006	05-JUL-2006	10008535		
9652:506	10051503		in	N	1p	IN:	199.11	105-JUL-2006	05-JUL-2006	IDDOBSUS		
47463369	10024955	Ě.	N	N	P	N	29,470.90	07-JUL-2006	07-301-2006	10008996		
58579775	10052957	17	N	1/1	P	N	960.35	07-JUL-2006	07-301-2006	100008996		
52018120	10025053	¥	14	N	2	N	6.195.70	07-JUL-2006	07-JUL-2006	10008996		
6-144500	10055054	Y	'N	in a	P	N	1,235.35	07-301-2006	07-JUL-2006	10008996		
6024220	10085055	Y	N	N	P	N	238.00	07-JUL-2006	07-301-2006	10003996		
5333394	10085055	· *	N	2	1p	N	1,859.46	07-JUL-2005	07-101-2006	10004595		
224232AP	10055058	17	N	10	2	N	265.99	07.111.200+	02 200 2000	10000000		

All invoices associated with the selected vendor will display. The VIC Ind (indicator) on the FAIVNDH form indicates a Y (Yes) if there are multiple vendor invoices associated with the SCT Banner invoice.

10. Click the Exit icon to exit the form.

The Purchasing Department wish to thank the following for their support in gathering and supporting the information assembled in this document:

Delores Hudson, *Purchasing Director* Kourtney Greene, *Buyer* Vindetta Medlock, *Buyer* 

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