

HOW TO CREATE A REQUISITION IN SELF SERVICE

Banner 9

ACCESSING BANNER 9 SELF-SERVICE

The screenshot shows the Washburn University website's Employee page. The left sidebar contains navigation links: Home, News & Events, University Services, Student Academics, Student Life, Financial Services, Finance, MyCourses, Employee, and Sites. The main content area is titled "Employee" and includes a breadcrumb trail: Home Community / Home / Employee. The page is divided into two columns. The left column features the "Washburn University Mission Statement" with a small image of a building. The right column is titled "Finance Information" and contains the following text: "For those with Finance role access", "**NEW**", "Banner 9 Self-Service", "Finance Dashboard (Budget Query, Requisitions, Journals, etc.)", and "Access Finance Self-Service Main Menu". Below this text is a table with two columns: "Task" and "Instructions". The table lists tasks such as "Budget Queries", "Encumbrance Query", "Requisition", "Approve Documents", and "View Documents", each with corresponding instructions. At the bottom of the Finance Information section, there are links for "Finance Glossary of Terms", "Finance Issue Workarounds", and "Finance Lookup Tips". The page footer indicates "For all Employees".

Washburn University
Mission Statement

Washburn University enriches the lives of students by providing opportunities for them to develop and to realize their intellectual, academic, and professional potential, leading to becoming productive and responsible citizens. We are committed to excellence in teaching, scholarly work, quality academic and professional programs, and high levels of faculty-student interaction. We develop and engage in relationships to enhance educational experiences and community. (Approved by the Washburn Board of Regents 4/9/10)

Student Employment Information

Finance Information

For those with Finance role access

****NEW****

Banner 9 Self-Service

Finance Dashboard
(Budget Query, Requisitions, Journals, etc.)

[Access Finance Self-Service Main Menu](#)

Task	Instructions
Budget Queries	How to perform a Budget Query How to perform Payroll Expense Detail Query
Encumbrance Query	How to perform an Encumbrance Query
Requisition	How to Create a Requisition How to View a Requisition Requisition Video
Approve Documents	How to Approve Documents
View Documents	


Finance Glossary of Terms
Finance Issue Workarounds
Finance Lookup Tips


For all Employees


- Under “Finance Information”
- Click on “Finance Dashboard”
- This will take you to create your requisition


GETTING STARTED

My Finance

 Hello Jody,
Create, edit and approve transactions and view financial information for department / organization.

 **My Finance Query**
Create, view and share budget availability, encumbrance and payroll queries.

 **My Journals**
Create and view draft, pending and completed journals and supporting documentation.

 **My Requisitions**
Create and view draft, pending and completed requisitions and supporting documentation.

Click on My Finance Query to:

- Check the approval status of a requisition
- If it has been turned into a PO
- View a PDF of the requisition

Click on My Requisition to:

- Create
- View a draft
 - Pending
 - Completed requisitions
 - Supporting documentation

MY REQUISITION

My Finance • My Requisitions

My Requisitions [Create Requisition](#)

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 3				
R0041111	08/24/2018	\$20.00	Medco Supply Inc	Draft
R0040244	02/14/2018	\$0.00		Draft
View More				
Pending Requisitions 0				
Completed Requisitions 142				
R0041349	10/24/2018	\$900.00	Patio Pool & Fireside	Assigned to Buyer
R0041331	10/23/2018	\$18,146.00	McElroy's Inc	Assigned to Buyer
View More				

- On this screen you can see your drafts, pending, and completed requisitions.
- To create a new requisition click on the “Create Requisition” in blue.

Create Requisition

1 Requestor Information

Requestor *

Jody Johnson

Transaction Date *

02/21/2019

Delivery Date *

MM/DD/YYYY

Requestor Email

Enter Requestor Email

Accounting Type : **Document level**

Requisition Comments

Public Comment

Enter comments for the requisition

Private Comment

Enter comments for the requisition

2 Vendor Information

3 Add Item & Accounting

Chart *

W Washburn University

Organization *

Ship To Location *

Choose Ship To Location

Attention To *

Enter Name

Tax Group

Choose Tax Group

Requisition Summary

Save as draft

- Can use the “tab” key to move through boxes
- Make sure to click “NEXT” at bottom of screen

Add details and click Next to build this summary view.

- Public comment = Document text
- Put information about quote: vendor, quote number, date, by who in this box.

Create Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requestor *

Jody Johnson

Transaction Date *

MM/dd/yyyy



Delivery Date *

MM/dd/yyyy



Requestor Email

Enter Requestor Email

Accounting Type : Document level

Requisition Comments

Document Text

Enter comments for the requisition

Private Comment

Enter comments for the requisition

Chart *

W Washburn University



Organization *

440020 Purchasing



Ship To Location *

Choose Ship To Location



Attention To *

Enter Name

Tax Group

Choose Tax Group



On this screen you will enter the requestor information.

- Requestor
- Transaction date
- Delivery date
- Requestor email
- Public comment will be at the top of the PO
- Private comment information for Purchasing
- Chart
- Organization
- Ship to location
- Attention to
- You do have the option to save as a draft if needed in upper right hand corner.
- Click "NEXT" in bottom right corner to move to next screen

ADD VENDOR INFORMATION

My Finance • My Requisitions • R0041442

R0041442

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Choose vendor for me

Vendor

Choose Vendor x

Discount

30 Net 30 Days x

Currency

USD US Dollars x

Requisition Summary

Save as draft

Requisition Number

R0041442

- You can look up the Vendor name using a wild card %vendor% or use the WIN number.
- Once you have found your vendor click on "NEXT".

Above you will see the requisition number.

Back

Next

View as PDF

Submit Requisition

ENTERING ITEMS

R0041442

 Attachments  Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Requisition Summary

Save as draft

Requisition Number

R0041442

- Required now is a **Commodity Code** for each item being ordered

ADDING ITEMS TO REQUISITION

My Finance • My Requisitions • R0041442

R0041442

Attachments Delete Requisition

1 Requestor Information

Enter Commodity Code

Item Code (710750000)

Other Supplies Materials and Parts

Unit Of Measure*

EACH (EA)

Tax Group*

Choose Tax Group

Quantity*

1.00

Unit Price*

1,002.0000

(Quantity) X (Unit Price)

USD 1,002.00

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Commodity Item Total

USD 1,002.00

3 Add Item & Account

Enter a complete description and part numbers from the quote.

Commodity Comment

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

Back

Save

Requisition Summary

Save as draft

Requisition Number

R0041442

- Enter Commodity Code
- Unit of Measure
- Quantity
- Price
- Public Comment is text to describe the item being ordered
- Click "Save"

View as PDF

Submit Requisition

CONTINUE ADDING ITEMS OR ADD ACCOUNTING INFORMATION

My Finance • My Requisitions • R0041442

R0041442

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

Other Supplies Materials and Parts (7107500000)	1,002.00
Quantity 1.00 @ 1,002.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

To add additional items click “Add item & Accounting” continue adding until ALL items from quote are listed on the requisition.

Once all items are entered click on “Add Accounting”

Attachments Delete Requisition

Requisition Summary Save as draft

Requisition Number R0041442

Commodities (1)

Other Supplies Materials and Parts (7107500000)	1,002.00
Quantity 1.00 @ 1,002.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Grand Total - All Commodities 1,002.00

Grand Total - All Accounting 0.00

Back Add Accounting View as PDF Submit Requisition

ACCOUNTING CODES (FOPALS)

My Finance • My Requisitions • R0041442

R0041442

Attachments Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number (R0041442)

Currency USD

Chart*

Index

Fund*

Organization*

Account*

Program*

Activity

Location

Project

Distribution Amount*

Distribution Percent*

Discount Amount

Additional Amount

Tax Amount

Distribution Total

1,002.00

Remaining

0.00

○ Fill in:

- Chart (W or K)
- Fund
- Organization
- Account
- Program
- And Activity, Location, Project as needed
- Click "Save"

Grand Total - All Commodities	1,002.00
Grand Total - All Accounting	0.00

DISTRIBUTION

My Finance • My Requisitions • R0041442

R0041442

Attachments Delete Requisition

3 Add Item & Accounting

Distribution Amount*

1,002.00

Distribution Percent*

100.00000000

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Distribution Total

1,002.00

Remaining

0.00

- Once you have added your accounting code you can chose if you want to distribute the amount to one accounting code or multiple.
- If multiple:
 - Click in Distribution Amount or Percent and type in the appropriate amount.
 - Click "Save"

Requisition Summary

Save as draft

Requisition Number R0041442

Commodities (1)

Other Supplies Materials and Parts (7107500000)	1,002.00
Quantity 1.00 @ 1,002.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Accounting Total 0.00

Commodity Total 1,002.00

Balanced 0%

Grand Total - All Commodities 1,002.00

Grand Total - All Accounting 0.00

DISTRIBUTION

Distribution Amount *

114.50

Distribution Percent *

50.00000000

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Distribution Total

114.50

Remaining

114.50

Split Accounting →

- Enter the amount or %
- Click “Split Accounting”
- Continue entering accounting codes till paid in full

DISTRIBUTION

On the right hand side of the screen you will see that 50% of the total has been met.

Requisition Number	R0041449
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546	
Commodities (2)	
Clothing and Uniforms (7100000000)	225.00
Quantity 150.00 @ 1.5000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Clothing and Uniforms (7100000000)	4.00
Funding	Amount
W-100000-440020-100350-10000	114.50
Accounting Total	114.50
Commodity Total	229.00
Balanced	50%
Grand Total - All Commodities	229.00
Grand Total - All Accounting	114.50
View as PDF	Submit Requisition

DISTRIBUTION

Requisition Number (R0041449)

Currency USD

Chart *

W Washburn Un... x v

Index

Choose Index x v

Fund *

Choose Fund x v

Organization *

440020 Purchasing x v

Account *

Choose Account x v

Program *

Choose Program x v

Activity

Choose Activity x v

Location

Choose Location x v

Project

Choose Project x v

Distribution Amount *

114.50

Distribution Percent *

50.00000000

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Distribution Total

114.50

Remaining

0.00

Back

DISTRIBUTION

Requisition Summary		Save as draft
Requisition Number	R0041449	
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546		
Commodities (2)		
Clothing and Uniforms (7100000000)	225.00	
Quantity 150.00 @ 1.5000	Discount 0.00	
Additional Charges 0.00	Tax 0.00	
Clothing and Uniforms (7100000000)	4.00	
Funding		100%
Grand Total - All Commodities	229.00	
Grand Total - All Accounting	229.00	

Checking the right side of your screen you should see the “Funding” is now at 100%.

DISTRIBUTION

Requisition Summary		Save as draft
Requisition Number	R0041449	
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546		
Commodities (2)		
Clothing and Uniforms (7100000000)	225.00	
Quantity 150.00 @ 1.5000	Discount 0.00	
Additional Charges 0.00	Tax 0.00	
Clothing and Uniforms (7100000000)	4.00	
Funding	Amount	
W-100000-440020-100350-10000	114.50	
W-100000-440020-293010-14000	114.50	
Grand Total - All Commodities	229.00	
Grand Total - All Accounting	229.00	

If you need to check the accounting codes that you are using click on “funding” and the accounting codes will show.

SUBMITTING REQUISITION

My Finance • My Requisitions • R0041442

R0041442 [Attachments](#) [Delete Requisition](#)

1 Requestor Information **2** Vendor Information **3** Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

Other Supplies Materials and Parts (7107500000)	1,002.00
Quantity 1.00 @ 1,002.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

- Once you have double checked your information on your requisition.
- Click “Submit requisition” the blue button in bottom right corner.

Requisition Summary [Save as draft](#)

Requisition Number R0041442

Commodities (1)

Other Supplies Materials and Parts (7107500000)	1,002.00
Quantity 1.00 @ 1,002.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

Grand Total - All Commodities 1,002.00

Grand Total - All Accounting 1,002.00

[Back](#) [View as PDF](#) [Submit Requisition](#)

COMPLETED REQUISITION

My Finance • My Requisitions

Requisition R0041442 completed successfully

My Requisitions [Create Requisition](#)

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 3				
R0041111	08/24/2018	\$20.00	Medco Supply Inc	Draft
R0040244	02/14/2018	\$0.00		Draft
View More				
Pending Requisitions 0				
Completed Requisitions 142				
R0041349	10/24/2018	\$900.00	Patio Pool & Fireside	Assigned to Buyer
R0041331	10/23/2018	\$18,146.00	McElroy's Inc	Assigned to Buyer
View More				

- In the top right hand corner you will see a green box showing your Requisition number and that it was completed successfully.

DRAFT, PENDING, OR COMPLETED REQUISITION

My Finance • My Requisitions

My Requisitions [Create Requisition](#)

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 4				
R0041442	02/21/2019	\$1,002.00		Draft
R0041111	08/24/2018	\$20.00	Medco Supply Inc	Draft
View More				
Pending Requisitions 0				
Completed Requisitions 142				
R0041349	10/24/2018	\$900.00	Patio Pool & Fireside	Assigned to Buyer
R0041331	10/23/2018	\$18,146.00	McElroy's Inc	Assigned to Buyer
View More				

- If you need to look up your requisition you can check
- Pending
- Draft if you have not completed the requisition.
- Completed
- Search by the search box

PURCHASING DEPARTMENT

- If you need any help please contact Purchasing or stop by Morgan Hall Rm 214.
 - Debi Feyh, Buyer x 2338, Deborah.feyh@Washburn.edu
 - Donna Landry, Assistant Buyer X 2333, donna.landry@washburn.edu