# HOW TO CREATE A REQUISITION IN SELF SERVICE

Banner 9

2019

# ACCESSING BANNER 9 SELF-SERVICE

### WASHBURN.

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**University Services** 

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Student Life

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Finance

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☆ Sites

### Employee

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## 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

v to perform a Budget Query v to perform Payroll Expense ail Query v to perform an Encumbrance ery
ail Query v to perform an Encumbrance
v to perform an Encumbrance
ery
v to Create a Requisition
v to View a Requisition
uisition Video
v to Approve 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 Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



### My Journals

Create and view draft, pending and completed journals and supporting documentation.

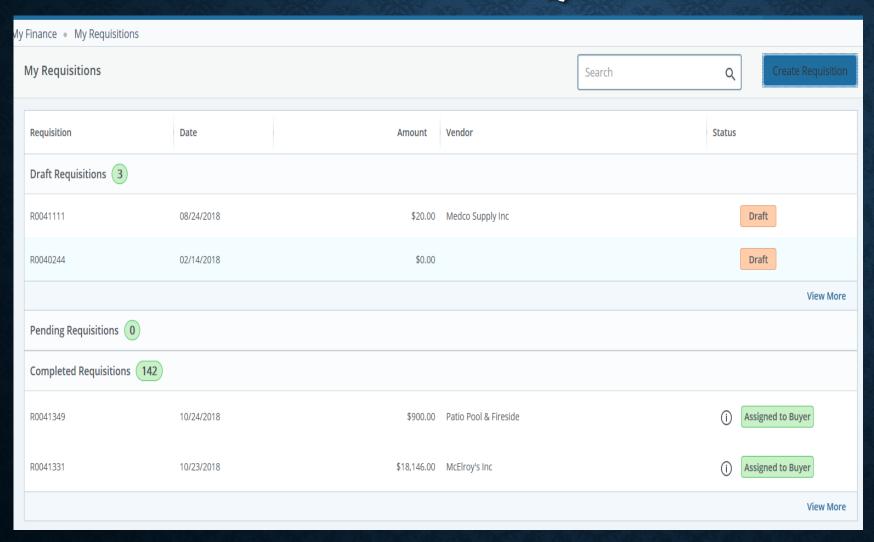
### Click on My Finance Query to:

- 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:

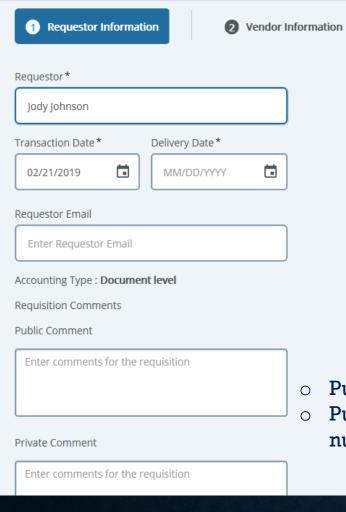
- o Create
- View a draft
  - o Pending
  - Completed requisitions
  - Supporting documentation

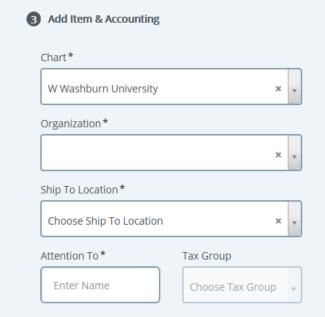
# MY REQUISITION



- 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**





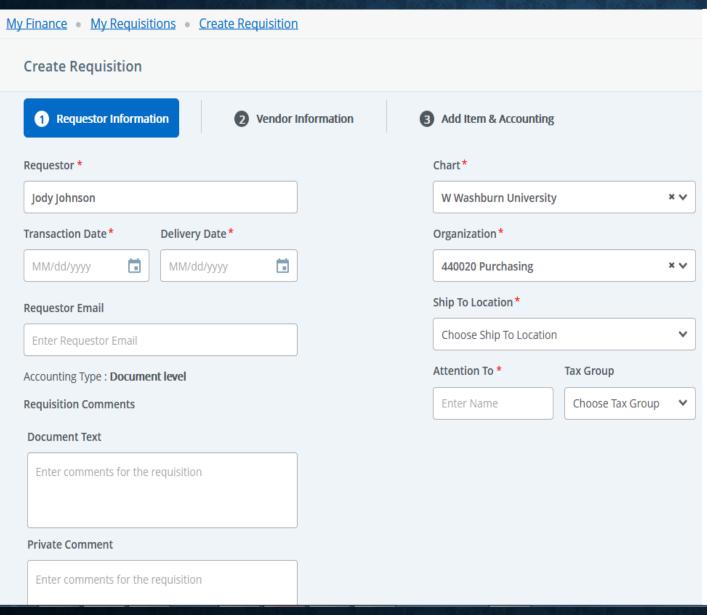
**Requisition Summary** 

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.

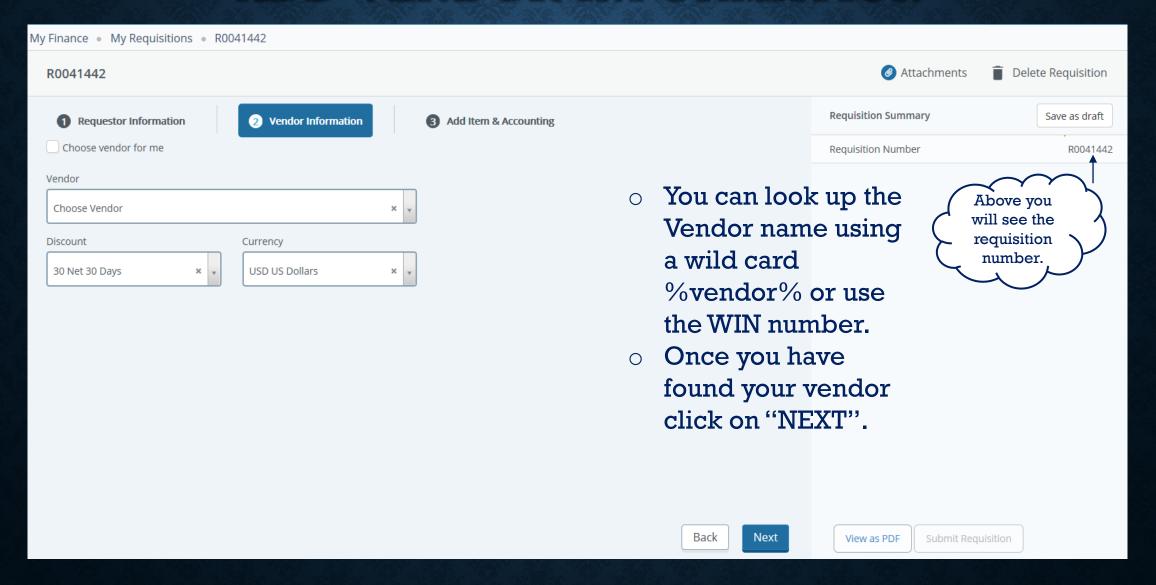
- Public comment = Document text
- Put information about quote: vendor, quote number, date, by who in this box.



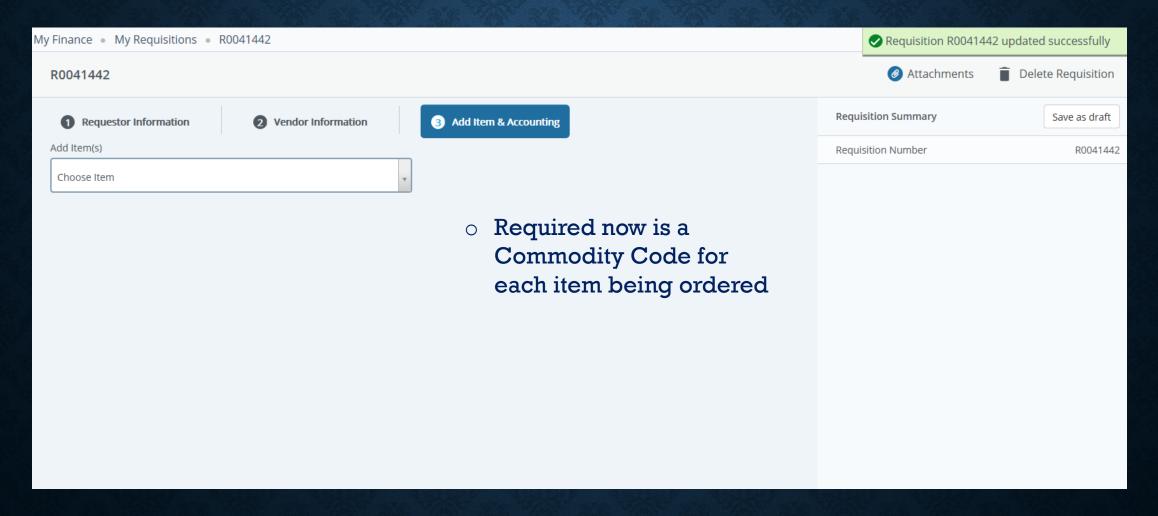
On this screen you will enter the requestor information.

- 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

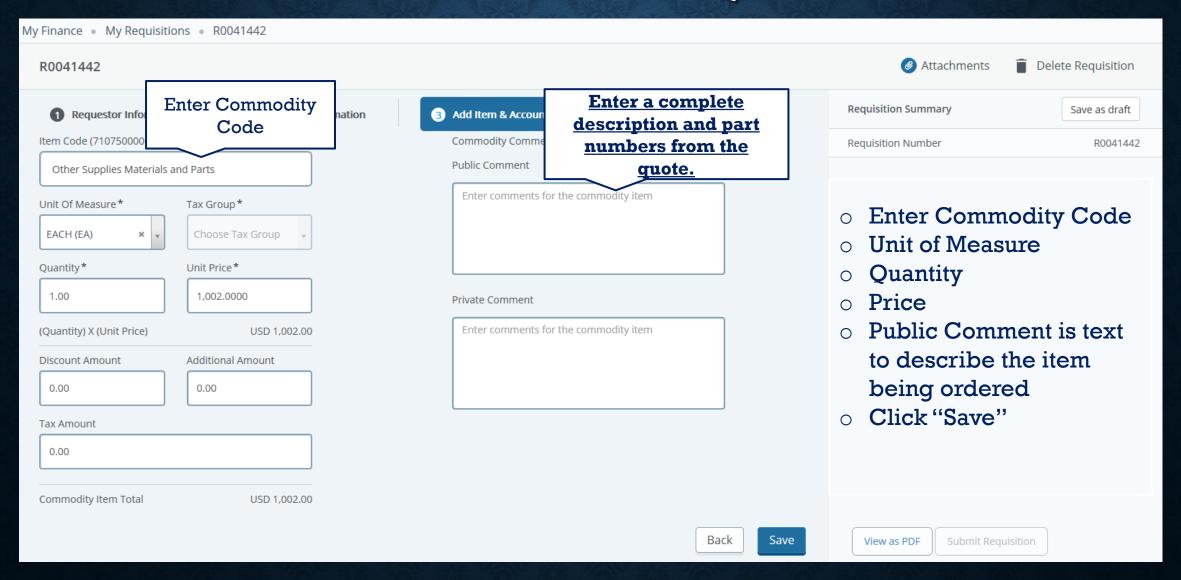
### ADD VENDOR INFORMATION



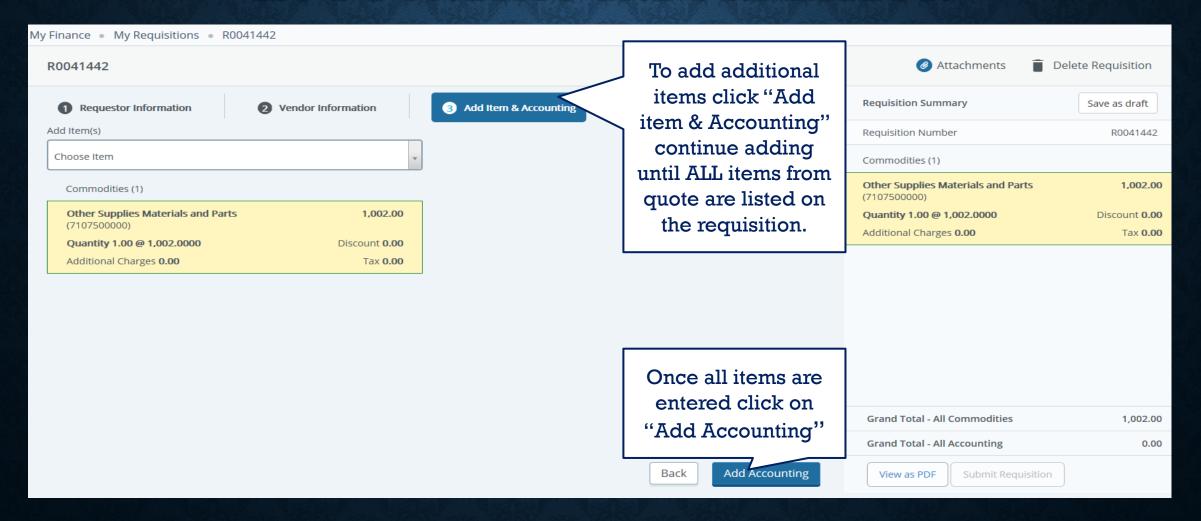
### **ENTERING ITEMS**



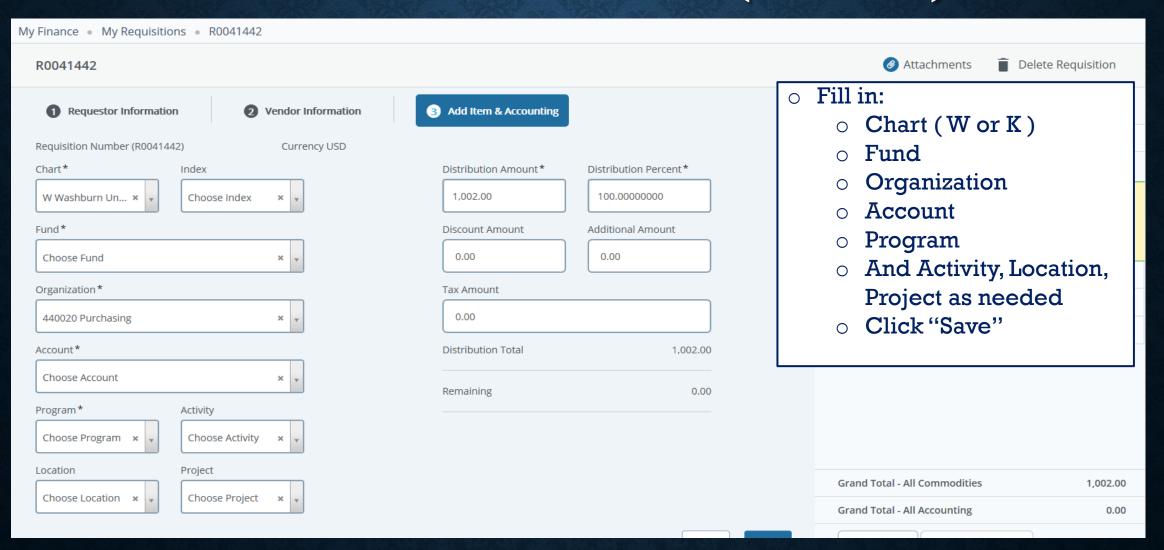
### ADDING ITEMS TO REQUISITION



# CONTINUE ADDING ITEMS OR ADD ACCOUNTING INFORMATION



# **ACCOUNTING CODES (FOPALS)**

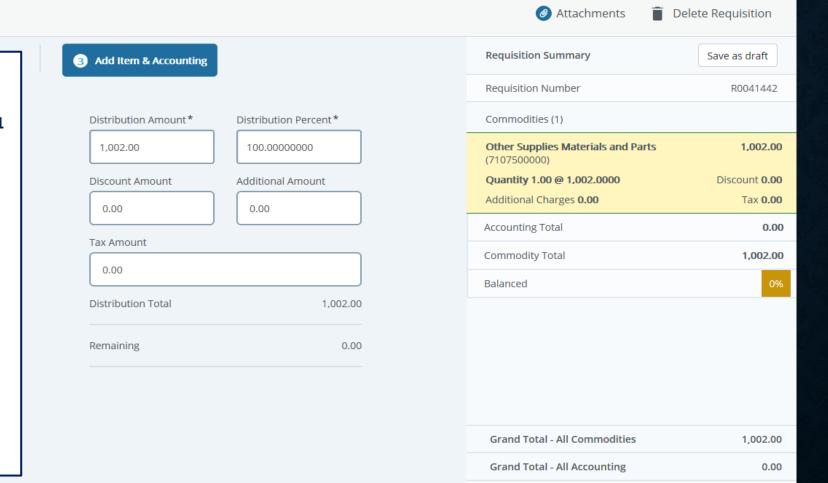


My Finance • My Requisitions • R0041442

R0041442

 Once you have added your accounting code you can chose if you want to distribute the amount to one accounting code or multiple.

- o If multiple:
  - Click in Distribution
     Amount or Percent
     and type in the
     appropriate amount.
  - o Click "Save"



Distribu	tion Amount*	_	Distribution Percer	nt*
114.5	0		50.00000000	
Discour	nt Amount		Additional Amount	t
0.00			0.00	
Tax Am	ount			
0.00				
Distribu	ition Total			114.50
Remain	ing			114.50
	Spli	t Accou	nting →	

- Enter the amount or %
- Olick "Split Accounting"
- Continue entering accounting codes till paid in full

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 <b>0.00</b>	
Additional Charges <b>0.00</b>	Tax <b>0.00</b>	
Clothing and Uniforms (7100000000)	4.00	П
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		

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

Dequisition Number (D00414	40)	Currongy LICD		
Requisition Number (R00414 Chart*	Index Choose Index	Currency USD	Distribution Amount *	Distribution Percent *
Fund*			Discount Amount	Additional Amount
Choose Fund		×	0.00	0.00
Organization *			Tax Amount	
440020 Purchasing		х	0.00	
Account*			Distribution Total	114.50
Choose Account		х	Remaining	0.00
Program*	Activity		Terraining	0.00
Choose Program * •	Choose Activity	X v		
Location	Project			
Choose Location ×	Choose Project	×		

Bac

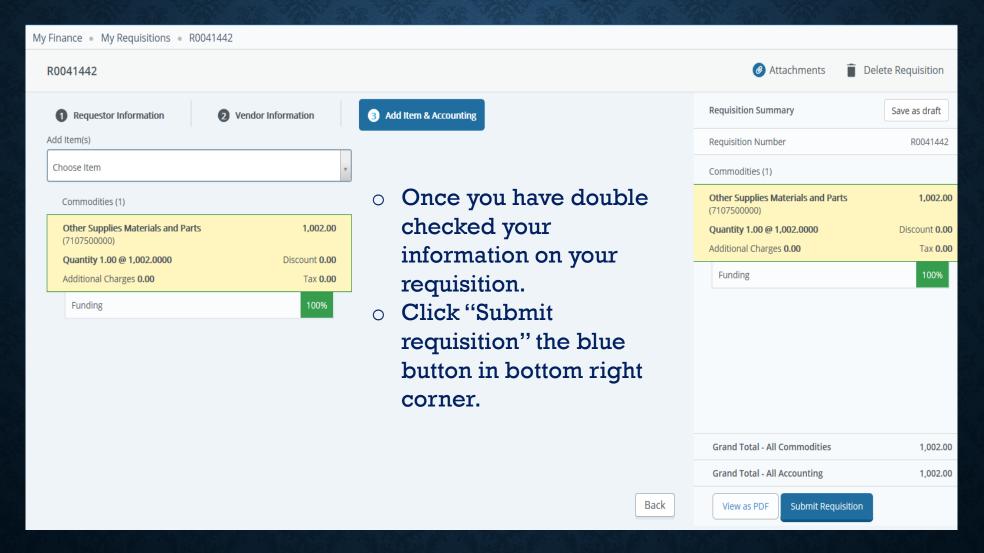
Requisition Summary	Save as draft
Requisition Number	R0041449
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546	
Commodities (2)	
Clothing and Uniforms (7100000000)	225.00
Quantity 150.00 @ 1.5000	Discount 0.00
Additional Charges <b>0.00</b>	Tax <b>0.00</b>
Clothing and Uniforms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

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

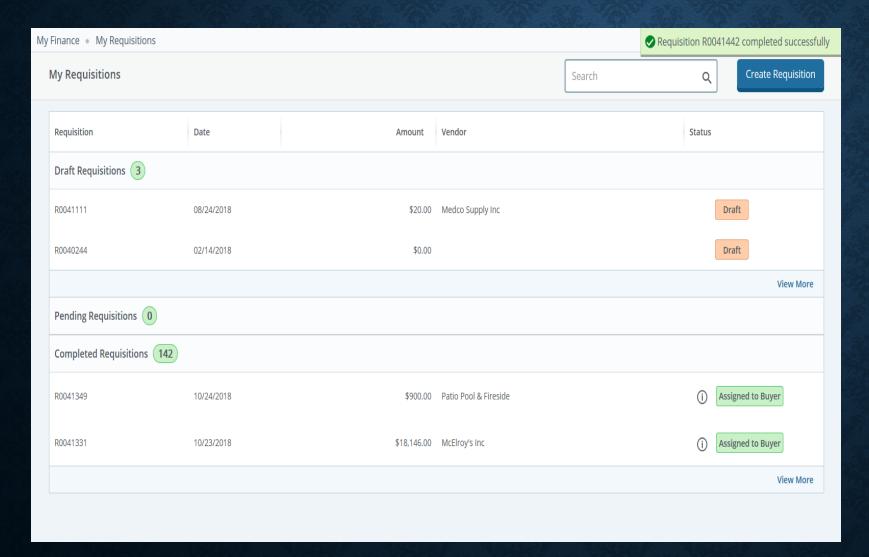
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Clothing and Uniforms (7100000000)	225.00
Quantity 150.00 @ 1.5000	Discount 0.00
Additional Charges <b>0.00</b>	Tax <b>0.00</b>
Additional Charges <b>0.00</b> Clothing and Uniforms (7100000000)	Tax <b>0.00</b> 4.00
Clothing and Uniforms (7100000000)	4.00
Clothing and Uniforms (7100000000)  Funding	4.00 Amount
Clothing and Uniforms (7100000000)  Funding  W-100000-440020-100350-10000	4.00 Amount 114.50

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

# SUBMITTING REQUISITION

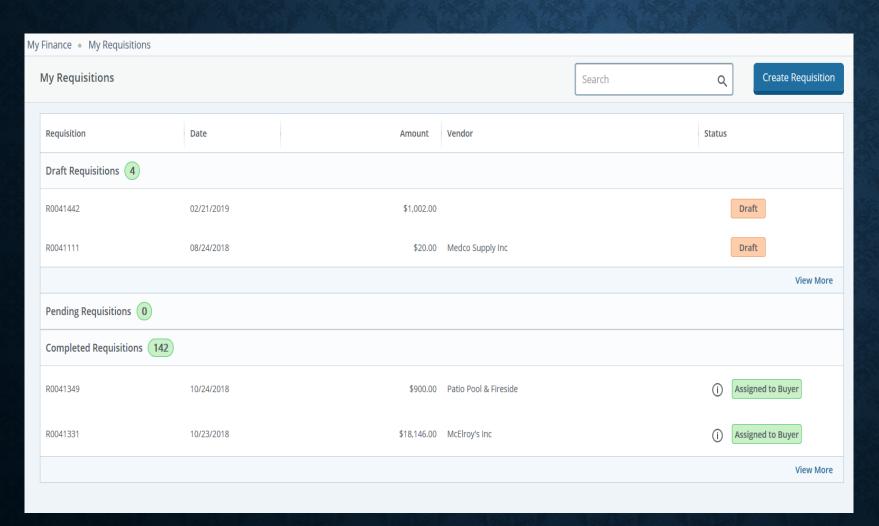


# COMPLETED REQUISITION



 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



- 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, Purchasing Specialist x 2333, <u>Deborah.feyh@Washburn.edu</u>
  - Kathy Pflaum, Director of Purchasing x 2312, Kathy.Pflaum@Washburn.edu