


HOW TO CREATE A REQUISITION IN SELF SERVICE

Banner 9

ACCESSING BANNER 9 SELF-SERVICE



Employee

[Home](#) [Community](#) / [Home](#) / [Employee](#)

Home

News & Events

University Services

Student Academics

Student Life

Financial Services

Finance


MyCourses

Employee

Sites

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

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

2 Vendor Information

3 Add Item & Accounting

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

Above you will see the requisition number.

- 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”.

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

ENTERING ITEMS

My Finance • My Requisitions • R0041442

✓ Requisition R0041442 updated successfully

R0041442

 Attachments  Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

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

Requisition Summary

Save as draft

Requisition Number

R0041442

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

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"

Back

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*

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*

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

○ 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

Requisition Summary

Save as draft

Requisition Number

R0041442

Commodities (1)

Other Supplies Materials and Parts 1,002.00
(7107500000)

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

- 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”

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 iJumber (R0041449J) Currency USD

Chart*	Index	Distribution Amount*	DistributionPercent*
W Washburn Un... It -,	Choose Index	1114.50	50.00000000

Fund*	Discount Amount	Additional Amount
Choose Fund	0.00	0.00

Organization*	Tax Amount
1440020 Purchasing	0.00

Account"	Distribution Total	114.50
Choose Account	Remaining	0.00

Program*	Activity
Choose Program	Choose Activity

Location	Project
Choose Location	Choose Project

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 (71000000000)	225.00	
Quantity 150.00 @ 1.5000	Discount 0.00	
Additional Charges 0.00	Tax 0.00	
Clothing and Uniforms (71000000000)	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%

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

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

COMPLETED REQUISITION

My Finance • My Requisitions

My Requisitions

Search

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

i

Assigned to Buyer

R0041331

10/23/2018

\$18,146.00

McElroy's Inc

i

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

GET IN TOUCH WITH THE PURCHASING OFFICE:

Purchasing Office

Morgan Hall Room 214

1700 SW College Ave.

Topeka, KS 66621

Phone & Email

Phone: 785.670.2333

Fax: 785.670.1114

purchasing@washburn.edu