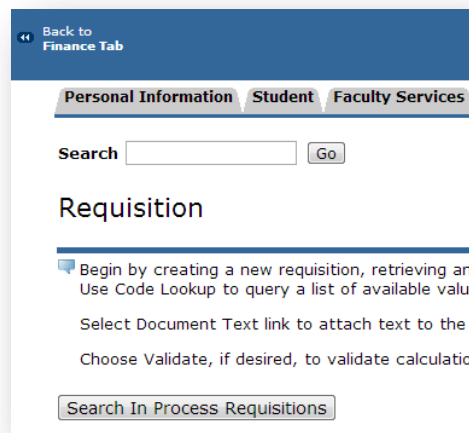# INITIATING A REQUISITION IN SELF SERVICE BANNER

Log into Self Service Banner in the manner you were initially shown.

- Click on the "Finance" tab.
- Click on "Requisition".

You should now be in the screen that has the word "REQUISITION" at the top left.

Unless you have the vendor number memorized or available, you will need to search for the vendor number.

- To do this; scroll to the bottom of the page to the "Code Lookup" section.
- In the box after/next to the word "Type", click on the blue arrow to see the drop down menu.
- Go to the bottom of the drop down menu and select the word VENDOR.

It will show the word VENDOR in the "Type" box now.

- Next put your cursor in the box after/next to the words "Title Criteria".
- Type in the vendor's name or 1 or 2 key words in the vendor's name. Do not space. Type in % where you would normally space as well as at the end of the last word.

% is a "wildcard" and will help the search.

- Press "EXECUTE QUERY".

Any vendors will appear under "Code lookup results" back up at the top of the screen.

Your vendor should be listed. In the event it's not in the database, it will not be listed and you must email Purchasing the vendor's information to be added to the database.

- Type the 9 digit Vendor ID # that appears for your desired vendor in the box after/next to the words "VENDOR ID".
- Then click on the "VENDOR VALIDATE" button and the vendor information will populate into your requisition.

- Add Ship Code 1900 – only if it doesn't default and asks for a Ship To code

- Scroll down to the section where you see "Item", Commodity Code", Commodity Description", etc.

You do not need to enter anything in the box in the "Commodity Code" column.

- Enter an item # and a description of the item you wish to order in the box under "Commodity Description". If you need to expand on your description and run out of room, go to the left and click on the BLUE "1".
- Finish elaborating on the description in the "Enter Item 1 Text, Print" box.
- When finished, click on SAVE, then click on [Exit document/item text page] and you will be back in your requisition screen.
- Tab to the box under U/M and click on the blue arrow next to the box that says "None" to select a unit of measure.
- Then tab to the box under "Tax Group" and click on the blue arrow next to the box that says "None" and select CUSE for taxable or NTX for non-taxable. Do not use the other options.
- Tab to the box under "Quantity" and type in the quantity of the first item you want.
- Tab to the box under "Unit Price" and type in the dollar amount of the item.
- Continue adding up to 4 more items the same way.

Item	Commodity Code	Commodity Description	U/M	Tax Group	Quantity	Unit Price	Discount Amount	Additional Amount
1		Microsoft Surface Pro 2	EA	CUSE	1	979.02		
2		2Yr Tablet RPR Plan	EA	NTX	1	61.92		
3		Electronic Distribution	EA	NTX	1	3		
4			None	None				
5			None	None				

Commodity Validate

- When all items are entered, click on the "Commodity Validate" button.

Scroll back to that same section where you were and insure that the "Calculated Commodity Amounts" populated in.

Calculated Commodity Amounts

Item	Extended Amount	Discount Amount	Additional Amount	Tax Amount	Net Amount
1	979.02			84.44	1,063.46
2	61.92				61.92
3	3.00				3.00
4					
5					
Totals:	1,043.94	0.00	0.00	84.44	1,128.38

- Go to the next section where you see "Seq#", "Chart", "Index", "Fund", etc.
- Type a capital "S" in the box under "Chart".
- Do not type anything in the box under "Index".

- Type your fund # in the box under the word "Fund", type your org (organization) # in the box under the word "Orgn", type your account # in the box under the word "Account" and type your program # in the box under the word "Program".

Do not type anything in the boxes under "Activity" or "Location".

- If using only one budget, type "100" in the box under "Accounting".
- If more than one budget/FOAP is needed, select "Dollars" rather than "Percents" and enter each budget with the combined dollar amount (including tax) for each budget in the box under "Accounting" as shown below.

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	S		110809	2050	6410	660000			1066.46
2	S		110809	2050	4500	660000			61.92
3									
4									
5									

Click on the "Validate" button.

You should be "sent" back to the top and see a check mark in a box next to the message "Document Validated with no errors".

Scroll back to that same section (Seq #, Chart, Index, Fund…) and click on the "Complete" button.

You should now be "sent" back to the top and see a check mark in a box next to the message "Document R000XXXX completed and forwarded to the Approval process" along with the message "Document Validated with no errors".

✔ Document Validated with no errors
✔ Document R0008098 completed and forwarded to the Approval process

BE SURE TO NOTE YOUR DOCUMENT/REQUISITION NUMBER!!!