

ellucian®

Banner Finance
Purchase Requisition
Handbook

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Purchase Requisition Overview

Purchase Requisition allows you to create and submit a purchase requisition. You can create a purchase requisition using either document-level or commodity-level accounting.

You can also use this application for the following:

- Save requisition as a draft (Draft status)
- Edit a draft requisition and submit a draft requisition
- Delete a draft requisition
- View requisition status
- Copy a completed requisition
- Add comments (public and private)
- Add and delete attachments using Banner Document Management
- Recall your requisition from Banner Finance approvals
- Search and filter requisitions you have created
- Order returned search data
- View a requisition as a PDF

Purchase Requisition concepts

Several concepts are important to understand before using Purchase Requisition.

Purchase requisition status

A status indicates the state of a purchase requisition.

Status	Description
Draft	Requisition previously saved as a draft and awaiting final submission. You can edit and submit.
Pending	Requisition is pending approval in one of the Banner Finance approval queues.
Disapproved	Requisition submitted but disapproved by a Banner Finance approver. The approver can provide Disapproval Text explaining why the requisition was disapproved. You can edit disapproved requisitions and resubmit them.

Status	Description
Completed	<ul style="list-style-type: none">• Completed = Requisition approved and posted.• Converted to PO = Requisition items have been converted to Purchase Orders .• Assigned to Buyer = Requisition assigned a buyer code, making the buyer responsible for it.

Purchase Requisition Pages

This section describes the Purchase Requisition pages and the tasks you can perform using these pages.

Purchase Requisition Dashboard page

The Purchase Requisition Dashboard page serves as the home page. Use this page to create requisitions and view requisitions you have created.

Purchase requisitions are separated into three sections:

- Draft
- Pending
- Completed

Requisitions appear in each section if available. The number of requisitions in each section is listed after the section's title. By default, only two requisitions are listed when a section contains more than two.

Clicking the information icon next to a requisition's status provides a summary window of information for the requisition. This window can also contain comments. For example, if a requisition is disapproved, the user who disapproved it can add a comment explaining why the requisition is disapproved.

Click a requisition's current status button in the Status column to view the requisition's detailed information.

Requestor Information page

The Requestor Information page allows you to specify who is creating the requisition.

For user convenience, field information on this page is already completed and defaults from the requester's Banner Finance User Profile (FOMPROF).

You can accept the default values provided or select alternate values if needed. You can provide an explanation or justification for the requisition by adding comments or an attachment.

Also, you have the option to select the requisition's accounting type (Document or Commodity), if that option for user choice has been configured when the application was deployed.

Vendor Information page

You define the vendor for the purchase requisition.

Selecting a vendor is optional. You can check the **Choose vendor for me** check box to let your Procurement Office select the vendor.

The page also contains fields defining the default discount terms and the vendor's base currency.

Commodity Information page

This page contains the requisition's descriptive information about the goods and services requested.

Page fields include information about the unit of measure, quantity, unit price, and any additional costs, such as shipping and handling. You can add comments for each commodity item, or update or delete the commodity item. You can select a commodity code/description from the lookup or enter commodity information not available in the lookup. You can also update the Tax and Discount fields.

Add Item & Accounting page

This page allows you to add items and accounting distributions to the requisition.

Page fields enable you to provide and select the data for the accounting distributions (budget line items) to which the request cost will be charged. The application supports document or commodity level accounting. You can also update or delete the accounting distribution.

Attachments page

This page contains a list of the requisition's attachments.

You can add, delete, and view attachments. When viewing any attachment, you can see the document stored in the B-F-DOCS application in Banner Document Management.

Purchase Requisition tasks

This section contains the tasks you can perform using Purchase Requisition.

Create a requisition

To begin the purchase process, use the Purchase Requisition dashboard page to create a purchase requisition.

Procedure

1. On the **Purchase Requisition** dashboard page, click **Create Requisition**.
2. On the **Requestor Information** page, specify who is requesting the purchase using the available fields if you are not the default requester for the account. Click **Next** to continue to the next page.
3. On the **Vendor Information** page, select the vendor for the requisition.
By default, the **Choose vendor for me** check box is checked. When checked, the system chooses a vendor for you. Uncheck the check box if you want to select the vendor.
4. On the **Add Item & Accounting** page, add an item using the **Add Item(s)** field.
After an item is selected, the page updates with required fields for the selected item.
5. Click **Save**.
The page refreshes with the item you just added listed below the **Add Item(s)** field in the **Commodities** list. You can click any item in the list to view its details.
6. Repeat steps 4 and 5 as necessary to add additional items to the requisition.
7. Click **Add Accounting**.
The page refreshes with the required fields for accounting information.
8. Click **Save**.
The Requisition Summary updates.
9. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

Copy a requisition

You can copy a completed requisition and use it as a template for a new requisition.

Procedure

1. On the **Purchase Requisitions** dashboard page, click the completed requisition you want to copy.

The requisition opens on the **Requestor Information** page.

2. Click **Copy Requisition**.
3. On the copy prompt, choose the appropriate option.

Option	Description
Yes	The system copies the requisition and creates an identical new requisition that you can edit.
No	The system cancels the copy.

4. Edit the requisition as appropriate, just as you would a new requisition.

Delete a requisition

You can delete any requisition that is in Draft status.

Procedure

1. On the **Purchase Requisitions** dashboard page, click the requisition in Draft status you want to delete.
The requisition opens on the **Requestor Information** page.
2. Click **Delete Requisition**.
3. On the delete prompt, choose the appropriate option.

Option	Description
Yes	The system deletes the requisition.
No	The system cancels the delete.

Edit a requisition

You can edit requisitions in Draft status. To edit a requisition in Pending status, you must recall the requisition.

Procedure

1. On the **Purchase Requisitions** dashboard page, click **Draft** in the Status column for the requisition that you want to edit.
2. Using the **Next** and **Back** buttons, edit the Requestor Information, Vendor Information, and Add Item & Accounting pages as necessary.
3. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

Add an attachment to a requisition

After an attachment is created, such as a statement of work, you can add an attachment to the requisition at any time before submitting the requisition. You can add attachments to requisitions in Draft or Disapproved status.

Procedure

1. Open the requisition in Draft or Disapproved status to which you want to add an attachment.
2. Click **Attachments**.
3. Click **Attach File**.
4. Using the **Attach Documents** prompt, choose a file to attach.
5. Select the **Document Type**.
6. Click **Upload**.

The file is added to the Attachments page list.

Delete an attachment from a requisition

If you want to delete an attachment from a purchase requisition, you can use the Attachments page to delete one or more attachments.

Procedure

1. Open the requisition containing the attachment you want to delete.
2. Click **Attachments**.
3. On the **Attachments** page, click the attachment that you want to delete in the Attachments list, and then click **Delete**.
4. Confirm that you want to delete the attachment.

Recall a requisition

You can recall requisitions that are in Pending status.

Procedure

1. On the **Purchase Requisitions** dashboard page, open the pending requisition that you want to recall.
2. Click **Recall My Requisition**.
3. On the recall prompt, choose the appropriate option.

Option	Description
Yes	The system recalls the requisition. The Purchase Requisition Dashboard page loads with the recalled requisition placed in the draft requisitions section with a draft status
No	The system cancels the recall.

View as PDF

You can download the purchase requisition as a PDF file to verify requisition information is correct.

Procedure

1. Open the requisition that you want to view as a PDF.
2. Click **View as PDF**.
Purchase Requisition formats the requisition's information into PDF format.
3. Right-click in the PDF file for other options, such as printing or saving the requisition.

Hide optional page elements using Extensibility

You can hide Purchase Requisition's optional page elements using the Extensibility tool set delivered with the application.

About this task

Use the Extension Editor, accessed in Purchase Requisition's Tools menu, to configure which optional elements you want to hide. When the extensions are edited and saved, this configuration is applied uniformly across your site's Purchase Requisition implementation.

NOTE: Only users who have a Web Tailor admin role can use the Extension Editor. For more information about this role, refer to the *Finance Web app extensibility* section in the *Banner Finance Purchase Requisition Installation Guide 9.0.1*

Use the "exclude" value to specify that an element be displayed or hidden.


- "exclude":true = hides the element
- "exclude":false = element is displayed

The following optional page elements can be hidden using the Extension Editor:

- Tax Group field
- Tax Amount field
- Vendor Discount
- Discount Amount field

- Additional Amount field
- Index field
- Activity field
- Location field
- Project field
- View as PDF button

Procedure

1. Log into Purchase Requisition using the Web Tailor Admin role.
2. Click Tools  and select **Extensibility >Edit Extensions**.
The **Extension Editor** window appears.
3. For each optional page element that you want to hide, copy and paste the provided JSON code into the Extension Editor window.

Optional element	JSON Code
Tax Group/Tax Amount	<pre>{ "sections": [{ "name": "taxGroup", "exclude": true }, { "name": "taxAmount", "exclude": true }] }</pre>
Vendor Discount	<pre>{ "sections": [{ "name": "vendorDiscount", "exclude": true }] }</pre>
Discount Amount	<pre>{ "sections": [{ "name": "discountAmount", "exclude": true }] }</pre>

Optional element	JSON Code
	<pre data-bbox="876 283 1412 367">] }</pre>
Additional Amount	<pre data-bbox="876 367 1412 693">{ "sections": [{ "name": "additionalAmount", "exclude": true }] }</pre>
Index	<pre data-bbox="876 693 1412 1018">{ "sections": [{ "name": "indexSection", "exclude": true }] }</pre>
Activity	<pre data-bbox="876 1018 1412 1312">{ "sections": [{ "name": "activity", "exclude": true }] }</pre>
Location	<pre data-bbox="876 1312 1412 1606">{ "sections": [{ "name": "location", "exclude": true }] }</pre>
Project	<pre data-bbox="876 1606 1412 1824">{ "sections": [{ "name": "project", "exclude": true }] }</pre>

Optional element	JSON Code
	}
View as PDF	<pre>{ "sections": [{ "name": "viewAsPdf", "exclude": true }] }</pre>

4. Click **Submit** to save the extension.
A notification center message appears verifying your save.
5. Refresh the page to verify the optional element is hidden.
6. Repeat Steps 1 through 5 as necessary to hide all the optional elements you want to hide.