



Banner Finance Purchase Requisition Release Guide

Release 9.0.1
April 2016

Notices

Without limitation: Ellucian®, Banner®, Colleague®, and Luminis® are trademarks of the Ellucian group of companies that are registered in the U.S. and certain other countries; and Ellucian Advance™, Ellucian Course Signals™, Ellucian Degree Works™, Ellucian PowerCampus™, Ellucian Recruiter™, Ellucian SmartCall™, are also trademarks of the Ellucian group of companies. Other names may be trademarks of their respective owners.

© 2016 Ellucian.

Contains confidential and proprietary information of Ellucian and its subsidiaries. Use of these materials is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

In preparing and providing this publication, Ellucian is not rendering legal, accounting, or other similar professional services. Ellucian makes no claims that an institution's use of this publication or the software for which it is provided will guarantee compliance with applicable federal or state laws, rules, or regulations. Each organization should seek legal, accounting, and other similar professional services from competent providers of the organization's own choosing.

Ellucian
4375 Fair Lakes Court
Fairfax, VA 22033
United States of America

Contents

Introduction.....	4
About Purchase Requisition.....	4
System requirements.....	4
Application source code tag in Git.....	5
Multi-Entity Processing.....	5
Related documentation.....	5
Navigate among 9.x applications.....	5
With CAS.....	6
Without CAS.....	6
Extensibility tools.....	6
 Change Request Enhancements.....	 7
Purchase Requisition Enhancement.....	7
Purchase Requisition defects.....	7

Introduction

This release guide provides information about the Banner Finance Purchase Requisition 9.0.1 release.

Several enhancements concerning Purchase Requisition functionality have been addressed with this release and are detailed in this Release Guide.

Several technical improvements have been made to support newer technical stacks/frameworks like Java 8, Tomcat 8, and Weblogic 12c, while retaining the backward compatibility with Java 7, Tomcat 7, and Weblogic 10.

About Purchase Requisition

Purchase Requisition allows you to create and submit a purchase requisition. You can create a purchase requisition using either document 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

For more information about Purchase Requisition, see the *Banner Finance Purchase Requisition Handbook 9.0.1*.

System requirements

You must be running the following Banner applications to ensure a successful deployment of Purchase Requisition.

- Banner Finance 8.10.1
- Banner DB Upgrade 9.3
- Banner General 8.7 with 8.7.2 and 8.7.5

- Banner Web General 8.7
- Banner Web Tailor 8.7
- Banner Document Management 8.6.0.1 with ApplicationXtender 7.0.260 and ApplicationXtender Web Services 7.0.260 (for only institutions who need BDM Integration)

Application source code tag in Git

To customize an application, you can retrieve the application's source code from Ellucian's public repository (Git) to your own repository. A tag is required for identifying the application's source code in the Git repository.

The source code for Purchase Requisition 9.0.1 is tagged as `rel-financeprocurement-9.0.1` in the Git repository.

Multi-Entity Processing

Multi-Entity Processing (MEP) is supported for this release.

Related documentation

The following lists related documentation for the Banner Finance Purchase Requisition 9.0.1 release.

Title	Description
Banner Finance Purchase Requisition Installation Guide 9.0.1	Contains instructions for Purchase Requisition installation.
Banner Finance Purchase Requisition Handbook 9.0.1	Contains functionality and task information.
Banner Getting Started Guide 9.x	Contains information about Banner 9. Located in the Documentation Libraries on the Ellucian Support Center under Banner General.

Navigate among 9.x applications

You can navigate among multiple Banner 9.x applications with or without CAS.

NOTE: If you do not enable CAS, you must log in to each Banner 9.x application and Banner 8.x application separately.

With CAS

Users are authenticated for only the first login when CAS single sign on (SSO) is enabled. After first login, users can access and navigate all Banner 9.x applications without logging in again. When users log out of an application, they are logged out of all open applications.

Refer to the *CAS Single Sign On Handbook*, available on the Ellucian Support Center, for details on configuring Banner for CAS.

Without CAS

Users must authenticate before accessing each Banner 9.x application if CAS SSO is not enabled. When users log out of an application, they are logged out of that current application. They are still logged in to all other open applications.

Extensibility tools

Banner Extensibility tools let you make changes to your Banner 9.x applications without changing Ellucian source code.

For more information about using Extensibility tools with Purchase Requisition, see the *Banner Finance Purchase Requisition 9.0.1 Handbook*.

For more information, see the Banner Extensibility Documentation Library in the Ellucian Support Center.

NOTE: Additional installation steps are required to enable tool functionality. To use this tool, you must check with the person who completed the application installation to verify the additional steps were performed.

Change Request Enhancements

This section contains the change request enhancements that were resolved in the Purchase Requisition 9.0.1 release.

Purchase Requisition Enhancement

This Change Request (CR) enhancement is included with this release.

For more information on change requests and their resolutions, search for the CR numbers under the Change Requests section of the Ellucian Client Support website: <http://www.ellucian.com/Solutions/Ellucian-Client-Support>.

CR #	Summary	Resolution
CR-000138693	Provide application level configuration to enable or disable BDM integration.	Modified the Purchase Requisition configuration file so that BDM integration can be enabled or disabled. This option will provide customers greater control over the configurability of Purchase Requisition

Purchase Requisition defects

These Change Request (CR) defects are included with this release.

CR #	Summary	Resolution
CR-000138922	Security related enhancement for Purchase Requisition.	Additional validation was added to strengthen verification of the feature.
CR-000137448	Documentation Improvement related to Banner Documentation Management Integration.	Enhanced the BDM configuration section in the Installation guide.
CR-000136408	Data Format Validation issue.	Improved the Date format validation message and suggestion to the user for the right date format that should be used.

CR #	Summary	Resolution
CR-000138994	Purchase Requisition 9.0 Fund/Org data lookups not including data hierarchy for Fund/Org Security.	Fund and Organization lookup now populates based on the Fund/Org hierarchy, if configured.
CR-000139004	Display issue – the Accounting Distribution amount is displayed as whole number.	Modification made to avoid the display round off issue.