# CREATING & MAINTAINING REQUISITIONS IN BANNER 9

*Revised 6/12/2025*

## Guide Updates for 6/6/2024 Release

| Description | Page | Section |
|---|---|---|
| Added “FGIENCD” & “FAIVNDH” | 4 | Query Classes |
| Updated Language | 5 | Logging into Banner INB |
| Updated Screenshot & Language | 5 | Logging into Banner SSB (Bannerweb) |
| Updated Language | 7 | *“NOTE”* Section “***NOTE**: Use the <TAB> to move from field to field”* |
| Updated Language | 10 | “18. Tax Group” and both “*NOTE”* Sections |
| Updated Language | 10 | “22. Additional” Section – This field is no longer used for Shipping & Handling or Freight charges; these will be added to the REQ as their own commodity line. |
| Updated Language | 28 | “Document Text” Section |
| Added Additional Appendix | 32 | Appendix E – Additional Resources & Support |

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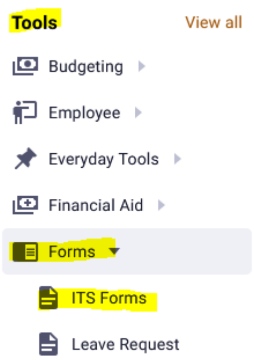
# CREATING & MAINTAINING REQUISITIONS

## SETTING UP ACCESS TO BANNER INB AND SSB

ITS sets up user access to Banner INB and Banner SSB (aka Bannerweb on myAVC)

1. Complete a **Banner Access Request form** located on my.avc.edu. Tools→Forms→ITS Forms




2. Under the following Classes note the listed forms in the "Other" sections & check the "Add" box:

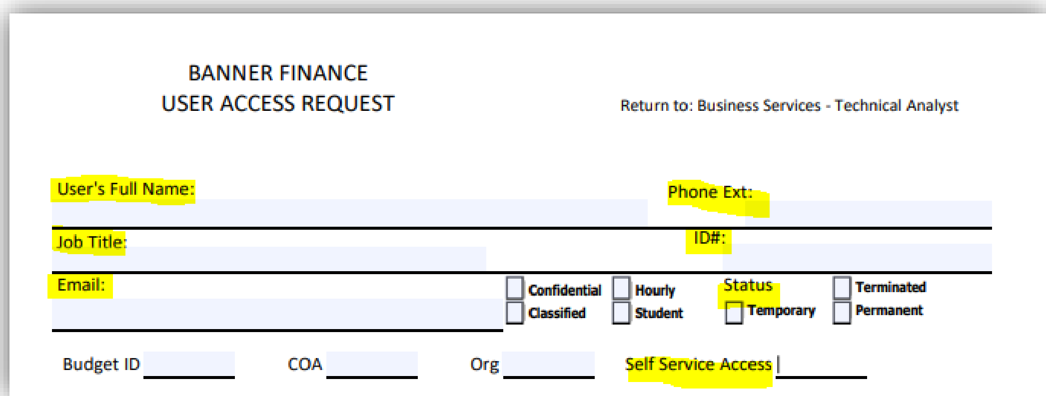
Maintenance Classes:

- FPAREQN
- FPARDEL
- FOAPOXT

Query Classes:

- FPIREQN
- FGIENCD
- FAIVNDH
- FTIIDEN
- GUAMESG

3. Complete the signature and approvals box at the bottom of the form and email to help@avc.edu.
4. Complete a **Banner Finance User Access Request form** located on https://www.avc.edu/purchasing-and-contracts/forms.
5. Complete highlighted fields below and mark Self Service Access with an "X."
6. Complete the signature and approvals box at the bottom of the form and email to help@avc.edu.



BANNER FINANCE
USER ACCESS REQUEST

Return to: Business Services - Technical Analyst

User's Full Name: Phone Ext:

Job Title: ID#:

Email: ☐ Confidential ☐ Hourly Status ☐ Terminated
☐ Classified ☐ Student ☐ Temporary ☐ Permanent

Budget ID ______ COA ______ Org ______ Self Service Access ______

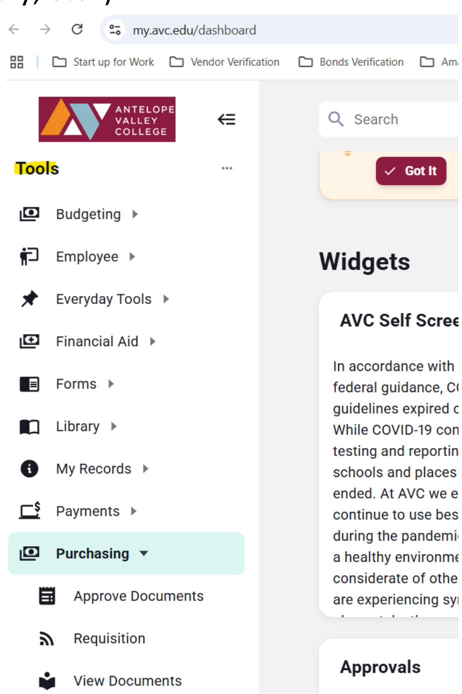
# CREATING & MAINTAINING REQUISITIONS

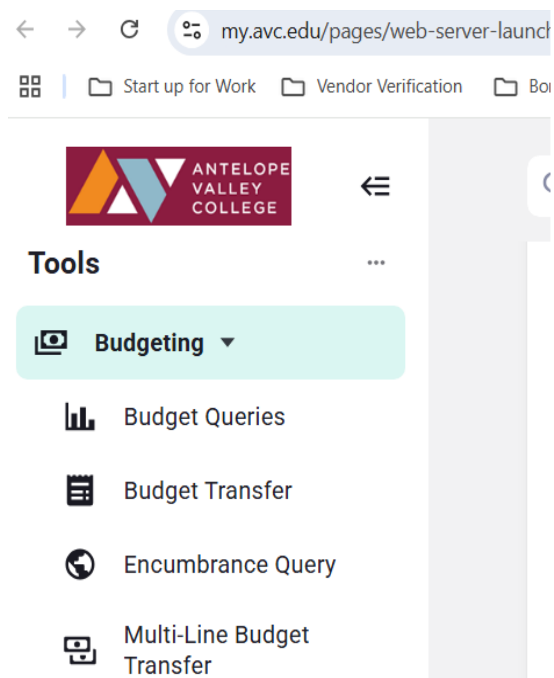
## LOGGING INTO BANNER 9 INB

1. Go to https://ssb.avc.edu/launch/ or double-click the Webapps icon on your desktop.
2. Log-in using your AVC username and password
3. Go to Pages→ITS
4. Select the **Web Server Launch Page**.
5. Under **Production Servers** select **Banner** link.

## LOGGING INTO BANNER SSB (BANNERWEB)

1. Log-in to your myAVC account, https://ssb.avc.edu/launch/
2. Go to Tools→Purchasing for Purchasing related items (e.g., approve/disapprove REQ's, view pending REQ approvals, etc.)
3. Go to Tools→Budgeting for fiscal related items (e.g., budget transfers, budget query, encumbrance query, etc. )



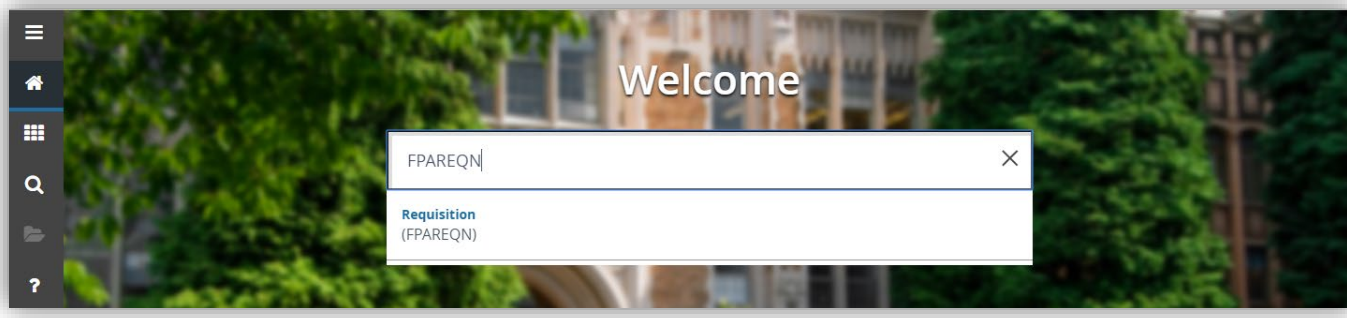



## BANNER 9 INB

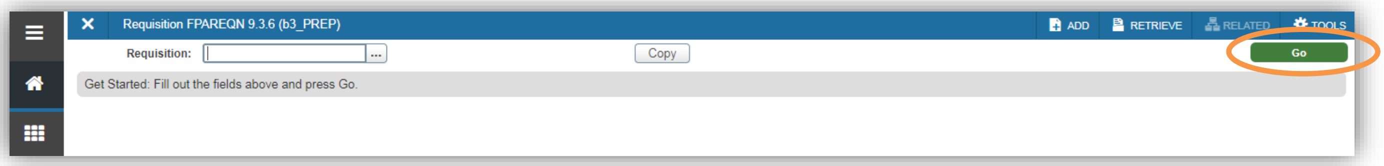
### CREATING A REQUISITION

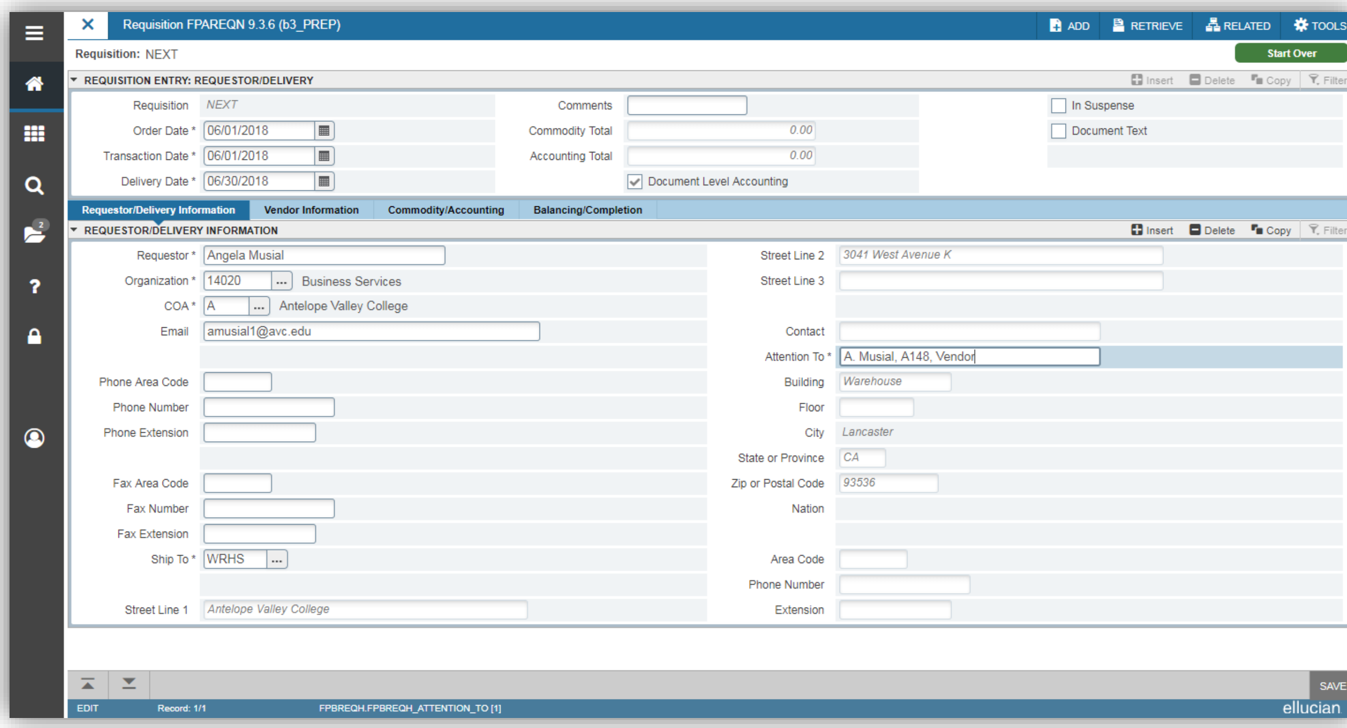
***NOTE:*** *Per purchasing policies and procedures approved by the board of trustees, departments <u>must</u> obtain proper authorization from the Purchasing Department (such as a PO #) <u>prior</u> to procuring <u>any</u> goods or services.*

**1.** On the Welcome screen type **FPAREQN** then **[Enter].**




**2.** Leave the **Requisition** field blank and click on **Go**.



# CREATING & MAINTAINING REQUISITIONS

***NOTE**: Use the <TAB> to move from field to field – **Do NOT use your mouse to click from field to field.***

3. **ORDER DATE**: Defaults to current date. See Appendix C for a future fiscal year Requisition.

4. **TRANSACTION DATE**: Defaults to current date. Do NOT adjust this date unless directed by the Fiscal or Purchasing Department. See Appendix C for a future fiscal year Requisition.

***NOTE:** The Order Date and the Transaction Date must be the same.*

5. **DELIVERY DATE**: Enter the desired delivery date for receivable items; three weeks from the date of entry is recommended. Standing PO's can have a delivery date through the end of the fiscal year (06/30/XXXX).

***NOTE:** It is the Requesters responsibility to ensure that their Requisition is approved in a timely manner to allow for the desired delivery date.*

6. **COMMENTS**: Leave blank.

7. **DOCUMENT LEVEL ACCOUNTING**: Uncheck if your document has multiple commodity lines **with** multiple FOAPs that need to be applied to specific commodity lines. Check with your accountant if you are unsure. Your Buyer can assist you with entering these types of requests.

8. **REQUESTOR**: Defaults to the Requester entering Requisition.

9. **COA:** Will default to "A." Leave as is.

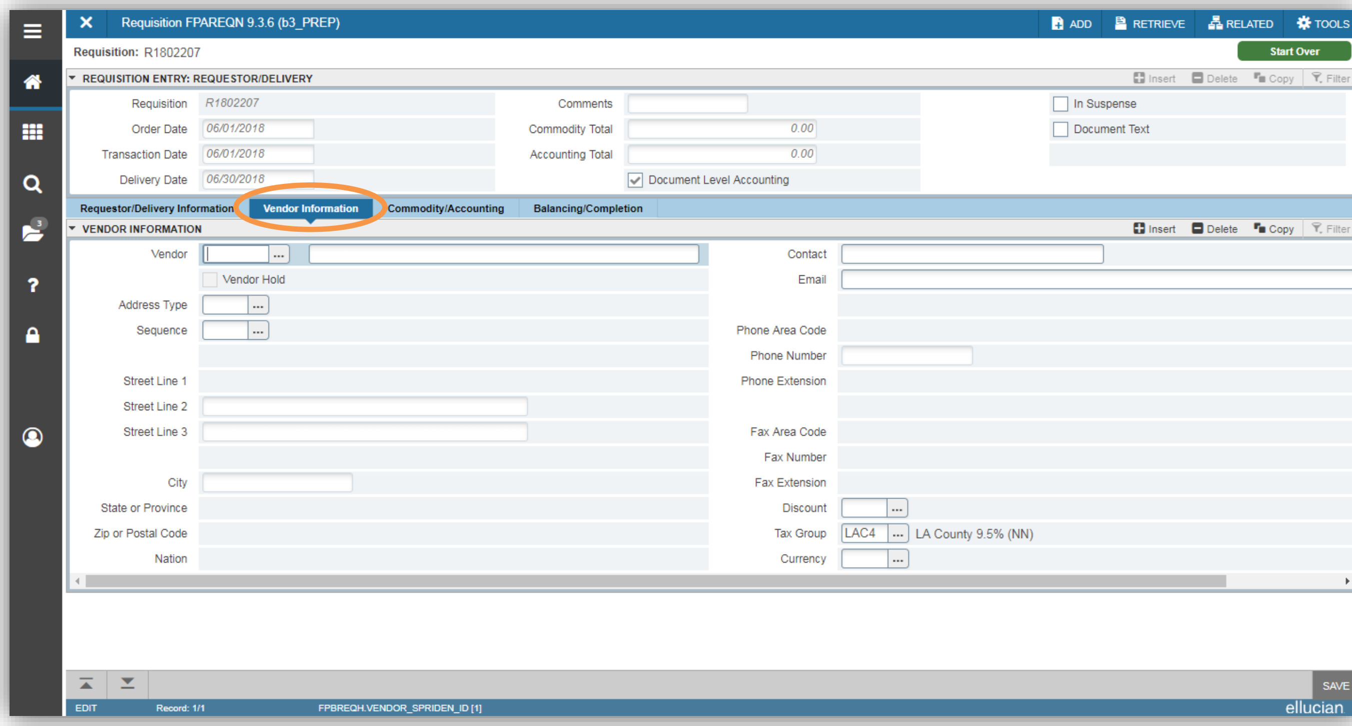
10. **ORGANIZATION**: Type in the Organization # or **Search** using "**...**" and double-click on the **"A"** next to the correct Organization.

11. **ATTENTION TO**: This is where you will note the point of contact name, the location that the warehouse will deliver the items to (if applicable), and if the PO needs to be sent to the vendor. Noting "Vendor" in the **Attention to** field prompts Purchasing to place the order/send a copy of the PO to the vendor via the e-mail address on file as well as to Accounts Payable (AP). Noting "AP" in the **Attention to** field prompts Purchasing to send a copy of the PO directly to AP; the PO will **NOT** be sent to the vendor if "AP" is noted. Here are some examples:

    - Items received in warehouse, order needs to be placed/vendor needs copy of PO:
      *Attention To: D. Morgan, A154, Vendor*
    - Items received in warehouse, order doesn't need to be placed/vendor doesn't need copy of PO:
      *Attention To: D. Morgan, A154, AP*
    - No items received in warehouse, order needs to be placed/vendor needs copy of PO:
      *Attention To: D. Morgan, Vendor*
    - No items received in warehouse, order doesn't need to be placed/vendor doesn't need copy of PO:
      *Attention To: D. Morgan, AP*

***The deliver to location must be the end users building and room # (EX: A154). This applies to IT equipment as well.**

12. Click on the **Vendor Information** tab.

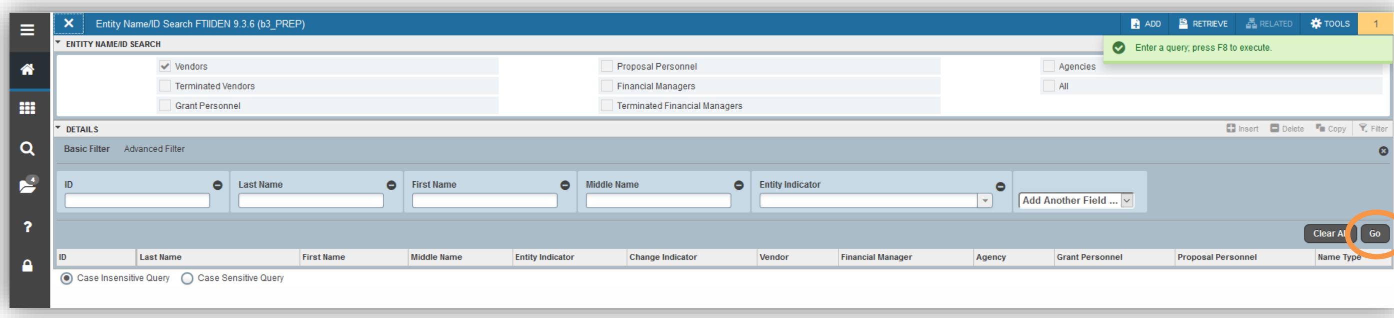



**13. Search** for your vendor using "**...**" next to the **Vendor** field.

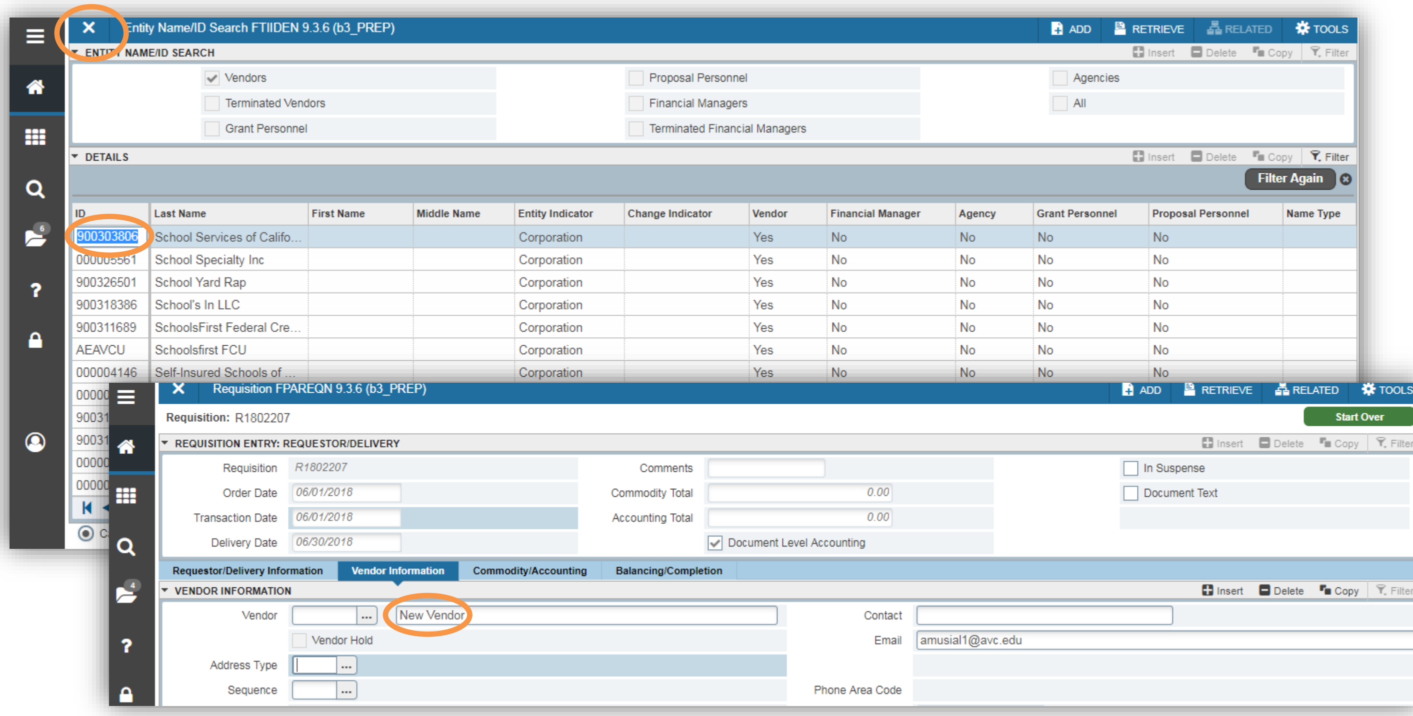
a. In the Option List, choose **Entity Name/ID Search Form (FTIIDEN).**

b. From the **Details** section in the **Last Name** field, type part of the vendor name or last name if a person surrounded by "%" (EX: %Sierra% for Sierra School Equipment Co.).

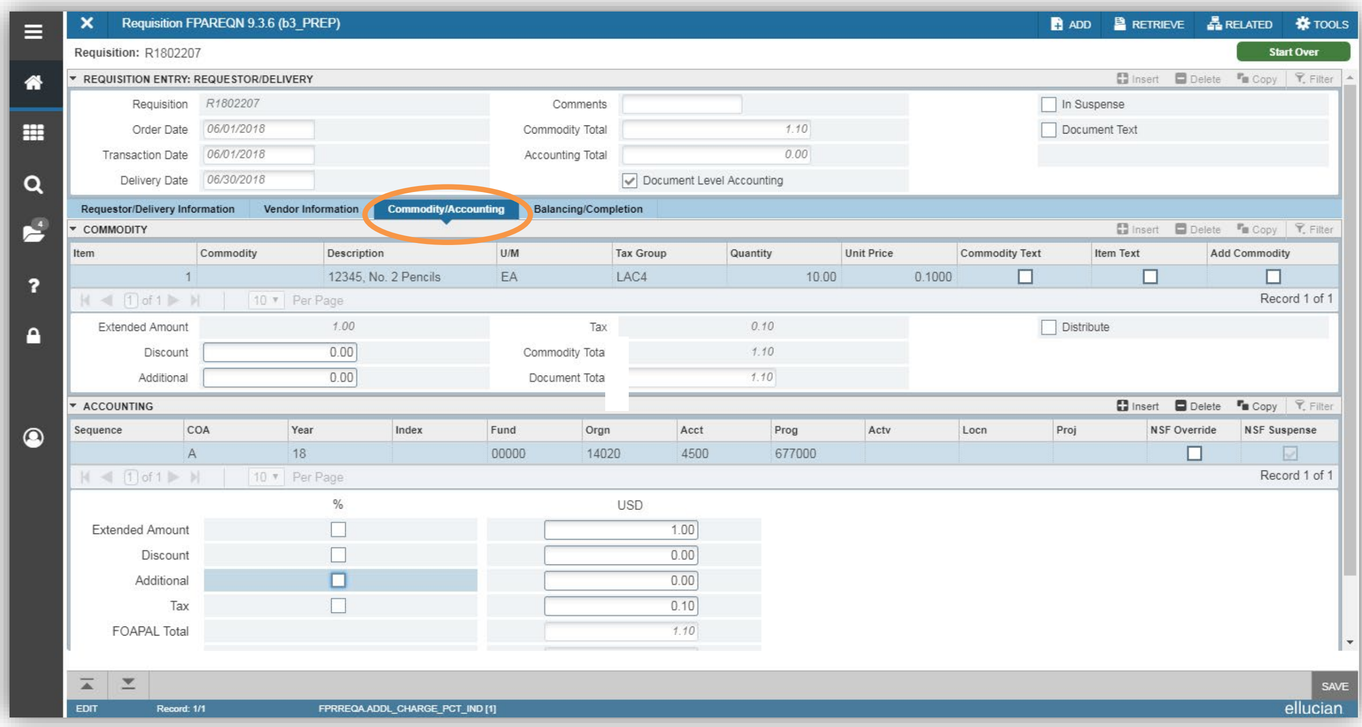
c. Select **Go.**




d. A list of vendors will populate. Double-click on the correct vendor ID number. If no vendor ID # populates, this means the vendor is not listed in the Banner database. Click **Close** to return to the Vendor Information tab, then type "New Vendor" into the field right of the Vendor field. Provide all new vendor information in Document Text field (see Appendix A, Vendor), including the vendors Name, Address, Phone #, & email.




**14.** Click on the **Commodity/Accounting** tab.




**15. COMMODITY**: Leave blank and tab to **Description**.

**16. DESCRIPTION**: Enter a detailed description of the commodity, starting with the item #, manufacturer # or ISBN # if applicable. If you need additional space for your description or have specific instructions for a line item, use **Item Text [FOAPOXT]** (see Appendix A). The description field must include a description of the item being purchased; REQs with a description field only containing item #, manufacturer #, or ISBN # will be returned to the requester for correction.

***NOTE:*** *The only allowable characters in the Description field are visible keyboard characters. Other characters (such as Alt codes) are NOT allowable and if used, will cause an error in your Requisition that will result in resubmittal of a new REQ.* ***When copying and pasting commodity description into Banner that include characters other than numbers and letters, you must retype the character.***

***NOTE:*** *See the Requisition Checklist for complete details about commodity information, and document text to include with your Requisition: https://www.avc.edu/purchasing-and-contracts/guidelines-processes),*

**17. U/M**: Enter Unit of Measure code. **Search** using **"..."** to look up and retrieve your unit of measure.

**18. TAX GROUP:** Click the **…** to select one of the following options:

- **a.** LAC1 – XX.XX% (NY), freight not taxed (N), discount taxed (Y)
- **b.** LAC2 – XX.XX% (YY), freight taxed (Y), discount taxed (Y)
- **c.** LAC3 – XX.XX% (YN), freight taxed (Y), discount not taxed (N)
- **d.** LAC4 – XX.XX% (NN), freight not taxed (N), discount not taxed (N)– **most commonly used**
- **e.** NT – For Non Taxable items (Open PO, E-Waste Fee, Etc.)

***NOTE:*** *For the most current tax rate information, please visit https://www.cdtfa.ca.gov/taxes-and-fees/rates.aspx*

***NOTE:*** *The District is responsible for paying California Sales Tax on the purchase of all tangible personal property whether or not it is quoted by the vendor. Examples of tangible personal property include such items as office supplies, furniture, electronics, and so forth. In addition, some service and labor costs are subject to sales tax if they result in the creation of tangible personal property, as well as shipping and handling in some cases. Visit https://www.cdtfa.ca.gov/taxes-and-fees/rates.aspx and the District's Sales Tax Website for additional information.*

**19. QUANTITY**: Enter number of items desired.

**20. UNIT PRICE**: Enter price per unit.

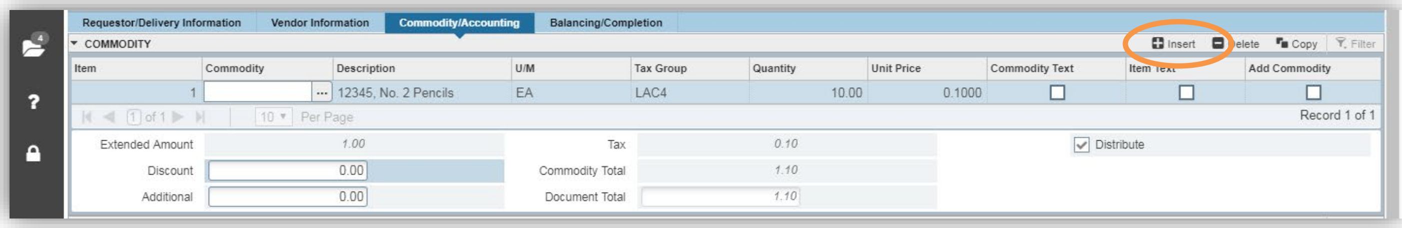
**21. DISCOUNT**: Enter the dollar amount discount in this field. If there is one discount amount for an entire order with multiple commodity lines, you will need to distribute the dollar amount amongst the commodity lines.

**22. ADDITIONAL**: Leave at $0.00 - we do not use this field.

**23. TAX**: Field will auto populate.

To add additional commodities, click **Insert** Insert and then repeat the steps above.

Unwanted commodity lines may be removed by clicking **Delete** Delete while on the line of the specific record that you want to delete.




***NOTE:*** *Requisition commodities need to be itemized. Do NOT group multiple items on one commodity line; if there is a quote for the Requisition, the Requisition should reflect the quote.*

**24.** Once you have completed the entry of commodities, select **Next Section** at the bottom left of the screen to move to the **Accounting Block**.

**25. CHART OF ACCOUNTS (COA):** This field will default to "A." DO NOT CHANGE OR DELETE.

**26. YEAR:** Should default to current fiscal year (EX: 22 for 21/22 fiscal year).

**27. INDEX**: Leave blank.

* To search for any part of the FOAP using **"…"** while in the field and double-click on the **"A"** next to the correct number**.**

**28. FUND**: Enter a Fund code or **Search** using "**...**"

**29. ORGN**: Defaults from Requestor's setup. If your Orgn Code differs from the default, enter the appropriate Organization code or **Search** using "**...**"

**30. ACCT**: Enter Account code or **Search** using "**...**"

**31. PROG:** Enter Program code or **Search** using "**...**"

**32.** Leave the following blank: **ACTV, LOCN, PROJ**.

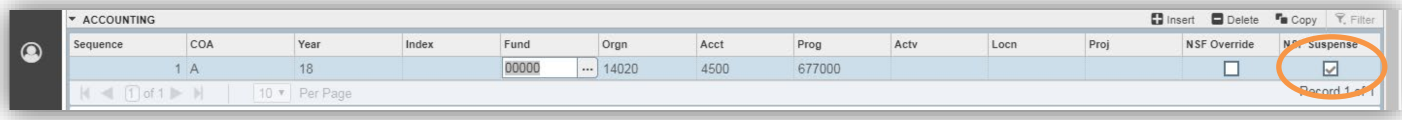
**33.** Tab through the remaining fields to auto populate.

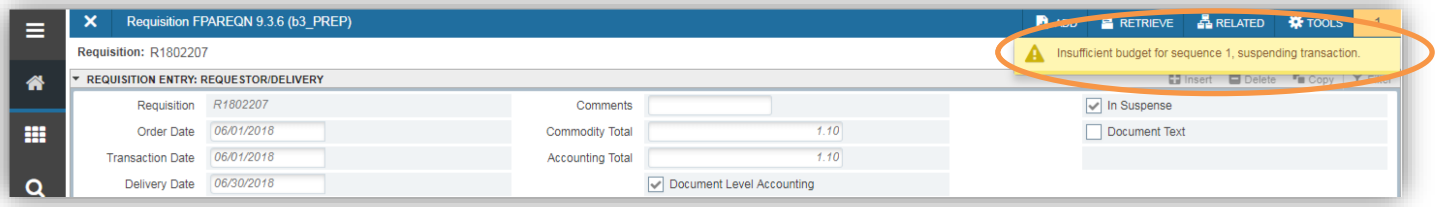
To add additional FOAPS, click **Insert** Insert and then repeat the steps above.

***NOTE:*** *If you have multiple FOAPs the cost of the commodities is shared among your FOAPs. To manually distribute changes in the $ amounts for commodities, the Distribute box should be unchecked, then go to the FOAP block and make changes to the amount(s) as appropriate. Banner will reserve the funds of your FOAP once the FOAP is entered and saved.*

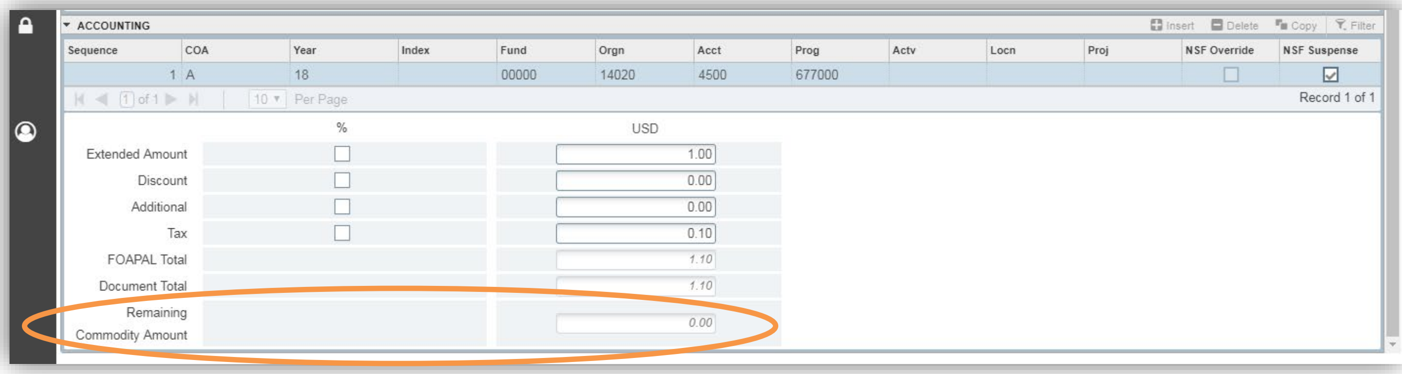

**IF ONE OF YOUR FOAPS DOES NOT HAVE SUFFICIENT FUNDS YOU WILL NEED TO MOVE BUDGET BEFORE COMPLETING YOUR REQUISITION OR USE A DIFFERENT FOAP.**

# CREATING & MAINTAINING REQUISITIONS

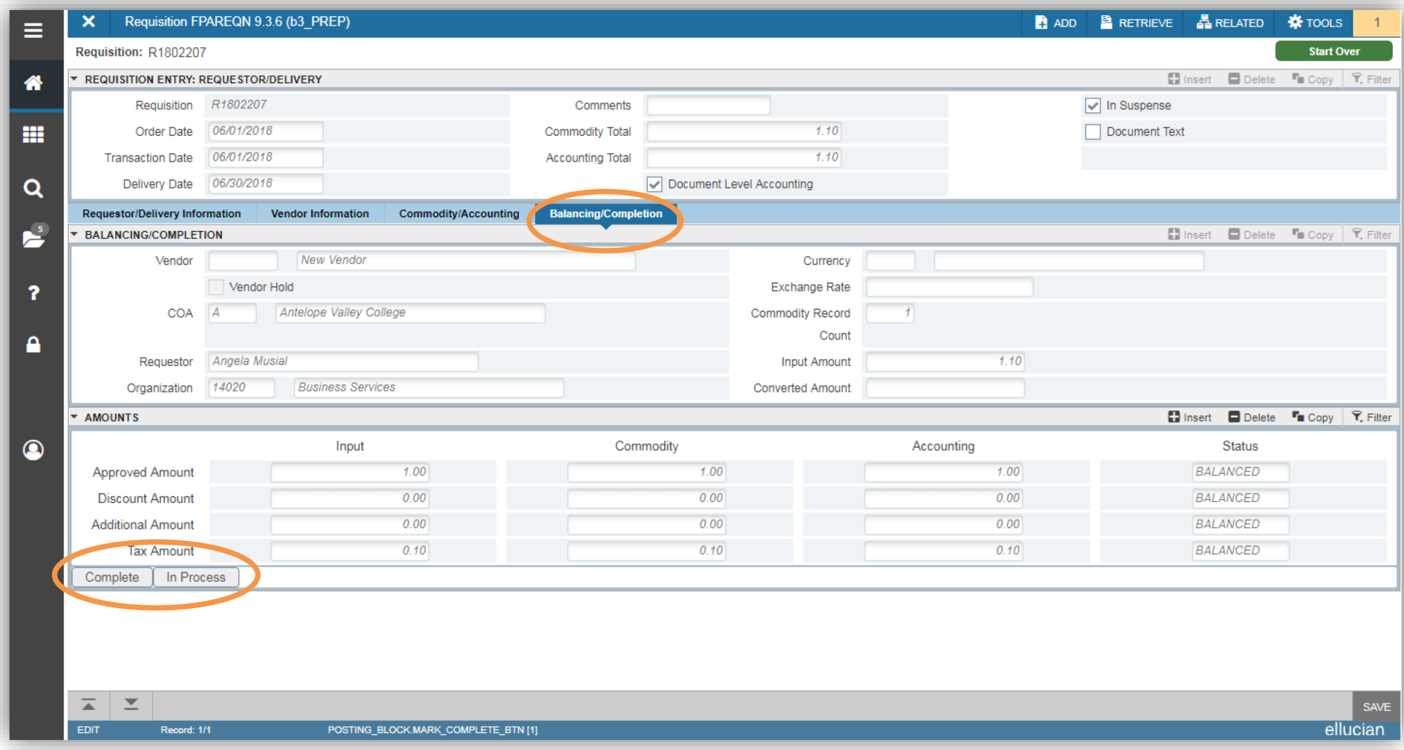



*__NOTE:__ The REMAINING COMMODITY AMOUNT field in the FOAP block specifies any remaining dollars that have not been applied to a FOAP. Adjust your FOAPs extended amounts and SAVE to refresh the field.*




**34.** Once you have completed your Commodity and Accounting information, select the **Balancing/Completion** tab.




This window displays summary information. The **Status** fields need to state "BALANCED" before completing a REQ.

**COMPLETE:** Select **Complete** when you have entered all the information for the Requisition and are ready to send it forward to approvals.

***NOTE:*** *If your Requisition requires any supporting documentation to be uploaded to Onbase (see Requisition Checklist https://www.avc.edu/purchasing-and-contracts/guidelines-processes), these documents should be uploaded prior to completing your Requisition for approvals. Requisitions completed prior to documents being uploaded to Onbase may be disapproved if a Buyer reviews the Requisition prior to the documents being uploaded. See Appendix B for additional information regarding Onbase and uploading documents.*

**IN PROCESS:** Select **In Process** to save your Requisition to complete at a later time.
**NOTE YOUR REQUISITION NUMBER FOR FUTURE REFERENCE.**

***NOTE:*** *Any required changes on a completed Requisition will require that you deny the Requisition in approvals. If the Requisition were to already go through the approval process, you will have to cancel the Requisition and resubmit to make changes. Please notify your Buyer if you cancel a Requisition that has already been approved.*

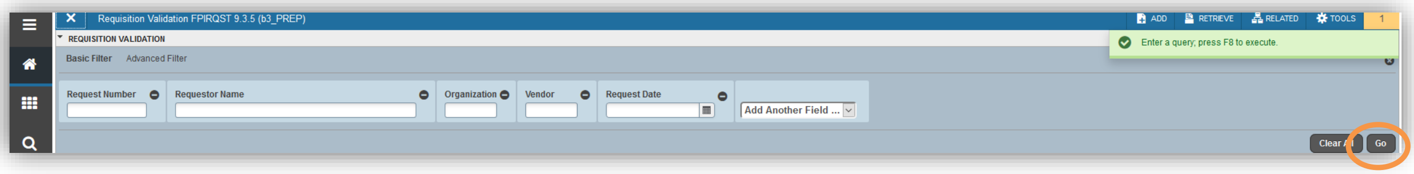
**Orders take approximately 1-2 weeks to process once approved. Please notify the Purchasing Department for all urgent/rush requests at 661-722-6310 or purchasing @avc.edu.**

## MAKING CHANGES TO A REQUISITION

**Making changes to a Requisition that is NOT Complete and Approved or has been disapproved.**

1. If your Requisition is in the approval process, first remove it by following the instructions under "Removing a Requisition from Approvals in Bannerweb" on page 26.

2. Login to Banner.
3. Access the Requisition through **FPAREQN**.
4. Click on the **…** to select your Requisition #.
    a. Click **Filter** in the top right of your screen.
    b. Choose your method of search (Request Number, Requestor Name) and enter the search information next to the field and select **Go.**




    c. Once you find the Requisition you were searching for, double-click the **Request Number**.

***NOTE:*** *If you choose to type your Requisitions # directly into the Requisition field rather than search for your Requisition # as described above, be careful as you may create a new Requisition that will require deletion if you are missing or transpose any digits.*

5. Click **Go** to access the REQ.
6. Make changes to the applicable fields. Please reference the "Creating a Requisition in Banner" guide for further details on the **FPAREQN** form.
7. When you are finished making changes go to the **Balancing/Completion** tab and select "**Complete**" to send your Requisition for approval or select "**In Process**" to save your Requisition and make additional changes later.

**Making changes to a Requisition that is Complete and Approved – Change Order (C/O).**

1. Email the Purchasing Department, purchasing@avc.edu, with the following information:
    a. SUBJECT: C/O Request REQ # RXXXXXXXXX
    b. BODY: Explain the change that needs to be made
2. Purchasing will verify that the changes can be made and process the C/O for approval.

***NOTE:*** *It is the responsibility of the requester to ensure C/O is approved by desired date.*

## INCREASING OR DECREASING A STANDING (OPEN) PO – CHANGE ORDER (CO)

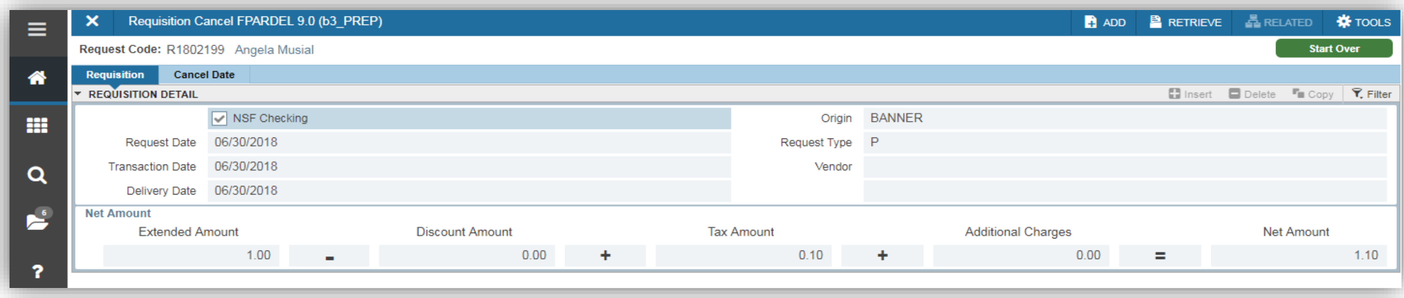
If you need to increase or decrease a standing PO, please follow the instructions below.

1. Email the Purchasing Department, purchasing@avc.edu, with the following information:
    a. SUBJECT: CO Request PO # XXXXXXXXX
    b. BODY: Include the increase/decrease amount along with the new total of the PO. If your PO will be increasing to an amount that requires additional documentation (EX: $5K or more would require 3 quotes), please include the documents as attachments to your email.
2. Purchasing will verify that the changes can be made and process the CO for approval.

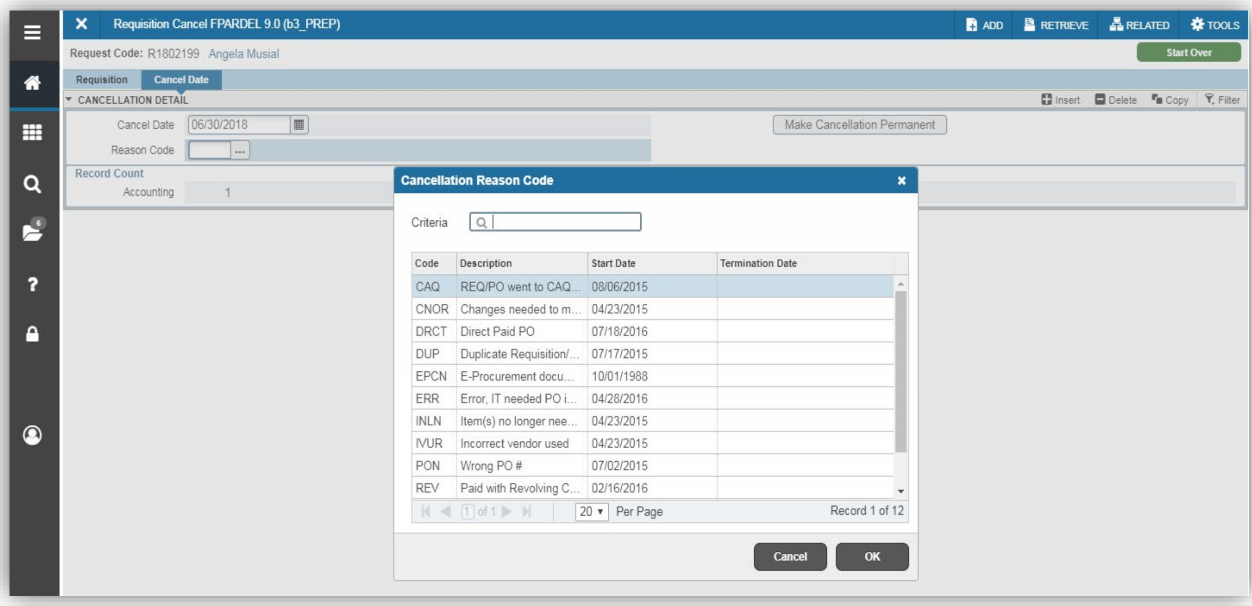
## CANCELING A REQUISITION

A Requisition can be cancelled after it has been completed and approved by using FPARDEL Requisition Cancel. A cancelled Requisition will no longer be viable in the system. A Requisition cannot be cancelled if a purchase order number has been assigned to it. Please notify your Buyer if you need to cancel a Requisition and Contact the Purchasing Department if you need to cancel a Requisition that has been assigned a Purchase Order.

1. Access the Requisition through **FPARDEL**.
2. Enter the Requisition number in the **Request Code** field.
3. Click **Go**.
4. Review the information fields to verify the Requisition being cancelled.




5. Select the **Cancel Date** tab.
6. Select **...** next to the Reason Code and select the reason for the cancellation.

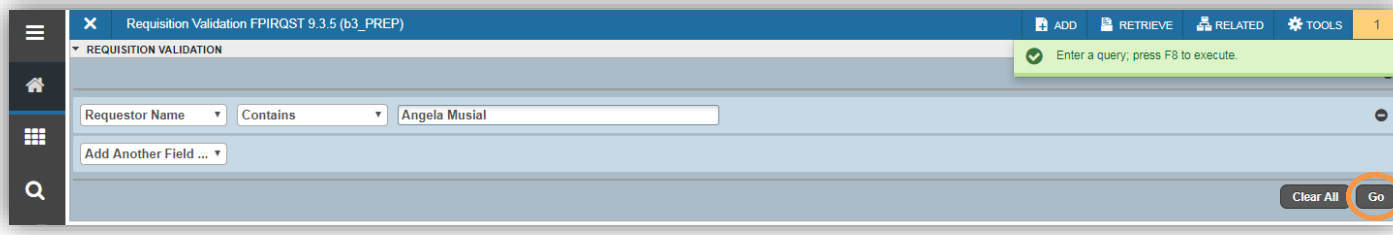



7. Click on the **Make Cancellation Permanent** button to cancel the Requisition.

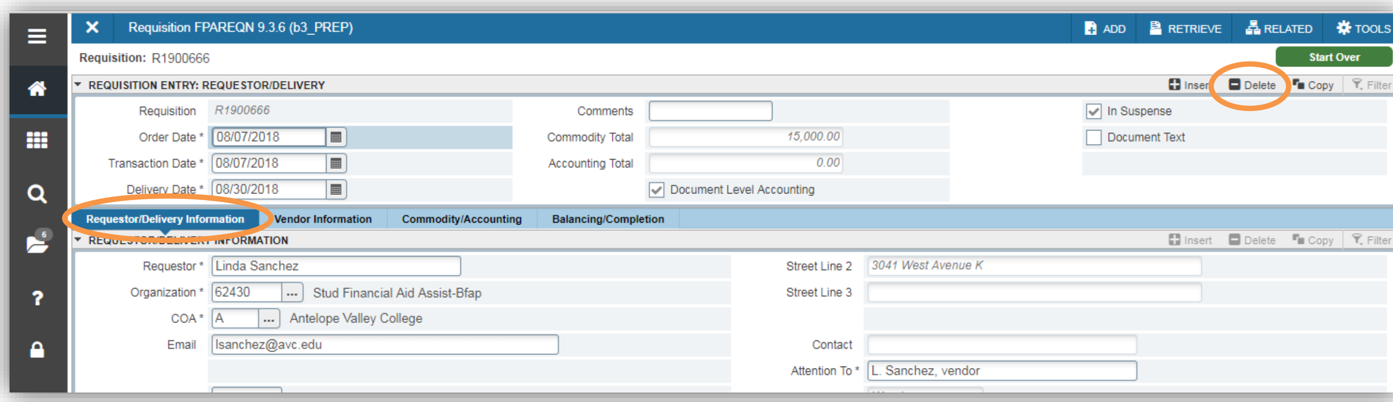
## DELETING A REQUISITION

A Requisition can only be deleted if it is still In Process. If a Requisition has been completed, but not approved, first remove the Requisition from Approvals in Bannerweb (see page 26) then proceed to delete the Requisition. If a Requisition has been Completed and Approved, you will only be able to cancel the Requisition (see page 14).

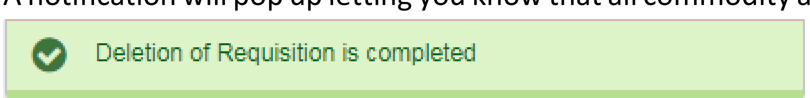
1. Access the Requisition through **FPAREQN**.
2. Click on the **...** to select your Requisition #.
    a. Click **Filter** in the top right of your screen.
    b. Choose your method of search (Request Number, Requestor Name) and enter the search information next to the field and select **Go.**
    c. Once you find the Requisition you were searching for, double-click the **Request Number**.




3. Click **Go** to access the REQ.
4. While on the **Requestor/Delivery Information** tab, click **Delete** at the top right of the screen twice.




5. A notification will pop up letting you know that all commodity and accounting records will be deleted.




## CHECKING BANNER MESSAGES

When a Requisition is approved or denied, the requester will receive an auto generated e-mail message from Banner workflow. Users can also view these messages in Banner through the following steps:

1. Log-in to Banner (INB)

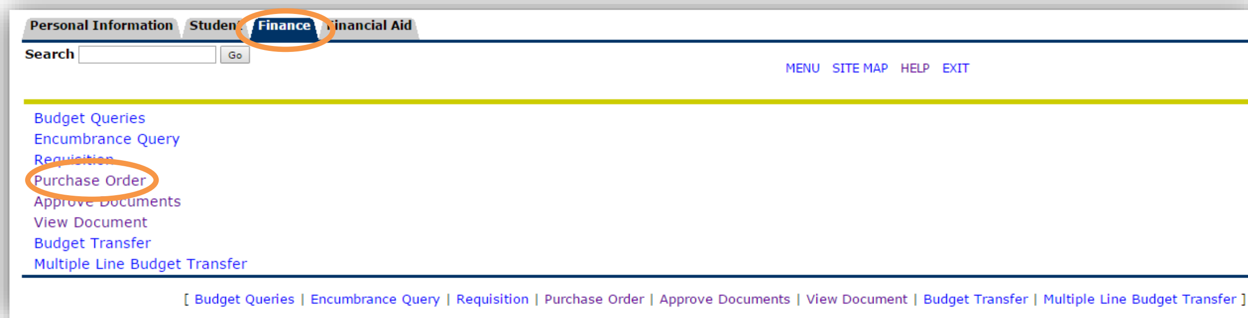
2. Navigate to **GUAMESG**.
3. Click **Filter** in the top right of your screen.
4. From **Add Another Field …** select **Item,** enter the Requisition # in the field, and select **Go.**


Scroll through the pages to review each message.

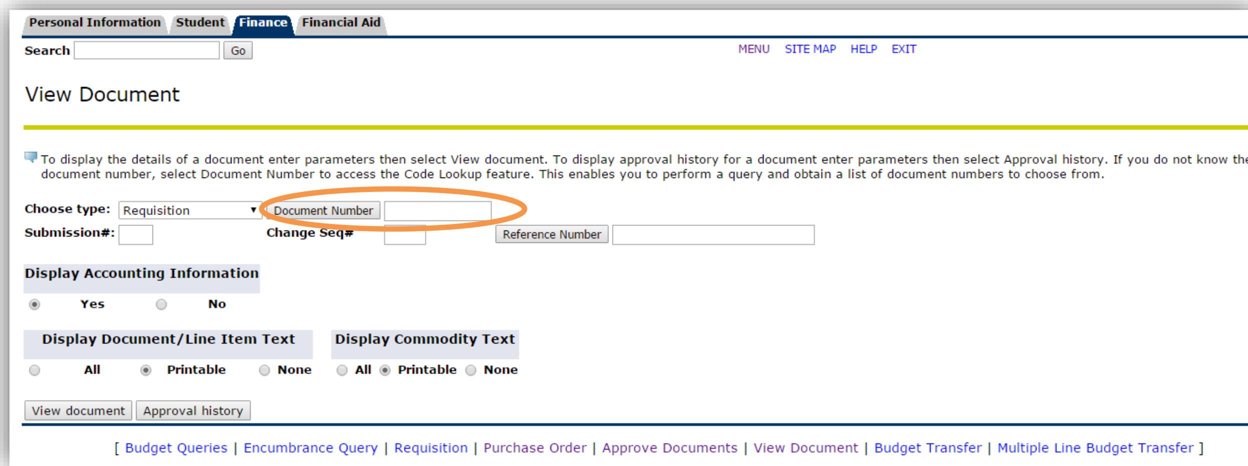
## BANNER SSB (BANNERWEB)

### VIEW DOCUMENTS (REQ, PO, ETC.) IN BANNER SSB

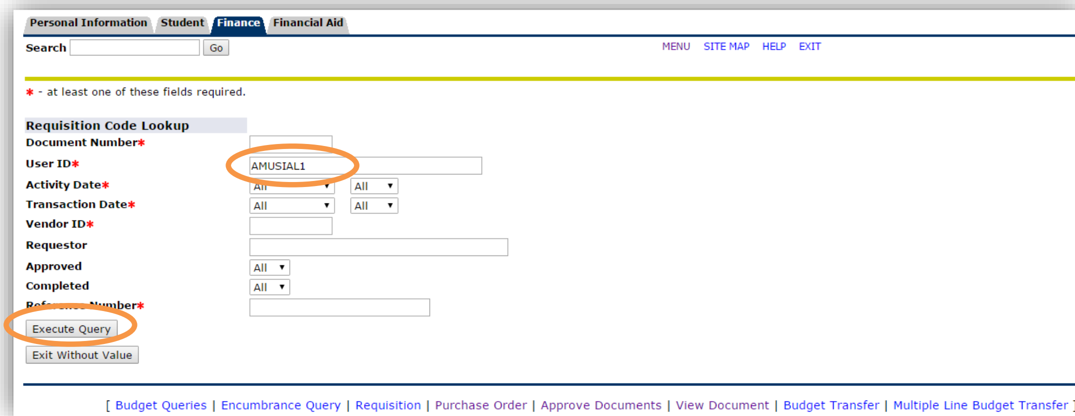
1. Click on the **Finance tab** at the top.
2. Select **View Document**




3. Select the **Choose type** (default will be **Requisition).**
4. Type the document # in the **Document Number** field or click **Document Number** to search

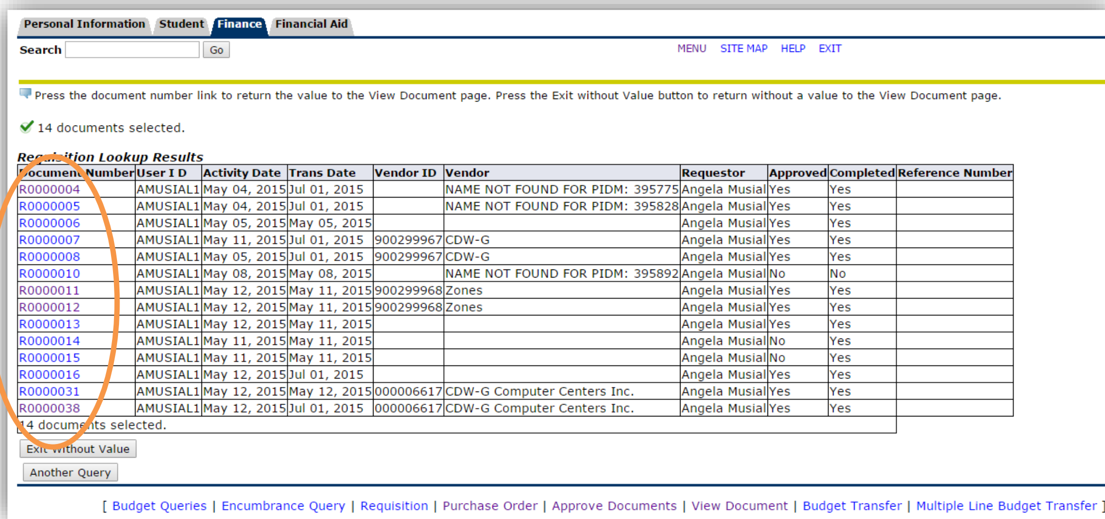



a. If you click **Document Number** to search, leave your name in the **User ID** field and select **Execute Query**. To view another users documents, type their User ID in the User ID field and select **Execute Query**.



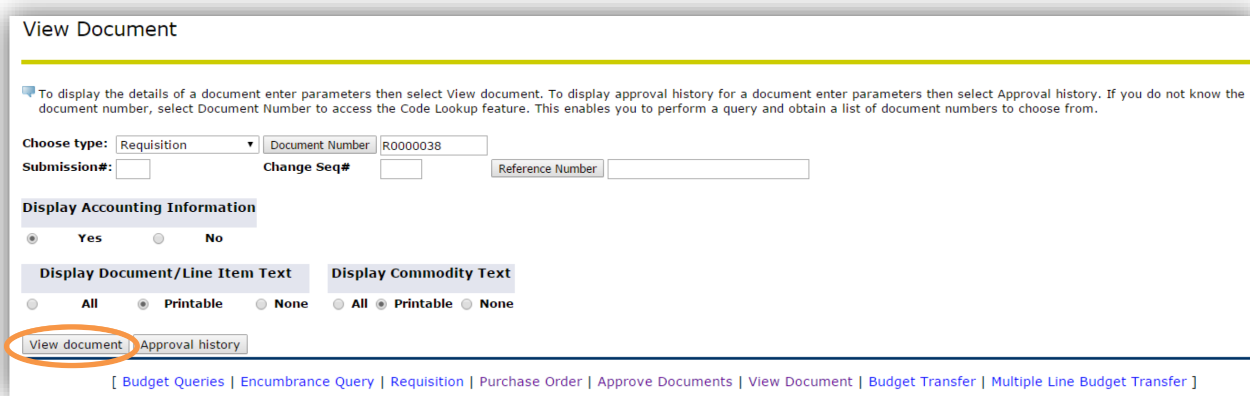

You can also use the wildcard key "**%**" if you know part of your document # (EX: R2101%) or want to view documents for an entire fiscal year (EX: R21%). Select **Execute Query**.

b. A list of your documents will appear. Click on the document # you want to view.




| Document Number | User I D | Activity Date | Trans Date | Vendor ID | Vendor | Requestor | Approved | Completed | Reference Number |
|---|---|---|---|---|---|---|---|---|---|
| R0000004 | AMUSIAL1 | May 04, 2015 | Jul 01, 2015 | | NAME NOT FOUND FOR PIDM: 395775 | Angela Musial | Yes | Yes | |
| R0000005 | AMUSIAL1 | May 04, 2015 | Jul 01, 2015 | | NAME NOT FOUND FOR PIDM: 395828 | Angela Musial | Yes | Yes | |
| R0000006 | AMUSIAL1 | May 05, 2015 | May 05, 2015 | | | Angela Musial | Yes | Yes | |
| R0000007 | AMUSIAL1 | May 11, 2015 | Jul 01, 2015 | 900299967 | CDW-G | Angela Musial | Yes | Yes | |
| R0000008 | AMUSIAL1 | May 05, 2015 | Jul 01, 2015 | 900299967 | CDW-G | Angela Musial | Yes | Yes | |
| R0000010 | AMUSIAL1 | May 08, 2015 | May 08, 2015 | | NAME NOT FOUND FOR PIDM: 395892 | Angela Musial | No | No | |
| R0000011 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | 900299968 | Zones | Angela Musial | Yes | Yes | |
| R0000012 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | 900299968 | Zones | Angela Musial | Yes | Yes | |
| R0000013 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | | | Angela Musial | Yes | Yes | |
| R0000014 | AMUSIAL1 | May 11, 2015 | May 11, 2015 | | | Angela Musial | No | Yes | |
| R0000015 | AMUSIAL1 | May 11, 2015 | May 11, 2015 | | | Angela Musial | No | Yes | |
| R0000016 | AMUSIAL1 | May 12, 2015 | Jul 01, 2015 | | | Angela Musial | Yes | Yes | |
| R0000031 | AMUSIAL1 | May 12, 2015 | May 12, 2015 | 000006617 | CDW-G Computer Centers Inc. | Angela Musial | Yes | Yes | |
| R0000038 | AMUSIAL1 | May 12, 2015 | Jul 01, 2015 | 000006617 | CDW-G Computer Centers Inc. | Angela Musial | Yes | Yes | |

5. Select **View Document** to view the document.

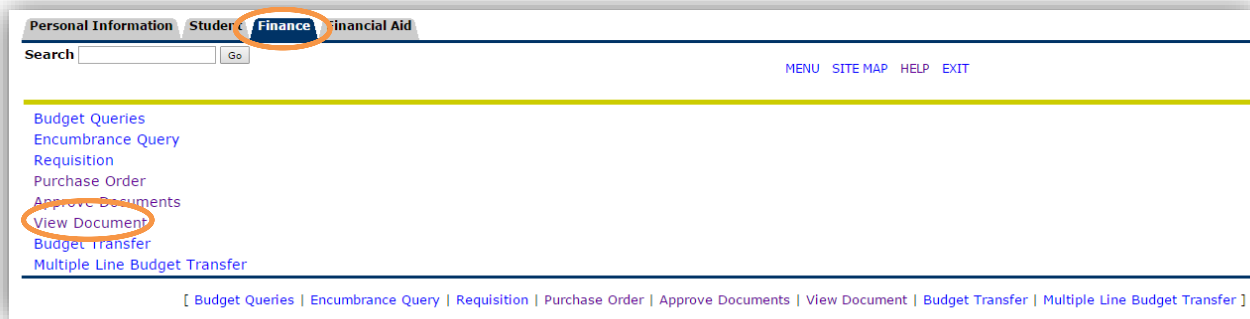


***Requisition Header***

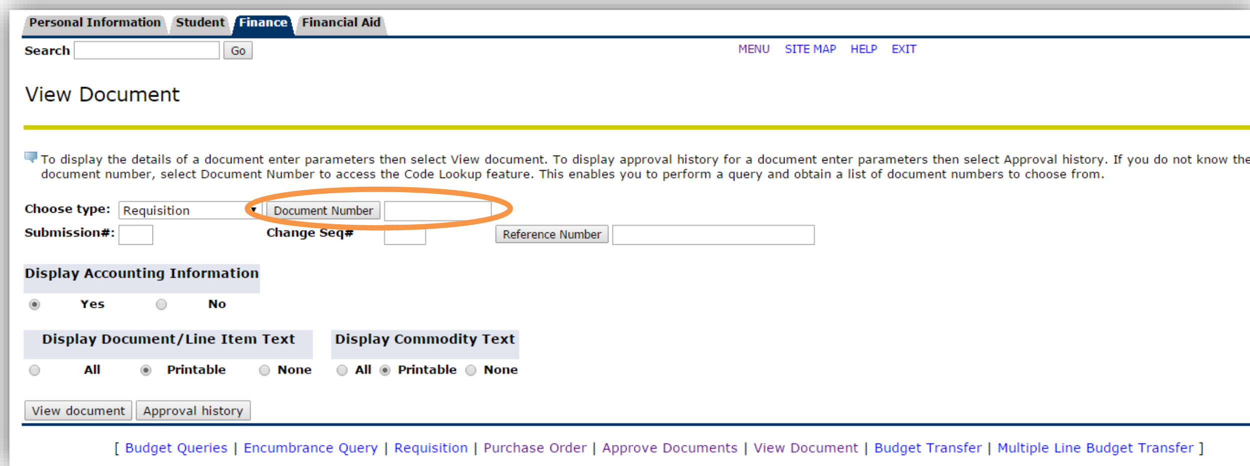
| Requisition | Order Date | Trans Date | Delivery Date | Print Date | Total |
|---|---|---|---|---|---|
| R1602340 | Mar 24, 2016 | Mar 24, 2016 | Mar 24, 2016 | | 296.58 |
| | | | | | |
| Origin: | BANNER | | | | |
| Complete: | Y | Approved: | Y | Type: | Procurement |
| Cancel Reason: | | | | Date: | |
| Requestor: | Angela Musial | | 14020 | Business Services | |
| E-mail: | amusial1@avc.edu | | | | |
| Accounting: | Document Level | | | | |
| | | | | | |
| Ship to: | Antelope Valley College | | | | |
| | 3041 West Avenue K | | | | |
| | Warehouse | | | | |
| | Lancaster, CA 93536 | | | | |
| Attention: | a.musial, A154, Vendor | | | | |
| Contact: | | | | | |
| Phone Number: | | | | | |
| | | | | | |
| Vendor: | 000004533 | Zones Inc Business & Technology | | | |
| | 1102 15th St SW Ste 102 | | | | |
| | Auburn, WA 98001 | | | | |
| Phone Number: | 800-419-9663 | | | | |
| Fax Number: | | | | | |
| | | | | | |
| Document Text: | Quote # K0275851 | | | | |

## PRINT DOCUMENTS (REQ, PO, ETC.) IN BANNER WEB

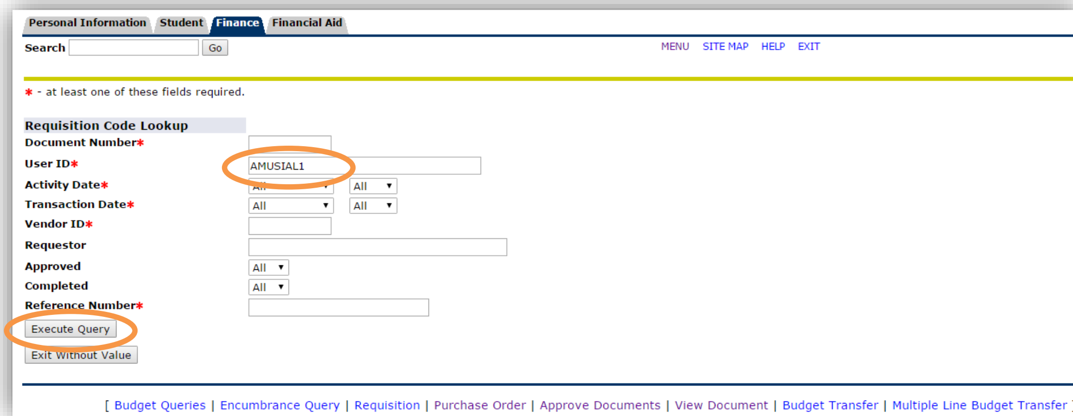
1. Click on the **Finance tab** at the top.
2. Select **View Document**




3. Select the **Choose type** (default will be **Requisition).**
4. Type the document # in the **Document Number** field or click **Document Number** to search

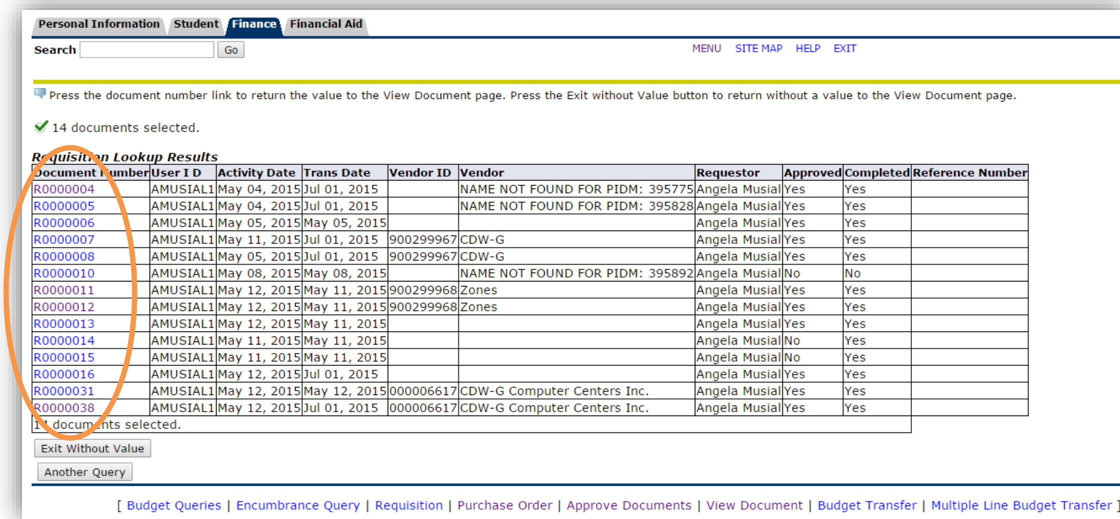



a. If you click **Document Number** to search, leave your name in the **User ID** field and select **Execute Query**. To view another users documents, type their name in the User ID field and select **Execute Query**.



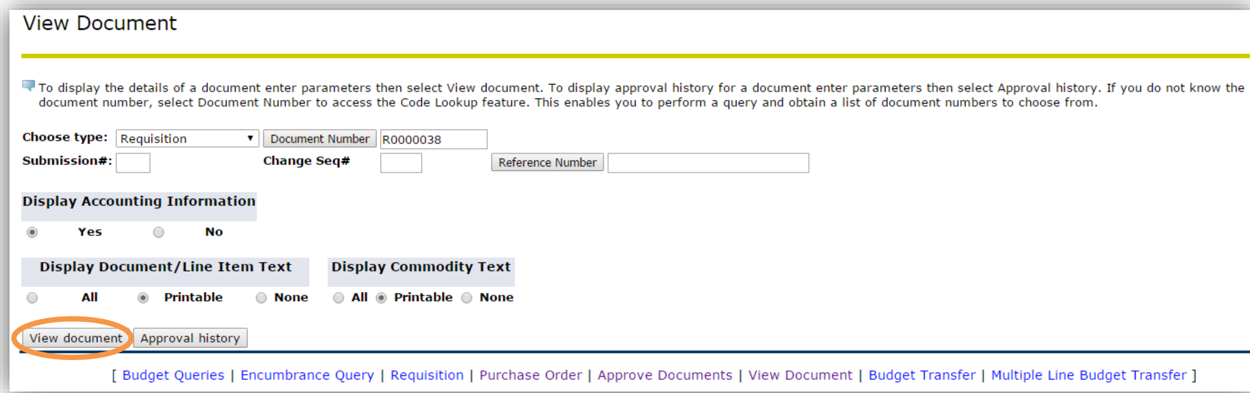

You can also use the wildcard key "**%**" if you know part of your document # (EX: R00001%) or want to view documents for an entire fiscal year (EX: R16%). Select **Execute Query**.

b. A list of your documents will appear. Click on the document # you want to view.




| Document Number | User I D | Activity Date | Trans Date | Vendor ID | Vendor | Requestor | Approved | Completed | Reference Number |
|---|---|---|---|---|---|---|---|---|---|
| R0000004 | AMUSIAL1 | May 04, 2015 | Jul 01, 2015 | | NAME NOT FOUND FOR PIDM: 395775 | Angela Musial | Yes | Yes | |
| R0000005 | AMUSIAL1 | May 04, 2015 | Jul 01, 2015 | | NAME NOT FOUND FOR PIDM: 395828 | Angela Musial | Yes | Yes | |
| R0000006 | AMUSIAL1 | May 05, 2015 | May 05, 2015 | | | Angela Musial | Yes | Yes | |
| R0000007 | AMUSIAL1 | May 11, 2015 | Jul 01, 2015 | 900299967 | CDW-G | Angela Musial | Yes | Yes | |
| R0000008 | AMUSIAL1 | May 05, 2015 | Jul 01, 2015 | 900299967 | CDW-G | Angela Musial | Yes | Yes | |
| R0000010 | AMUSIAL1 | May 08, 2015 | May 08, 2015 | | NAME NOT FOUND FOR PIDM: 395892 | Angela Musial | No | No | |
| R0000011 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | 900299968 | Zones | Angela Musial | Yes | Yes | |
| R0000012 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | 900299968 | Zones | Angela Musial | Yes | Yes | |
| R0000013 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | | | Angela Musial | Yes | Yes | |
| R0000014 | AMUSIAL1 | May 11, 2015 | May 11, 2015 | | | Angela Musial | No | Yes | |
| R0000015 | AMUSIAL1 | May 11, 2015 | May 11, 2015 | | | Angela Musial | No | Yes | |
| R0000016 | AMUSIAL1 | May 12, 2015 | Jul 01, 2015 | | | Angela Musial | Yes | Yes | |
| R0000031 | AMUSIAL1 | May 12, 2015 | May 12, 2015 | 000006617 | CDW-G Computer Centers Inc. | Angela Musial | Yes | Yes | |
| R0000038 | AMUSIAL1 | May 12, 2015 | Jul 01, 2015 | 000006617 | CDW-G Computer Centers Inc. | Angela Musial | Yes | Yes | |

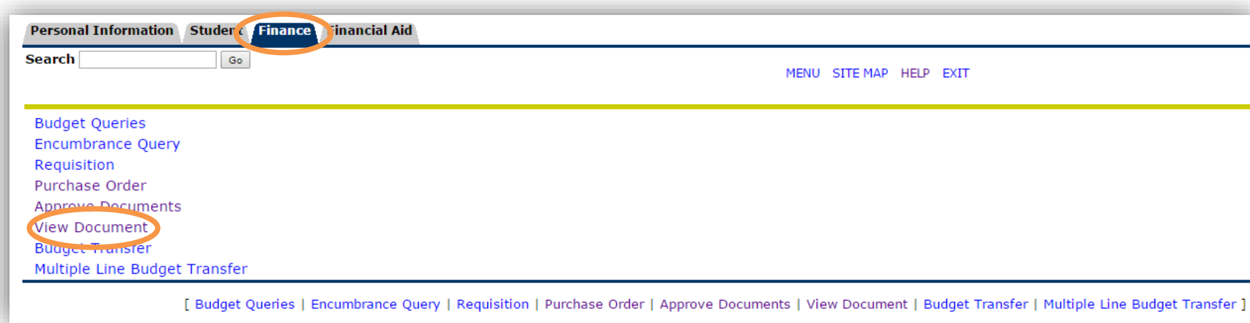
5. Select **View Document** to print the document.



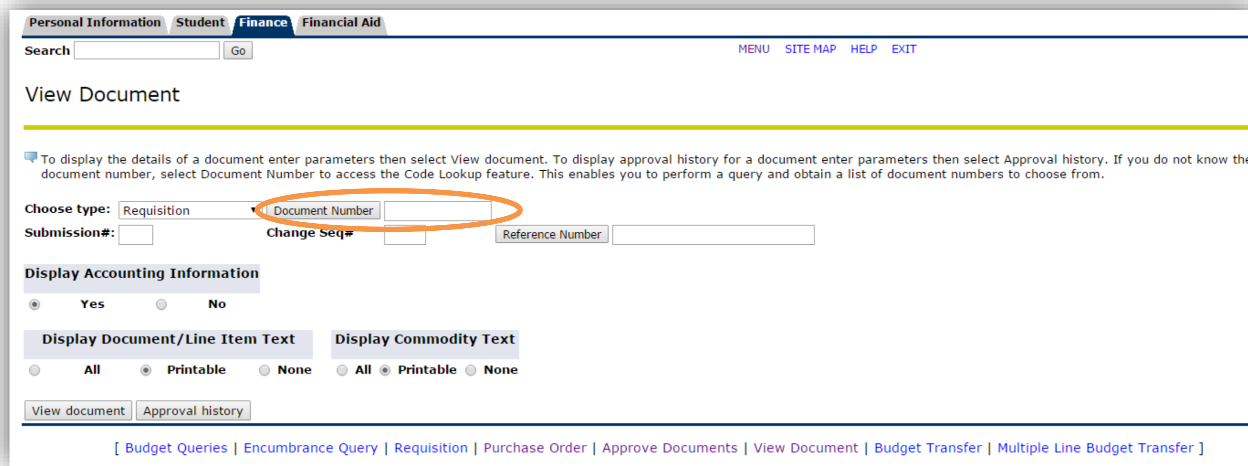

6. Right click on the Requisition information and select print or on your keyboard select Ctrl+P

## VIEW/CHECK APPROVALS FOR A DOCUMENT (REQ, PO, ETC.) IN BANNER WEB

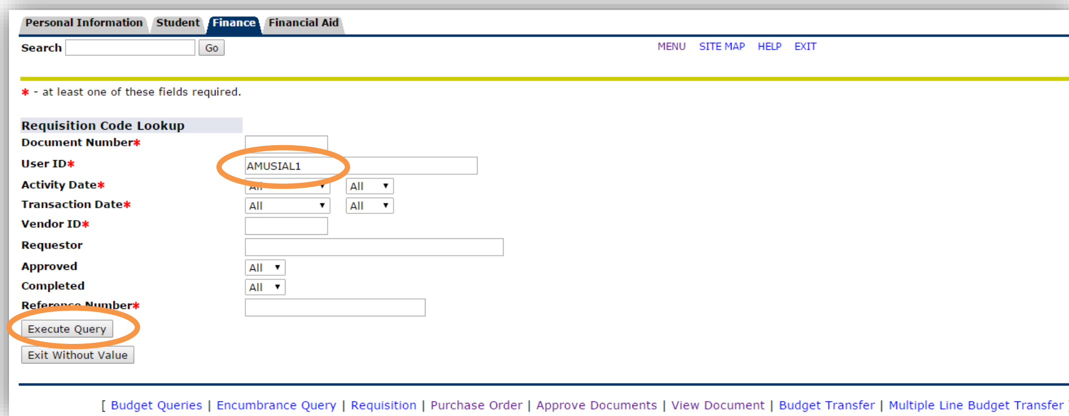
1. Click on the **Finance tab** at the top.
2. Select **View Document**




3. Select the **Choose type** (default will be **Requisition).**
4. Type the document # in the **Document Number** field or click **Document Number** to search

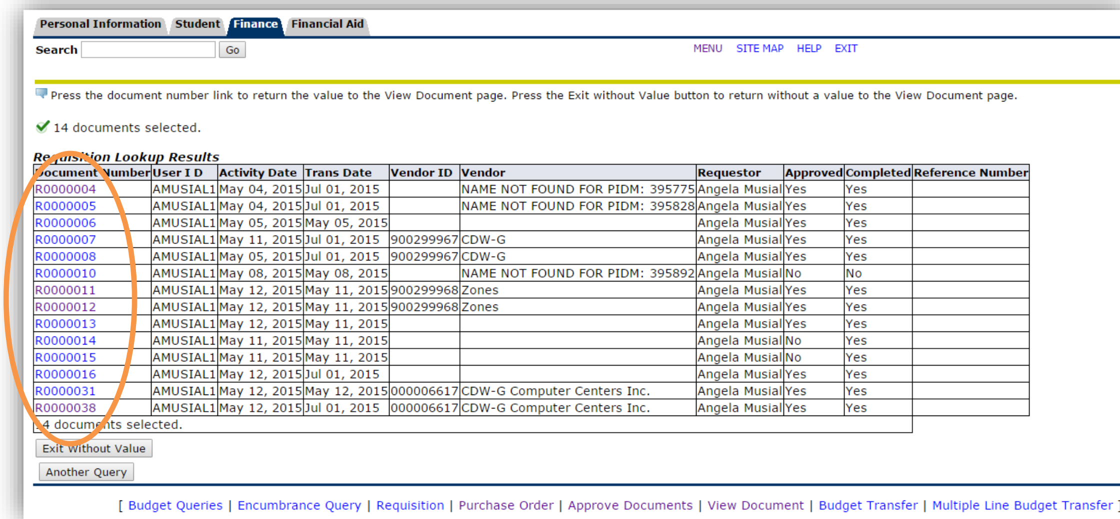



a. If you click **Document Number** to search, leave your name in the **User ID** field and select **Execute Query**. To view another users documents, type their name in the User ID field and select **Execute Query**.




You can also use the wildcard key "**%**" if you know part of your document # (EX: R00001%) or want to view documents for an entire fiscal year (EX: R16%). Select **Execute Query**.

b. A list of your documents will appear. Click on the document # you want to view.



Personal Information | Student | Finance | Financial Aid

Search [ ] Go — MENU SITE MAP HELP EXIT

Press the document number link to return the value to the View Document page. Press the Exit without Value button to return without a value to the View Document page.

14 documents selected.

*Requisition Lookup Results*

| Document Number | User I D | Activity Date | Trans Date | Vendor ID | Vendor | Requestor | Approved | Completed | Reference Number |
|---|---|---|---|---|---|---|---|---|---|
| R0000004 | AMUSIAL1 | May 04, 2015 | Jul 01, 2015 | | NAME NOT FOUND FOR PIDM: 395775 | Angela Musial | Yes | Yes | |
| R0000005 | AMUSIAL1 | May 04, 2015 | Jul 01, 2015 | | NAME NOT FOUND FOR PIDM: 395828 | Angela Musial | Yes | Yes | |
| R0000006 | AMUSIAL1 | May 05, 2015 | May 05, 2015 | | | Angela Musial | Yes | Yes | |
| R0000007 | AMUSIAL1 | May 11, 2015 | Jul 01, 2015 | 900299967 | CDW-G | Angela Musial | Yes | Yes | |
| R0000008 | AMUSIAL1 | May 05, 2015 | Jul 01, 2015 | 900299967 | CDW-G | Angela Musial | Yes | Yes | |
| R0000010 | AMUSIAL1 | May 08, 2015 | May 08, 2015 | | NAME NOT FOUND FOR PIDM: 395892 | Angela Musial | No | No | |
| R0000011 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | 900299968 | Zones | Angela Musial | Yes | Yes | |
| R0000012 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | 900299968 | Zones | Angela Musial | Yes | Yes | |
| R0000013 | AMUSIAL1 | May 12, 2015 | May 11, 2015 | | | Angela Musial | Yes | Yes | |
| R0000014 | AMUSIAL1 | May 11, 2015 | May 11, 2015 | | | Angela Musial | No | Yes | |
| R0000015 | AMUSIAL1 | May 11, 2015 | May 11, 2015 | | | Angela Musial | No | Yes | |
| R0000016 | AMUSIAL1 | May 12, 2015 | Jul 01, 2015 | | | Angela Musial | Yes | Yes | |
| R0000031 | AMUSIAL1 | May 12, 2015 | May 12, 2015 | 000006617 | CDW-G Computer Centers Inc. | Angela Musial | Yes | Yes | |
| R0000038 | AMUSIAL1 | May 12, 2015 | Jul 01, 2015 | 000006617 | CDW-G Computer Centers Inc. | Angela Musial | Yes | Yes | |

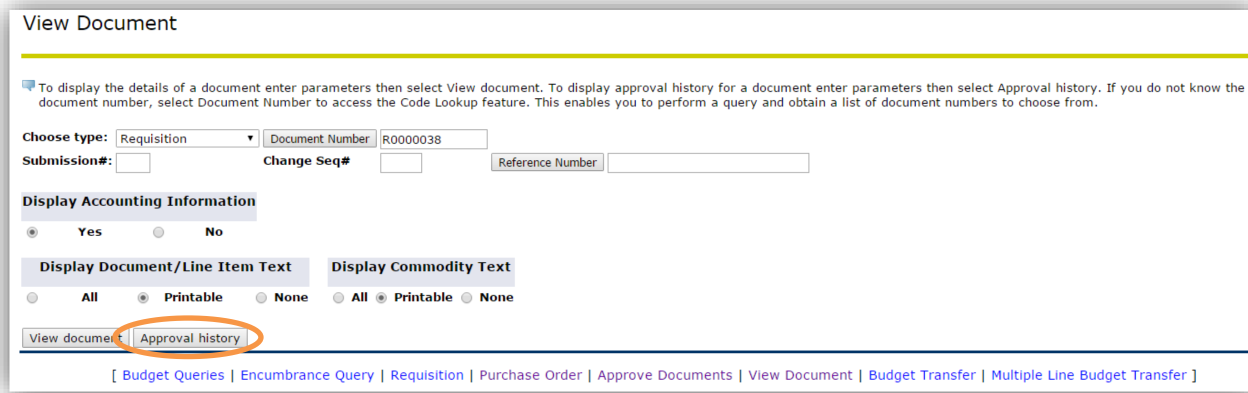
14 documents selected.

Exit Without Value

Another Query

[ Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer ]

5. Select **Approval History** to view the approval history of the Requisition.



View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type: Requisition — Document Number: R0000038

Submission#: — Change Seq# — Reference Number

Display Accounting Information: Yes / No

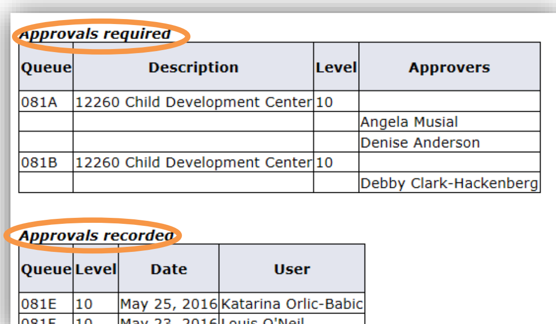
Display Document/Line Item Text: All / Printable / None

Display Commodity Text: All / Printable / None

View document | Approval history

[ Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer ]

Approval History



*Approvals required*

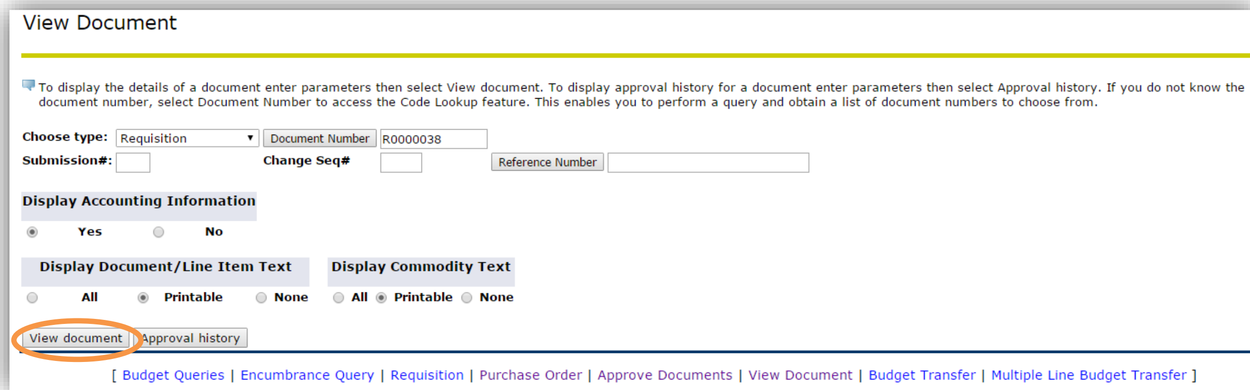
| Queue | Description | Level | Approvers |
|---|---|---|---|
| 081A | 12260 Child Development Center | 10 | |
| | | | Angela Musial |
| | | | Denise Anderson |
| 081B | 12260 Child Development Center | 10 | |
| | | | Debby Clark-Hackenberg |

*Approvals recorded*

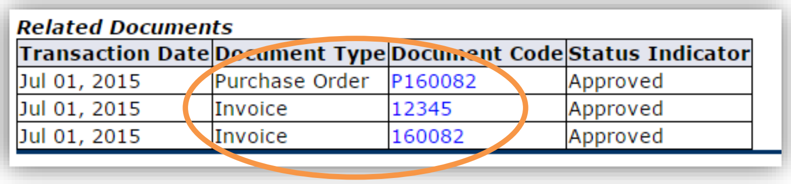
| Queue | Level | Date | User |
|---|---|---|---|
| 081E | 10 | May 25, 2016 | Katarina Orlic-Babic |
| 081F | 10 | May 23, 2016 | Louis O'Neil |

## LOOKING UP/VIEWING A PO NUMBER, CHANGE ORDER, OR INVOICE

1. Follow steps 1-5 under **VIEW DOCUMENTS (REQ, PO, ETC.) IN BANNER WEB**.
2. Select **View Document**.




3. Scroll to the end of the Requisition to view **Related Documents.**

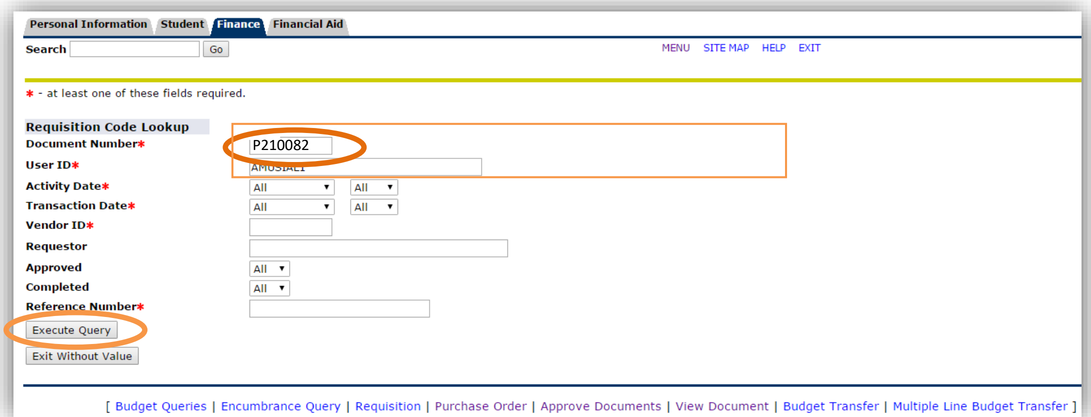

*Related Documents*

| Transaction Date | Document Type | Document Code | Status Indicator |
|---|---|---|---|
| Jul 01, 2015 | Purchase Order | P160082 | Approved |
| Jul 01, 2015 | Invoice | 12345 | Approved |
| Jul 01, 2015 | Invoice | 160082 | Approved |

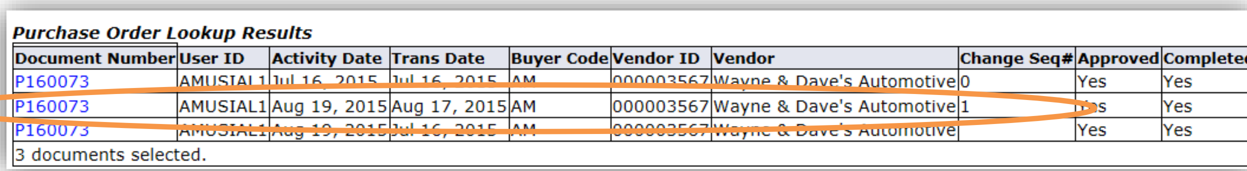
4. You can then click on the **Document Code** to view or print.

**To view a Change Order**

1. Go back to the View Document Screen, select Purchase Order as the **Choose Type** and select **Document Number.**
2. Type the Purchase Order # into the **Document Number** field and remove the username from the **User ID** field.




3. Select **Execute Query.**
4. Change Orders will have a Change Seq# of 1 or greater. Select the document # you wish to view, then Select View Document to view and/or print the document or select Approval History to view the approval history of the document.



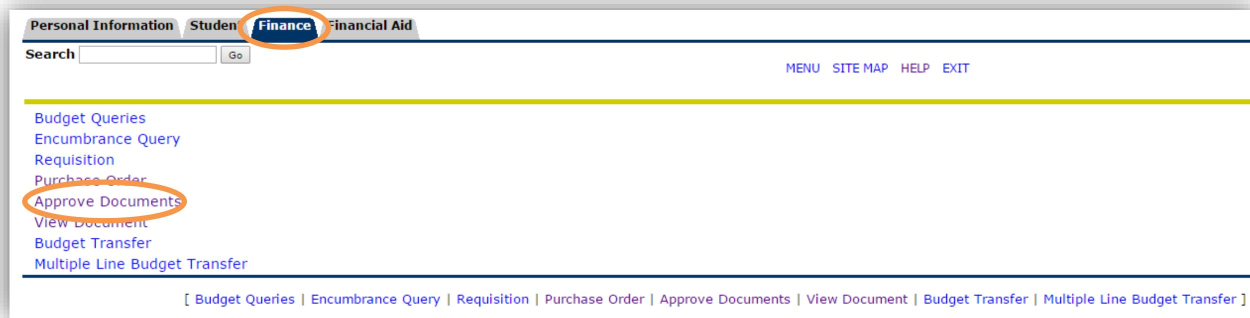
*Purchase Order Lookup Results*

| Document Number | User ID | Activity Date | Trans Date | Buyer Code | Vendor ID | Vendor | Change Seq# | Approved | Completed |
|---|---|---|---|---|---|---|---|---|---|
| P160073 | AMUSIAL1 | Jul 16, 2015 | Jul 16, 2015 | AM | 000003567 | Wayne & Dave's Automotive | 0 | Yes | Yes |
| P160073 | AMUSIAL1 | Aug 19, 2015 | Aug 17, 2015 | AM | 000003567 | Wayne & Dave's Automotive | 1 | Yes | Yes |
| P160073 | AMUSIAL1 | Aug 19, 2015 | Jul 16, 2015 | AM | 000003567 | Wayne & Dave's Automotive | | Yes | Yes |
| 3 documents selected. | | | | | | | | | |

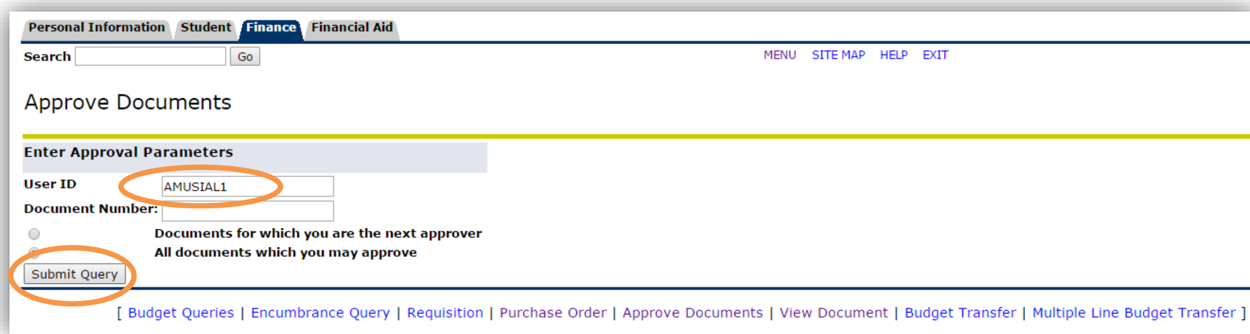
## REMOVING A REQUISITION FROM APPROVALS IN BANNERWEB

To make changes to, or delete, a Requisition that is in the approval process, you will need to deny the Requisition in the Approve Documents section of Bannerweb.

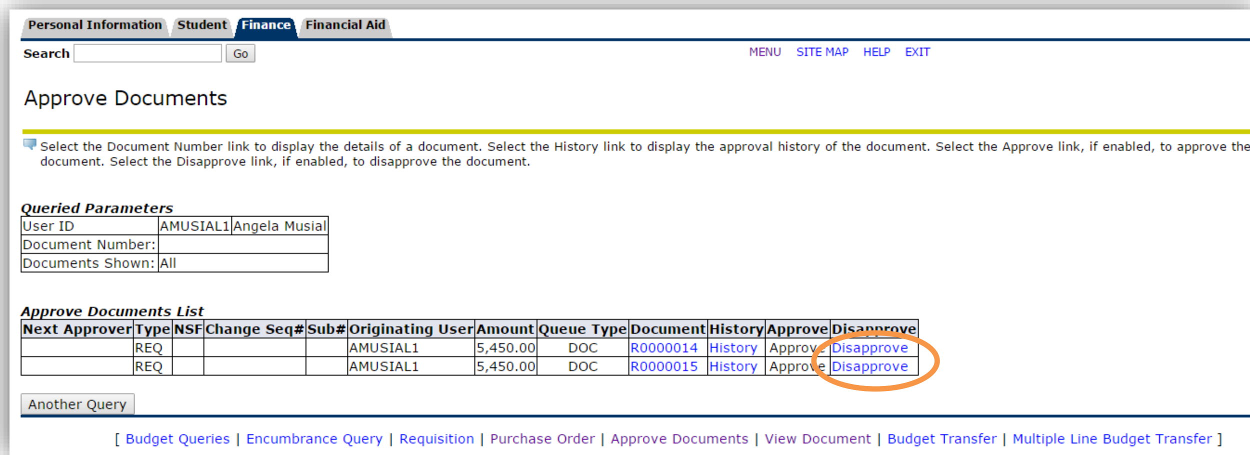
1. Click on the **Finance tab** at the top.
2. Select **Approve Documents.**




3. **User ID** will default to you.
4. Select **All documents which you may approve** and **Submit Query.**




5. All Requisitions you have submitted which are currently in the approval process will display.
6. Select **Disapprove** of the Requisition you want to remove from the approval process.



Personal Information | Student | Finance | Financial Aid

Search [ ] Go

MENU SITE MAP HELP EXIT

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

*Queried Parameters*

| | | |
|---|---|---|
| User ID | AMUSIAL1 | Angela Musial |
| Document Number: | | |
| Documents Shown: | All | |

*Approve Documents List*

| Next Approver | Type | NSF | Change Seq# | Sub# | Originating User | Amount | Queue Type | Document | History | Approve | Disapprove |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | REQ | | | | AMUSIAL1 | 5,450.00 | DOC | R0000014 | History | Approve | Disapprove |
| | REQ | | | | AMUSIAL1 | 5,450.00 | DOC | R0000015 | History | Approve | Disapprove |

Another Query

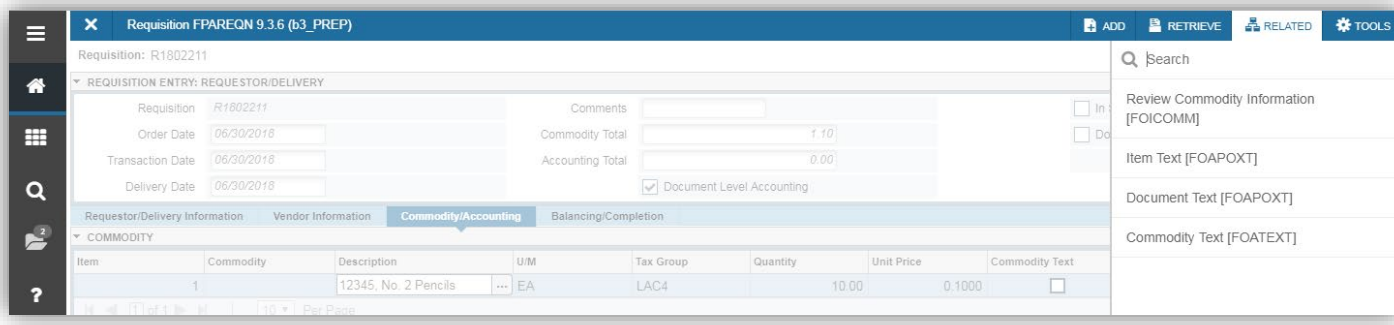
[ Budget Queries | Encumbrance Query | Requisition | Purchase Order | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer ]

Once your Requisition is removed, you can cancel or make changes to the Requisition in Banner (INB), FPAREQN.

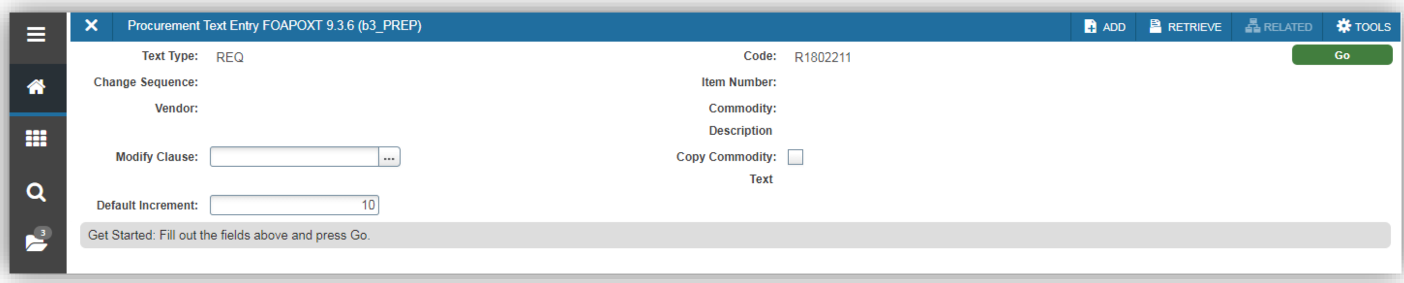
# Appendix A – Document and Item Text (FOAPOXT)

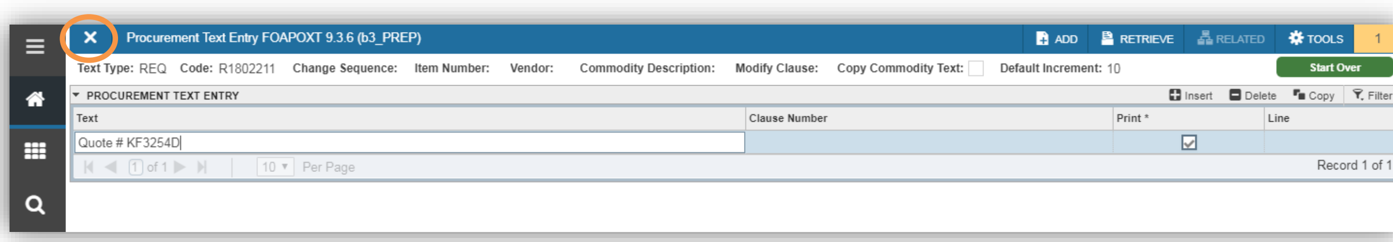
**DOCUMENT TEXT** (optional): Allows you to enter text that applies to the entire Requisition (new vendor information, processing instructions for Purchasing department, quote numbers, kit information, piggyback information, authorized users, description of purchases for Standing PO's, etc.).

**ITEM TEXT** (optional): Allows you to enter text that applies to a specific commodity line (additional description information, delivery dates if they differ for each line, etc.).




1. While in any of the Requisition tabs, under "Related" (top right of page), select Document Text [FOAPOXT] or while in the Description field of the applicable Item select Item Text [FOAPOXT], to enter additional information.
2. Entering Text:
   a. **TO ENTER TEXT**: select **Next Section**  at the bottom left of the screen to move to the Accounting Block. Begin typing your information in the **TEXT** field. Use the **down arrow** to add more text (the text will not automatically wrap to the next line).




**TO ENTER NEW VENDOR INFORMATION**: Click the **…** next to the Modify Clause field:
   i. Double click the VEND clause. It will then show up in the **Modify Clause** field.
   ii. Click **Next Section**  and begin filling in the required items in the **TEXT** field.

3. Click **Save** at the bottom right of the screen when you have finished entering your text.

4. Click **Close** at the top left of the screen to return to the Requisition Entry.

## Appendix B – Attaching Documents to Your Requisition

If your Requisition requires Supporting Documentation, please upload the supporting documentation to your Requisition through OnBase.

If you need access to Onbase or are having issues with your access, ITS can assist you by emailing help@avc.edu.

OnBase Video Guides can be found on the Purchasing Banner page under **Other Helpful Guides/Information**.

https://www.avc.edu/purchasing-and-contracts/banner

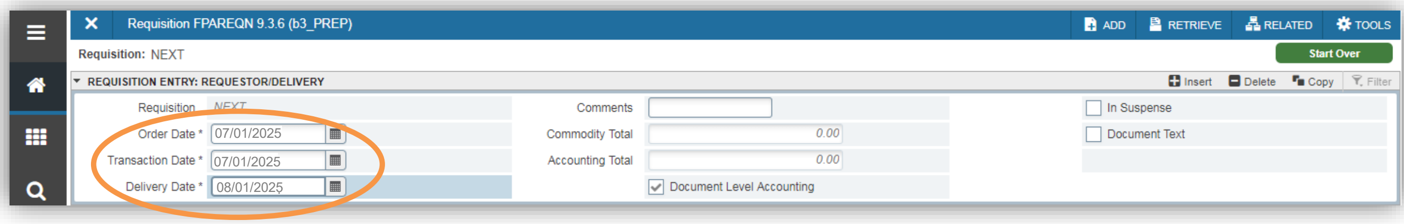
# Appendix C – Creating a Requisition for a Future Fiscal Year

When creating a Requisition for a Future Fiscal Year (prior to July 1), after notice to do so has been provided by the Fiscal or Purchasing Department, there are a few items that will be different on the Requisition:

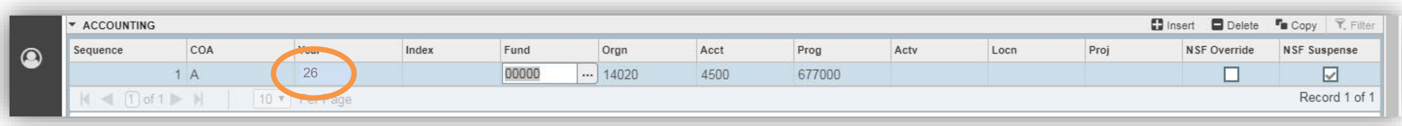
1. **ORDER DATE**: The **Order Date** will need to be changed to the first date of the fiscal year 01-JUL-20XX. Once the new fiscal year begins, the **Order Date** will default to the current date and will not need to change.
2. **TRANSACTION DATE**: The **Transaction Date** will need to be changed to the first date of the fiscal year 01-JUL-20XX. Once the new fiscal year begins, the **Transaction Date** will default to the current date and will not need to change.

***NOTE:*** *The Order Date and the Transaction Date* ***must*** *be the same.*

3. **DELIVERY DATE**: The **Delivery Date** should be a date that is at least 3 weeks from the **Order Date** to allow adequate time for approvals, processing, and delivery.




4. **YEAR**: The Fiscal Year in the FOAP will automatically default based on the Order Date and Transaction Date. Be sure that this **Year** matches the Fiscal Year in which your Requisition is being entered for.




5. **IN PROCESS:** Select In Process to save your Requisition to complete at a later time.

   **COMPLETE:** Select Complete when you have entered all the information for the Requisition and are ready to send it forward to approvals.

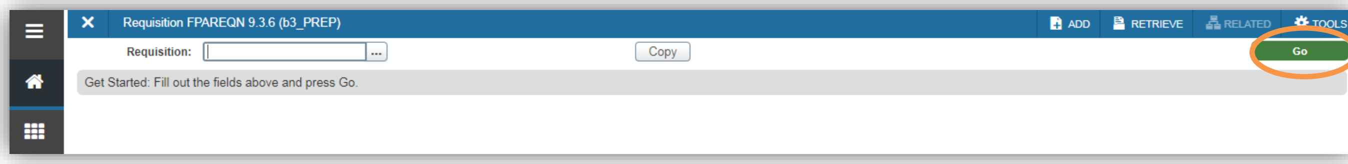
***NOTE:*** *If your Requisition requires any supporting documentation to be uploaded to Onbase (see Requisition Checklist [https://www.avc.edu/purchasing-and-contracts/guidelines-processes](https://www.avc.edu/purchasing-and-contracts/guidelines-processes)), these documents should be uploaded prior to completing your Requisition for approvals. Requisitions completed prior to documents being uploaded to Onbase may be disapproved if a Buyer reviews the Requisition prior to the documents being uploaded. See Appendix B for additional information regarding Onbase and uploading documents.*

**NOTE YOUR REQUISITION NUMBER FOR FUTURE REFERENCE.**

# Appendix D – Copying a Requisition in FPAREQN

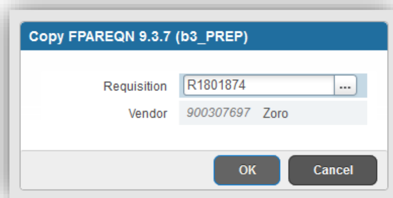
When creating a requisition, you may find it convenient to copy a requisition you created at an earlier date. For instance, if you have some standard supplies you buy several times each year, you can copy an older requisition, change a few fields and complete the requisition.

1. In Banner SSB (myAVC), navigate to **View Documents** and bring up the PO of the REQ you want to copy.
2. Navigate to FPAREQN.




3. Click on the **Copy** button. This opens the Copy dialog box.

4. Enter the Requisition number you want to copy and hit enter.
5. Banner will display the vendor name for verification. Click the **OK** button to open the new copy of the requisition.




Banner will display all previous information except the order and transaction date will reflect the current date and the delivery date field will be blank.

6. Enter a new date in the Delivery Date field.
7. Proceed through the information blocks as you did previously, changing information as necessary. **Because buyers will make changes on the PO, you must bring up the PO of the REQ your copying in myAVC and update the necessary information including document text, item text, commodity, etc.**
8. Complete or put the requisition In Process on the Balancing/Completion block.

# Appendix E – Additional Resources & Support

Below are key resources to support you in preparing and submitting purchase requisitions. These links will take you directly to our website, where you can find tools, checklists, and important procedural information to help you navigate the procurement process.

1. **Educational Resources (Banner, Contract Services & Travel Workings Sessions)**
   Join us for in-person working sessions designed to provide hands-on support and answer your questions. Be sure to bring any requisitions or related documents you're working on; these sessions are meant for live, active support.
   View the Schedule on our Website

2. **Procurement Guidelines**
   This section includes essential guidance on:
   a. ***The Procurement Process*** - Review the overall procurement process, including steps to initiate and complete a purchase.
   b. ***Requisition Checklist & Bid Limits*** - Use this checklist to ensure your requisition is complete and accurate before submission and complies with current bid thresholds.
   c. ***Exceptions to Quotes/Bidding*** – A reference list of legal authority allowing alternative to standard quote/bid requirements.

3. **Purchasing Processes & Procedures**
   Review the district's purchasing policies and compliance procedures.
   Access Policies & Procedures