

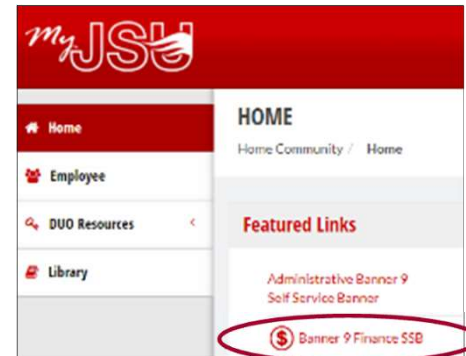
Procurement & Fixed Assets Banner 9 Finance SSB My Requisitions



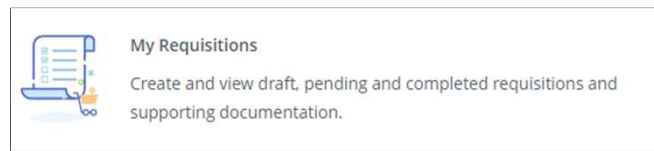
Entering Requisitions



Login to your MyJSU account.
Select the Banner 9 Finance SSB link.



Select 'My Requisitions' from the My Finance menu.



Select 'Create Requisition' - located top right of screen.



Entering Requisitions – Requestor Information



- Enter 'Delivery Date' as one month after the transaction date to allow sufficient time for recording of approvals and PO processing. This is not the PO date. PO date will be assigned when processed by Procurement.
- Requestor Information (including email) defaults from the Banner Finance user profile maintenance form.
 - 'Organization' code defaults (Can be changed if entering for another org)
 - 'Ship To Location' & 'Attention To' defaults (Select from list or enter directly if entering for another dept.) – if 'Ship To' information is incorrect, email purchasing@jsu.edu, providing 'Ship To' code and correct information
- Select 'Next'

Other notes:

- Do not change the 'Accounting Type'; leave as 'Document Level Accounting'
- Enter document text in 'Public Comments'



Entering Requisitions – Vendor Information



- Enter the Vendor ID or the Vendor name (a listing will appear from which you can select). **For a new vendor, please provide the vendor's signed W-9 to Procurement at purchasing@jsu.edu.

Vendor

Choose Vendor

staples

Staples Contract & Commercial Inc. (001094244)
500 Staples Drive Framingham MA 01702

Staples Contract & Commercial Inc. (001094244)

Staples Advantage Dept Atl Atlanta GA 30348-5748

Staples Promotional Products (001000270)

Staples Contract & Commercial LLC Overland Park KS 66210-2372

- Select the vendor. Information will auto populate. No vendor email is necessary. System will override any email address entered. PO vendor and receiving copies are emailed to the Requestor. Exception: Apple, CDWG or Dell vendor copy is emailed to IT for ordering with receiving copy emailed to Requestor.

- Select 'Next' at the bottom of the screen.

Vendor

Staples Contract & Commercial Inc. (001094244)
x v

Vendor Information

Staples Contract & Commercial Inc. (001094244)
500 Staples Drive
Framingham MA 01702

Vendor Email

Choose/Enter Email
v

Discount

Choose Discount
v

Currency

Choose Currency
v

Other notes:

- No entry in the 'Discount' field
- No entry in the 'Currency' field



Entering Requisitions – Adding Items



- Enter the item description in the 'Add Item(s)' box.
- If you have a list of items or a quote (non-capital equipment only), you can enter 'See attached list of supplies' or 'See attached quote'.
- NOTE: For capital equipment (individual item costing \$5,000 or more; not total of all items) the item description must be entered for inventory description/tracking. Capital equipment items cannot be included on the same requisition as non-capital items.

Add Item(s)

Choose Item ^

staples q

staples (Add as new item)

- Select 'Unit of Measure'
- Enter the 'Quantity' and net 'Unit Price'
- Do not enter amounts in the 'Discount Amount' or 'Additional Amount' or 'Tax Amount' fields
- Comments specific to the item can be entered in 'Public Comments'
- Select 'Save' at the bottom of the screen
- Repeat above steps if you have additional items

1 Requestor Information
2 Vendor Information
3 Add Item & Accounting

Commodity Description		Commodity Comments
Staples		Public Comment
Unit Of Measure*	Tax Group*	Enter comments for the
(EA) x v	Choose Tax Group	
Quantity*	Unit Price*	Private Comment
5.00	10.0000	Enter comments for the
(Quantity) X (Unit Price) USD 50.00		
Discount Amount	Additional Amount	
0.00	0.00	
Tax Amount		
0.00		
Commodity Item Total USD 50.00		



Entering Requisitions – Add Accounting Information



- Once all items have been entered select 'Add Accounting'

My.Finance » My.Requisitions » R0097859

R0097859 Attachments Delete Requisition

1 Requestor Information **2** Vendor Information **3** Add Item & Accounting Save as draft

Add Item(s)

Choose Item

Commodities (1)

Stapler	50.00
Quantity 5.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Requisition Summary

Requisition Number: R0097859

Staples Contract & Commercial Inc. (001094244)
500 Staples Drive
Framingham MA 01702

Commodities (1)

Stapler	50.00
Quantity 5.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Grand Total - All Commodities: 50.00

Grand Total - All Accounting: 0.00

Back **Add Accounting** View as PDF Submit Requisition



Entering Requisitions – Add Accounting Information



- Fund, Organization, Program will automatically populate based on the requestor’s Banner set-up
- Select the correct ‘Account’ number (must begin with a ‘7’; 70000 cannot be used for requisitions). Any FOAP changes can be entered on this screen
- If all items will be charged to the same FOAP, the default ‘Distribution Amount’ and ‘Distribution Percent’ should match the total of all items entered
- If additional accounting information is required, continue to the next page
- If accounting is complete select ‘Save’
- ‘View as PDF’ to review entries
- Continue to ‘Attachments’

Requisition Number (R0097859)		Currency USD		<input type="checkbox"/> Delete Accounting
Chart *	Index	Distribution Amount *	Distribution Percent *	
J Jacksonville State... ▾	Choose Index ▾	50.00	100.00000000	
Fund *		Discount Amount	Additional Amount	
10000 Current Unrestricted ▾		0.00	0.00	
Organization *		Tax Amount		
62001 Procurement & Fixed Assets ▾		0.00		
Account *		Distribution Total		50
Choose Account ▾		Remaining		0
72010				
72010 Office Supplies				

1 Requestor Information	2 Vendor Information	3 Add Item & Accounting	Requisition Summary <input type="button" value="Save as draft"/>												
Add Item(s)			Requisition Number: R0097859												
Choose Item ▾			Staples Contract & Commercial Inc. (001094244) 500 Staples Drive Framingham MA 01702												
Commodities (1)			Commodities (1)												
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Stapler</td> <td align="right">50.00</td> </tr> <tr> <td>Quantity 5.00 @ 10.0000</td> <td align="right">Discount 0.00</td> </tr> <tr> <td>Additional Charges 0.00</td> <td align="right">Tax 0.00</td> </tr> </table>			Stapler	50.00	Quantity 5.00 @ 10.0000	Discount 0.00	Additional Charges 0.00	Tax 0.00	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Stapler</td> <td align="right">50.00</td> </tr> <tr> <td>Quantity 5.00 @ 10.0000</td> <td align="right">Discount 0.00</td> </tr> <tr> <td>Additional Charges 0.00</td> <td align="right">Tax 0.00</td> </tr> </table>	Stapler	50.00	Quantity 5.00 @ 10.0000	Discount 0.00	Additional Charges 0.00	Tax 0.00
Stapler	50.00														
Quantity 5.00 @ 10.0000	Discount 0.00														
Additional Charges 0.00	Tax 0.00														
Stapler	50.00														
Quantity 5.00 @ 10.0000	Discount 0.00														
Additional Charges 0.00	Tax 0.00														
Funding <input type="text" value="100%"/>			Funding <input type="text" value="100%"/>												



Entering Requisitions – Add Accounting Using Multiple FOAPS



- When Requisition items need to be allocated to multiple FOAPS - Click 'Add Accounting' at bottom of form

Commodities (3)	
Stapler	50.00
Quantity 5.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
4x4 Post-it notes	25.00
desk pad	15.00

- The Accounting detail screen appears - update FOAP as required

1 Requirer Information
2 Vendor Information
3 Add Item & Accounting

Requisition Number (R0096734) Currency USD

Chart *	Index	Distribution Amount *	Distribution Percent *
<input type="text" value="Jacksonville ..."/>	<input type="text" value="Choose Index"/>	<input type="text" value="90.00"/>	<input type="text" value="100.00000000"/>
Fund *		Discount Amount	Additional Amount
<input type="text" value="10000 Current Unrestricted"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Organization *		Tax Amount	
<input type="text" value="62001 Procurement & Fixed Assets"/>		<input type="text" value="0.00"/>	
Account *		Distribution Total	90.00
<input type="text" value="72010 Office Supplies"/>		Remaining	0.00
Program *	Activity		



Entering Requisitions – Add Accounting Using Multiple FOAPS



- Enter the corresponding dollar amount to be charge to the new FOAP in the 'Distribution Amount'
- The 'Distribution Percent' will auto adjust
- The 'Split Accounting' option appears - Click on it

Distribution Amount *	Distribution Percent *
50.00	55.5555556
Discount Amount	Additional Amount
0.00	0.00
Tax Amount	
0.00	
Distribution Total	50.00
Remaining	40.00
Split Accounting →	

- Requisition amount remaining to be distributed is displayed

Distribution Amount *	Distribution Percent *
40.00	44.4444444

- Update FOAP as required – Update 'Distribution Amount' if needed
- If the 'Distribution Amount' is updated, the 'Split Accounting' option will again appear for selection
- Repeat above steps until all required accounting information and amounts are correct
- Select 'Save'
- Confirm that the Grand Total amounts equal requisition items and funding is 100%
- Select 'View as PDF' to view and confirm all information appears correct on requisition



Attachments - Supporting Documentation



- **All** required documentation must be obtained and attached to the requisition prior to submitting
- A requisition can be saved as a 'Draft' until all documents are obtained - Requisition # is assigned
- Procurement will disapprove or delete requisitions submitted without proper documentation
- Supporting documentation may include:
 - Meal Request Form and backup documentation including agenda (Dynamic form must reflect all approvals)
 - IT Request for Approval to Purchase Computer Hardware and Software and all backup documentation
 - Applies to all computer systems / device purchases, regardless of price
 - Applies to peripherals and software purchases over \$500
 - Dynamic form must reflect all approvals
 - Quote
 - Invoice (required for pre-payments)
 - Contract
 - State of Alabama Vendor Disclosure Statement (when over \$5,000) - Form must be signed and notarized
 - Copy of Chrome River travel pre-authorization when requisition is travel related



Attachments - Supporting Documentation



- Select 'Attachments' to upload all required supporting documentation - Save as a draft until all documents are obtained

A screenshot of a web interface for requisitions. At the top, there are two buttons: 'Attachments' (with a paperclip icon) and 'Delete Requisition' (with a trash can icon). Below these is a 'Requisition Summary' section with a 'Save as draft' button. At the bottom, the 'Requisition Number' is listed as 'R0097859'. The 'Attachments' button is circled in red.

- Once all documents have been uploaded the requisition can be submitted for approval(s)

A screenshot showing two buttons: 'View as PDF' and 'Submit Requisition'. A blue arrow points from the right towards the 'Submit Requisition' button.

- The Requisition status can be viewed in Banner 9 Finance SSB

A screenshot of a table titled 'My Requisitions'. The table has columns for 'Requisition', 'Date', 'Vendor', 'Amount', and 'Status'. It shows two categories: 'Draft Requisitions' with a count of 0 and 'Pending Requisitions' with a count of 1. The pending requisition is R0097859, dated 03/10/2022, from Staples Contract & Commercial Inc., for an amount of \$75.00, with a status of 'In Approval' and a help icon.

My Requisitions (Additional Notes) & View Document



Additional information is located on Procurement's webpage:

<https://www.jsu.edu/purchasing/my-requisitions-view-document.html>

- Recalling a Requisition
- View Document
- View Approvals & Related Documents

Questions?



Email: purchasing@jsu.edu

Thank you!

