Procurement & Fixed Assets
Banner 9 Finance SSB
My Requisitions

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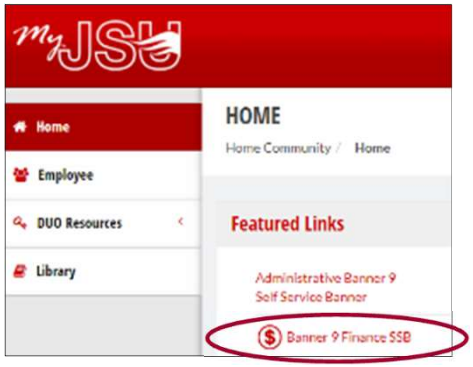
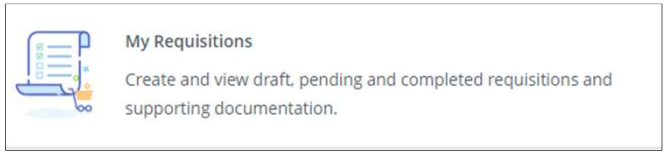
Entering Requisitions

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.

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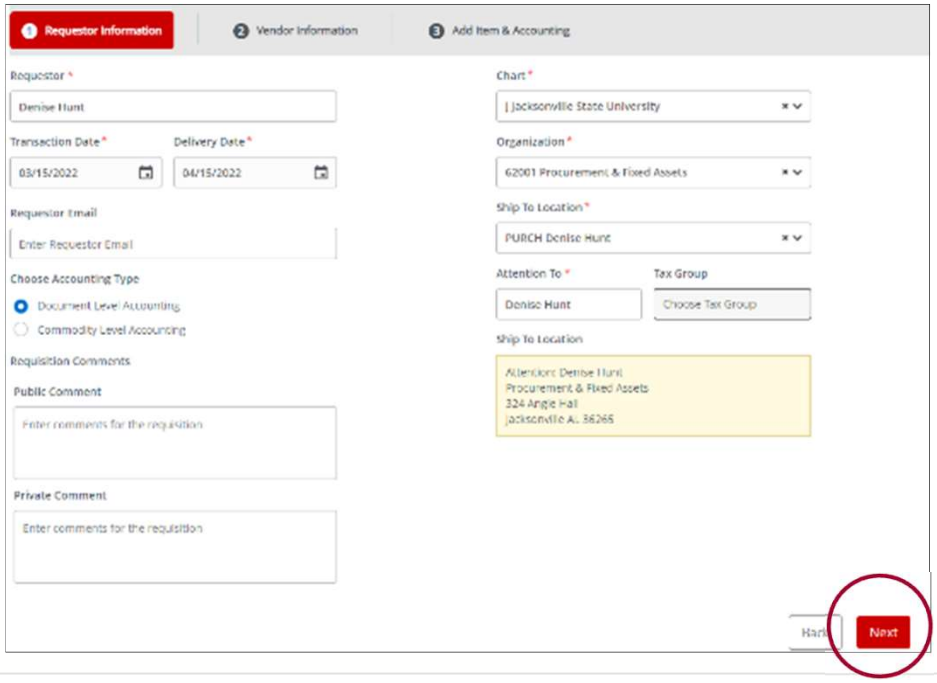
Entering Requisitions – Requestor Information

- 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.

- <u>Requestor Information (including email) defaults from the Banner Finance user profile maintenance form.</u>
  - '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'

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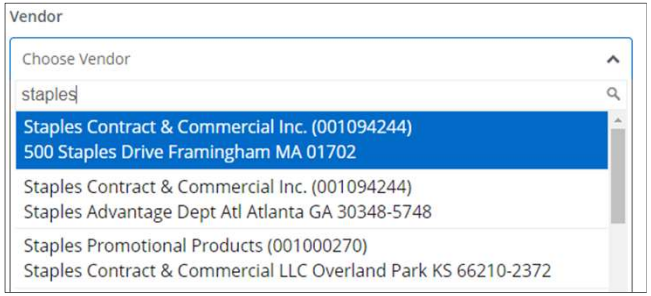
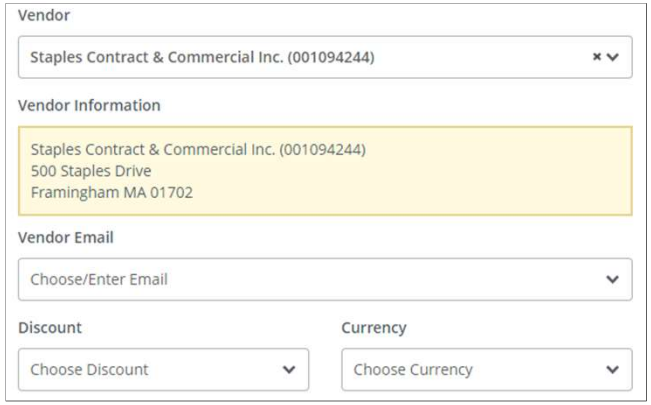
Entering Requisitions – Vendor Information

- 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.



- 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.

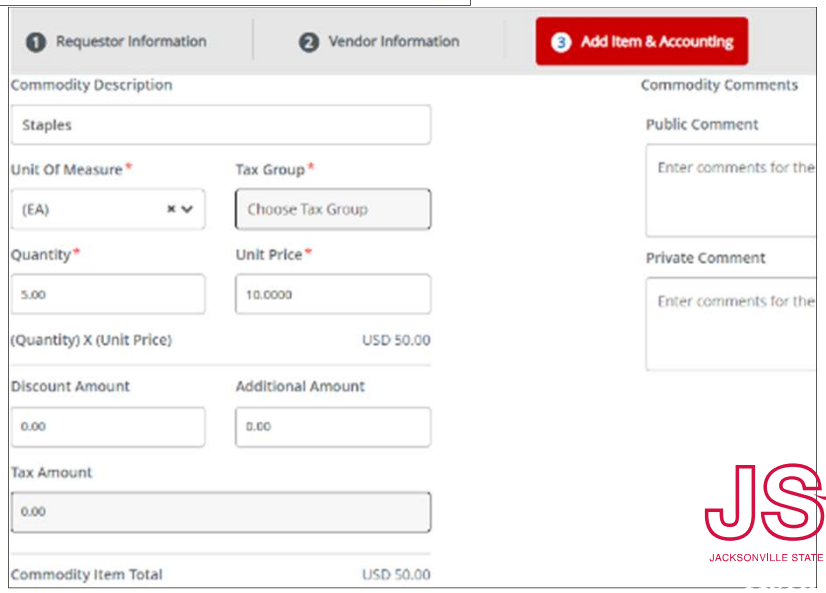
- Select 'Next' at the bottom of the screen.



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.



- 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

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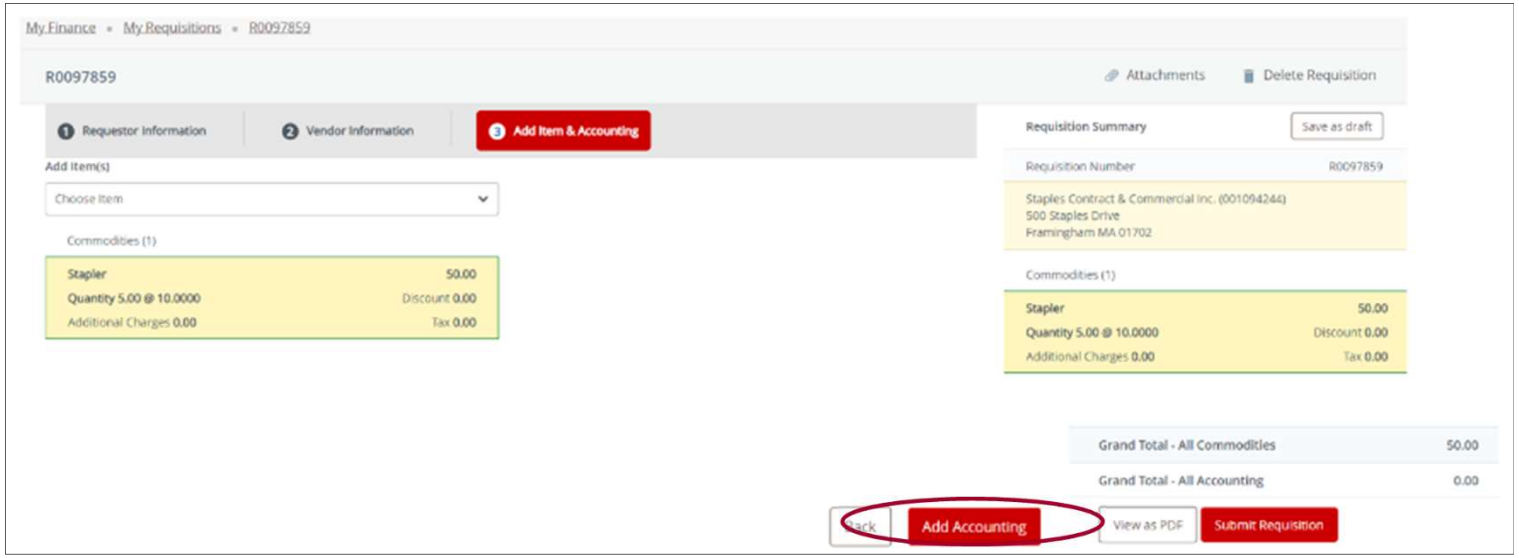
Entering Requisitions – Add Accounting Information

- Once all items have been entered select ‘Add Accounting’



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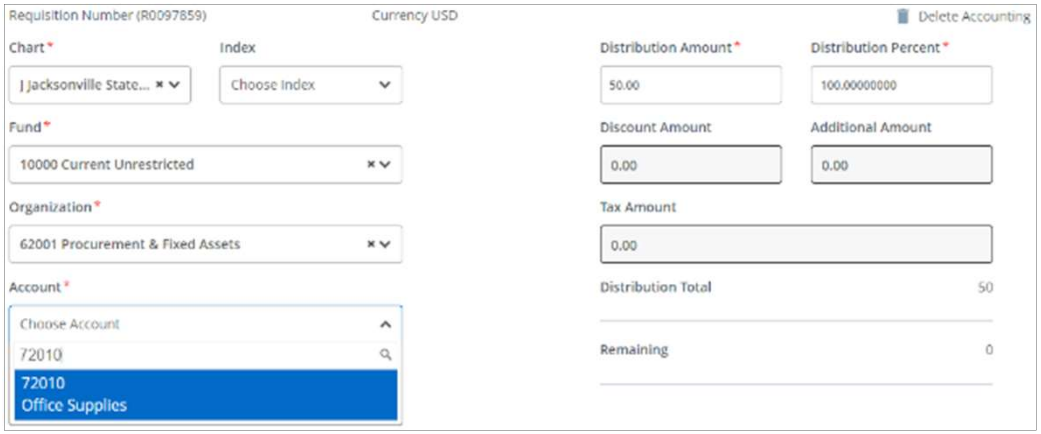
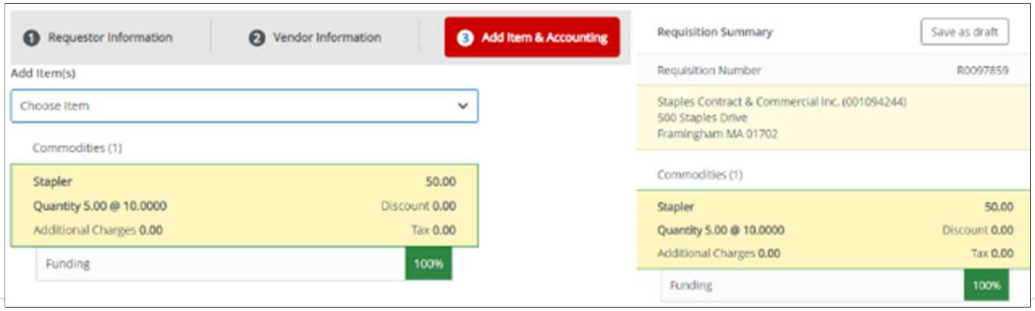
Entering Requisitions – Add Accounting Information

- 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'





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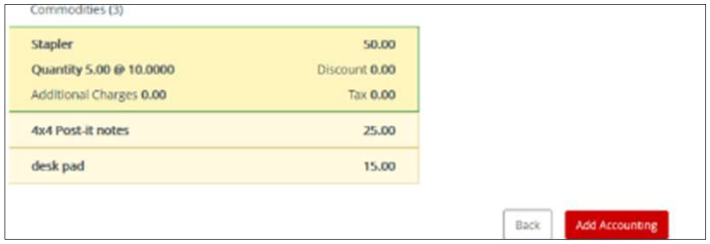
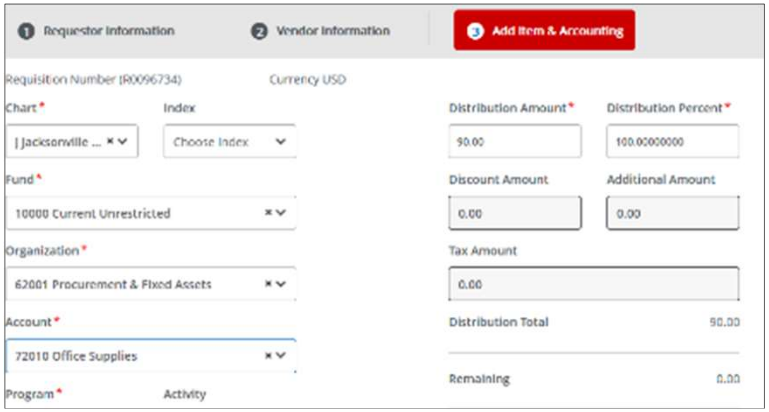
Entering Requisitions –Add Accounting Using Multiple FOAPS

- When Requisition items need to be allocated to multiple FOAPs - Click ‘Add Accounting’ at bottom of form



- The Accounting detail screen appears - update FOAP as required



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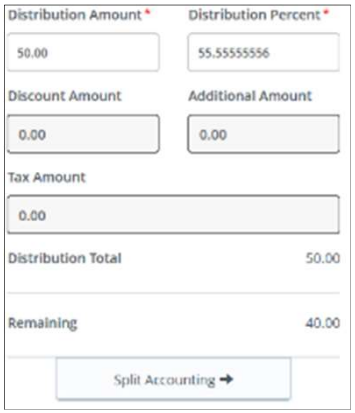
Entering Requisitions –Add Accounting Using Multiple FOAPS

- 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



- Requisition amount remaining to be distributed is displayed

- 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

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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

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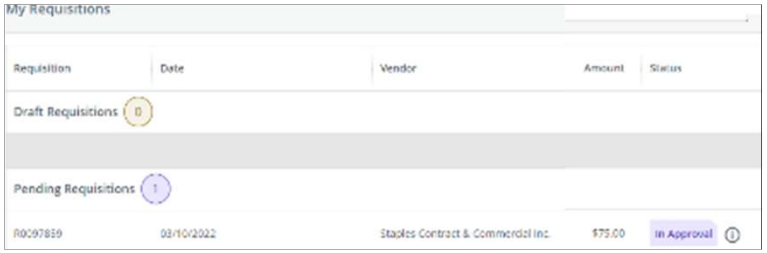
Attachments - Supporting Documentation

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

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

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



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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

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Questions?

Email: purchasing@jsu.edu

Thank you!

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