HOW TO CREATE A REQUISITION IN SELF SERVICE

Banner 9

ACCESSING BANNER 9 SELF-SERVICE

WASHBURN. Home News & Events

University Services

Student Academics

Student Life

Financial Services

Finance

MyCourses

Employee



Employee

Home Community / Home / Employee

Washburn University Mission Statement

Washburn University enriches the lives of students by providing opportunities for them to develop and to realize their intellectual, academic, and professional potential, leading to becoming



productive and responsible citizens. We are committed to excellence in teaching, scholarly work, quality academic and professional programs, and high levels of faculty-student interaction. We develop and engage in relationships to enhance educational experiences and community. (Approved by the Washburn Board of Regents 4/9/10)

Student Employment Information

Finance Information For those with Finance role access

NEW

Banner 9 Self-Service

Finance Dashboard

(Budget Query, Requisitions, Journals, etc.)

Access Finance Self-Service Main Menu

Task	Instructions
Budget Queries	How to perform a Budget Query How to perform Payroll Expense Detail Query
Encumbrance Query	How to perform an Encumbrance Query
Requisition	How to Create a Requisition How to View a Requisition Requisition Video
Approve Documents	How to Approve Documents
View Documents	
Finance Glossary of Te Finance Issue Workard Finance Lookup Tips	
For all Employees	

- Under "Finance Information"
- Click on "Finance Dashboard"
- This will take you to create your requisition

GETTING STARTED

My Finance



Hello Jody,

Create, edit and approve transactions and view financial information for department / organization.



My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.



My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



My Journals

Create and view draft, pending and completed journals and supporting documentation.

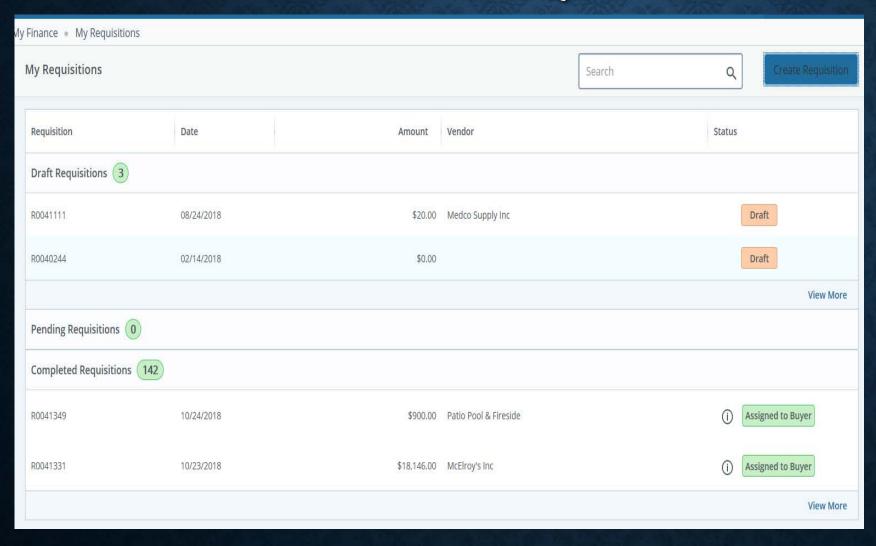
Click on My Finance Query to:

- Check the approval status of a requisition
- If it has been turned into a PO
- View a PDF of the requisition

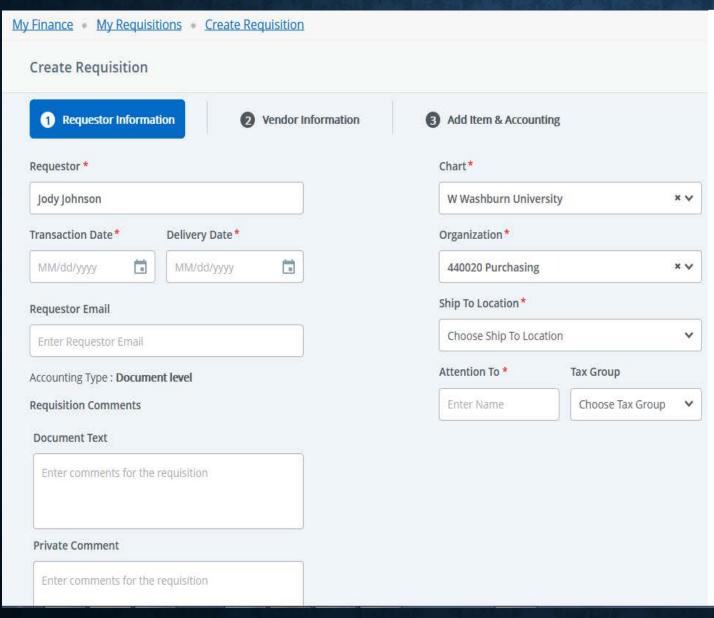
Click on My Requisition to:

- Create
- View a draft
 - o Pending
 - Completed requisitions
 - Supporting documentation

MY REQUISITION



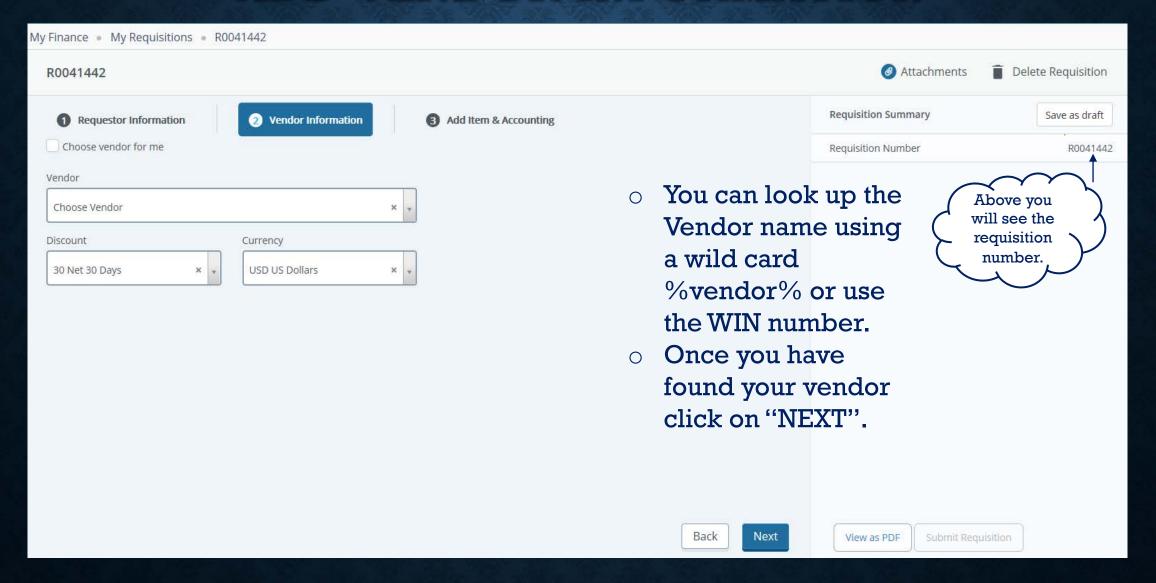
- On this screen
 you can see
 your drafts,
 pending, and
 completed
 requisitions.
- To create a new requisition click on the "Create Requisition" in blue.



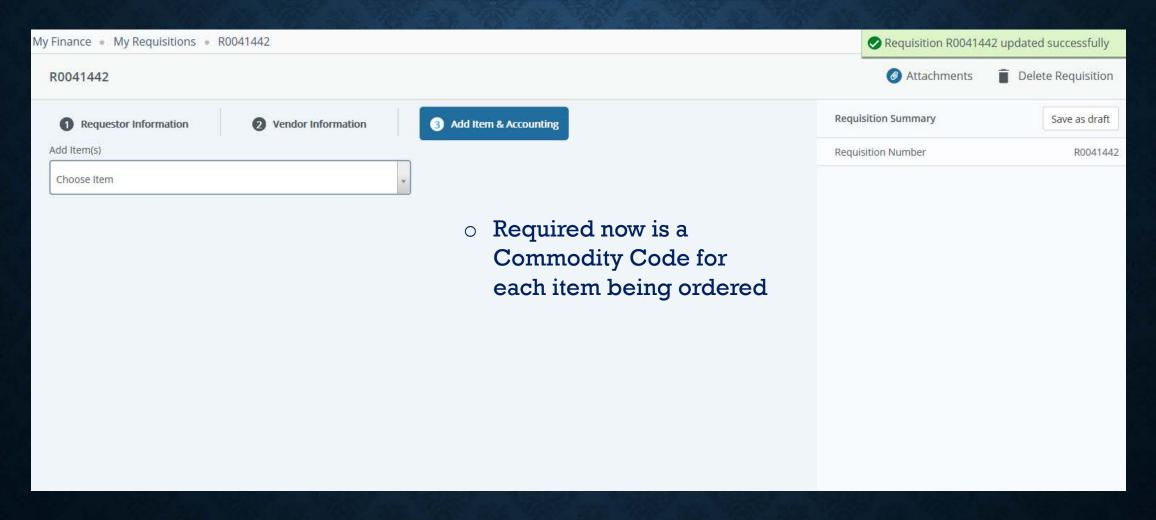
On this screen you will enter the requestor information.

- o Requestor
- Transaction date
- Delivery date
- Requestor email
- Public comment will be at the top of the PO
- Private comment information for Purchasing
- Chart
- Organization
- Ship to location
- o Attention to
- You do have the option to save as a draft if needed in upper right hand corner.
- Click "NEXT" in bottom right corner to move to next screen

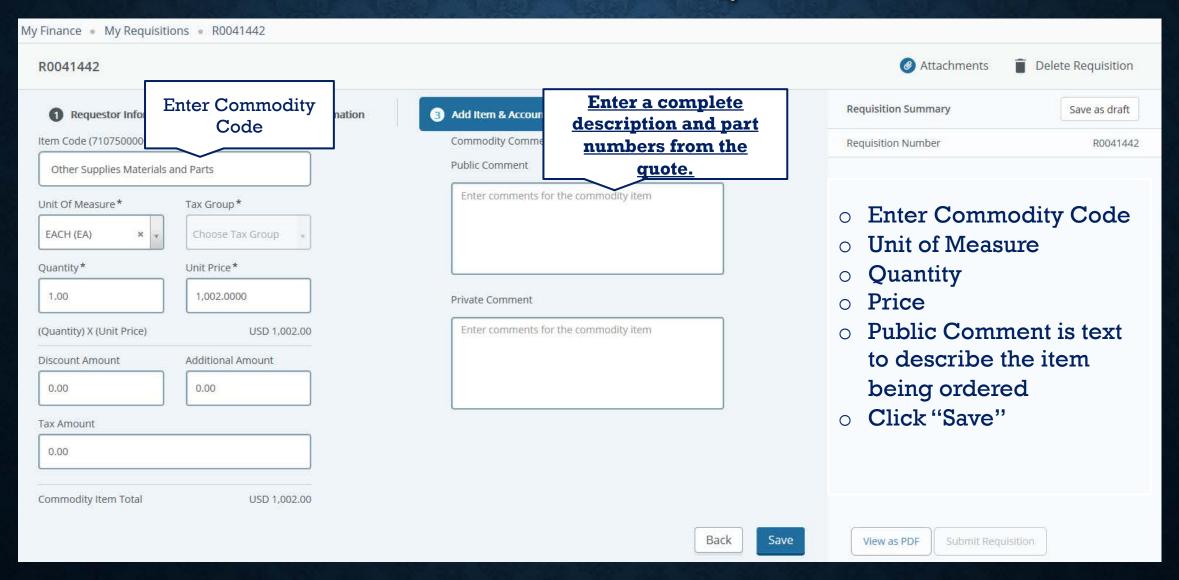
ADD VENDOR INFORMATION



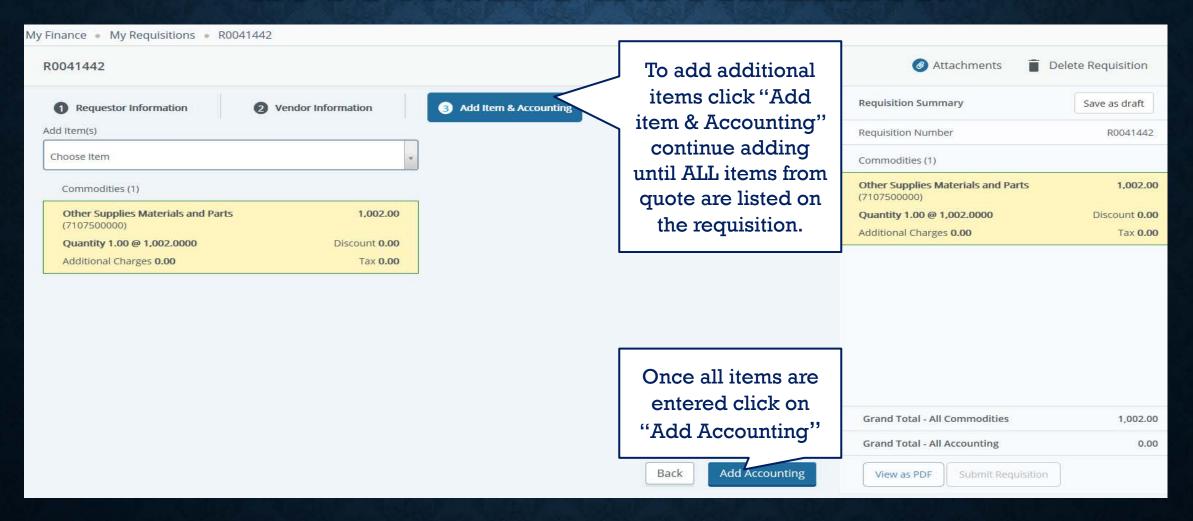
ENTERING ITEMS



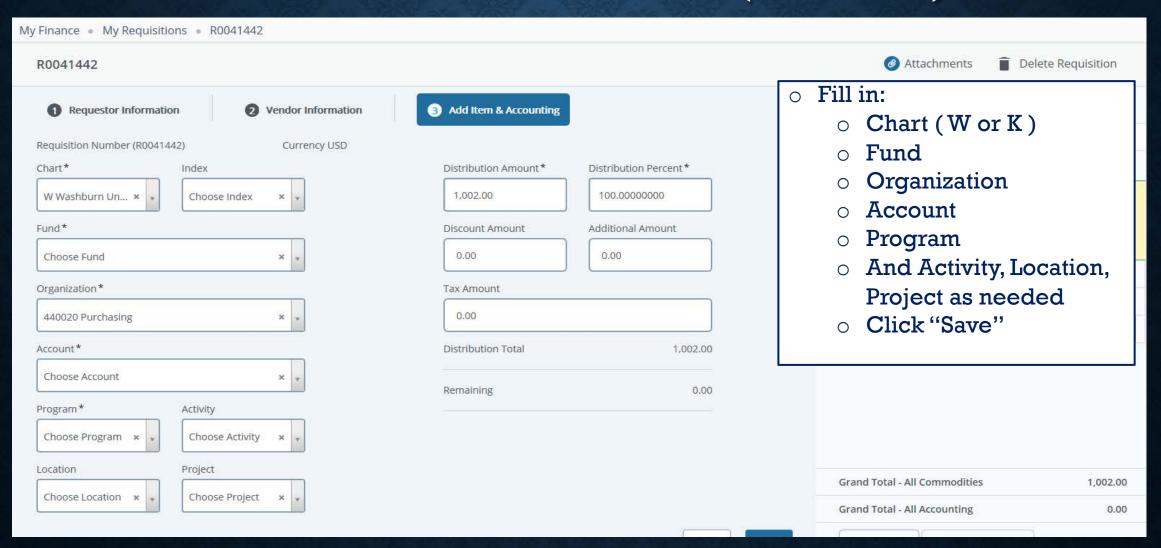
ADDING ITEMS TO REQUISITION



CONTINUE ADDING ITEMS OR ADD ACCOUNTING INFORMATION



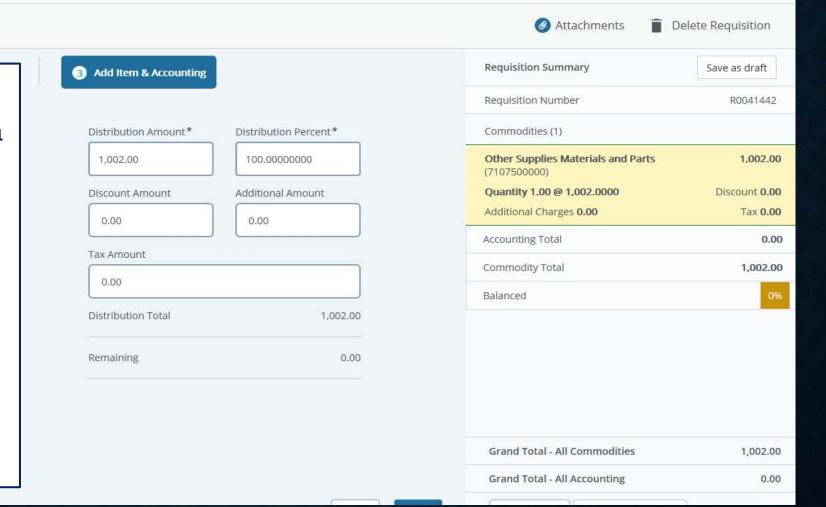
ACCOUNTING CODES (FOPALS)



My Finance • My Requisitions • R0041442

R0041442

- Once you have added your accounting code you can chose if you want to distribute the amount to one accounting code or multiple.
- o If multiple:
 - Click in Distribution
 Amount or Percent
 and type in the
 appropriate amount.
 - o Click "Save"



Distribut	ion Amount*	Distribution Percer	nt*
114.50		50.00000000	
Discount	Amount	Additional Amount	
0.00		0.00	
Tax Amo	unt		
0.00			
Distribut	ion Total		114.50
Remainir	ng		114.50
	Split Accou	unting →	

- Enter the amount or %
- O Click "Split Accounting"
- Continue entering accounting codes till paid in full

Requisition Number	R0041449
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546	
Commodities (2)	
Clothing and Uniforms (7100000000)	225.00
Quantity 150.00 @ 1.5000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Clothing and Uniforms (7100000000)	4.00
Funding	Amount
W-100000-440020-100350-10000	114.50
Accounting Total	114.50
Commodity Total	229.00
Balanced	50%
Grand Total - All Commodities	229.00
Grand Total - All Accounting	114.50
View as BDE Submit Paguisition)
View as PDF Submit Requisition	

On the right hand side of the screen you will see that 50% of the total has been met.

Chart *	Index	Distribution Amount *	Distribution Percent*
W Washburn Un × 🔻	Choose Index × *	114.50	50.0000000
Fund *		Discount Amount	Additional Amount
Choose Fund	×	0.00	0.00
Organization *		Tax Amount	
440020 Purchasing	x y	0.00	
Account*		Distribution Total	114.50
Choose Account	×	Remaining	0.00
Program *	Activity		
Choose Program * +	Choose Activity × ,		
Location	Project		
Choose Location * •	Choose Project * •		

Back

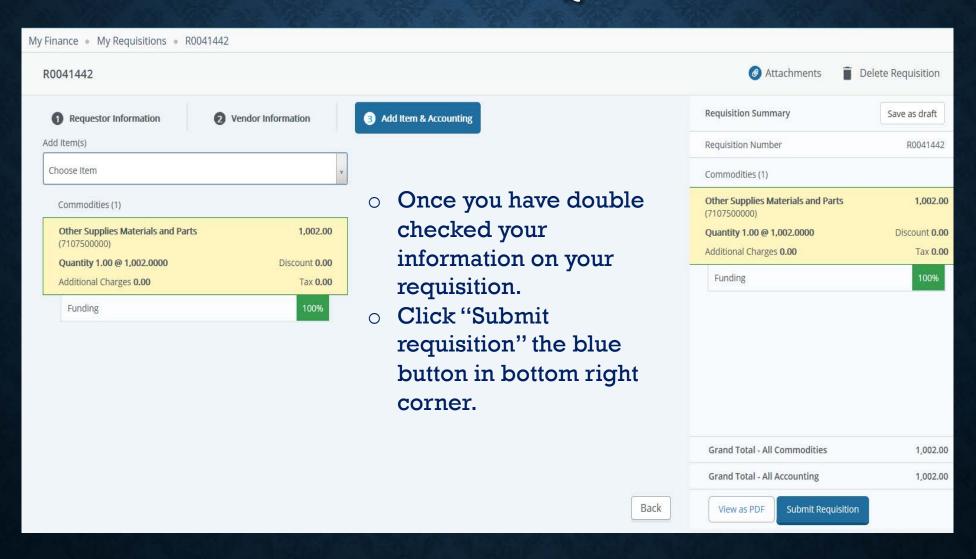
Requisition Summary	Save as draft
Requisition Number	R0041449
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546	
Commodities (2)	
Clothing and Uniforms (7100000000)	225.00
Quantity 150.00 @ 1.5000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Clothing and Uniforms (7100000000)	4.00
Funding	100%
Grand Total - All Commodities	229.00
Grand Total - All Accounting	229.00

Checking the right side of your screen you should see the "Funding" is now at 100%.

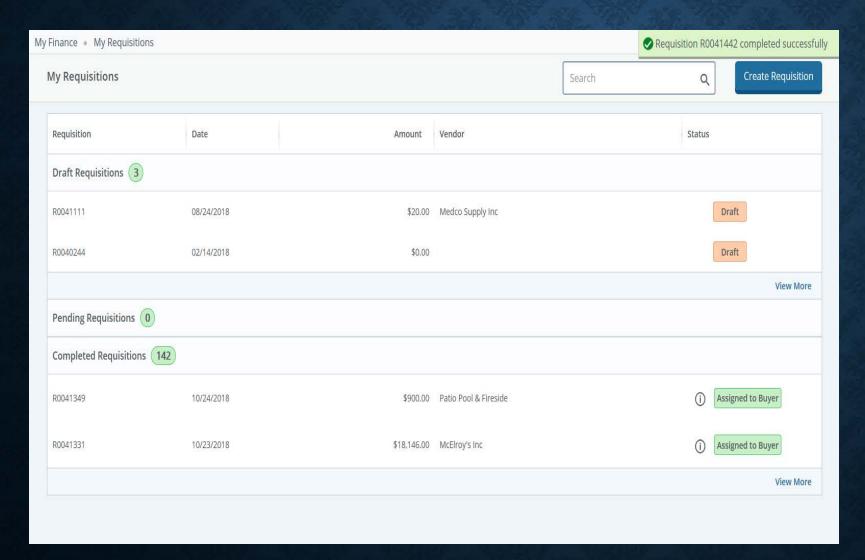
Requisition Summary	Save as draft
Requisition Number	R0041449
ABWA Career Chapter (W20139002) c/o 10524 S Burlingame Wakarusa KS 66546	
Commodities (2)	
Clothing and Uniforms (7100000000)	225.00
Quantity 150.00 @ 1.5000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Additional Charges 0.00 Clothing and Uniforms (7100000000)	Tax 0.00 4.00
Clothing and Uniforms (7100000000)	4.00
Clothing and Uniforms (7100000000) Funding	4.00 Amount
Clothing and Uniforms (7100000000) Funding W-100000-440020-100350-10000	4.00 Amount 114.50

If you need to check the accounting codes that you are using click on "funding" and the accounting codes will show.

SUBMITTING REQUISITION

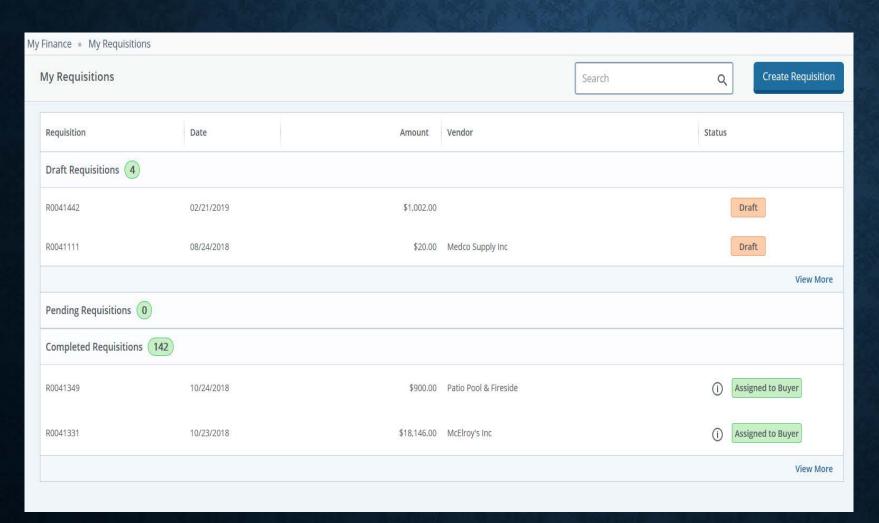


COMPLETED REQUISITION



 In the top right hand corner you will see a green box showing your Requisition number and that it was completed successfully.

DRAFT, PENDING, OR COMPLETED REQUISITION



- If you need to look up your requisition you can check
- Pending
- Draft if you have not completed the requisition.
- Completed
- Search by the search box

PURCHASING DEPARTMENT

- If you need any help please contact Purchasing or stop by Morgan Hall Rm 214.
 - Debi Feyh, Buyer x 2338, <u>Deborah.feyh@Washburn.edu</u>
 - Donna Landry, Assistant Buyer X 2333, donna.landry@washburn.edu