

# Arkansas State University Internet Native Banner Initiating Requisitions

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Revised August 2018

## Data Standards

The following guidelines should be followed when entering requisitions in Banner:

### General

- Use mixed-case sentence structure
- Do NOT use symbols such as @, #, %, &, /, \_
- The dash, -, can be used without spaces between the two words

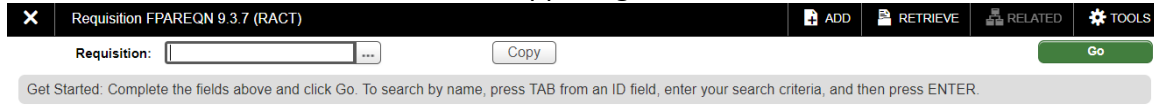
### Commodity Codes

- Commodity codes are required on all requisitions. The commodity code list is available on the Procurement Services web site.
- The commodity code will generate a generic description. Delete the generic description and enter the vendor's description of the item instead beginning with a noun.
- Example: Pens Pilot Gel Black Item 135972A

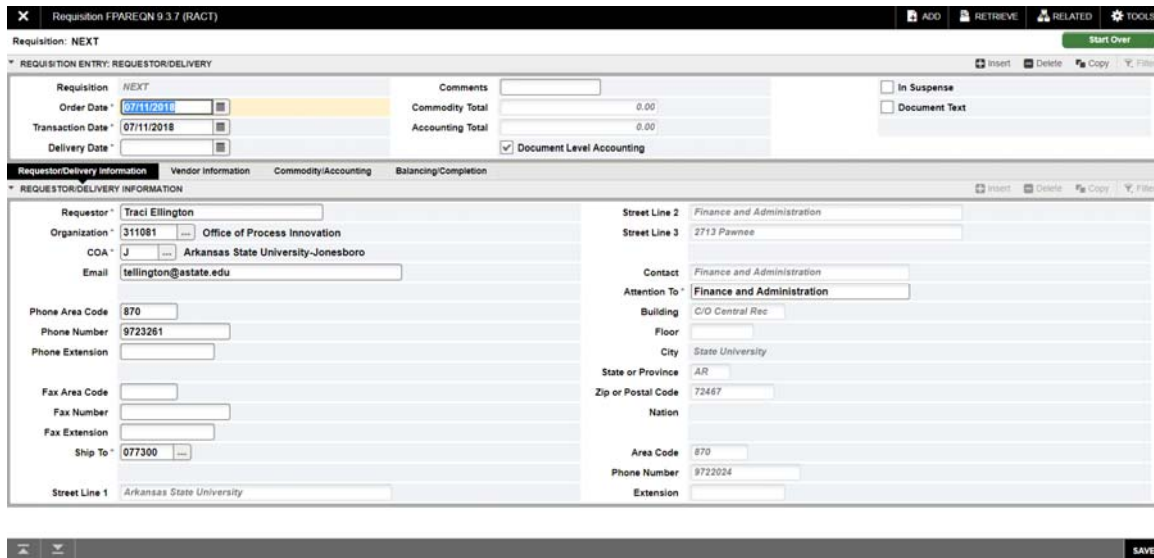
# Creating a Requisition

## Check your budget availability on FGIBAVL.

1. Enter 'FPAREQN' in the Search bar in Application Navigator and press Enter.
2. For a new requisition leave the **Requisition** field blank and click the Go button in the upper right corner.
3. To access an existing requisition enter the requisition number in the **Requisition** field and click the Go button in the upper right corner.



## Requestor/Delivery Information Block



4. Tab to the Delivery Date field and enter the current date (enter a 'T' and tab to default in today's date).
5. Leave **Comments** field blank, unless entering a confirming order. Enter the word '**Confirming**' in this field.
6. Review the **Requestor/Delivery Information** for accuracy. Send changes to [cpi-security@astate.edu](mailto:cpi-security@astate.edu).
7. The **Email** address listed in the Requestor/Delivery Information is the address where a copy of the PO will be sent. To add additional email addresses, separate them using a semi-colon (;).
8. Update the **Ship To** code if necessary by clicking on the Search icon and typing in the Contact Name in the Criteria field. Double click on the result to return it to the requisition.

9. Optional: Enter specific building, room number, etc in the **Attention To** field (Admin Bldg Rm 231). Do not enter names or phone numbers unless different than Requestor information.
10. Click on the Next Section icon to go to the Vendor Information tab

**Vendor Information Block**

Note: To search for a frequently used vendor, use the Vendor Quicklist on the Procurement web site: <http://www.astate.edu/a/procurement/>.

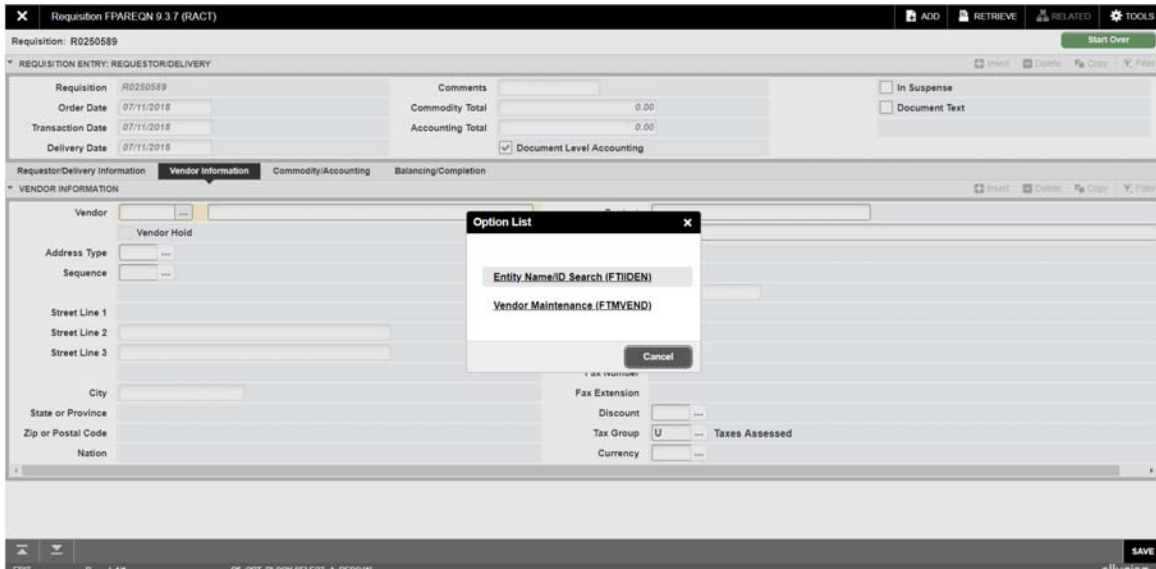
The screenshot displays the Banner Procurement interface for requisition R0250589. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons, along with a 'Start Over' button. The main content area is divided into several tabs: 'Requestor/Delivery Information', 'Vendor Information' (which is currently selected), 'Commodity/Accounting', and 'Balancing/Completion'. The 'Vendor Information' tab contains a form with the following fields:

- Vendor:** A dropdown menu with a search icon.
- Vendor Hold:** A checkbox.
- Address Type:** A dropdown menu.
- Sequence:** A dropdown menu.
- Street Line 1, 2, 3:** Text input fields.
- City:** Text input field.
- State or Province:** Dropdown menu.
- Zip or Postal Code:** Text input field.
- Nation:** Dropdown menu.
- Contact:** Text input field.
- Email:** Text input field.
- Phone Area Code:** Dropdown menu.
- Phone Number:** Text input field.
- Phone Extension:** Text input field.
- Fax Area Code:** Dropdown menu.
- Fax Number:** Text input field.
- Fax Extension:** Text input field.
- Discount:** Text input field.
- Tax Group:** Dropdown menu, currently set to 'U'.
- Taxes Assessed:** Text input field.
- Currency:** Dropdown menu.

At the bottom of the screen, there is a 'SAVE' button.

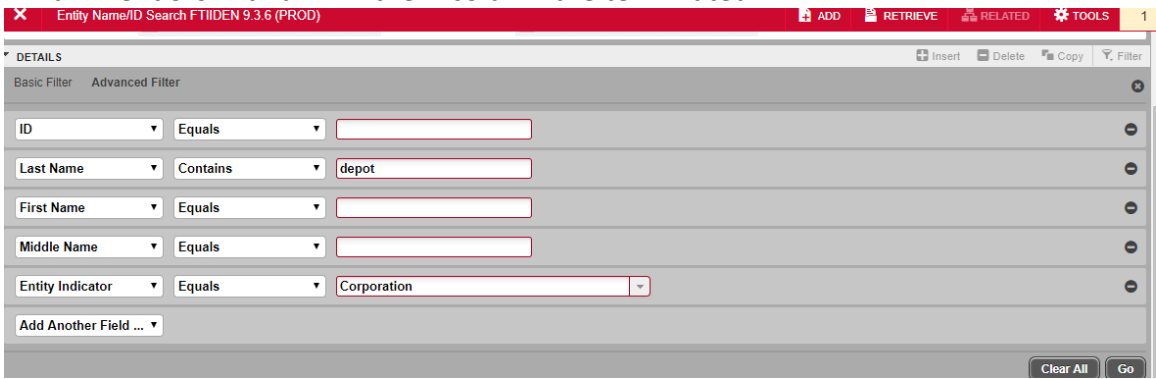
1. To search in Banner, click on the Search icon next to the Vendor field

2. Click on the FTIIDEN link



For a vendor (non-person) search:

3. Click on Advanced Filter to search on part of the Vendor name.
4. Change the qualifier for the **Last Name** field and enter a portion of the vendor name.
5. Select "Corporation" from the **Entity Indicator** drop down to only pull up Corporations/Companies
  - a. Vendors with a 'T' in the **V** column are terminated



6. Click on Go

Entity Name/ID Search FTIDEN 9.3.6 (RACT)

ENTITY NAME/ID SEARCH

Active filters: Last Name: %sdepot% Entity Indicator: Corporation

| ID        | Last Name                | First Name | Middle Name | Entity Indicator | Change Indicator | Vendor     | Financial Manager | Agency | Grant Personnel | Proposal Personnel | Name Type |
|-----------|--------------------------|------------|-------------|------------------|------------------|------------|-------------------|--------|-----------------|--------------------|-----------|
| 50242042  | Home Depot               |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 | ALUM      |
| 50327121  | IT Parts Depot           |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 |           |
| 50265986  | Medical Device Depot Inc |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 |           |
| 000091257 | Office Depot             |            |             | Corporation      | ID               | Yes        | No                | No     | No              | No                 | ALUY      |
| 50005889  | Office Depot             |            |             | Corporation      | Name             | Yes        | No                | No     | No              | No                 | ALUM      |
| 50005889  | Office Depot             |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 |           |
| 50007384  | Test Equipment Depot     |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 |           |
| 50313077  | The Lab Depot            |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 |           |
| 50305280  | The Tank Depot           |            |             | Corporation      |                  | Terminated | No                | No     | No              | No                 |           |
| 50266040  | Whiteboard Depot         |            |             | Corporation      |                  | Yes        | No                | No     | No              | No                 |           |

Record 1 of 10

7. Double-click on the vendor's ID to populate the ID in the **Vendor ID** field on the requisition form

Requisition FPAREQN 9.3.7 (RACT)

Requisition: R0250589

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requestion: R0250589

Order Date: 07/11/2018

Transaction Date: 07/11/2018

Delivery Date: 07/11/2018

Comments

Commodity Total: 0.00

Accounting Total: 0.00

In Suspense

Document Text

Document Level Accounting

Requestor/Delivery Information

Vendor Information

Vendor: 50005889 Office Depot

Vendor Held

Address Type: PO

Sequence: 3

Street Line 1: PO Box 88040

City: Chicago

State or Province: IL

Zip or Postal Code: 60680-1040

Nation

Contact: Amber Smith

Phone Area Code: 800

Phone Number: 7216592

Fax Area Code

Fax Number

Fax Extension

Discount

Tax Group: U

Taxes Assessed

Currency

SAVE

8. When the vendor does not exist in Banner, call Procurement Services for assistance.
  - a. Enter the Vendor's name in the Vendor Description field and enter the address information in the Document Text. Do not include a person's social security number in the requisition.
9. To access Document Text, click on the Related menu and select Document Text.
  - a. Document Text is additional information that pertains to the entire requisition. Examples include a quote number, state contract numbers, cooperative agreement numbers, vendor address changes, addresses of new vendors, and general notes to Procurement.
10. Click the Go button
11. Enter the appropriate text in mixed-case (up to 50 characters/line)
12. To insert another line, click on the Insert button

13. Click on the Save button and Exit.

14. Is the PO address correct? If not, click on the Address Type search icon

15. Search through the addresses to find the ‘PO’ address by clicking the arrows or selecting to see more records per page. You **MUST** use the PO type.

16. Double-click on the Address Type field to select the address. When the address does not exist, click on the Exit icon. Enter the new address in Document Text.

17. Click on the Next Section icon to navigate to the Commodity/Accounting block

For a person search:

18. Click on Advanced Filter to search on part of the Vendor name.

19. Change the qualifier for the **Last Name** field and enter a portion of the last name and/or first name.

20. Select “Person” from the **Entity Indicator** drop down to only pull up people

21. Click on Go

22. Double-click on the person’s ID to populate the ID in the Vendor ID field on the requisition form

## Commodity/Accounting Block

1. Write down your requisition number.

Use the Commodity Code List on the Procurement web site:

<http://www.astate.edu/a/procurement/> to find the appropriate commodity description.

2. Enter the code in the **Commodity Code** field
3. Tab to the **Description** field
4. Remove the generic commodity description that populated
5. For a **non-confirming** order, enter the specific item description beginning with a noun (up to 50 characters/line)
  - a. Close the “Original Commodity Description” box when it pops up



6. For a **confirming** order, enter a summary description for the items ordered followed by the invoice number.
  - a. Additional invoices can be entered on the same requisition with each invoice on a separate commodity line.
7. To access Item Text, click on the Related menu and select Item Text.
  - a. Item Text is additional information that pertains to the specific commodity record and should be used to complete item descriptions that are too long for the Description field.
8. Click the Go button
9. Enter the appropriate text in mixed-case (up to 50 characters/line)
10. To insert another line, click on the Insert button
11. Tab to the **U/M** (unit of measure) field. The default is “EA” (Each). Click on the Search icon to select a different code
12. Tab to the **Tax Group** field. The default tax group will populate.
  - a. For a **confirming** requisition change the tax group to “P”.
13. Tab to the **Quantity** field and enter the quantity desired
14. Enter the unit price in the **Unit Price** field (do not enter a \$0 amount)



15. Tab until the cursor is located in the Commodity field again

| COMMODITY       |           |                            |                 |           |          |                                     |                |           |
|-----------------|-----------|----------------------------|-----------------|-----------|----------|-------------------------------------|----------------|-----------|
| Item            | Commodity | Description                | U/M             | Tax Group | Quantity | Unit Price                          | Commodity Text | Item Text |
| 2               | 62080     | Pens Pilot Gel Black It... | BXS             | U         | 2.00     | 9.5000                              |                |           |
| Extended Amount |           | 19.00                      | Tax             |           | 1.62     | <input type="checkbox"/> Distribute |                |           |
| Discount        |           | 0.00                       | Commodity Total |           | 20.62    |                                     |                |           |
| Additional      |           | 0.00                       | Document Total  |           | 41.24    |                                     |                |           |

16. Click on the Insert button to enter an additional commodity record

a. For a **non-confirming** order enter shipping on a separate line

17. Follow the same instructions to enter additional commodity records

18. Click on the Next Section icon to navigate to the Accounting block

19. The 'J' (for Jonesboro Campus) will default in the **COA** field. The current fiscal year will default into the **Year** field.

20. The Fund, Orgn, Acct, Prog will default in based on your Finance security and Commodity code.

21. Override the Fund, Orgn, and Prog as necessary. Do not override the Account.

22. Tab through the Amount fields to calculate all totals

23. To enter an additional FOAP, tab to the **COA** field

24. Click on the Insert button to enter the new FOAP

25. Pay close attention to the NSF Suspense checkbox. When checked, this indicates there is not sufficient funding in the account. The FOAPs will need to be changed or a budget transfer done before the requisition is completed. The Budget Office may need to override the NSF for certain requisitions. Contact the Budget Office at 972-3700 for budget assistance.

| ACCOUNTING   |                          |      |       |        |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
|--|--------------------------|------|-------|--------|--------|--------|------|------|------|------|--------------------------|-------------------------------------|--|---|-----|--|-----------------|--------------------------|--|--|-------|----------|--------------------------|--|--|------|------------|--------------------------|--|--|------|-----|--------------------------|--|--|------|--------------|--|--|--|-------|----------------|--|--|--|------|----------------------------|--|--|--|-------|
| Sequence   | COA                      | Year | Index | Fund   | Orgn   | Acct   | Prog | Actv | Locn | Proj | NSF Override             | NSF Suspense                        |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| J  |                          | 19   |       | 110000 | 311081 | 711302 | 1630 |      |      |      | <input type="checkbox"/> | <input checked="" type="checkbox"/> |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| <table border="1"> <thead> <tr> <th colspan="2"></th> <th>%</th> <th colspan="2">USD</th> </tr> </thead> <tbody> <tr> <td>Extended Amount</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>38.00</td> </tr> <tr> <td>Discount</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>0.00</td> </tr> <tr> <td>Additional</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>0.00</td> </tr> <tr> <td>Tax</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>3.24</td> </tr> <tr> <td>FOAPAL Total</td> <td></td> <td></td> <td></td> <td>41.24</td> </tr> <tr> <td>Document Total</td> <td></td> <td></td> <td></td> <td>0.00</td> </tr> <tr> <td>Remaining Commodity Amount</td> <td></td> <td></td> <td></td> <td>41.24</td> </tr> </tbody> </table> |                          |      |       |        |        |        |      |      |      |      |                          |                                     |  | % | USD |  | Extended Amount | <input type="checkbox"/> |  |  | 38.00 | Discount | <input type="checkbox"/> |  |  | 0.00 | Additional | <input type="checkbox"/> |  |  | 0.00 | Tax | <input type="checkbox"/> |  |  | 3.24 | FOAPAL Total |  |  |  | 41.24 | Document Total |  |  |  | 0.00 | Remaining Commodity Amount |  |  |  | 41.24 |
|  |                          | %    | USD   |        |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| Extended Amount  | <input type="checkbox"/> |      |       | 38.00  |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| Discount   | <input type="checkbox"/> |      |       | 0.00   |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| Additional   | <input type="checkbox"/> |      |       | 0.00   |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| Tax  | <input type="checkbox"/> |      |       | 3.24   |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| FOAPAL Total   |                          |      |       | 41.24  |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| Document Total   |                          |      |       | 0.00   |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |
| Remaining Commodity Amount   |                          |      |       | 41.24  |        |        |      |      |      |      |                          |                                     |  |   |     |  |                 |                          |  |  |       |          |                          |  |  |      |            |                          |  |  |      |     |                          |  |  |      |              |  |  |  |       |                |  |  |  |      |                            |  |  |  |       |

26. Click on the Next Section icon to navigate to the Completion block

## Balancing/Completion Block

1. Make sure all Amount display a **Status** of BALANCED. Click on the Complete button to complete the requisition.
2. Click on the In Process button to save the requisition to complete at a later time

Requisition: R0250589

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: R0250589  
 Order Date: 07/11/2018  
 Transaction Date: 07/11/2018  
 Delivery Date: 07/11/2018

Comments: \_\_\_\_\_  
 Commodity Total: 41.24  
 Accounting Total: 41.24

In Suspende  
 Document Text  
 Document Level Accounting

Requestor/Delivery Information Vendor Information Commodity/Accounting **Balancing/Completion**

BALANCING/COMPLETION

Vendor: 50005889 Office Depot  
 Vendor Hold  
 COA: J Arkansas State University-Jonesboro  
 Requestor: Traici Ellington  
 Organization: 311081 Office of Process Innovation

Currency: \_\_\_\_\_  
 Exchange Rate: \_\_\_\_\_  
 Commodity Record Count: 2  
 Input Amount: 41.24  
 Converted Amount: \_\_\_\_\_

AMOUNTS

|                   | Input | Commodity | Accounting | Status   |
|-------------------|-------|-----------|------------|----------|
| Approved Amount   | 38.00 | 38.00     | 38.00      | BALANCED |
| Discount Amount   | 0.00  | 0.00      | 0.00       | BALANCED |
| Additional Amount | 0.00  | 0.00      | 0.00       | BALANCED |
| Tax Amount        | 3.24  | 3.24      | 3.24       | BALANCED |

Complete In Process

SAVE

3. To return to a previous section to make changes, click on the Previous Section button
4. Write the requisition number on any documentation that will be sent to Procurement Services. If you do not have any back-up documentation, you do not have to send anything to Procurement Services.

## Checking the Status of My Requisition

Note: Automatic emails are now sent to initiators when the document (requisition or budget transfer) is approved or disapproved.

1. For disapproved requisition, correct the issue and recomplete to submit to approvals again.
2. If the requisition needs to be deleted see the Deleting an Incomplete Requisition instructions

## Deleting an Incomplete Requisition

Note: A requisition can only be deleted when the initiator does one of the following: does not complete the requisition, clicks on the 'In Process' icon or the requisition is denied by the approver or initiator.

1. Enter 'FPAREQN' in the Search bar in Application Navigator and press Enter.
2. Enter the requisition document number in the **Requisition** field
3. Click on the Next Section button
4. While still in the Key Block select the Delete button

The screenshot displays the 'Requisition FPAREQN 9.3.7 (RACT)' interface. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. The main content area is divided into two sections: 'REQUISITION ENTRY: REQUESTOR/DELIVERY' and 'REQUESTOR/DELIVERY INFORMATION'. The 'REQUISITION ENTRY' section contains fields for 'Requisition' (R0250589), 'Order Date' (07/11/2018), 'Transaction Date' (07/11/2018), 'Delivery Date' (07/11/2018), 'Comments', 'Commodity Total' (41.24), 'Accounting Total' (41.24), and checkboxes for 'In Suspense' and 'Document Text'. The 'REQUESTOR/DELIVERY INFORMATION' section is further divided into 'Requestor/Delivery Information' and 'Vendor Information'. The 'Requestor/Delivery Information' section includes fields for 'Requestor' (Traci Ellington), 'Organization' (311081 Office of Process Innovation), 'COA' (J Arkansas State University-Jonesboro), 'Email' (tellington@astate.edu), 'Phone Area Code' (870), 'Phone Number' (9723261), 'Phone Extension', 'Fax Area Code', 'Fax Number', 'Fax Extension', and 'Ship To' (077300). The 'Vendor Information' section includes fields for 'Street Line 2' (Finance and Administration), 'Street Line 3' (2713 Pawnee), 'Contact' (Finance and Administration), 'Attention To' (Finance and Administration), 'Building' (C/O Central Rec), 'Floor', 'City' (State University), 'State or Province' (AR), 'Zip or Postal Code' (72467), 'Nation', 'Area Code' (870), and 'Phone Number' (9722024). A 'SAVE' button is located at the bottom right of the interface.

5. Select Delete again-All Commodity and Accounting Records will be deleted

## Disapproving a Requisition

Note: Initiators can disapprove their own requisitions until the last person in the approval queue approves it.

1. Click on the Self-Service Banner (SSB) icon in myCampus.
2. Click on the Finance menu.
3. Click on the Approve Documents link.
4. Click Submit Query.

### Approve Documents

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**Questions:** Please contact Traci Ellington([tellington@astate.edu](mailto:tellington@astate.edu)) at 972-:

To view all documents waiting on your approval, click on the Submit Query

**Enter Approval Parameters**

**User ID**

**Document Number:**

**Documents for which you are the next approver**  
 **All documents which you may approve**

1. Click on the Disapprove link.

### Approve Documents

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☛ 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

**Queried Parameters**

User ID: TELLINGTON Trad R. Ellington

Document Number:

Documents Shown: Next Approver

**Approve Documents List**

| Next Approver | Type | NSF | Change | Seq# | Sub# | Originating User | Amount | Queue | Type | Document | History                 | Approve                 | Disapprove                 |
|---------------|------|-----|--------|------|------|------------------|--------|-------|------|----------|-------------------------|-------------------------|----------------------------|
|               | REQ  |     |        |      |      | TELLINGTON       | 93.31  | DOC   |      | R0138436 | <a href="#">History</a> | <a href="#">Approve</a> | <a href="#">Disapprove</a> |
|               | JV   |     |        | 0    |      | TELLINGTON       | 400.00 | DOC   |      | J0053825 | <a href="#">History</a> | <a href="#">Approve</a> | <a href="#">Disapprove</a> |

2. Click on the Disapprove Document button. Once this is done you will receive an e-mail stating the document has been disapproved. You can now login to Internet Native Banner (INB) and make corrections or delete the document.

## Canceling an Approved Requisition

Note: A requisition can be canceled after it has been approved. Please contact Procurement Services to help with canceling an approved requisition.

The screenshot shows the 'Requisition Cancel FPARDEL 9.0 (RACT)' application. The 'Request Code' is R9020853 and the user is HERMANN, SANDY. The 'REQUISITION DETAIL' section is expanded, showing the following information:

|  |              |                                |
|--|--------------|--------------------------------|
| <input checked="" type="checkbox"/> NSF Checking | Origin       | BANNER                         |
| Request Date 07/03/2018                          | Request Type | P                              |
| Transaction Date 07/03/2018                      | Vendor       | 50162673 Barton's of Jonesboro |
| Delivery Date 07/03/2018                         |              |                                |

| Net Amount      |   | Discount Amount |   | Tax Amount |   | Additional Charges |   | Net Amount |  |
|-----------------|---|-----------------|---|------------|---|--------------------|---|------------|--|
| Extended Amount | - | 0.00            | + | 221.34     | + | 0.00               | = | 2,825.14   |  |

The screenshot shows the bottom right corner of the application window, featuring a 'SAVE' button.

1. Enter 'FPARDEL' in the Search bar in Application Navigator and press Enter.
2. Enter the requisition number in the **Request Code** field
3. Click on the Next Section button

The screenshot shows the 'Requisition Cancel FPARDEL 9.0 (RACT)' application. The 'Request Code' is R9020853 and the user is HERMANN, SANDY. The 'CANCELLATION DETAIL' section is expanded, showing the following information:

|             |                  |                             |
|-------------|------------------|-----------------------------|
| Cancel Date | 07/11/2018       | Make Cancellation Permanent |
| Reason Code | CE Correct Error |                             |

| Record Count |   |
|--------------|---|
| Accounting   | 1 |
| Commodity    | 5 |

4. Click on the **Reason** search icon to select the reason for cancellation
5. Click on the Make Cancellation Permanent button
6. Click on the Exit button
7. Notify Procurement Services when cancelled.

## Finding a Requisition Number

If you have been timed out in the middle of processing a requisition or forgot to write down a requisition number, please use the following steps to find your requisition.

1. Enter 'FPAREQN' or 'FPIREQN' in the Search bar in Application Navigator and press Enter.
2. Click on the Search icon next to the **Requisition** field
3. On FPIRQST, click on the Filter button

The screenshot shows the 'REQUISITION VALIDATION' search interface. At the top, there is a green notification bar that says 'Enter a query; press F8 to execute.' Below this, there are search filters for Request Number, Requestor Name, Organization, Vendor, and Request Date. A 'Go' button is visible. The search results table shows one entry for Request Number R0003519, with details for Requestor Name (Natalie J Turney), Organization (257301 English and Philosophy), Vendor (50005414 Officemax Contract Inc), Request Date (02/17/2006), Request Type (Purchase), Deliver by Date (02/21/2006), Complete (Yes), Approved (Yes), Origin (BANNER), and Reference Number.

| Request Number | Requestor Name   | Organization                  | Vendor                          | Request Date | Deliver by Date | Complete | Approved | Origin | Reference Number |
|----------------|------------------|-------------------------------|---------------------------------|--------------|-----------------|----------|----------|--------|------------------|
| R0003519       | Natalie J Turney | 257301 English and Philosophy | 50005414 Officemax Contract Inc | 02/17/2006   | 02/21/2006      | Yes      | Yes      | BANNER |                  |

4. Tab over to the **Requestor Name** field and type in the wildcard (%), the last name of the initiator and then the wildcard (%) again in mixed case.
5. Select the **Request Date**.
6. Click on the Go button.
7. If on FPAREQN and the requisition is incomplete double click on it to return to the Requisition form and make the appropriate updates to the order before clicking Complete or stay in the Requisition Header section and click Delete twice to delete the requisition.
8. If on FPIREQN double click on the requisition number to return to the Requisition Inquiry form and review the document for accuracy.

## **Copying a Requisition to Create a New Request**

Only copy **your own APPROVED** requisitions and contact Procurement for additional instructions.

1. Enter 'FPAREQN' in the Search bar in Application Navigator and press Enter.
2. Click on the "Copy" icon
3. Enter the Requisition number and tab to populate the vendor information
4. Click the Copy button
5. A new requisition will be generated with current dates.
6. Review each section of the requisition and make appropriate corrections or updates
7. Click Complete to send to approvals

# Inquiry Forms

## FPIREQN - Requisition Query

The Requisition Query Form is the query form for the requisition.

1. Enter the Requisition Document Code
2. Click on the Next Section icon to navigate through the blocks.

## FOIDOCH—Document History

1. Enter a Document Type in the Document Type field:
  - a. REQ-Requisition
  - b. PO-Purchase Order
  - c. RCV-Receiving Document
  - d. INV-Invoice
  - e. CHK-Check
2. Enter the document number in the Document Code field.
3. Click on the Go button in the upper right corner.

| Document Type      | Document Number | Status | Status Description   |
|--------------------|-----------------|--------|----------------------|
| Requisition        | R0168493        | A      | Approved             |
| Purchase Order     | P0160205        | A      | Approved             |
| Invoice            | I0335504        | P      | Paid                 |
| Check Disbursement | 00250112        | F      | Final Reconciliation |

4. Click on the desired document number.
5. Select Query Document from the Related menu.
6. To view what the status indicators are, select View Status Indicators from the Options section of the Tools menu.

*Note:* When looking at a check, enter '12' in the Bank field prior to clicking on the Go button in the upper right corner (enter '01' for checks printed prior to July 1, 2009).