



**ARKANSAS STATE**  
UNIVERSITY

**Banner Requisition Training**

**December 2019**

## PROCUREMENT TERMS

**Requisition** - An internal document by which a department requests Procurement Services to initiate a purchase.

**Initiator/End User** – The person who enters a requisition into the Banner system.

**Approver** – The person who approves requisitions in the department (ex. Dean, Chair, VC)

**Purchase Order** – An external document issued by Procurement Services using the requisition to order items or make payment to a vendor.

**Order Requisition** – A requisition for items that are to be ordered or have a quote. This type of requisition is used to place an order for items the department has not received. *Previously known as a non-confirming requisition.*

**Payment Requisition** – A requisition to pay an invoice or reimbursement. *Previously known as a confirming requisition.*

**Blanket/Standing/Open Order** – A requisition to pay for goods/services during the fiscal year or up to a maximum dollar amount. Invoices will be paid against the standing order over the entire fiscal year.

**Quote** – A formal statement from a potential supplier/vendor to supply goods or services at a specific price within a specific period. Processed by an order requisition.

**Invoice** – A bill for payment submitted to a buyer from a seller. Invoices are processed using a payment requisition or against an existing purchase order.

**Vendor** – A supplier of a good or service.

**Commodity** – A product or service provided by a vendor.

**VPAT** – Voluntary Product Accessibility Template – this form is required for technology purchases.

**IT Questionnaire** – An IT Data Security, System Performance and Service Reliability form must accompany VPAT with technology orders.

**State Contract** – A contract issued by Office of State Procurement. Some are mandatory, some are not. Items purchased from State Contracts do not have to be bid. They also do not require a VPAT.

**Cooperative Contract** – A contract issued by two or more governments sharing procurement contracts. Examples include E & I Cooperative, TCPN, Sourcewell, US Communities, NIPA, NASPO, TIPS.

**Document Text** – Text in Banner that pertains to the entire requisition. Ex. Quote Number, Notes to Procurement, State Contract Numbers, etc.

**Item Text** – Text in Banner that pertains just to a specific item. Each line item has an Item Text field. Ex. Make/Model/Item number of that specific item.

**CONFIRMING ORDERS – (NOW KNOW AS PAYMENT REQUISITIONS)**

A confirming order, now known as a payment requisition, acknowledges that an employee made a purchase on behalf of the University without first securing the appropriate internal approvals and without using a University authorized procurement method (i.e. valid Purchase Order, PCard, or existing signed and valid University contract). **This is a violation of University policy if not approved by Procurement Services.**

**Procurement Services may decline to accept confirming order requisitions unless they are on the approved list below or permission has been given prior to the purchase.**

**We encourage departments to use their PCard or process an order or blanket/standing requisition to eliminate confirming/payment orders.**

**NOTE: The department is responsible for ensuring all staff are made aware purchase orders are required before goods or services may be ordered or received. Lack of knowledge of proper procedure is not grounds for the approval of after-the-fact requisitions. The use of Foundation funds or the employee's personal funds may be required to pay the cost of an unauthorized purchase.**

Although the items and services noted below are allowed on a payment requisition, if a supplier requires a purchase order or needs a contract signed by A-State, the employee will need to request a contract/purchase order through the normal requisition process. This is not an all-inclusive list of allowed items. **Permission will be given on a case-by-case basis.**

- Accreditation fees
- Student action funds
- Advertising
- Building Leases / Rentals
- Cadavers for Gross Anatomy laboratory
- Charitable donations
- Conference registrations
- Equine supplies (bedding, hay, feed)
- Exams
- Freight Charges: Fed Ex/ UPS
- Food purchases when not using Sodexo
- Homeland Security fees as required by the Federal Government
- Insurance payments
- Internet Charges
- Livestock auctions

- Lodging
- Medical services for student athletes
- Medication for athletes
- Memberships & Registrations (fees for professional organizations and events)
- Non-duty Stipends/ Scholarships/ Fellowships – to the exclusion of honoraria, for which Purchase Orders are required.
- Parking fees
- Postal services via the US Postal Services (stamps, meters, packaging)
- Publication charges/ Page charges/ Scientific reprint fees
- Subscriptions and Renewal Subscriptions
- Temp Labor/Officials/Security
- Utilities (water, electric, sewer, gas, refuse disposal)
- Veterinarian services, including medication for farm animals

**The following guidelines should be followed when entering order requisitions:**

- Leave comment field blank
- Descriptions should begin with a **noun** followed by additional information.  
(Example: Pens, Pilot Gel, Black, Item No. 135972A)
- The commodity code will generate a generic description. **Delete the generic description** and type the vendor's description of the item instead. Do not use the generic commodity description for the item's description.
- Use mixed-case letters.
- Do **NOT** use symbols: . \ ? : @ & = < >  
(You may use commas and dashes)
- If you have a quote number or name of person who quoted the item/service, enter it into **Document Text**.
- State or any cooperative contract numbers should be entered on line 10 of Document Text. Contract numbers should appear like the example below:
  - CNR-01499
  - SP-19-0012
- You must itemize order requisitions using the quote. If you have three items, you will have three line items on your requisition. If you run out of space on the description, use **ITEM TEXT** to complete the description.  
  
**\*\*Exception for Facilities Mgt.:** If submitting PRQs from FAMIS to Banner the description that is put in FAMIS should to be the same on the purchase order in Banner. Also, if taxes are on the purchase order in Banner you will need to add the taxes to FAMIS.
- Shipping is a considered a commodity and should be on a separate line description. The shipping commodity code is 91558 and is taxed.
- Receiving is required on order requisitions.

**Note: Document Text should be used when the information refers to the entire requisition (ex, quote number, state contract number, notes to Procurement, new vendor Info). Item Text should be used to refer to a particular line item (make/model, product/item numbers, information that did not fit on description line).**

## **PAYMENT REQUISITION GUIDELINES (Invoice or Reimbursement)**

The following guidelines should be followed when entering payment requisitions:

- Type in **PAYMENT** or **INVOICE** in comment field.
- Descriptions should begin with a **noun** followed by additional information.  
(Example: *Membership for Chamber of Commerce Invoice No. 5698*)
- The commodity code will generate a generic description. **Delete the generic description** and type the description of the service. Do not use the generic commodity description for the item's description.
- Use mixed-case letters.
- Do **NOT** use symbols: . \ ? : @ & = < >  
(You may use commas and dashes)
- **DO NOT ITEMIZE** payment requisitions. If you have one invoice, you will have one line item.
- Payment invoices are not taxed in Banner. Use the “P” in the tax group and enter full amount of the payment.
- **If you are reimbursing an individual, write the name and address of the person on the invoice/receipt.**
- Receiving is not required on Payment requisitions.

## BLANKET/STANDING ORDERS GUIDELINES

The following guidelines should be followed when entering blanket requisitions:

- Type **STANDING ORDER** in comment field.
- In Document Text enter – **EFFECTIVE JULY 1, 2019 TO JUNE 30, 2020** and save. (If the blanket/open order is for another time period, the Document Text statement should reflect those dates).
- Descriptions should begin with a **noun** followed by additional information. (Example: *Shredding Services for Fiscal year 2019-2020*)
- The commodity code will generate a generic description. **Delete the generic description** and type the description of the service. Do not use the generic commodity description for the item's description.
- Use mixed-case letters.
- Do **NOT** use symbols: . \ ? : @ & = < >  
(You may use commas and dashes)
- **DO NOT ITEMIZE** blanket requisitions. You should have one line item in most cases.
- Blanket orders not taxed in Banner. Use the “P” in the tax group and enter full amount of the encumbrance.
- When an invoice for payment arrives, write the PO number on the invoice and forward to [accountspayable@astate.edu](mailto:accountspayable@astate.edu). No receiving is necessary on Blanket/Standing orders.
- Most blanket requisitions will not have backup documentation.

## **SUPPORTING DOCUMENTATION**

Supporting documents are required requisitions.

- The requisition number should be written on the documents in clear and legible ink in order to allow for quicker processing. **Copies of banner screenshots are not required.**
- If you are reimbursing an individual, write the name and address of the person on the invoice/receipt (backup documentation).
- Procurement Services will accept scanned PDF copies of the documents. Scanned copies should be sent to [procurement@astate.edu](mailto:procurement@astate.edu).
- Departments are responsible for retaining the original documents for at least two years.

### **SHARESPACE**

**Personally Identifiable Information such as W-9, social security number and date of birth should be submitted using ShareSpace. Do not send this information by email!!**

**Instructions for ShareSpace are available online:**

<https://webapps.astate.edu/sharespace/>.

## **OFFICE SUPPLY PURCHASES**

Office supplies are no longer on a mandatory state contract, but the department will benefit from the cost savings by using one of the following sources:

**Staples** – Cooperative Contract – E & I - online purchases  
**Office Depot** – State Contract - online and in-store purchases

You may purchase your office supplies by an order requisition or P-Card.

If you do not have a user name or password for these websites, email your contact information to [procurement@astate.edu](mailto:procurement@astate.edu).

Once you have obtained your user id and password, please use the correct website in order to receive the contracted prices.

Staples – <http://www.StaplesAdvantage.com>  
Office Depot– <https://epsprocure.e-procurementservices.com/osp/oc>

If you have any questions, feel free to contact Procurement Services at 2028.

### **AMAZON ORDERS**

Amazon purchases are allowed on the P-Card. Amazon does not accept purchase orders. ASU employees must use the Amazon Business Advantage website and not their personal account to order for the University. To get setup on Amazon Business Advantage, contact Nanya French at [nfrench@astate.edu](mailto:nfrench@astate.edu).

# **FOOD PURCHASES**

## **Food Purchase Requests**

Departments must complete the Food Purchase Request form when using state funds to purchase food not provided by Sodexo, Inc., our Dining Services vendor. The form is not required when food is purchased using A-State Foundation or Student Agency funds.

- On-Campus facilities include all buildings on the Jonesboro campus with the exception of the Judd Hill Center.
- Off-Campus facilities include restaurants, parks, and other establishments not on the Jonesboro campus.

## **On-Campus Official Functions**

- Food purchased for an on-campus function should be purchased through Sodexo, Inc.
- The Food Purchase Request form must be approved by Sodexo, Inc., **PRIOR** to ordering from an off campus vendor.

## **Required Approvals**

- All food purchase requests for off-campus official functions must be approved by the department head, chair, dean, and vice chancellor **PRIOR** to the event.
- Once Sodexo, Inc., has approved the request, the department can submit a requisition for approval, along with the Food Purchase Request form.

## **The Food Purchase Request form is not required for the following purchases.**

The function must be documented on the requisition or p-card log.

- Food purchases provided by Sodexo
- Classroom experiment food
- Coffee & supplies for University guests only
- Candy for community fairs, recruitment trips, and other University functions. Candy for the department is not allowed.
- Meals outside of Jonesboro

For more information, see Operating Procedure 05-09 and the Food Purchase Request form on Procurement Services' web site.

# ON-CAMPUS PURCHASES

On campus purchase instructions can be found on the Procurement Service's website.

## Click on Requisition Information

ARKANSAS STATE UNIVERSITY [Giving](#) [Library](#) [Athletics](#) [News](#) [Calendar](#) [myCampus](#) [A-Z Index](#)



[ADMISSIONS](#) | [ACADEMICS](#) | [CAMPUS LIFE](#) | [RESEARCH](#) | [ABOUT A-STATE](#)

INFO FOR: [FUTURE STUDENTS](#) | [CURRENT STUDENTS](#) | [PARENTS](#) | [FACULTY & STAFF](#) | [ALUMNI](#) | [COMMUNITY](#)

[HOME](#)

**PROCUREMENT SERVICES**

- [Bids/RFP/RFQ & Results](#)
- [Campus Credit Cards](#)
- [Contract Administration](#)
- [Forms](#)
- [Frequently Asked Questions](#)
- [Requisition Information](#)
- [State & Cooperative Contracts](#)
- [Staff](#)
- [Vendor Information](#)
- [Xerox Services](#)

**DOING BUSINESS WITH ASU-JONESBORO**

*Doing Business With ASU-Jonesboro Information*



## PROCUREMENT SERVICES



## Click on On-Campus Purchases

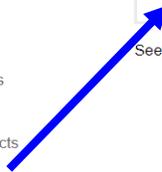
- HOME
- PROCUREMENT SERVICES
- REQUISITION INFORMATION**
- Bids/RFP/RFQ & Results
- Campus Credit Cards
- Contract Administration
- Forms
- Frequently Asked Questions
- Requisition Information
- State & Cooperative Contracts
- Staff
- Vendor Information
- Xerox Services

## REQUISITION INFORMATION

### BANNER REQUISITIONING INFORMATION

- [Training Guides](#)
- [Commodity Codes - Updated 2/20/2018](#)
- [Vendor Quicklist - Updated 08/22/2018](#)
- [On Campus Purchases](#)

See the FAQ page for more information.

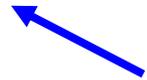


## Choose the department for your order requisition

- HOME
- PROCUREMENT SERVICES
- ON-CAMPUS PURCHASING**
- Bids/RFP/RFQ & Results
- Campus Credit Cards
- Contract Administration
- Forms
- Frequently Asked Questions
- Requisition Information
- State & Cooperative Contracts
- Staff
- Vendor Information
- Xerox Services

## ON-CAMPUS PURCHASING

INFORMATION AND TECHNOLOGY SERVICES	+
PRINTING SERVICES	+
PARKING SERVICES	+
DINING SERVICES/SODEXO, INC. AND AFFILIATES	+
FACILITIES MANAGEMENT	+
UNIVERSITY POLICE	+
A-STATE BOOKSTORE - FOLLETT	+
FIRST NATIONAL BANK ARENA	+
PUBLICATIONS AND CREATIVE SERVICES	+
ALUMNI ASSOCIATION	+



## **PROCUREMENT WEBSITE**

The Procurement Service's website has all the Procurement information, forms, state and cooperative contracts, and links posted. The webpage is kept up to date and we strongly encourage you to visit our website and look around.

Our website is <http://www.astate.edu/a/procurement/>

HOME

**PROCUREMENT SERVICES**

Bids/RFP/RFQ & Results

Campus Credit Cards

Contract Administration

Forms

Frequently Asked Questions

Requisition Information

State & Cooperative Contracts

Staff

Vendor Information

Xerox Services

### **DOING BUSINESS WITH ASU- JONESBORO**

*Doing Business With ASU-  
Jonesboro Information*

### **NOTICES & REMINDERS**

*Procurement Findings and  
Recommendations Report*

*Operating Procedures*

*Procurement Procedure  
Handbook - revised*

*06/11/2019*

*Licensed Collegiate Vendors*

## **PROCUREMENT SERVICES**



**Procurement Services'** mission is to provide the University with services that effectively and efficiently respond to the campus's operating needs.

## CONTACTS

### [PROCUREMENT@ASTATE.EDU](mailto:PROCUREMENT@ASTATE.EDU)

Procurement Services has experienced some changes in the past year. Below is the contact information for questions:

**Carol Barnhill, C.P.M., CPPO, APO - [cbarnhil@astate.edu](mailto:cbarnhil@astate.edu) - 870-972-2122**

- Major issues for Procurement
- Contracts, terms and conditions, agreements
- Leases, copiers, BIDs, RFPs
- Vehicle purchases

**Lisa Glasco, CPCP, CPPB, CPPO - [lglasco@astate.edu](mailto:lglasco@astate.edu) - 870-972-3449**

- Bids, RFPs, change orders, PO's, requisitions
- State and Cooperative contracts
- Procurement website
- Vendor questions
- On-Campus purchases questions
- Procurement training
- Banner Questions

**Nanya French - [nfrench@astate.edu](mailto:nfrench@astate.edu) - 870-972-3445**

- Requisitions, Banner questions
- Backup documentation
- W9 – New Vendor Packet Information
- P-Card backup
- Amazon Business Advantage setup
- Office Suppliers setup
- Enterprise Rental Cars

**Mike Smith - [mismith@astate.edu](mailto:mismith@astate.edu) - 870-680-4230**

- P-Cards
- P-Card training
- Banner Questions
- Requisition Questions

#### **Travel and Departmental Cards**

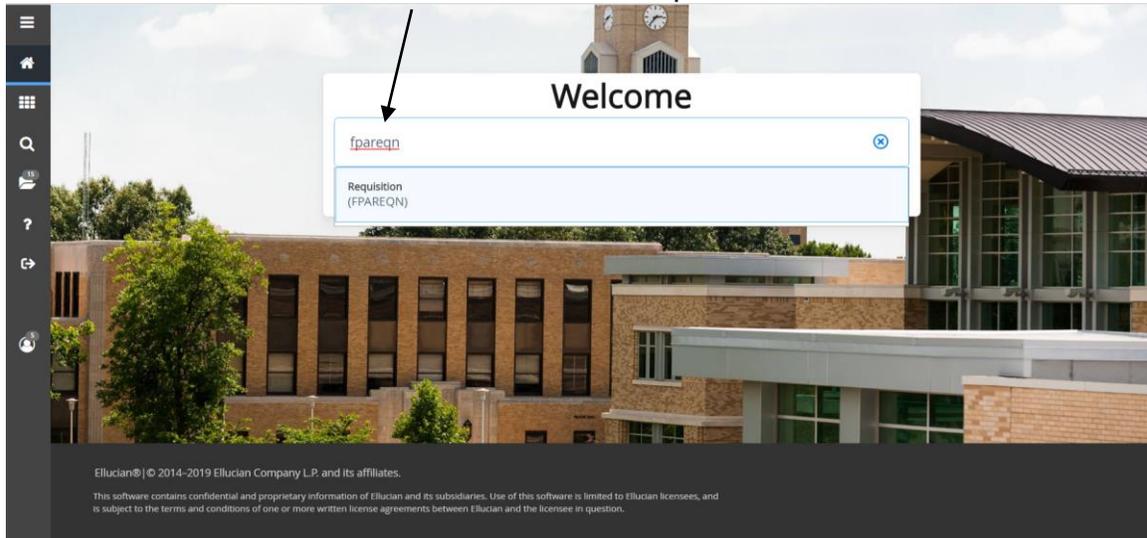
Garry Patterson in Accounts Payable – [gpatterson@astate.edu](mailto:gpatterson@astate.edu) – 870-972-2333 is responsible for Travel and Departmental Cards.

#### **International Vendors**

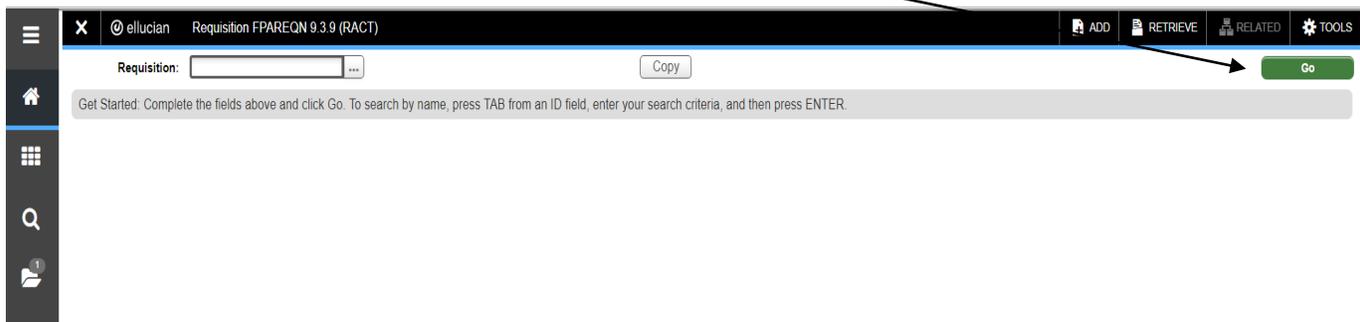
Contact Fran Lincoln in Treasurer's Office - [flincoln@astate.edu](mailto:flincoln@astate.edu) – 870-972-2285

## Creating a Requisition

Enter 'FPAREQN' in the Welcome field and press Enter



Leave Requisition field blank and click GO



## Requestor/Delivery Information Block

- Tab to the Delivery Date field and enter today's date.
- Leave the Comment field blank for Order Requisitions. Enter 'Invoice' or 'Payment' for Payment Requisitions and 'Standing' for Blanket requisitions.
- Click on the Next Section icon (or Alt + Page Down) to go to the Vendor Information tab

Requisition: NEXT

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT

Order Date: 07/18/2019

Transaction Date: 07/18/2019

Delivery Date: [ ]

Comments: [ ]

Commodity Total: 0.00

Accounting Total: 0.00

In Suspense

Document Text

Document Level Accounting

Requestor/Delivery Information

Requestor: Lisa Glasco

Organization: 311201 Contract Admin-Strategic Sourcing

COA: J Arkansas State University-Jonesboro

Email: lglasco@astate.edu

Phone Area Code: 870

Phone Number: 9723449

Phone Extension: [ ]

Fax Area Code: [ ]

Fax Number: [ ]

Fax Extension: [ ]

Ship To: 077880

Street Line 1: Arkansas State University

Street Line 2: Procurement Services

Street Line 3: 2713 Pawnee

Contact: Procurement Services

Attention To: Procurement Services

Building: C/O Central Rec

Floor: [ ]

City: State University

State or Province: AR

Zip or Postal Code: 72467

Nation: [ ]

Area Code: 870

Phone Number: 9722028

Extension: [ ]

EDIT Record: 1/1 FPBREQH FPBREQH EMAIL\_ADDR [1] ©2000 - 2018 Ellucian All rights reserved ellucian

## 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/>

- Click on the Search dots next to the Vendor field
- Click on the FTIIDEN link

Requisition: NEXT  
REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT  
Order Date: 07/18/2019  
Transaction Date: 07/18/2019  
Delivery Date: 07/18/2019

Comments: [Text Field]  
Commodity Total: 0.00  
Accounting Total: 0.00  
Document Level Accounting:

In Suspend  
 Document Text

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

VENDOR INFORMATION

Vendor: [Field] [Search Icon] [Field]  
Vendor Hold:

Address Type: [Field]  
Sequence: [Field]

Street Line 1: [Field]  
Street Line 2: [Field]  
Street Line 3: [Field]

City: [Field]  
State or Province: [Field]  
Zip or Postal Code: [Field]  
Nation: [Field]

Contact: [Field]  
Email: [Field]  
Phone Area Code: [Field]  
Phone Number: [Field]  
Phone Extension: [Field]  
Fax Area Code: [Field]  
Fax Number: [Field]  
Fax Extension: [Field]  
Discount: [Field]  
Tax Group: U Taxes Assessed  
Currency: [Field]

EXIT Record: 1/1 FPAREQ.VENDOR: SPRIDEN ID(1) ©2000 - 2018 Elucian. All rights reserved. elucian. SAVE

Requisition: NEXT  
REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT  
Order Date: 07/18/2019  
Transaction Date: 07/18/2019  
Delivery Date: 07/18/2019

Comments: [Text Field]  
Commodity Total: 0.00  
Accounting Total: 0.00  
Document Level Accounting:

In Suspend  
 Document Text

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

VENDOR INFORMATION

Vendor: [Field] [Search Icon] [Field]  
Vendor Hold:

Address Type: [Field]  
Sequence: [Field]

Street Line 1: [Field]  
Street Line 2: [Field]  
Street Line 3: [Field]

City: [Field]  
State or Province: [Field]  
Zip or Postal Code: [Field]  
Nation: [Field]

Contact: [Field]  
Email: [Field]  
Phone Area Code: [Field]  
Phone Number: [Field]  
Phone Extension: [Field]  
Fax Area Code: [Field]  
Fax Number: [Field]  
Fax Extension: [Field]  
Discount: [Field]  
Tax Group: U Taxes Assessed  
Currency: [Field]

**Option List**

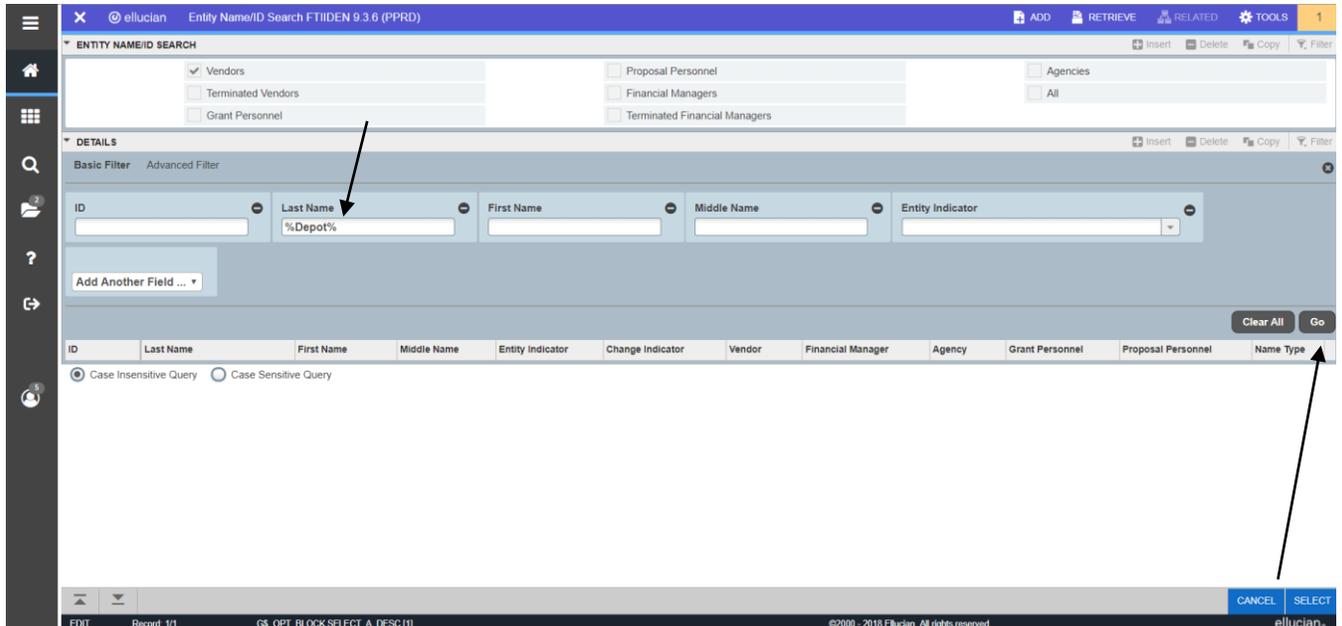
Entity Name/ID Search (FTIIDEN)  
Vendor Maintenance (ETMVEND)

Cancel

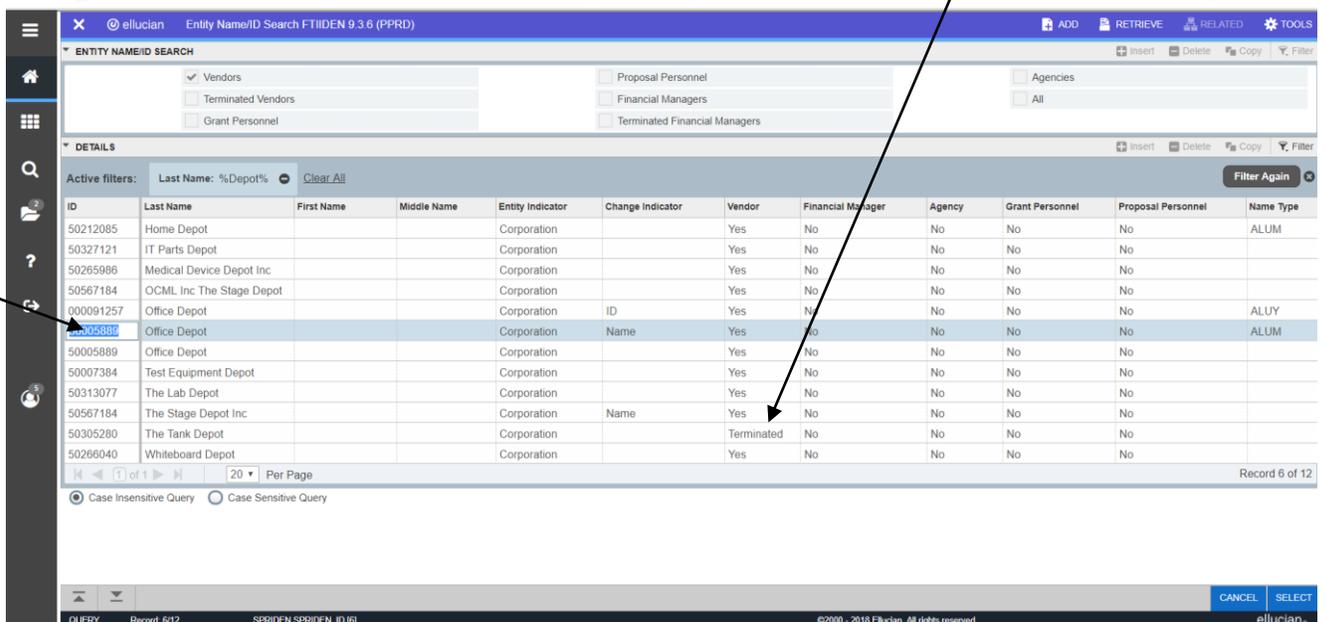
EXIT Record: 1/1 GS OPT\_BLOCKSELECT A DESC(1) ©2000 - 2018 Elucian. All rights reserved. elucian. SAVE

For a basic vendor search:

- Tab to the Last Name field and enter a portion of the vendor's name using the wildcard (%) For example: %Depot% to search for Office Depot (It is **VERY** important to use mixed-case when searching for any type of data)
- Click the Go button to search



- Double-click on the vendor's ID to populate the ID in the Vendor ID field on the requisition form
  - *Notes: The vendors with duplicate IDs were converted so it does not matter which ID number you click on—the system will default in the Banner ID. Terminated vendors can't be used.*



When the vendor does not exist in Banner, enter the Vendor's name and address information in the Document Text. **Do not** include a person's social security number in the requisition.

To access Document Text, click on the Related menu and select Document Text.

- 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. Document Text pertains to the entire PO.

Click the Go button

- Enter the appropriate text in mixed-case (up to 50 characters/line)  
To insert another line, click on the Insert button (or down arrow on the keyboard). **Do not include a person's SSN in the requisition.**

Click Save and then Click X to return to your requisition.

Text	Clause Number	Print	Line
Please add address		<input checked="" type="checkbox"/>	10
27930 North Vegas Blvd		<input checked="" type="checkbox"/>	20
Las Vegas, NV 46258		<input checked="" type="checkbox"/>	30

- Does the PO address match the address on the quote or invoice? If not, click on the Address Type search icon.
- Scroll through the addresses to find the 'PO' address. You **MUST** use the PO type. If you find the address, double-click on the Address Type field.

The screenshot displays the 'REQUISITION ENTRY: REQUESTOR/DELIVERY' form in the ellucian system. The 'VENDOR INFORMATION' tab is active, showing details for Vendor 50005889, Office Depot. The Address Type is set to 'PO', and the Sequence is '5'. An arrow points to the Address Type field. Other fields include Order Date (07/24/2019), Transaction Date (07/24/2019), Delivery Date (07/24/2019), and City (Dallas, TX). The form also includes sections for Requestor/Delivery Information, Vendor Information, Commodity/Accounting, and Balancing/Completion. The bottom of the screen shows the record ID (11) and the ellucian logo.

## Commodity/Accounting Block

**Write your requisition number on your quote or invoice at this point!**

***\*\*Important Note: The commodity code will generate a generic description. Delete the generic description and enter the specific item description **beginning with a noun**. Do not use the generic commodity description for the item's description.***

### Searching and Entering Commodity Codes

- Enter the code in the Commodity Code field or search for the commodity code by clicking on the search dots.

Requisition: R0265201

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

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
				U				

Extended Amount: [ ] Tax: [ ]  
Discount: [ ] Commodity Total: [ ]  
Additional: [ ] Document Total: [ ]

Sequence: J Year: % Index: USD

Extended Amount: [ ]  
Discount: [ ]  
Additional: [ ]  
Tax: [ ]  
FOAPAL Total: [ ]

- Choose Basic filter and type in %, the item and then the % again. \*Use mixed case lettering.
- Click Go
- Find Description that does not have a termination date and double click to populate the commodity on the requisition.

Commodity Code Validation

Basic Filter: Commodity Code [ ] Description [%Office%] U/M [ ] Fixed Asset [ ] Stock [ ]

Commodity Code	Description	U/M	Fixed Asset	Stock	Start Date	Termination Date
615600	consulting and installation of audio equipment	EA	N	N	10/08/2007	10/24/2007
00505	Abrasive Equipment and Tools	EA	N		01/01/2001	05/19/2009
00514	Abrasives Coated Cloth Fiber Sandpaper etc	EA	N		01/01/2001	05/19/2009
00584	Steel Wool Aluminum Wool Copper Wool and Lead Wool	EA	N		01/01/2001	05/19/2009
007940	breakfast food for field fair	EA	N	N	02/04/2008	08/22/2008
01005	Acoustical Tile All Types (Including Recycled Type)	EA	N		01/01/2001	05/19/2009
01017	Aluminum Foil etc	EA	N		01/01/2001	05/19/2009
01030	Bands Clips and Wires (For Pipe Insulation)	EA	N		01/01/2001	05/19/2009
01041	Cork Blocks Boards Sheets etc	EA	N		01/01/2001	05/19/2009
01056	Foam Glass Blocks Sheets etc	EA	N		01/01/2001	05/19/2009
01059	Foam Plastics Blocks Boards Sheets etc	EA	N		01/01/2001	05/19/2009
01075	Paints Primers Sealers etc	EA	N		01/01/2001	05/19/2009
01078	Pipe and Tubing Insulation All Types	EA	N		01/01/2001	05/19/2009
01515	Chemicals and Supplies Dry	EA	N		01/01/2001	05/19/2009
01516	Chemicals and Supplies Wet	EA	N		01/01/2001	05/19/2009
01520	Chemicals and Supplies	EA	N		01/01/2001	05/19/2009
01525	Chemicals Inks and Supplies	EA	N		01/01/2001	05/19/2009
01538	Paper Chemicals and Supplies (Addressing)	EA	N		01/01/2001	05/19/2009

- Tab to Description

The screenshot shows the 'COMMODITY' section of a requisition entry form. The 'Description' field is highlighted with an arrow. The table below it contains one record with the following details:

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
	61505	Office Supplies-Glue, Paste, etc	EA	U				

Below the table, there are input fields for 'Extended Amount', 'Discount', and 'Additional'. The 'ACCOUNTING' section below shows a table with columns for 'Sequence', 'COA', 'Year', 'Index', 'Fund', 'Orig', 'Acct', 'Prog', 'Actv', 'Locn', 'Proj', 'NSF Override', and 'NSF Suspense'.

- Remove the generic commodity description that populated and enter specific item description **BEGINNING WITH A NOUN**
- If you need to enter more detail in the Description field, select Item Text from the Related tab
- Enter the appropriate text in mixed-case (up to 50 characters/line)
- Tab to the U/M (unit of measure) field and select the appropriate code if different than “EA” (each)
  - Tab to the Tax Group field and select the appropriate code if different than “U” (**default tax rate – 8.5%**)
  - **Payment requisitions use “P”**
  - **On-Campus requisitions use “NT”**
- Tab to the Quantity field and enter the quantity desired
- Enter the unit price in the Unit Price field (**do not enter a \$0 amount**)
- Tab until the cursor is located in the Commodity field again
- Click on the Insert button or push the down arrow on your keyboard to enter additional commodity records.

- Shipping is considered a separate line item with the commodity code of 91558. Shipping is taxed “U” tax group!
- **Click on the Next Section icon to navigate to the Accounting block**
- The ‘J’ (for Jonesboro Campus) will default in the COA field. The current fiscal year will default into the Year field.
- The Fund, Orgn, Acct, Prog will default in based on your Finance security and Commodity code.
- Tab through the Amount fields to calculate all totals
- 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.
- **Click on the Next Section icon to navigate to the Completion block**

The screenshot displays the 'Accounting' section of a requisition entry. The interface includes a top navigation bar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. The main content area is divided into several sections:

- REQUISITION ENTRY: REQUESTOR/DELIVERY:** Contains fields for Requisition (R0265201), Order Date (07/24/2019), Transaction Date (07/24/2019), and Delivery Date (07/24/2019). It also shows 'Commodity Total' (303.80) and 'Accounting Total' (0.00).
- COMMODITY:** A table with columns: Item, Commodity, Description, UIM, Tax Group, Quantity, Unit Price, Commodity Text, and Item Text.
 

Item	Commodity	Description	UIM	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
1	61505	Pens, Papermate Item 1264	CS	U		10.00	23.0000	
2	91558	Shipping Charged by Vendor	EA	U		1.00	50.0000	
- ACCOUNTING:** A table with columns: Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Actv, Locn, Proj, NSF Override, and NSF Suspense. Below this is a summary table with columns for % and USD.
 

	%	USD
Extended Amount	<input type="checkbox"/>	280.00
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	23.80

An arrow points to the 'USD' column header in the Accounting summary table. The bottom of the screen shows 'EDIT Record 1/1' and 'FPFRE-QA-DISCOUNT PCT IND [1]'.

## Balancing/Completion Block

- Make sure all Amount display a Status of BALANCED. Click on the complete button to complete the requisition.
- Click on the In Process button to save the requisition to complete at a later time or complete to finish the requisition.
- Write the requisition number on any documentation and send to [procurement@astate.edu](mailto:procurement@astate.edu). If you do not have any back-up documentation, you do not have to send anything to Procurement Services.

Requisition: R0265201

REQUISITION ENTRY: REQUESTOR/DELIVERY

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

**BALANCING/COMPLETION**

Vendor: 50005889 Office Depot  
 COA: J Arkansas State University-Jonesboro  
 Requestor: Lisa Glasco  
 Organization: 311201 Procurement

	Input	Commodity	Accounting	Status
Approved Amount	280.00	280.00	280.00	BALANCED
Discount Amount	0.00	0.00	0.00	BALANCED
Additional Amount	0.00	0.00	0.00	BALANCED
Tax Amount	23.80	23.80	23.80	BALANCED

Complete    In Process

EDIT    Record: 1/1    POSTING: BLOCK-MARK: COMPLETE: BIN [1]    ©2000 - 2018 Ellucian. All rights reserved.    ellucian

## 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.

## Types of Status Indicators for Requisitions (FOIDOCH)

- Blank – incomplete
- “C” status – Completed but not approved
- “A” status – Approved
- “X” status – Deleted

## Deleting an Incomplete Requisition (Blank status)

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 Header Block select the Delete button
5. Select Delete again-All Commodity and Accounting Records will be deleted.

The screenshot displays the 'eFlucian' interface for a requisition. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main content area is titled 'Requisition: R0285208' and features a 'Start Over' button. Below this is the 'REQUISITION ENTRY: REQUESTOR/DELIVERY' section, which contains several input fields and buttons. A black arrow points to the 'Delete' button. The 'REQUESTOR/DELIVERY INFORMATION' section follows, with fields for 'Requestor' (Lisa Glasco), 'Organization' (311201), 'COA' (J), 'Email' (lglasco@astate.edu), and various address and contact details. The bottom of the screen shows a status bar with 'Record: 01' and 'FPAREQN FPAREQN REQM DATE (1)'.

## Disapproving a Requisition (“C” Status)

**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.



### Arkansas State University

[Personal Information](#) [Student](#) [Financial Aid](#) [Employee](#) [Finance](#)

Search

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#### Approve Documents

Download the [Self-Service Banner](#) guide for further instruction or contact the [Banner Support Administrator](#) for assistance.

#### Enter Approval Parameters

User ID:   
Document Number:   
 Documents for which you are the next approver  
 All documents which you may approve

- Click on the Disapprove link.

#### 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

#### Queried Parameters

User ID: TELLINGTON Traci 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>

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

## Canceling an Approved Requisition (“A” Status)

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

## 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.

- Enter ‘FPAREQN’ or ‘FPIREQN’ in the Search bar in Application Navigator and press Enter.
- Click on the Search dots next to the **Requisition** field
- Click on the Filter button
- 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**.
- Click on the Go button.

The screenshot shows the 'REQUISITION VALIDATION' application interface. The search criteria are: Request Number (empty), Requestor Name (%Glasco%), Organization (empty), Vendor (empty), and Request Date (empty). The search results display details for Request Number R0003519, Requestor Name Natalie J Turney, Organization 257301 English and Philosophy, Vendor 50005414 Officemax Contract Inc, Request Date 02/17/2006, and Request Type Purchase. The status is 'Approved' and 'Origin' is 'BANNER'. The 'Per Page' field is set to 1. Arrows point to the 'Requestor Name' field and the 'Go' button.

- To view multiple requisitions, increase the per page field.

The screenshot shows the 'REQUISITION VALIDATION' application interface. The search criteria are: Requestor Name (%Glasco%). The search results display details for Request Number R0265208, Requestor Name Lisa Glasco, Organization 311201 Procurement, Request Date 07/31/2019, and Request Type Purchase. The status is 'Complete' and 'Approved' is 'No'. The 'Per Page' field is set to 10. A dropdown menu is open showing options 1, 2, 3, 5, and 10. The 'Filter Again' button is visible.

- 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.

# Inquiry Forms

**FOIDDOCH** – DOCUMENT HISTORY

**FPIREQN or FPAREQN** – REQUISITION QUERY

**FOAAINP** - APPROVALS

## **FOIDDOCH—Document History**

- Enter a Document Type in the Document Type field:
  - REQ-Requisition
  - PO-Purchase Order
  - RCV-Receiving Document
  - INV-Invoice
  - CHK-Check
- Enter the document number in the Document code field
- Click on the Go button

Document Type	Document Number	Status	Status Description
Requisition	R0231737	A	Approved
Purchase Order	P0220568	A	Approved
Invoice	I0454053	P	Paid
Check Disbursement	00320062	F	Final Reconciliation

- Click on the desired document number.
- Select Query Document from the Related menu.
- 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).

## FPIREQN - Requisition Query

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

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

Requisition: R0265208 Go

Get Started. Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER

## FOAAINP— Approvals

- Enter 'FOAAINP' in the Search bar in Application Navigator and press enter
- Enter the requisition number in the Document field
- Click on the Go button
- The department that has not approved the requisition is listed under the Queue Description.
- The approver for that department is listed under Approver List.
- The lowest number on the Queue Level is the next approver. If you have more than one level of approval, just use a mouse click (or page down arrow) to navigate to the next approver level.

Document: R0265101 Type: REQ Change Sequence: Submission: Start Over

Queue ID	Queue Description	Queue Level	Approval Level
SPAR	SPONSORED PROGRAMS ACCOUNTING		30

+ Indicates what will be approved

Queue	Level	User
SPAR	30	Chelsea Gambill
SPAR	30	Whitney Lumpkin

In suspense  Detail Approve Disapprove