Administrative Professional Workshop
Agenda

Banner for Purchasing

• Access
• Training
• Requisition Entry
• Invoice Submittal
• Tips and Tricks
Banner

What does Banner do?

Requisition Entry
Requisition Approval
Purchase Order Status
Payment Tracking
**Access to Banner**

Where can you find access to Banner?

- Requisition Entry – Banner Self Service
- Approvals
- Vendor Look-up
- Training Resources
Access to Banner

Banner Finance Access Request Form

New Access
• List all known Fund/Organization combinations.

Changes to Current Access
• Adding new Fund/Orgs or if you change departments.

Banner Access Request
Moodle Class – Banner Purchasing Training

Videos
- Requisition Entry
- Requisition Approval
- Vendor Query

PDF Documents with Step-by-Step Instructions
- Requisition Entry
- How to Charge Multiple Accounts
- Vendor Query
- Mobile Document Approval

Banner Purchasing Training Moodle Class
Banner Requisition Dashboard

- Requisition Entry
- Status of Approvals
- Purchase Order Process Status
- Purchase Order Number
- Search Requisitions

Requisition Entry
No Vendor – No Problem

Vendor Information Form

Vendor Completed W-9

** Send to Purchasing **
What should be attached to your Requisition?

• Quotes
• Unsigned Agreements
• Solicitation Documents
• Required Documents
  (ex: PPCS, Exemption forms, etc.)

All common file extensions are accepted.
Requesting Invoice Payment

You have the invoice, now what?

Receiving Copy Report
When all items are received or when services are complete.

Partial Delivery Receiving Report
When some items are invoiced, or some services have been completed.

Email Invoice and one of the above receiving reports to Accounts Payable at accountspayable@louisiana.edu
Banner Tips and Tricks

- Internet Explorer is not your friend.
- When you get an error, get a screen snip, close everything and try again.
- Watch your use of special characters $%@&/
- Before submitting a help desk ticket; close the browser, clear the cache (history) and try again.
- Don’t forget your location code for any item exceeding $1000.
- Do not enter an item for zero dollars or negative dollars.

If you still have problems, call Kristi Montet in Teams.

Purchasing Website