



UNIVERSITY *of*
LOUISIANA
L A F A Y E T T E[®]

Administrative Professional Workshop

Agenda

Banner for Purchasing

- Access
- Training
- Requisition Entry
- Invoice Submittal
- Tips and Tricks



Banner

What does Banner do?

Requisition Entry

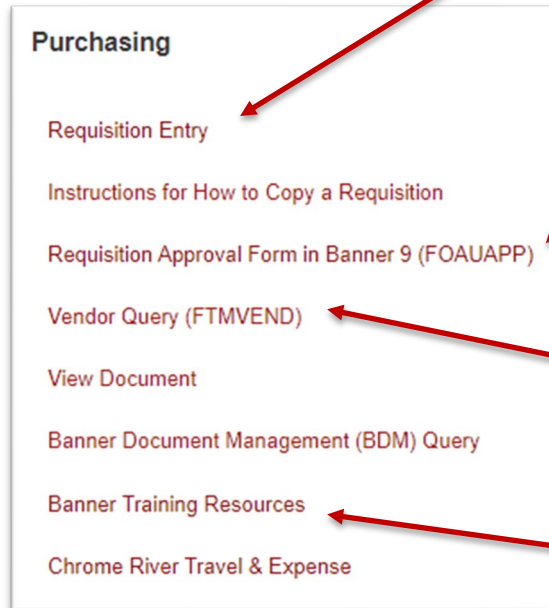
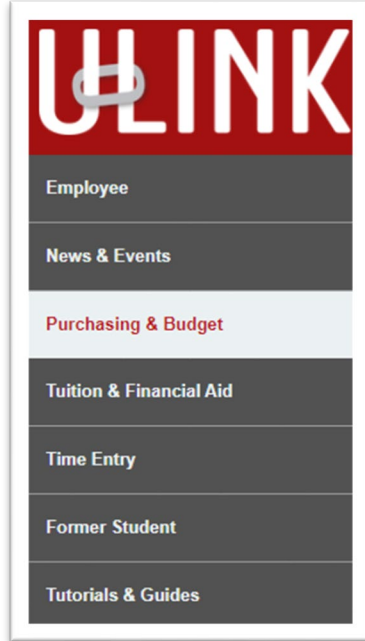
Requisition Approval

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

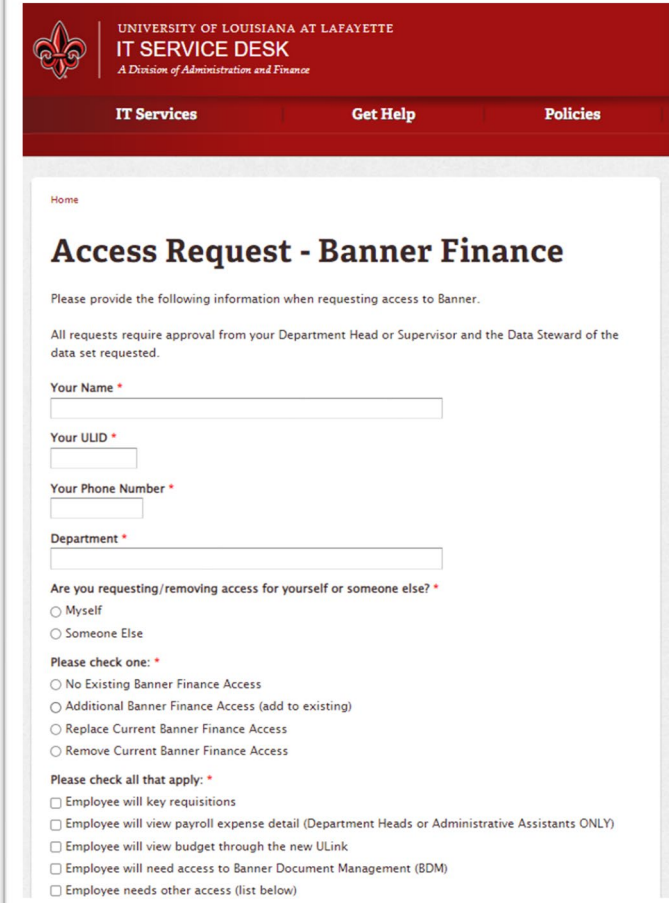
New Access

- List all known Fund/Organization combinations.

Changes to Current Access

- Adding new Fund/Orgs or if you change departments.

Banner Access Request



The screenshot shows the 'Access Request - Banner Finance' form. The header includes the University of Louisiana at Lafayette logo and 'IT SERVICE DESK' text. Navigation links for 'IT Services', 'Get Help', and 'Policies' are present. The form title is 'Access Request - Banner Finance'. Instructions state that requests require approval from a Department Head or Supervisor and the Data Steward. The form contains several required fields: 'Your Name', 'Your ULID', 'Your Phone Number', and 'Department'. Below these are radio buttons for 'Are you requesting/removing access for yourself or someone else?' with options 'Myself' and 'Someone Else'. A 'Please check one:' section includes radio buttons for 'No Existing Banner Finance Access', 'Additional Banner Finance Access (add to existing)', 'Replace Current Banner Finance Access', and 'Remove Current Banner Finance Access'. A 'Please check all that apply:' section includes checkboxes for 'Employee will key requisitions', 'Employee will view payroll expense detail (Department Heads or Administrative Assistants ONLY)', 'Employee will view budget through the new ULink', 'Employee will need access to Banner Document Management (BDM)', and 'Employee needs other access (list below)'.

Banner Training Documents

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](#)

▼ Video Resources

[Requisition Entry Video](#)

[Vendor Query](#) (How to look up a vendor.)

[Requisition Approval Video](#)

[Viewing a document not on the Requisition Landing Page Video](#)

[View/Print a pdf of your Requisition Video](#)

[Search for Scanned Documents in Banner Document Management Video](#)

▼ Printable Banner Finance Resources

 [Step by Step Requisition Entry](#)

 [Step by Step How to charge more than one FOAPAL \(Budget\)](#)

 [Step by Step Vendor Query](#)

 [Step by Step Document Approval](#)

 [Step by Step Document Approval from Mobile App](#)

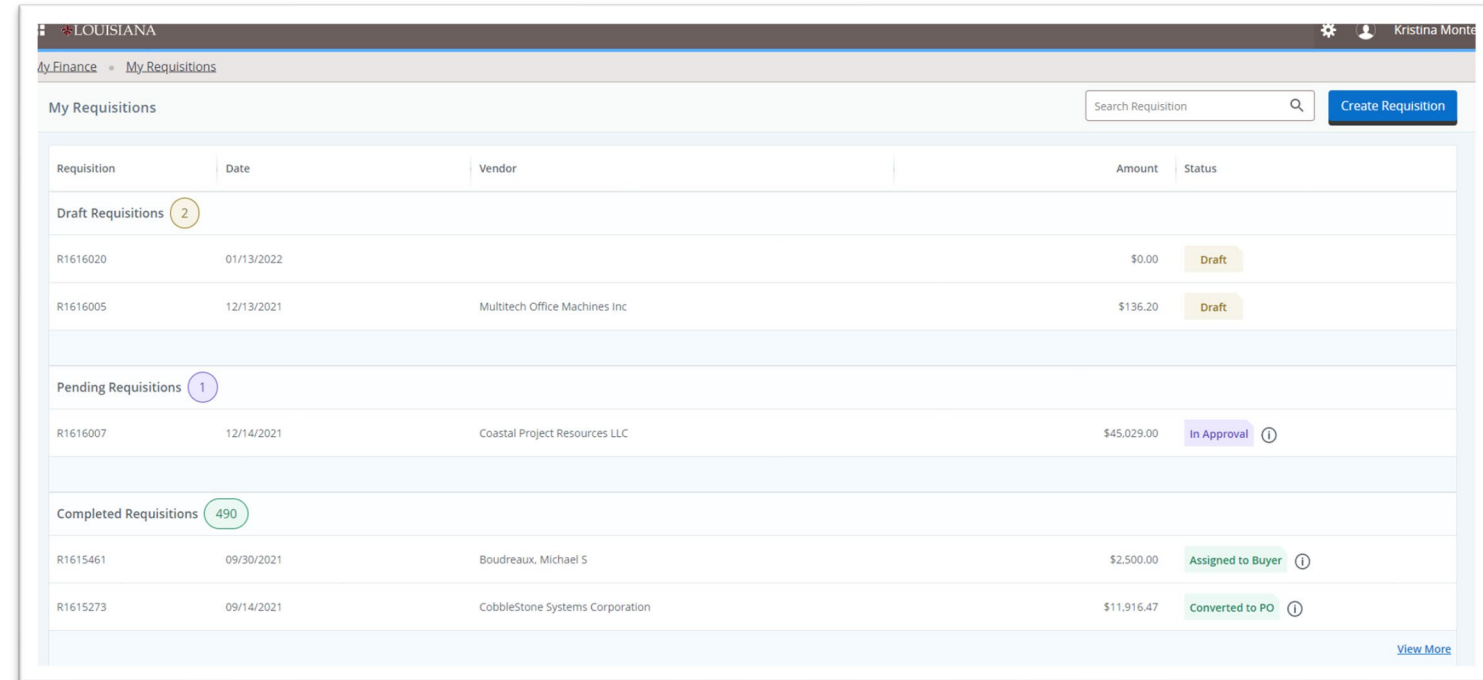
 [Step by Step Requesting a New Vendor](#)

 [Step by Step Copy a Completed Requisition](#)

 [Step by Step How to Change a Requisitions Fiscal Year](#)

Banner Requisition Dashboard

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



My Requisitions

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 2				
R1616020	01/13/2022		\$0.00	Draft
R1616005	12/13/2021	Multitech Office Machines Inc	\$136.20	Draft
Pending Requisitions 1				
R1616007	12/14/2021	Coastal Project Resources LLC	\$45,029.00	In Approval 1
Completed Requisitions 490				
R1615461	09/30/2021	Boudreaux, Michael S	\$2,500.00	Assigned to Buyer 1
R1615273	09/14/2021	CobbleStone Systems Corporation	\$11,916.47	Converted to PO 1

[View More](#)

Requisition Entry

No Vendor – No Problem


Vendor

Choose Vendor

Blue Marble

No Matches Found

Vendor Information Form

 UNIVERSITY of LOUISIANA LAFAYETTE PUR-112

Vendor Information Form

All new vendors and vendor name changes require a current W-9 to be submitted with form.

Add ☐ Change ☐ (If Change) Vendor Number

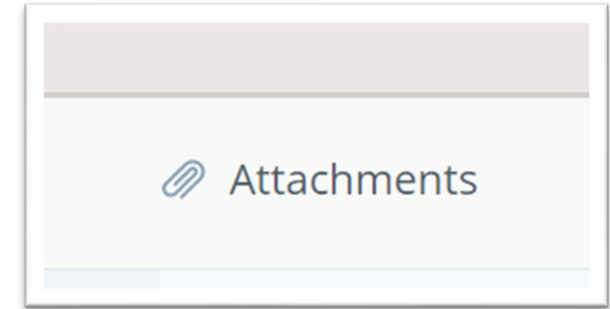
Vendor Completed W-9

<p>Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service</p>	<p>Request for Taxpayer Identification Number and Certification</p> <p>► Go to www.irs.gov/FormW9 for instructions and the latest information.</p>	<p>Give Form to the requester. Do not send to the IRS.</p>
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**** Send to Purchasing ****

What should be attached to your Requisition?

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



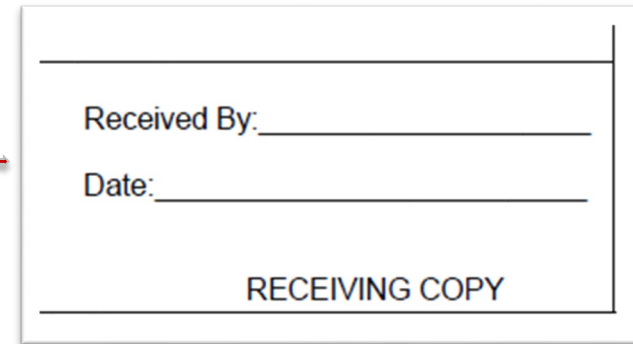
All common file extensions are accepted.

Requesting Invoice Payment

You have the invoice, now what?

Receiving Copy Report

When all items are received or when services are complete.



A rectangular form with a thin black border. It contains two horizontal lines for text entry. The first line is preceded by the text "Received By:" and the second line is preceded by "Date:". Below these lines, the words "RECEIVING COPY" are printed in a sans-serif font.

Partial Delivery Receiving Report

When some items are invoiced, or some services have been completed.



A rectangular form with a thin black border. On the left side, there is a logo consisting of a red fleur-de-lis followed by the text "UNIVERSITY of LOUISIANA LAFAYETTE". To the right of the logo, the words "PARTIAL DELIVERY RECEIVING REPORT" are printed in a bold, sans-serif font. In the top right corner, the text "University of Louisiana at Lafayette Administration and Finance Martin Hall, Room 178" is printed in a small font. In the bottom right corner, the text "Form PUR-200" is printed in a small font.

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

