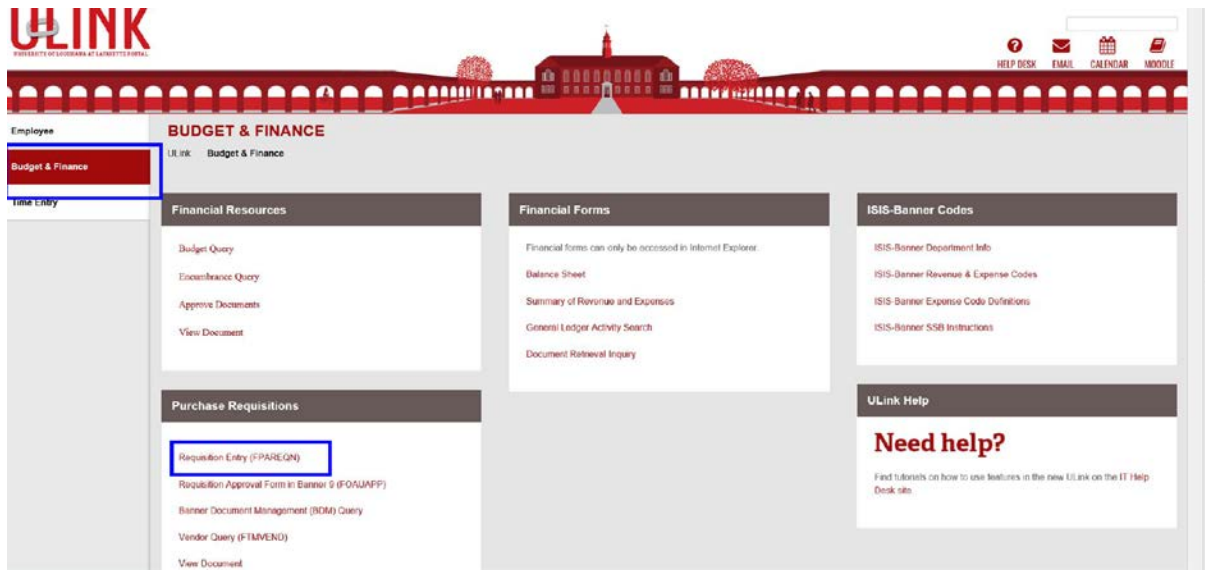
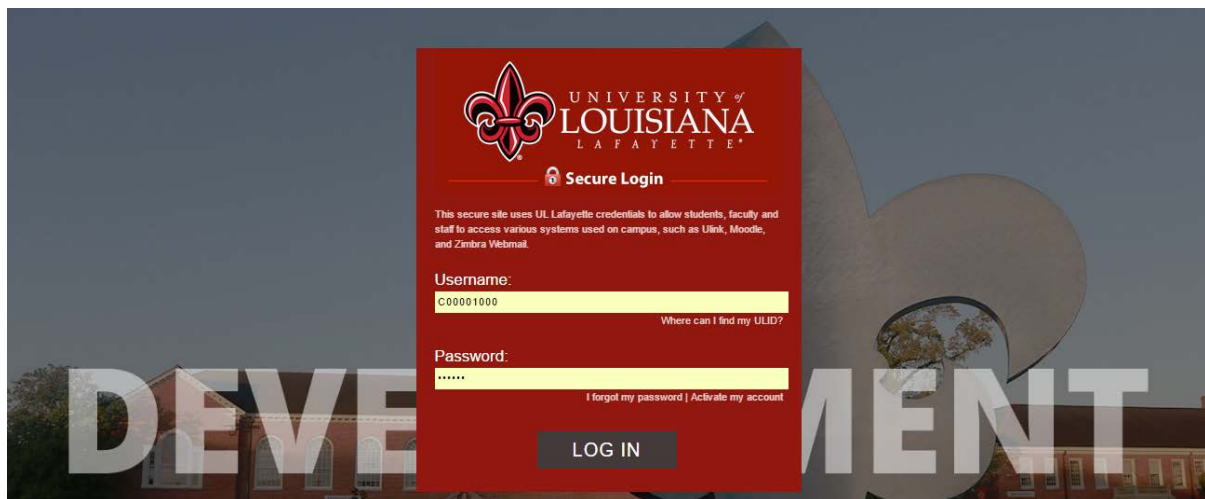


# Step by Step Requisition Entry in Banner

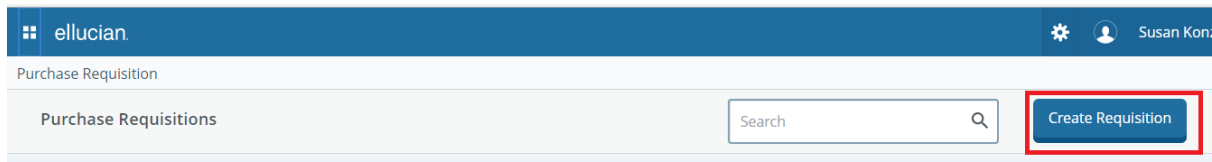
Step 1 - Log into your UL Portal click on budget and Finance TAB and then click on Requisition Entry.



Step 2 – After you click on Requisition Entry this window will appear. (Enter your C# and password).



Step 3 – Select create Requisition





# Step by Step Requisition Entry in Banner

Step 4 Put in Requisition Header information e.g. delivery, ship to, requestor and any special text you would like to appear on the order. Use the requisition public comment field enter additional order information for example; state contract, quote number, contract terms etc. The \* denotes mandatory fields.

Purchase Requisition • Edit Requisition

Requestor\*  
Consultant

Transaction Date\* 08/11/2016  Delivery Date\* 09/11/2016 

Accounting Type : Commodity level

Requisition Comments

**1 Public Comment**

- State Contract
- Quote number
- Contract Terms
- Anything that applies to whole document

**2 Private Comment**

Organisation\*  
6000 VP Admin and Finance

Ship To Location\*  
CENTRL

Attention To\*  
who is receivin



Tax Group  
Choose Tax ...

Ship To Location

Attention: who is receiving item  
CENTRAL RECEIVING DEPOT  
DELIVERIES ACCEPTED ONLY M-TH 8 AM-4 PM  
116 SOUTH CAMPUS DRIVE  
LAFAYETTE LA 70504

Step 4 Put in attention "to" information and select next to put in Vendor information

Purchase Requisition • Create Requisition

Transaction Date\* 05/11/2016  Delivery Date\* DD/MM/YYYY 

Accounting Type : Commodity level

Requisition Comments

**1 Public Comment**

Enter comments for the requisition

**2 Private Comment**

Organisation\*  
1000 President's Office

Ship To Location\*  
CENTRL

Attention To\*  
Enter Name

Tax Group  
Choose Tax ...

Ship To Location

Attention:  
CENTRAL RECEIVING DEPOT  
DELIVERIES ACCEPTED ONLY M-TH 8 AM-4 PM  
116 SOUTH CAMPUS DRIVE  
LAFAYETTE LA 70504

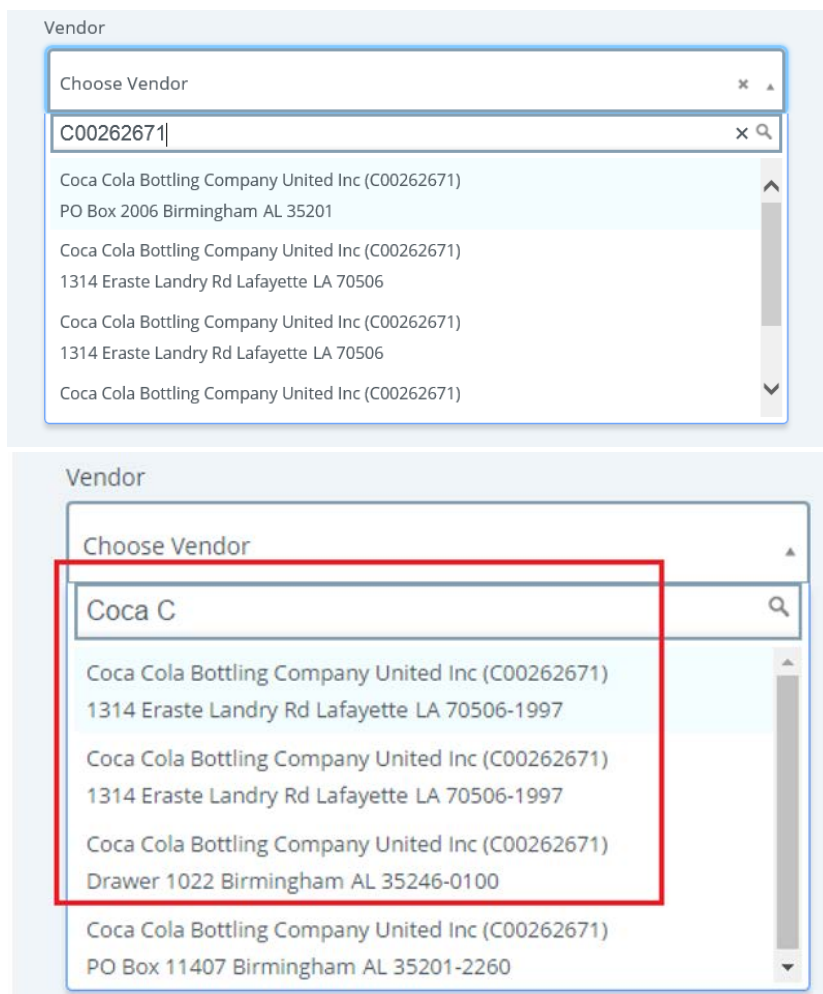
Back Next

## Step by Step Requisition Entry in Banner

Step 5 Vendor entry: Obtain vendor identification number (or C number) by clicking on the Vendor Query form from the ULink Budget & Finance dashboard. (See separate document for Vendor Query instructions.)



Enter the vendor "C" number or type in the company name. Review list and select the vendor with the correct address.



For requisitions requiring bidding, please enter one of the potential bidders in the vendor field then attach bidders list to requisition.

## Step by Step Requisition Entry in Banner

Step 6 – Type in the full description of the item you are buying and click on Add as new Item; in the Public comment field to describe as much detail about your items as possible e.g. item number, part number, serial number etc.

1 Requestor Information      2 Vendor Information      3 Add Item & Accounting

Add Item(s)

Choose Item

Fanta

Fanta (Add as new item)

Put in item unit price and quantity

Purchase Requisition • Edit Requisition

Item Code (908)

Services: Bookbinding, Rebinding, And Re

Unit Of Measure\*      Tax Group\*

EACH (EA)      Choose Tax ...

Quantity\*      Unit Price\*

0.00      0.0000

(Quantity) X (Unit Price)      USD 0.00

Discount Amount      Additional Amount

0.00      0.00

Commodity Comments

1 Public Comment

Enter comments for the commodity item

2 Private Comment

Click Add Accounting after EACH item.

Tax Amount

0.00

Commodity Item Total      USD 159.60

Back      Add Accounting

Do not use "as per attached list" when typing items. Each item must be entered individually.

# Step by Step Requisition Entry in Banner

Step 7 – Enter accounting information.

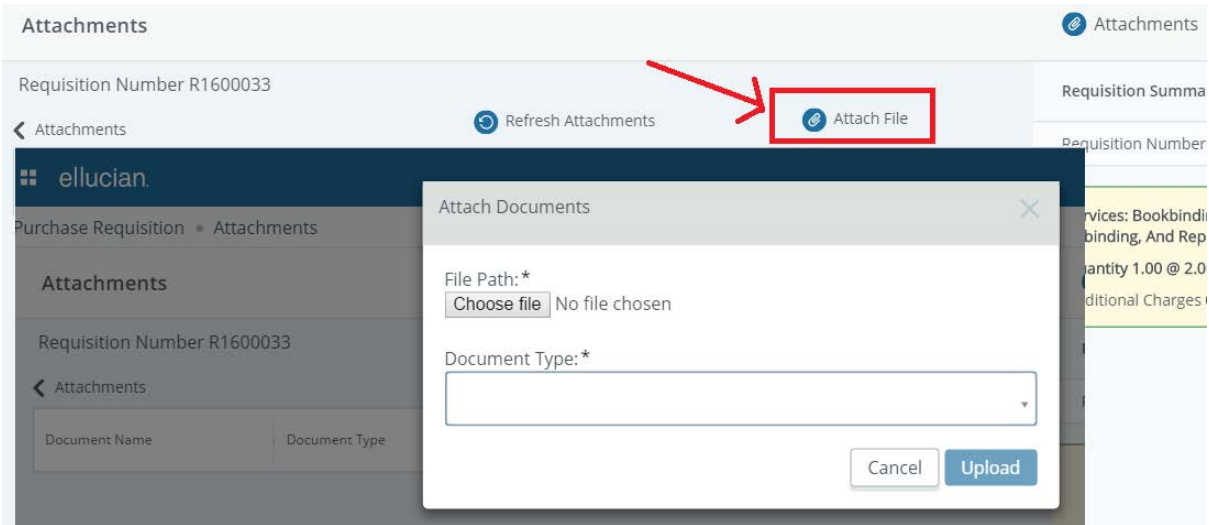
The screenshot shows the 'Edit Requisition' form in Banner. The 'Accounting' section includes dropdown menus for Chart, Index, Fund, Organisation, and Account. The 'Distribution' section has input fields for Distribution Amount (2.00), Distribution Percent (100.0000), Discount Amount (0.00), Additional Amount (0.00), and Tax Amount (0.00). A summary table on the right shows: Services: Bookbinding, Rebinding, And Repairing (908) 2.00; Quantity 1.00 @ 2.0000 Discount 0.00; Additional Charges 0.00 Tax 0.00. The Distribution Total is 2.00 and Remaining is 0.00.

If multiple FOAPALS need to be charged adjust either the Distribution Amount or Distribution Percent and click Split Accounting.

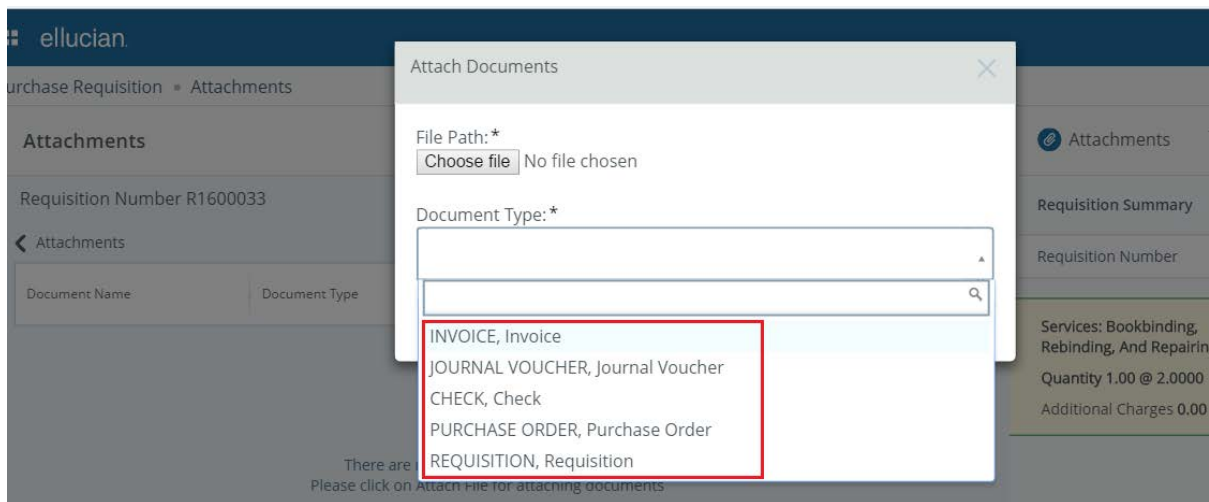
The screenshot shows the 'Add Item & Accounting' form in Banner. The 'Accounting' section includes dropdown menus for Chart, Index, Fund, Organization, Account, Program, Activity, Location, and Project. The 'Distribution' section has input fields for Distribution Amount (79.80), Distribution Percent (50.00000000), Discount Amount (0.00), Additional Amount (0.00), and Tax Amount (0.00). The Distribution Total is 79.80 and Remaining is 79.80. A 'Split Accounting' button with a right arrow is highlighted.

## Step by Step Requisition Entry in Banner

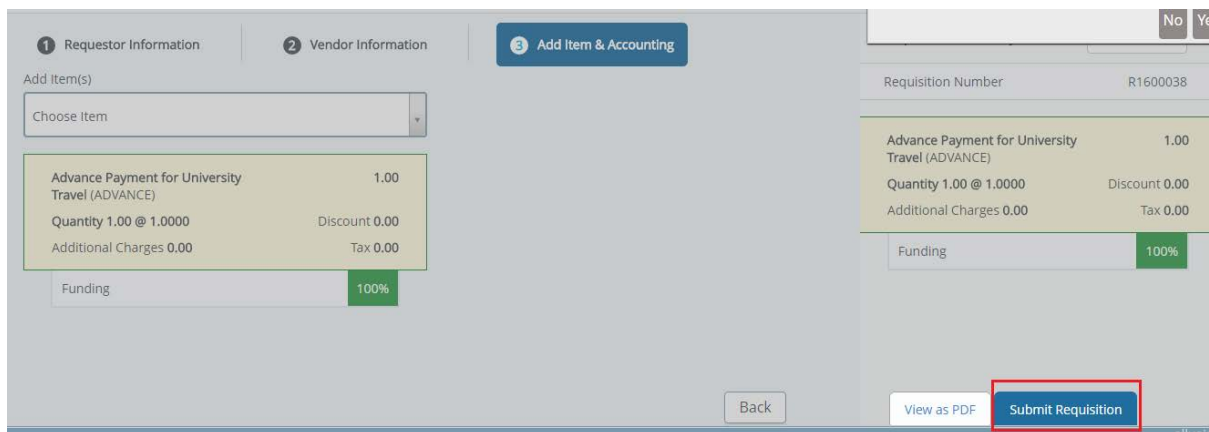
Step 8 Attach any documentation; for example W-9 forms, quotes, full specifications and vendors lists .



Attach document and select Requisition as the document type.

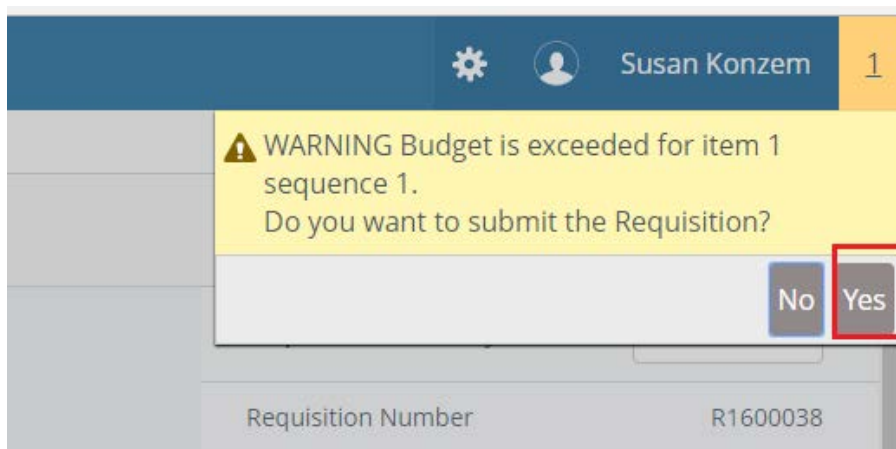


Step 9: Click on the “submit requisition button” to submit the requisition.



## Step by Step Requisition Entry in Banner

Step 10: If you get this warning (see below) select yes.



If you want to print your requisition, select the "view as PDF" button and send to printer.

If at any time you need to set the requisition aside and finish later you can click "Save as draft" in the top right corner of the screen.

