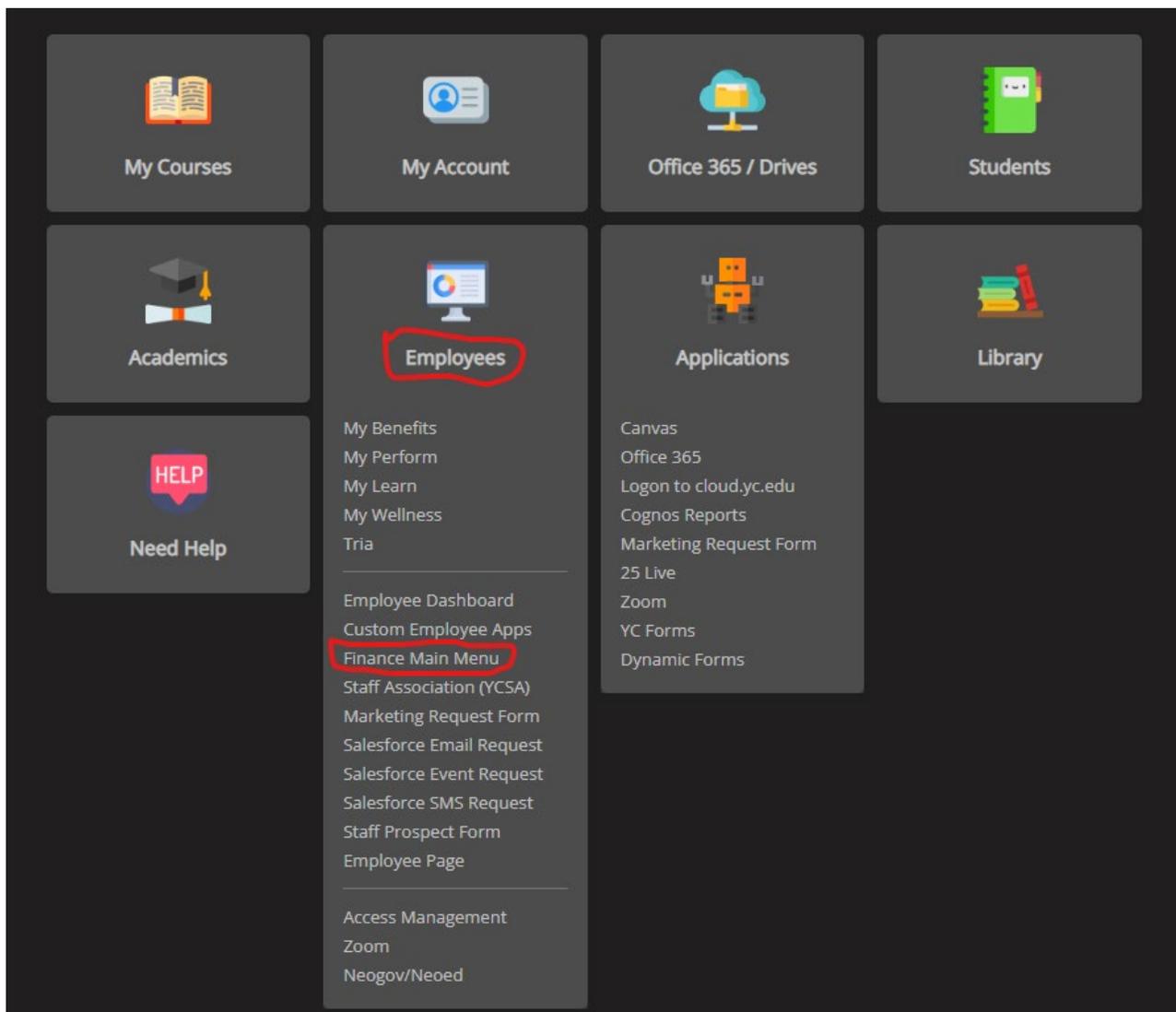


# *How to create a requisition in Banner Self-Service 9*

## Accessing Banner Self-Service 9 My Requisition Screen

1. Access My Requisitions from your **MyYC Portal**.

A. Log into your **MyYC Portal**. At the **Employees** menu select **Finance Main Menu**.



B. At the **My Finance** screen select **My Requisitions**.

# My Finance

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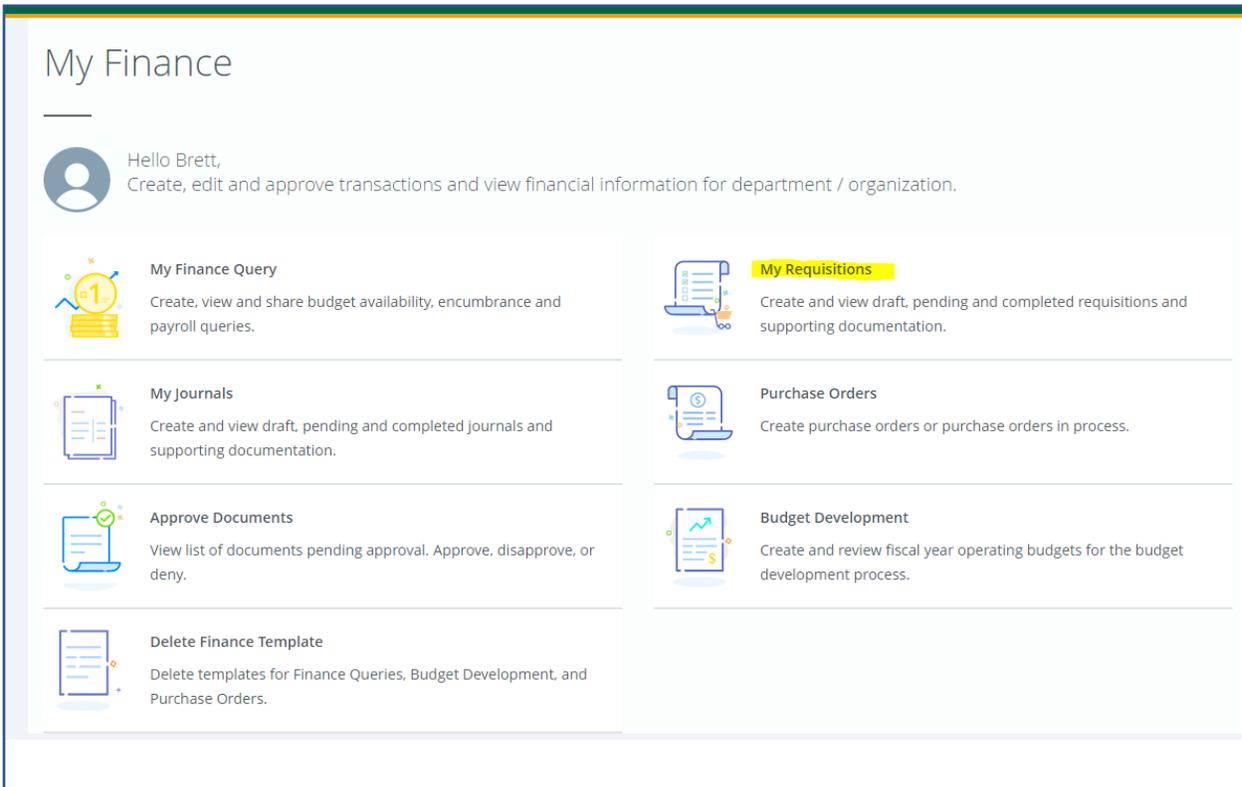


Hello Brett,  
Create, edit and approve transactions and view financial information for department / organization.

 <p><b>My Finance Query</b> Create, view and share budget availability, encumbrance and payroll queries.</p>	 <p><b>My Requisitions</b> Create and view draft, pending and completed requisitions and supporting documentation.</p>
 <p><b>My Journals</b> Create and view draft, pending and completed journals and supporting documentation.</p>	 <p><b>Purchase Orders</b> Create purchase orders or purchase orders in process.</p>
 <p><b>Approve Documents</b> View list of documents pending approval. Approve, disapprove, or deny.</p>	 <p><b>Budget Development</b> Create and review fiscal year operating budgets for the budget development process.</p>
 <p><b>Delete Finance Template</b> Delete templates for Finance Queries, Budget Development, and Purchase Orders.</p>	 <p><b>View Document</b> View draft, pending and completed documents with related information and approval history.</p>

# Entering a Requisition into Banner SS9

## 1. My Requisitions



- A. Select **My Requisitions** from the **My Finance dashboard**. Here you can create and view draft, pending and completed requisitions. Existing Requisitions are presented in three categories:

**Draft Requisitions:** Requisitions that have been started then saved as a draft for completion later.

**Pending Requisitions:** Requisitions that have been completed and are awaiting approval.

**Completed Requisitions:** Requisitions that are completed and have been assigned to a Buyer for PO creation or the PO has already been created.

My Requisitions

Search Requisition

Create Requisition

Requisition	Date	Vendor	Amount	Status
<b>Draft Requisitions</b> 4				
R0010802	11/25/2022	Pocket Nurse Enterprises Inc	\$7,857.10	Draft
R0010806	11/01/2022	Follett Higher Education Group Inc	\$32,500.00	Draft
<a href="#">View More</a>				
<b>Pending Requisitions</b> 2				
R0010804	10/03/2022	APL Access & Security Inc	\$1,523.00	In Approval ⓘ
R0010805	11/01/2022	US Foods, Inc.	\$20,000.00	In Approval ⓘ
<b>Completed Requisitions</b> 3				
R0010807	11/03/2022	A & K Gems & Minerals	\$4,000.00	Converted to PO ⓘ
R0010774	08/01/2022	Dooley Enterprises, Inc	\$8,701.72	Assigned to Buyer ⓘ
<a href="#">View More</a>				

B. Select **Create Requisition** at the upper right corner of the screen. You are now ready to enter information into three areas; **Requestor Information**, **Vendor Information** and **Add Item & Accounting** information. Use the Tab key to navigate through the fields on each screen.

2. Requestor Information Tab

Requestor name, requestor email address and transaction date (as today) will populate automatically.

My.Finance • My.Requisitions • Create Requisition

### Create Requisition

**1 Requestor Information**    2 Vendor Information    3 Add Item & Accounting

Requisition Summary Save as draft

Requestor \*

Transaction Date \*    Delivery Date \*

Requestor Email

Choose Accounting Type  
 Document Level Accounting  
 Commodity Level Accounting

Requisition Comments

Public Comment

Private Comment

Chart \*

Organization \*

Ship To Location \*

Attention To \*    Tax Group  
   

Add details and click Next to build this summary view.

- A. The **Transaction Date** is critical to pay attention to in May and June IF you happen to be entering a req ahead of time for a new FY order. **If you are using funds for the NEXT FISCAL YEAR your Transaction Date has to be 01-JUL-20XX.** If this is not done correctly the req will have to be deleted and redone. If you are not using funds for next fiscal year, the transaction date is not critical, and can just be the date that you enter in the req.
- B. Enter a delivery date in the **Delivery Date** field. Please communicate with the supplier to ensure they can comply with your required delivery date. The date should be listed on their quote. This simple step can prevent a lot of extra work and hassles for all involved in the procurement process. Things to note about delivery dates:
  - a. Delivery date cannot be before the order date.
  - b. If the req is for services, software, or a subscription with a period of performance, the last day is considered the delivery date.
  - c. If you are creating a Standing Order for an entire Fiscal Year, the Delivery Date will be 30-JUN-20XX.
- C. Select **Document** (default selection) or **Commodity Level Accounting**. – *Important* - if this is done incorrectly you will have to delete the Requisition and start over. If you have one FOAP for the entire requisition, just leave the default selection set to **Document Level Accounting**. Otherwise, if you will be using more than one FOAP on this requisition (which is called Commodity Level Accounting), you will need to select the **Commodity Level Accounting** field button.
- D. **Requisition Comments** - Enter a comment in the **Public Comment** field as needed. This field is the same as Document Text in Banner Admin. Information entered here will appear in the upper section of the PO above

the line items. A **Public Comment** should be added when information from the quote/ invoice that you are using to prepare your requisition applies to the entire document (examples include a quote #, date that the quote was issued and contract # if applicable.) This will be the first text that will appear at the top of the Purchase Order.

If this purchase is being paid for via grant funding, please provide the Grant Name/Number. Procurement has to ensure YC complies with all of the grant specific terms and conditions.

Enter a comment in the **Private Comment** field. This field is the same as Document text but will not appear on the PO. It will be visible in the Banner Admin screens but will be 'checked' to not show on PO. This can be used to relay information from the requisition creator to the Procurement staff or as a note for the record. For standing order purchase orders place a comment here "Standing Order".

- E. The **Chart** (Chart of Accounts) field will automatically populate Y Yavapai College.
- F. Select the appropriate **Organization** from the drop-down menu. Searchable by department name or enter the five-digit organization code. (Second part of FOAP string)
- G. **Ship To Location** - Select the desired campus from the drop-down menu. Banner will populate the location name and address automatically. PRST is for the main campus. A Yellow **Ship To Location** box will appear below showing the information that was just entered.
  - PRST – Prescott Campus
  - CLST – Verde Valley (Clarkdale) Campus
  - CTST – CTEC
  - CVST – Chino Valley Center
  - PVST – Prescott Valley Center
  - SEST – Sedona Center
- H. **Attention To** – Enter your name and department. This information will also appear in the yellow box below.

Chart\*

Y Yavapai College x v

Organization\*

011001 President's Office x v

Ship To Location\*

PRST x v

Attention To\* Tax Group

Joe Bloggs, Camp NT No Tax Gro... v

Ship To Location

Attention: Joe Bloggs, Campus Security  
1100 E. Sheldon Street  
Prescott AZ 86301

I. **Tax Group** – Check that the default value is NT No Tax Group. This is the correct value as requested by the Business Office.

J. Select **Next** at the bottom of the page to access the **Vendor Information** tab.

### 3. Vendor Information Tab

My Finance • My Requisitions • R0010810

R0010810 Delete Requisition

1 Requestor Information **2 Vendor Information** 3 Add Item & Accounting

Choose vendor for me

Vendor

Choose Vendor

Discount  Currency

Choose Discount  Choose Currency

Requisition Summary Save as draft

Requisition Number	R0010810
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Back Next View as PDF Submit Requisition

A. You will notice that information will begin to populate the **Requisition Summary** area at the right side of the page. At this point the summary is showing your requisition number. Information will continue to populate as the tabs and fields are populated.

B. **Vendor** – At the label **Choose Vendor** you can type search information to find your vendor. Use vendor name, Y# or vendor address as search values. It is important to make sure that the vendor address for your selection matches the vendor address on your quote or W-9. If the addresses available do not match your records email [procurement@yc.edu](mailto:procurement@yc.edu) to notify us about the issue and continue creating the requisition. Vendor information will populate in the yellow box below. At this time the **Vendor Email** field will appear below also. It will populate with the preferred email address available in Banner or you can enter a current/correct email address. This email address is where the PO will be sent.

[My Finance](#) • [My Requisitions](#) • [R0010810](#)

R0010810

**1** Requestor Information | **2** Vendor Information

Choose vendor for me

Vendor

Dooley Enterprises, Inc (Y02255716) x v

Vendor Information

Dooley Enterprises, Inc (Y02255716)  
1198 North Grove Street, Ste A  
Anaheim CA 92806

Vendor Email

joe.bloggs@dooleyenterprises.com x v

Discount

Choose Discount v

Currency

Choose Currency v

- C. **Discount** – A selection is not required.
- D. **Currency** – A selection is not required.
- E. Select **Next** at the bottom of the page to access the **Add Item & Accounting** tab.
- F. You will notice that the vendor information is showing in the **Requisition Summary**.

4. Add Item & Accounting Tab

- A. Begin entering requisition items by clicking on **Choose Item** and typing the description. Click the option to **(Add as new item)** once you are finished typing the description. Once the item is added, the fields for the item details will appear e.g. unit of measure, quantity, unit price....

Please always use a noun to describe the item, such as “Computer, Dell P/N 3Y123” instead of just an item or part number. A line item is needed for each item/service that has a specified price.

There is a 40-character limit for the **Choose Item** field. If additional description information is needed, type it in the **Public Comment** field and it will appear on the PO just below the **Commodity Description** for the selected line item.

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R0010810 Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Ammunition, 9mm 125gr

Ammunition, 9mm 125gr (Add as new item)

Requisition Summary Save as draft

Requisition Number R0010810

Dooley Enterprises, Inc (Y02255716)  
1198 North Grove Street, Ste A  
Anaheim CA 92806

Back View as PDF Submit Requisition

B. Enter the item detail information:

a. **Unit Of Measure** – Examples of U/M include:

- If you are ordering 1 pkg of 12 binders for example, that should be entered as 1pkg with 12 per pkg in the line item description – not 1 each.
- If you have a quote for several items, please list the items individually (separate line items). Do not simply put 1 ea, as per attached quote, or something like “Furniture.”
- A print job may be a lot order for 1,200 copies. Enter it as 1 lot of 1,200 copies (again indicate in the description that the one lot is for 1,200 copies).
- If you select “SVC” for services – in most cases, there will be nothing to physically receive.

b. **Tax Group** – Make sure it is defaulted **NT No Tax**, if not, use the drop-down box to make the selection.

c. **Quantity** – Enter the quantity requested.

d. **Unit Price** - Enter the unit price of this commodity in the Unit Price field.

- e. **Discount Amount** – Leave blank unless applicable. Use in cases that the quote specifies a discount amount.
  - f. **Additional Amount** – Enter tax + shipping amount as applicable on the last item entered. (enter a note in the **Public Comment** field “Additional = \$XX.XX tax + shipping \$XX.XX” on the last item entered)
  - g. **Tax Amount** – Leave this field blank.
  - h. **Commodity Comments** – Text will automatically wrap and the Enter key can be used to start a new line of text.
    - i. **Public Comment** – Enter additional item description information when the 40-character limit is exceeded in the **Commodity Description** field or **Additional Amount** description as mentioned in step F above. Additional commodity information could include model#, associated components or descriptive information included on the quote.
    - ii. **Private Comment** – Information entered here will not appear on the PO. It can be used for a note to Procurement relevant to the particular item.
- C. Once all of the item information has been entered, select **Save** at the bottom of the page to move to the next step of entering the accounting information.
- D. To enter the accounting information, select **Add Accounting** at the bottom of the page. Now the accounting fields will appear for entering the accounting information.
- a. For a Document Level Accounting requisition, the **Add Accounting** information will only have to be entered one time upon saving the first item. The **Add Accounting** fields will not appear as subsequent lines are added and saved as only one FOAP needs to be entered.
  - b. For Commodity Level Accounting requisition, accounting information will need to be entered line by line by selecting **Add Accounting** after saving each line.

My Finance • My Requisitions • R0010810

R0010810 Delete Requisition

1 Requestor Information    2 Vendor Information    3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (2)

Ammunition, 9mm 125gr	994.50
Quantity 15.00 @ 66.3000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Regulation Paper Target, 50 pk	199.80

Requisition Summary Save as draft

Requisition Number R0010810

Dooley Enterprises, Inc (Y02255716)  
1198 North Grove Street, Ste A  
Anaheim CA 92806

Commodities (2)

Ammunition, 9mm 125gr	994.50
Quantity 15.00 @ 66.3000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Regulation Paper Target, 50 pk	199.80

Grand Total - All Commodities 1,194.30

Grand Total - All Accounting 0.00

Back **Add Accounting** View as PDF Submit Requisition

- E. Enter FOAP information. Enter information directly or use drop-down to make a selection. Click the X to remove the selection and make a new selection.
- Chart** – This field will auto populate with Y Yavapai College.
  - Index** – Not required.
  - Fund** - Use drop-down to make selection or enter information directly.
  - Organization** – Will auto populate.
  - Account** - Use drop-down to make selection or enter information directly.
  - Program** - Use drop-down to make selection or enter information directly.
  - Activity** – Only used for specific cases.
  - Location** – Not required.
  - Project** – Not required.
  - Distribution Amount** – Do not change unless the requisition is set to Commodity Level accounting and payment for a single line item is being split between multiple FOAPs (contact Procurement for assistance).
  - Percent** – Do not change.
- F. Once all the FOAP information has been entered for the document (Document Level Accounting) or each line item (Commodity Level Accounting), click **Save** at the bottom of the page. The requisition is now ready to be reviewed and checked for accuracy, then submitted for approval. The requisition can also be saved as a draft for action at a later time (this can be done any time after the **Requestor Information tab** information has been saved).

R0010810 Delete Requisition

**1 Requestor Information**

Requisition Number (R0010810)      Currency USD

**Chart \***      **Index**

Y Yavapai ... x v      Choose Index v

**Fund \***

Choose Fund v

**Organization \***

011001 President's Office x v

**Account \***

Choose Account v

**Program \***      **Activity**

Choose Progr... v      Choose Activity v

**Location**      **Project**

Choose Locat... v      Choose Project v

**3 Add Item & Accounting**

**Distribution Amount \***      **Distribution Percent \***

1,034.30      100.00000000

**Discount Amount**      **Additional Amount**

0.00      160.00

**Tax Amount**

0.00

**Distribution Total**      1,194.30

**Remaining**      0.00

**Requisition Summary** Save as draft

Requisition Number      R0010810

Dooley Enterprises, Inc (Y02255716)  
1198 North Grove Street, Ste A  
Anaheim CA 92806

**Commodities (2)**

Ammunition, 9mm 125gr	994.50
Quantity 15.00 @ 66.3000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Regulation Paper Target, 50 pk	199.80
Accounting Total	0.00
Commodity Total	1,194.30
Balanced	0%

Grand Total - All Commodities      1,194.30

Grand Total - All Accounting      0.00

Back      Save      View as PDF      Submit Requisition

- G. After entering and saving the accounting information and a check for accuracy has been completed, select **View as PDF** and save a copy of the requisition for your records. The requisition .pdf is a good tool for reviewing the requisition before submitting it for approval.
- H. Upon saving the accounting information the **Submit Requisition** button will become active. Select **Submit Requisition** to submit for approvals. The requisition will now appear in the **Pending Requisition** section of the My Requisitions screen.

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R0010810 Delete Requisition

1 Requestor Information    2 Vendor Information    **3 Add Item & Accounting**

Add Item(s)

Choose Item

Commodities (2)

Ammunition, 9mm 125gr	994.50
Quantity 15.00 @ 66.3000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Regulation Paper Target, 50 pk	199.80

Funding  100%

Requisition Summary Save as draft

Requisition Number R0010810

Dooley Enterprises, Inc (Y02255716)  
1198 North Grove Street, Ste A  
Anaheim CA 92806

Commodities (2)

Ammunition, 9mm 125gr	994.50
Quantity 15.00 @ 66.3000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Regulation Paper Target, 50 pk	199.80

Funding  100%

Grand Total - All Commodities 1,194.30

Grand Total - All Accounting 1,194.30

Back View as PDF Submit Requisition

- I. Write down the requisition number listed on top left of the page. Congratulations you have completed the requisition! It is helpful for Procurement to save your quote/backup in the following format "R000XXXX Company Name". Send all backup documentation and any other pertinent information in an email to [Procurement@yc.edu](mailto:Procurement@yc.edu) as soon as you finish entering in the requisition.
  
- J. As the liaison, it is your responsibility to ensure that your requisition is approved. It's a good idea to send emails to your Budget Manager and any other approvers to let them know that the req has been entered and is in their queue for approval.