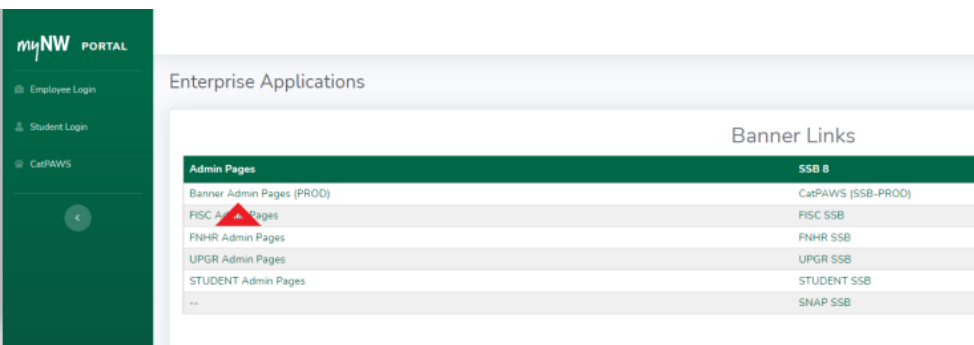


CREATING A PURCHASE REQUISITION (PR)

General Notes

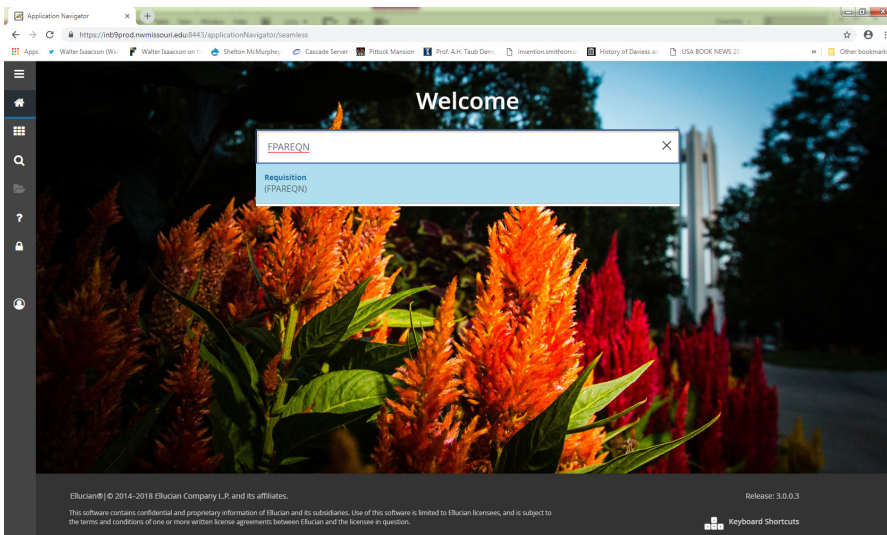
- If you are inactive for more than 30 minutes, it will log you out so make sure you write down your PR #.
- If you have problems with your username and password, call the Northwest Technology Service Center at 562-1634.
- If you need authorization, email Denise Workman at dwork@nwmissouri.edu.
- Training videos, instructions, & Central Stores Catalog are available on the Purchasing Department website:
www.nwmissouri.edu/services/purchasing/banner.htm



- In Google Chrome, type the following in the address bar:—
<https://www.nwmissouri.edu/intranet/ellucian/>

Click on **Banner Admin Pages (PROD)** link.

Enter network username & password then press the **Enter** key or click on **Sign In**.



In the **Search...** text box, type **FPAREQN**

Enter **OR**

Click on the drop-down menu link that appears with the same name.

CREATING A PR - Page 2

FPAREQN

The screenshot shows the 'Requisition Entry' screen in the FPAREQN application. The 'Requisition' field is set to 'NEXT' (1). The 'Go' button is highlighted (2). The application is running on a web browser with the URL 'https://nfbprod.nmmsout.edu/8443/applicationNavigator/seamless'.

1. Type **NEXT** in the Requisition textbox.
 - If you have already started a PR then enter the requisition number. Example: R00XXXXX
2. Click the **Go** button.

Note: If you want to delete the PR after you have a PR number but *before* you complete it, go to the **Requestor/Delivery Information** page. Click **Delete** (top right corner), click **Delete** again and then click **OK**.

FPAREQN - Requestor/Delivery Information

The screenshot shows the 'Requestor/Delivery Information' screen in the FPAREQN application. The 'Requestor' field is set to 'Ann Martin' (4). The 'Delivery Date' field is set to '07/30/2018' (3). The 'Attention To' field is set to 'Martin/Purchasing/SS Bldg' (5). The 'Down Arrow' button is highlighted (6a). The application is running on a web browser with the URL 'https://nfbprod.nmmsout.edu/8443/applicationNavigator/seamless'.

3. Tab to **Delivery Date** then click on calendar to select date.
4. Enter primary Org if it does not autofill
5. Attention To – Change to **Person/Dept/Bldg and Room** where the items need to be delivered.
- 6a. Click on **Down Arrow** button.
- 6b. To add document text, click **Related** button, and click **Document Text**.
 - You can select clauses that are already created by clicking on the ... then double clicking on the clause you want to use and then click **Go**.

FPAREQN - Document Text

The screenshot shows the 'Document Text' screen in the FPAREQN application. The 'Text' field is set to 'Supplies have been received' (7). The 'Procurement Text Entry' button is highlighted (8). The application is running on a web browser with the URL 'https://nfbprod.nmmsout.edu/8443/applicationNavigator/seamless'.

7. Enter text in the **Procurement Text Entry** area. State if the items have been ordered or received or if Purchasing needs to order. Also include vendor name (if g19# is not entered), contract number, and any special information.
8. Click **Save**.
9. Click **X**.
10. Click on **Down Arrow** button to go to the next section.

CREATING A PR - Page 3

FPAREQN - Vendor Information

Requisition: R0043335

Requestor/Delivery Information: Vendor Information

Vendor: [Red Circle]

Option List:

- Entity Name/ID Search (FTIIDEN)
- Vendor Maintenance (FTMVEND)

- Enter Vendor g19# number if known.
- If not known, **Click on...** ellipsis (...) to search.
- Select Entity Name/ ID Search (FTIIDEN)

FPAREQN - Entity Name/ ID Search (FTIIDEN)

Entity Name/ID Search (FTIIDEN)

Details:

Last Name: [Red Circle 11] First Name: Middle Name:

Entity Indicator: [Red Circle 12]

Go

11. Tab to Last Name and type **%Vendor Name%**. Example: %4Imprint%.
12. Click on **Go**.
 - Double-click on correct vendor g19#.

FPAREQN - Vendor Information

Requisition: R0043335

Requestor/Delivery Information: Vendor Information

Vendor: [Red Circle 13]

- Vendor information will come over to screen.
- Leave blank if you do not find the vendor or are not sure which number to select and add vendor info to document text by following directions above.
- 13. Click on **Down Arrow** button.

CREATING A PR - Page 4

FPAREQN - Commodity/Accounting

Requestion: R0043335

Order Date: 07/30/2018
Transaction Date: 07/30/2018
Delivery Date: 08/30/2018

Comments:
Commodity Total: 0.00
Accounting Total: 0.00
Document Level Accounting: ☒

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1									

Extended Amount:
Discount:
Additional:
Tax:
FOAPAL Total:
Document Total:

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orig	Acct	Prog	Actv	Loon	Proj	NSF Override
1	N										

Extended Amount:
Discount:
Additional:
Tax:
FOAPAL Total:
Document Total:

Option List

- Commodity Validation (FTVCOMM)
- Vendor Products (FPIVPRD)
- Vendor Products Validation (FPVPRD)

Cancel

- Enter commodity code.
- If needed, click on **Commodity...** ellipsis (...) to search
- Click on commodity validation (FTVCOMM).
- Double-click on commodity to add **OR**
- Use the commodity code spreadsheet available on the Purchasing Department website.

Requestion: R0043335

Order Date: 07/30/2018
Transaction Date: 07/30/2018
Delivery Date: 08/30/2018

Comments:
Commodity Total: 0.00
Accounting Total: 0.00
Document Level Accounting: ☒

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

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1	63778	Souvenirs, Promotional, ...	EA						

Extended Amount:
Discount:
Additional:
Tax:
FOAPAL Total:
Document Total:

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orig	Acct	Prog	Actv	Loon	Proj	NSF Override
1	N										

Extended Amount:
Discount:
Additional:
Tax:
FOAPAL Total:
Document Total:

Related

- Click on **Related, Item text, Go**,

FPAREQN - Procurement Text Entry

Text Type: REQ Code: R0043335 Change Sequence: Item Number: 1 Vendor: 919329496 4Imprint Commodity Description: Souvenirs, Promotional, Advertising, etc.

Modify Clause: Copy Commodity Text: Default Increment: 10

PROCUREMENT TEXT ENTRY

Text	Clause Number	Print	Line
Golf Umbrella 60", green, #25001		<input checked="" type="checkbox"/>	10
Quote sent by John Smith to Mary 7-15-18		<input checked="" type="checkbox"/>	

Record 2 of 2

14

- enter item text (description, stock number, color, packaging, etc.)
14. Click **Save**.
 15. Click **X**.

CREATING A PR - Page 5

FPAREQN - Commodity/Accounting

16a

16b

17a

17b

FPAREQN - Balancing/Completion

18

FOIDOCH

20

21

16a.Tab to **U/M** (Unit of measure)

... brings up a list of choices.

- Tab to **Quantity** enter Quantity.
- Tab to Unit Price, enter Price.
- Use **Insert** to add more commodities then add item text for each one.
- Tab to **Discount** or **Additional** to enter shipping costs
—Enter as dollar amount

16bClick on the **Down Arrow** button.

17aEnter your Fund, Org, Account, & Program codes. **ONLY** use account codes from the [Account Code list](#) on the Purchasing website. If over \$5,000 per item, may need a 76## code.

17bClick on the **Down Arrow** button.

18. Click on **Complete** button (or click in process and write down PR number to finish the PR later).

19. Click the **X** to continue or **Sign Out**.

In the Banner **Search** textbox, type **FOIDOCH**.

- In FOIDOCH you can track activity and view related documents FOIDOCH will give you document history on Purchase Order number, Receiving, Payment.

20. Enter REQ for purchase requisition or PO for purchase order, then Requisition or purchase order number.

21. Click on **Go**.

CREATING A PR - Page 6

FOIDDOCH - Document History

Document Type	Document Number	Status	Status Description
Requisition	R0043110	A	Approved
Purchase Order	P0031536	A	Approved
Receiving Documents	Y0033415	C	Completed

- This information tells you the purchase requisition number, Purchase order number and Receiving is complete but the document has not been paid yet. To see a document, highlight that document and click **Related** and **Query Document [BY TYPE]**.

22. Click the **X** to return to the main Banner Search textbox.

PRINTING IN CATPAWS

- Go to the Finance tab and click **View Document**.
- Type your PR# in **Document Number** box.
- Click on **View Document**.
- Right-click and select **Print** or go to Print in your web browser.
- At the bottom of the screen under **Related Documents** you will see a blue PO# once the PR is transferred.