Self Service Requisitions General – Checklist

Dashboard	Create, Track, and Manage Requisitions *Note: Be consistent with the way you enter information – Banner Finance is Case Sensitive.*
Requestor Information	☐Requestor: Enter Name of Requestor\Name of Person Entering Req ☐Enter Delivery Date: (30 Days) ☐Enter Organization number ☐Attention To: Name of Requestor or contact person ☐Enter Ship To Location (Where should the receiving department deliver the purchase?) ☐**Document Text/Public Comments** – Notes to Purchasing; used to add pertinent information regarding the Req, i.e., *Update of Vendor's contact name, email, phone, A New Vendor, Email or Fax PO to Vendor, Quote/Invoice attached, If Purchase has a contract or EULA (end user license agreement) Discounts…etc.* ☐**Document Text/ Private Comments: Don't Use** ☐Click **Next** **Note: Requisition Number appears in upper right. Write down for reference.**
Vendor Block	☐**Existing Vendors** Vendor –Enter as much of the vendor name as possible. To search for people, use @ ID's, ex: @00012345 ☐**New Vendors or Bids** • If a New Vendor, type in **NewVendor** (no spaces, one word) in the Vendor Field and add Vendor contact info to the Document Text/Public Comment box *(located on first page of req). Be sure to complete/submit required New Vendor documentation to purchasing:* • If a Best Bid, type **BestBid** (no spaces, all one word) in the Vendor Field and enter supporting information for Bid in Document Text/Public Comment Box
Add Item (Commodity) & Accounting (FOAPAL)	☐**Add Item (s) to be purchased:** o Enter Item Description – **Include Item/Product #'s, first, and then a complete description.** *(field is only 40 characters long, including spaces) If item description exceeds 40 characters, continue information on in Item Text (Public Comments)* o **Press TAB** ☐**Commodity (Item) Description:** • U/M (unit of measure) N/A or choose one of the item descriptors **(TAB)** • Enter Quantity **(TAB)** • Enter Unit Price **(TAB)** o **Item Text/Public Comments – A continuation of the description field:** *Note: Item text field is 50 characters, the text does not wrap in the field/box.* ***Press enter*** *when you get towards the middle of the text box, to begin a new line.* ☐Click **Save**
Add Accounting	☐Add Accounting information **(FOAPAL)** - *pronounced ("Foe" pull)* Chart & Organization automatically added. ***Note****: Index & location fields not used by WCC* ☐**Enter the information for the remaining fields: Fund, Account, Program, Activity** ☐Click **Save**
Add Attachment	☐Click Attachments to attach quotes/invoices – *Helpful if Req# was written on invoice.* ☐Click **Attach File** and Browse to select Document. **Note:** Attachment must be PDF ☐Select "**Requisition**" Document Type from drop down ☐Click **Upload**, to upload document to Xtender ☐Add the following note to Document Text/Public Comments: **Banner Attachment Document** ☐Email invoice/quote to Purchasing: pur@wccnet.edu (include Req #)
Requisition Summary	☐**Save as Draft** – Select this when you are not ready to submit the requisition and or need to make changes. ☐**Submit Requisition** –This will move the requisition to the next approver and into the pending area on your Dashboard. Notify approver that Req was entered. ☐**View as PDF (opens up in a new tab) – You can view a copy of the requisition**