Self Service Requisitions Travel – Quick Reference

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 person Traveling \ Name of Person Entering Req ☐Enter Delivery Date: **Last Date of Conference** ☐Enter Organization number ☐Attention To: Enter Name of Traveler ☐Enter Ship To Location: Use office location ☐**Document Text/Public Comments** – Notes to Purchasing; used to add pertinent information regarding the Req, ☐Document/Text Private Comments: **Don't Use** ☐Click **Next** ☐**Note: Requisition Number appears in upper right. Write down for reference.**
Vendor Block	☐ **Existing Employees** enter @ ID (ex.00012345) in Vendor field or search by employee's name ☐Select travelers home address ☐ **New Employees (if you can't find employees name)** • Type in **NewVendor** (no spaces, one word) in the Vendor Field and add employee contact info to the Document Text/Public Comment box *(located on first page of req). if questions email pur@wccnet.edu*
Add Item (Commodity) & Accounting (FOAPAL)	☐**Add Item (s)** Enter the following Description: o Travel Blanket mm/dd/yy – mm/dd/yy *(leaving and returning dates of conference)* o **Press TAB** ☐**Commodity (Item) Description:** • U/M (unit of measure) N/A **(TAB)** • Enter Quantity **(TAB)** • Enter Unit Price **(TAB)** • **Item Text/Public Comments Include the following** o Event Name o Location of Event – City and two digit state code ☐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 travel documentation – *Helpful if Req# was written on documentation.* ☐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 documentation 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, include req #. ☐**View as PDF (opens up in a new tab) – You can view a copy of the requisition**