

Online Requisitions Tips

The following are a few tips related to common problems or questions that Banner users have encountered when entering requisitions.





To log on to Banner, open your web browser to Internet Explorer and enter the following URL: <http://ban.uaex.edu>. Select **ACES WebForms INB** at the right of the screen. Follow the instructions to log on to Banner. When the Logon box appears, enter your Banner ID (first initial, last name) and password. On the Database line, leave blank. The database will automatically default to the correct base. Select Connect at the bottom of the logon box to connect to Banner. If you have forgotten your password, or it has expired and you cannot log on to Banner, return to <http://ban.uaex.edu> and choose **Reset Your Banner Password** and follow the instructions.

Banner passwords are valid for 90 days. The first time you log on to Banner WebForms, you will need to change your password. Then, you will be required to change your Banner password every 90 days.

When entering requested items, we **must have a dollar amount**. Do **NOT** use zero. Our system will not complete the PO when zero dollars are used. Use the best estimated cost of an item if you do not know the cost of it. You can usually find the price of an item from a vendor website. You need to enter a reasonable estimate of the cost of an item so the requisition will go through the proper approval channels. Purchasing can update the price when we process the PO.

Do **NOT** enter a separate line for **sales taxes**. Banner will calculate sales tax, based on the shipping destination. We pay sales or use tax on just about everything we purchase. If you are not sure if an item is taxed, let Banner calculate the tax, and we will update if required when we process the PO. If you know the item is not taxed, such as registration fees or publication subscription, you can enter NT for the tax group. Otherwise, let Banner default the tax.

Some users are not entering **complete information** that Purchasing needs to process a requisition. We need part, catalog, or item numbers, and a complete description of an item. Unit quantity is important. If an item is available in a 10 pack, a 20 pack, or a 100 pack, please indicate and tell us how many 10 packs, etc, you want. Without this information, we cannot process the order the way you intended.

Vendor information is not always complete. We need a good address, telephone number, and fax number if available to contact the vendor and process your order. We have over 5000 vendors in our database, so more than likely, we may have the vendor you need, but we are still receiving numerous requisitions with no vendor indicated. To search for a vendor, select the  on the right side of the vendor bar, do a Next Block , tab to the last name block and enter the vendor name. Choose the  on the Banner tool bar to search for a vendor. If the vendor is in our database, it should appear. Names are case sensitive, and you can use the % before and after the name to get a complete search. If you find the vendor, double click on the vendor name or use the select  on the tool bar. If you still cannot find your vendor, exit using the **X** and just type in the vendor name in the long block after Vendor. Use document text to add the address and

phone/fax numbers. The vendor information you type in document text will not appear under the vendor name on the form. The information is saved, however, and Purchasing will use that information to set up the vendor record.

When submitting **supplemental documents**, please complete in any forms as much as possible, including registrations, subscriptions, order forms, etc. Otherwise, we will send them back for you to complete, which will delay your order. For all direct bill requests for meals, you will need to complete the Finance 214 form and submit with the orange routing slip when you enter your requisition.


When submitting requisitions **after a purchase has already been made**, submit the invoice directly to Purchasing, using the orange routing slip. Do NOT send it to Accounts Payable. Have the purchaser sign the invoice, indicating the items were received. Invoices must be made out to us, i.e., University of Arkansas Cooperative Extension. We cannot process invoices made out to individuals or to UA Foundation, etc. Invoices should be itemized and include the items purchased and the price, and sales tax, and the vendor business name and address. Vendor statements that do not include an itemized listing of items purchased and their prices and applicable taxes are not acceptable. Indicate in the requisition you have already received the item; otherwise, we may send the PO to the vendor and you may get a duplicated order.


If your order requires a **check with order**, we will need some document stating that a check is required, what the dollar amount is, and the name of the vendor and address.

Do NOT send us **screen prints** of the requisition. We have access to such information in Banner, so please save the paper. All we need is any supplemental information to help process the order.

Many users enter a requisition, have problems, and exit before the requisition is completed. We have many **incomplete requisitions** that Purchasing has to remove in Banner. You can look up a requisition fairly easily to see if it is completed or find a lost one by using the following procedures:


In the **Go to** block, type in **FPIRQST** and press Enter on your keyboard. Use the F7 key to clear the screen. Tab to your organization code and type it in. Or, tab to the Requestor name and type in the name of the requestor that ENTERED the requisition. Remember, Banner is case sensitive, so type in the Requestor name correctly (or part of the name using the % before and after). Press the F8 key and all requisitions that have been entered by the Requestor (or all for the organization code if used) will appear. At the right of the screen you will see the status of each requisition. An 'N' in a box means the requisition has not been completed and/or approved. A 'Y' means the requisition has been completed and/or approved. If the completed box is blank but an 'N' appears in the approved box, then the requisition has been disapproved and the requestor should have received a message indicating that. Go to **GUAMESG** and review your messages.

To **remove an unwanted requisition**, in the **Go to** block, type in **FPAREQN**, and press Enter on your keyboard. Type in the requisition number and do a Next Block .

Choose the  on the Banner tool bar at the top left of the screen twice. You will receive a message the requisition has been removed. This is only possible if the requisition is incomplete.

If you need to **change or remove a requisition** that has been completed, have an approver **disapprove** the document. Once it has been disapproved, you can make changes to the requisition using FPAREQN and then re-complete it or remove it.



Any time a requisition has been disapproved, you will receive a **message** of the disapproval. You will **not** receive an electronic message of this disapproval. In the **Go to** block, you will need to type in **GUAMESG** and press Enter on your keyboard. Any messages will appear on your screen, including the document number and any text. Once you have read any messages, you can clear them by choosing the Complete button

below each message, then select Save  at the top of the screen. Select **X** to exit this screen.

The **Requestor, Email and Attention To** blocks on the requisition should always be completed a certain way. The Requestor block should have the name of the person entering the requisition. The Email block should have the email address of the person you want to receive the purchase order. The Attention To block should have the name of the person who will receive the order. The requestor and attention to information are included on the approver emails so they will know who entered the requisition and who the items are for.

If you enter a requisition near the **end of the month**, please make sure your department head approves the document within a few days. Each month is closed in Banner by the 15th of the following month. Once the month is closed, nothing can be recorded in that month. For example, if you enter a requisition on May 31 but your staff chair tries to approve it on June 20, he/she will not be able to approve the document since the month of May have already been closed. If this happens, the requisition must be disapproved, re-completed with a current order, transaction date, and delivery date and then approved. There is one additional way to avoid this. If you are entering a requisition on the last day of the month and you think it might take more than two weeks to get it approved, enter change the defaulted dates to the new month and complete the requisition.

If you have a **RUSH order**, you need to make sure you inform your department head that it is a rush. We cannot work your order until it has been approved and Purchasing cannot approve requisitions.

To see if a requisition has been **processed into a purchase order**, in the **Go to** block, type in **FOIDOCH**. Type in REQ in the Doc Type block, then tab to Doc Code and type in the requisition number. Choose the Next Block  or press Ctrl-Page Down on your keyboard. If a PO has been processed, a PO number will appear in the purchase order block. If an 'A' appears, then the PO has been completed and sent to the vendor. You can also see information in the Receiver and Invoice blocks. If the Receiver blocks show data and your item was shipped to our warehouse, then the item should be in. Contact the warehouse for delivery status. You can query the Purchase Order and Receiver blocks to check the status of an order, but not the Invoice block. To do this, choose the desired block you wish to query, which will then be highlighted. Choose Options above the tool bar, and then on the appropriate query. You may query this document by doing Next Blocks . This is a query function only, so you cannot change any record.

Finally, use our Financial Services website to help find information on purchasing procedures. State contract items are listed, and we have several vendor links for finding items you may want to purchase, including a link to the Office of State Procurement website. Information Technology has standard desktop and laptop computer configurations on their web page and also a link to our cell phone site for looking at cell phone information. Knowing what you want before you submit a requisition will save you time and Purchasing also. We are still available to help at any time, so call us if you are having problems.