

Simplified Requisition Form

Logging On

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 and last name) and password. On the Database line, leave blank. The database will automatically default to the correct base. Choose Connect to connect to Banner. If you have forgotten your password or it has expired, return to <http://ban.uaex.edu> and choose **Reset Your Banner Password** and follow the instructions.

Entering a new requisition using the simplified form

- In the **Go to** block, type **FZAREQN** and press Enter; or double click on these letters just below the Go to block.
- When the form opens, all requisitions entered under your username are listed
- Use the scroll bar to the right if you want to review any previous requisitions you have entered.
- The simplified form cannot be used to copy from a previous requisition. That can only be done from FPAREQN.
- To begin a new requisition, select the New Requisition button at the top left of the screen
- The screen will be cleared and a new requisition number assigned

Requestor/Delivery Information

- **Delivery Date** – Enter the date the goods or services are needed. Format can be either 103006 or 30Oct06.
- **Order date** – Will default to the current date.
- **Comments** – Enter any desired comments regarding the delivery date, e.g. RUSH
- **Requestor** – Your name should automatically default as the requestor. If not, enter your name.
- **E-Mail Address** – Should automatically default with your GroupWise e-mail address. A PDF file of your purchase order will be sent to this address when the purchase order is completed and approved.
- **Phone** Your phone and fax numbers should automatically default. Make any necessary corrections.
- **Ship To** – Enter the location goods are to be shipped to: CES-1 for items to be shipped to the Warehouse, CES-2 for the state office PO Box, the abbreviation for your location if known; or, select the Ship To button to select from a list of addresses.
- **Attention To** – Enter the person's name for which the order is intended.

Vendor Information

- **Vendor** – If you know the name of the most likely vendor for the product or service, choose the Vendor button to select the vendor. You have two options to find the vendor:
 - Scroll through the list until you find the name you are looking for; or,
 - Query on any information in the Vendor Name or Address
 - Enter the information you are searching for, then choose the Find button


- Use the % to search for any vendor containing the search information entered.
- Example: Entering %Computer% will return all vendors with Computer anywhere in the name, such as Global Computer Supplies or Arkansas Computer Systems or Computer Nerds.
- If you find the correct vendor, press OK or double-click on the name to select that vendor.
- If the vendor you were searching for does not appear, you can try different search criteria or select Cancel to exit the vendor search.
- If you did not find the vendor you want to use, you may then enter the most likely name of the vendor in the long block following Vendor.
- If you did not locate your vendor or need to list additional possible vendors, follow the steps in Additional Vendor Information below, otherwise continue to **Contact**.


Additional Vendor Information

- Choose **Text** to the right of the Vendor name block
- In the text box that appears, enter the vendor address, phone number, fax number and any other pertinent information. If necessary, enter additional vendor names, addresses, etc.
- When you have finished adding text, press Exit, then choose “Yes” to save the text you entered. You will return to the requisition form and can continue entering information.
- **Contact** - Enter a vendor Contact Name, if known.

Items Requested

- **Item Description** - enter the description of the goods or services you are requesting. If you need to enter more information than will fit in the Item Description block, follow the steps in Additional Commodity Information below, other wise tab to U/M.
- Additional Commodity Information:
- Select the **Text** block just to the right of the Item Description line you are working.
- In the text form that appears, enter any detailed information that will assist Purchasing in determining the exact nature of the item you are requesting.
- When you have finished adding text, press Exit, then choose “Yes” to save the text you entered. You will return to the requisition form and continue entering information.
- **U/M** – Enter the Unit of Measure or the way the goods are sold or packaged, for example, EA for Each or CTN for Carton. Press U/M to review a list of choices.
- **Tax** – The sales tax code should default to the Ship To location code you entered. If, not you can Press Tax to review a list of choices. Your tax group will not change, so after you have determined the code to enter, you do not need to look this up again. If you do not know the correct tax code, leave the defaulted code. Purchasing can correct the code when processing the purchase order. If you know an item is not taxable, such as a registration, you can enter NT for not tax. **DO NOT** enter an additional Item Description line for sales tax under any circumstances.
- **Quantity** – Enter the quantity you wish to purchase
- **Unit Price** – Enter the expected price for the goods or services. (The individual sales tax for each item will not be shown).
- After entering Item Description, U/M, Quantity, and Unit Price, you may enter additional products for this requisition. If you have additional items, including freight, you may press





the down arrow ↓ on your keyboard, the  button on the Banner Tool Bar, or the Tab key on your keyboard and repeat the previous steps.

- Do a Next Block  to get to the Accounting Information.

Accounting Information

- **Fund** – If the purchase will be charged to your operating budget, enter 14000. If not, enter the fund number for your grant or other special funds.
- **Orgn** – Your org number should default automatically. If not, enter your Org Code. You can enter only the Fund and Org codes authorized to you.
- **%** - If you are charging more than one fund/org combination, you can check the % box to enter the percent to be charged to each line. For example, if you are charging half of the request for two funds, check the % box on the first line and enter 50 in the Amount box. The amount will automatically be calculated as 50% of the total from the Items Requested section. Move to the second line and repeat the steps above.
- **Amount** – If you are only charging one fund and org, the total from the Items will calculate automatically. If you are charging more than one fund or org, enter the amount to charge on the first accounting line (or use the % field above). Use the down arrow to add additional accounting lines and enter the fund, org and amount information.

Balancing/Completion

- **Status** – If the Accounting Information Total agrees with the Order Total above, the Status box will show Balanced. Otherwise, Unbalanced will appear. When this occurs, review the accounting information entered to be sure the totals agree to the Order Total. Verify you have not entered an extraneous Item Description line with no quantity or dollar amounts.
- If there are no errors and you are finished with the requisition, press the Complete button . If you want to save your work and return to this requisition later, press In Process button . This will allow you to return to the same requisition and add to or change your order later. Be sure to make note of the requisition number that appears at the top left of the Balancing/Completion screen (All requisitions begin with the letter R and contain 7 digits). NOTE: You must always press the Complete Button  before your requisition is forwarded to the approvals process and on to purchasing.
- After pressing Complete or In Process, you can select the Requisition button to begin another requisition or press the Exit  to leave the simplified requisition form.

Returning to a Saved Requisition

If you saved a requisition as In Process, and are ready to return to complete the requisition:

- In the **Go to** block, type FZAREQN and press Enter; or double click on these letters.
- Press F7 to enter a query. Enter the requisition number you want to complete. Press F8 to execute the query.
- Choose “Edit this Requisition” at the bottom of the screen. If “Marked Complete” appears at the bottom, this requisition has been completed and cannot be changed.
- Follow the steps outlined above to update any necessary information.

- Press the Complete Button  when finished.

Potential Problems with Simplified Requisition Form

- The Ship To location does not always default to the correct sales tax code on the Item Description line. Notice on the example form, the taxes for Item Description lines 2 and 3 did not default to Lonoke. Line 1 was manually changed to Lonoke.
- The Vendor data base is limited to the first address listed. There is no method to determine if other vendor addresses exist.
- It is very simple to add additional Item Description lines without realizing it by just tabbing through the Line Total. If no data is entered, the requisition may not complete, or it may transfer problems to the purchase order.
- The amount of the sales tax for each individual Item Description Line is not shown, making it difficult to determine if the sales tax is correct.
- Commodity level accounting cannot be used with this form.

Simplified Requisition Form

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Window Help

Simplified Requisition Entry/Inquiry Form FZAREQN 7.0 (PREP0714)

New Requisition: R0015627 **Delivery Date:** 30-OCT-2006
Order Date: 11-OCT-2006 **Comments:**

Requestor: Jim Lipsey **Email:** jlipsej@uaex.edu
Phone: 501 6712296 **Ext:** **Fax:** 501 6712209 **Ext:**

Ship To: LONOKE **Vendor:** Computer Nerds Text
Address: Lonoke Agricultural Center **Address:** Attn: Order Dept
 2001 Highway 70 East 19077 W Dixie Hwy
 Lonoke AR 72086 North Miami Beach FL 33180
Attention To: Charles Whitaker **Contact:** Bill Gates

Items Requested

	Item Description	Text	U/M	Tax	Quantity	Unit Price	Line Total (incl tax)
1	Item 456987, Seagate 250GM 7200PRM AT	<input checked="" type="checkbox"/>	EA	LONO	3.00	158.9500	519.77
2	Item #123098, High Speed USB 2.0 A-B Ca	<input type="checkbox"/>	EA	LROC	4.00	5.9500	25.59
3	DHL 3-Day Business Shipping	<input type="checkbox"/>	EA	LROC	1.00	12.8500	13.81
		<input type="checkbox"/>					
		<input type="checkbox"/>					
		<input type="checkbox"/>					
Order Total:							559.17

Accounting Information

Fund	Fund Title	Orgn	Orgn Title	%	Amount
14000	Unrestricted FSL	8300	Lonoke Agricultural Center		279.59
14001	FSL Budget Carryover	8300	Lonoke Agricultural Center		279.59
Accounting Total:					559.17

Status: Balanced Complete: In Process:

Calculate percentage entered into amount field of order total
 Record: 2/2 <OSC>