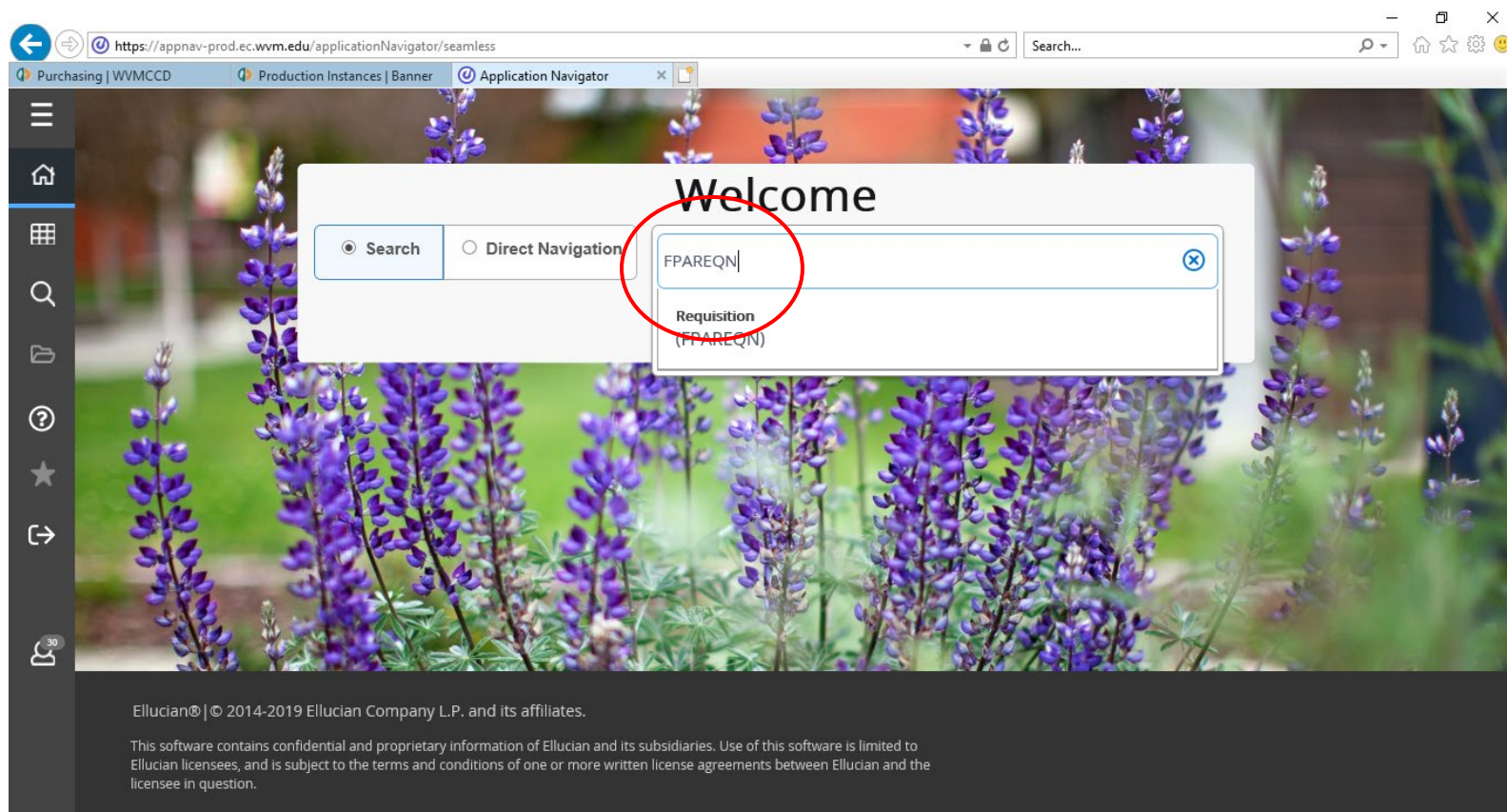
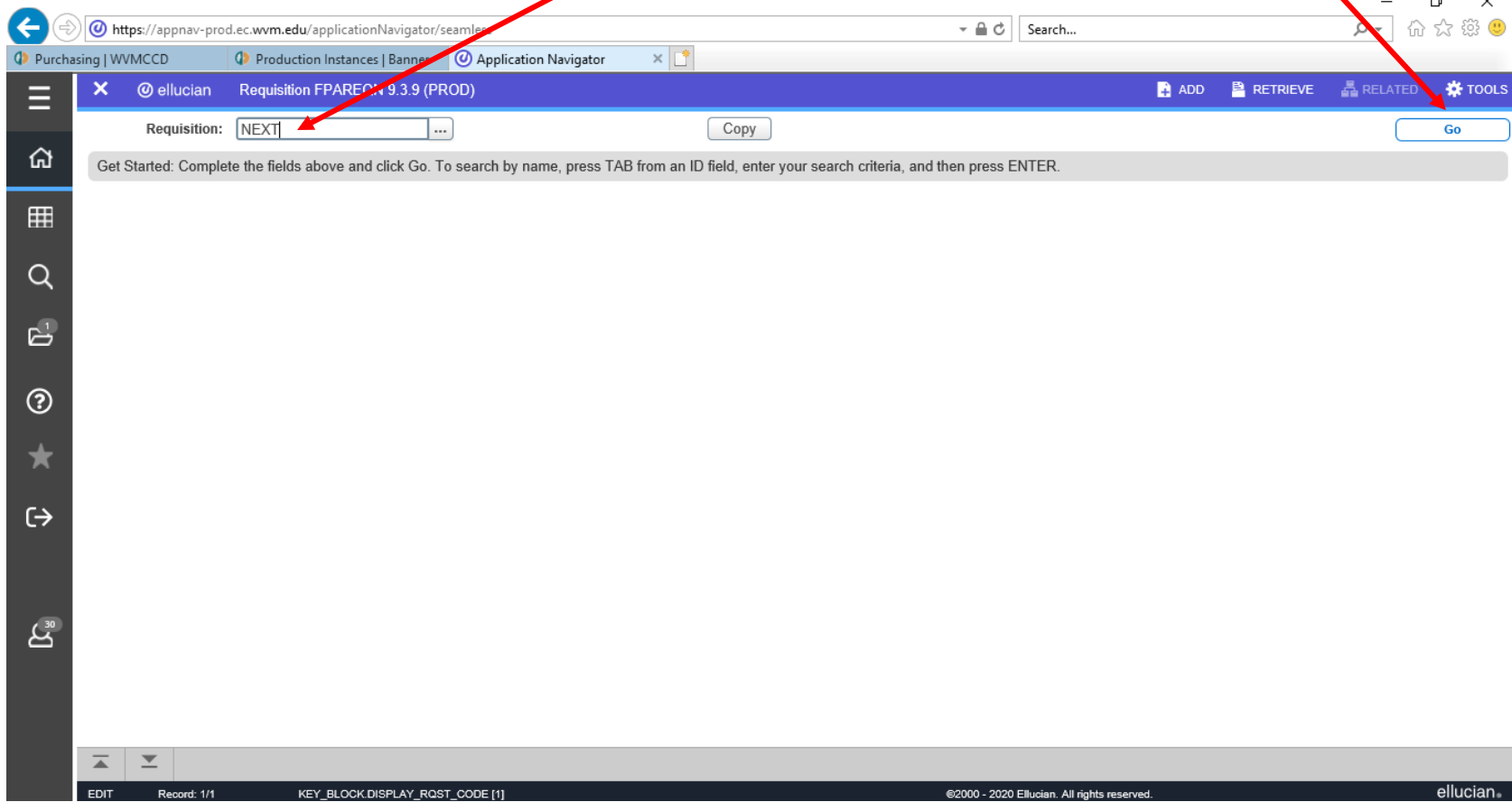


Banner 9 – Create a Requisition

From the Welcome screen, type **FPAREQN** in the search bar



On the following screen, type the word **NEXT** in the Requisition field and click **Go**



Complete the **Delivery Date** and **Ship To** fields

The screenshot shows the Ellucian Requisition Entry interface. At the top, the browser address bar displays 'https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless'. The page title is 'Requisition: NEXT'. The main form is titled 'REQUISITION ENTRY: REQUESTOR/DELIVERY'. It contains several input fields: 'Requisition' (NEXT), 'Order Date *' (10/19/2020), 'Transaction Date *' (10/19/2020), and 'Delivery Date *'. To the right, there are 'Comments', 'Commodity Total' (0.00), and 'Accounting Total' (0.00) fields. Below these are checkboxes for 'In Suspense', 'Document Text', and 'Document Level Accounting'. The form is divided into sections: 'Requestor/Delivery Information', 'Vendor Information', 'Commodity/Accounting', and 'Balancing/Completion'. The 'Requestor/Delivery Information' section is expanded, showing fields for 'Requestor *' (Gina Venn), 'Organization *' (309600), 'COA *' (D), 'Email' (gina.venn@wvm.edu), and various phone and fax numbers. The 'Ship To *' field is at the bottom of this section. A 'Next Section' button is located in the bottom left corner of the form area. A 'SAVE' button is in the bottom right corner. The footer includes 'EDIT', 'Requisition: 1/1', 'FPBREQH.FPBREQH_REQH_DATE [1]', '©2000 - 2020 Ellucian. All rights reserved.', and the 'ellucian' logo.

Click the **Next Section** button or **Alt+Page Down** in the lower left corner.

On the next screen, enter your **vendor code** in the **Vendor field**. Vendor code is their G0#

Requisition: NEXT

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: NEXT
Order Date: 10/19/2020
Transaction Date: 10/19/2020
Delivery Date: 10/19/2020

Comments: []
Commodity Total: 0.00
Accounting Total: 0.00
 Document Level Accounting

In Suspense
 Document Text

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

VENDOR INFORMATION

Vendor: [] [...]
 Vendor Hold

Address Type: [] [...]
Sequence: [] [...]

Street Line 1: []
Street Line 2: []
Street Line 3: []

City: []

State or Province: []
Zip or Postal Code: []
Nation: []

Contact: []
Email: []

Phone Area Code: []
Phone Number: []
Phone Extension: []

Fax Area Code: []
Fax Number: []
Fax Extension: []

Discount: [] [...]
Tax Group: CAD [...]
California Sales Tax
Currency: [] [...]

SAVE

EDIT Record: 1/1 FPBREQH.VENDOR_SPRIDEN_ID [1] ©2000 - 2020 Ellucian. All rights reserved. ellucian.

**If you don't know your vendor code, you can look up the code by clicking the ellipses icon (...) to the right of the Vendor field box.

To find your vendor, select **Entity Name**.

The screenshot shows a web browser window with the URL <https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless>. The application is titled "Requisition FPAREQN 9.3.9 (PROD)". The main form is for "REQUISITION ENTRY: REQUESTOR/DELIVERY" with a requisition number of "NEXT". The form includes fields for Order Date, Transaction Date, and Delivery Date, all set to 10/19/2020. It also shows commodity and accounting totals of 0.00. A "Vendor Information" tab is active, displaying fields for Vendor, Address Type, Sequence, Street Line 1-3, City, State or Province, Zip or Postal Code, and Nation. An "Option List" dialog box is open over the Vendor field, showing two options: "Entity Name/ID Search (FTIIDEN)" and "Vendor Maintenance (FTMVEND)". A red arrow points from the text "Entity Name" in the instruction above to the "Entity Name/ID Search (FTIIDEN)" option in the dialog. The dialog also has a "Cancel" button. The footer of the application shows "EDIT Record: 1/1 GS_OPT_BLOCK.SELECT_A_DESC [1] ©2000 - 2020 Ellucian. All rights reserved. ellucian." and a "SAVE" button.

Find your vendor by **Last Name**. Type in any portion of the vendor name with a **percent sign** to populate all applicable vendors to choose from. This field is case sensitive. Click **Go**.

The screenshot shows the Ellucian Entity Name/ID Search interface. The browser address bar displays <https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless>. The application title is "Entity Name/ID Search FTIIDEN 9.3.6 (PROD)".

The "ENTITY NAME/ID SEARCH" section includes the following filter options:

- Vendors
- Terminated Vendors
- Grant Personnel
- Proposal Personnel
- Financial Managers
- Terminated Financial Managers
- Agencies
- All

The "DETAILS" section shows the "Basic Filter" with the following fields:

- ID: [Empty]
- Last Name: **Fast Response%** (highlighted with a red circle)
- First Name: [Empty]
- Middle Name: [Empty]
- Entity Indicator: [Empty]
- Add Another Field ... [Dropdown]

The "Go" button is highlighted with a red arrow.

The table below shows the search results:

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type

The footer includes "EDIT Record: 1/1", "GS_OPT_BLOCK_SELECT_A_DESC [1]", "©2000 - 2020 Ellucian. All rights reserved.", and "ellucian".

On the next screen, hover over and highlight the vendor you need. **Double click** to select or click the **Select** button in the lower right corner of the screen. **Always choose the ID with the G0.**

The screenshot shows the Ellucian Entity Name/ID Search interface. The browser address bar shows the URL: <https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless>. The page title is "Entity Name/ID Search FTI/EN 9.3.6 (PROD)".

The "ENTITY NAME/ID SEARCH" section includes several filter categories:

- Vendors
- Terminated Vendors
- Grant Personnel
- Proposal Personnel
- Financial Managers
- Terminated Financial Managers
- Agencies
- All

The "DETAILS" section shows an active filter: "Last Name: Fast Response%". A "Filter Again" button is visible.

The table below displays search results:

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
1578468	Fast Response On-Sit...			Corporation	ID	Yes	No	No	No	No	
G01578468	Fast Response On-Sit...			Corporation		Yes	No	No	No	No	

The "G01578468" ID is highlighted with a red circle. The "SELECT" button is located at the bottom right of the interface.

Click inside the **Vendor** box and hit Tab, which will populate your vendor name and address.

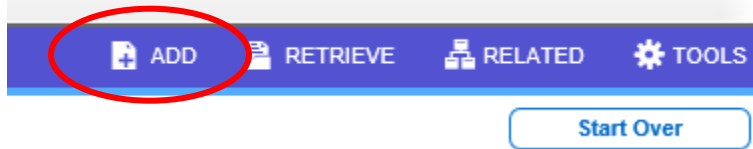
The screenshot shows the ellucian Requisition FPAREQN 9.3.9 (PROD) application. The 'Vendor Information' tab is active, and the 'Vendor' field is highlighted with a red circle. The 'Vendor Hold' checkbox is also highlighted. The application displays various fields for requisition entry and vendor information.

REQUISITION ENTRY: REQUESTOR/DELIVERY	
Requisition	NEXT
Order Date	10/19/2020
Transaction Date	10/19/2020
Delivery Date	10/19/2020
Comments	
Commodity Total	0.00
Accounting Total	0.00
<input type="checkbox"/> In Suspense	
<input type="checkbox"/> Document Text	
<input checked="" type="checkbox"/> Document Level Accounting	

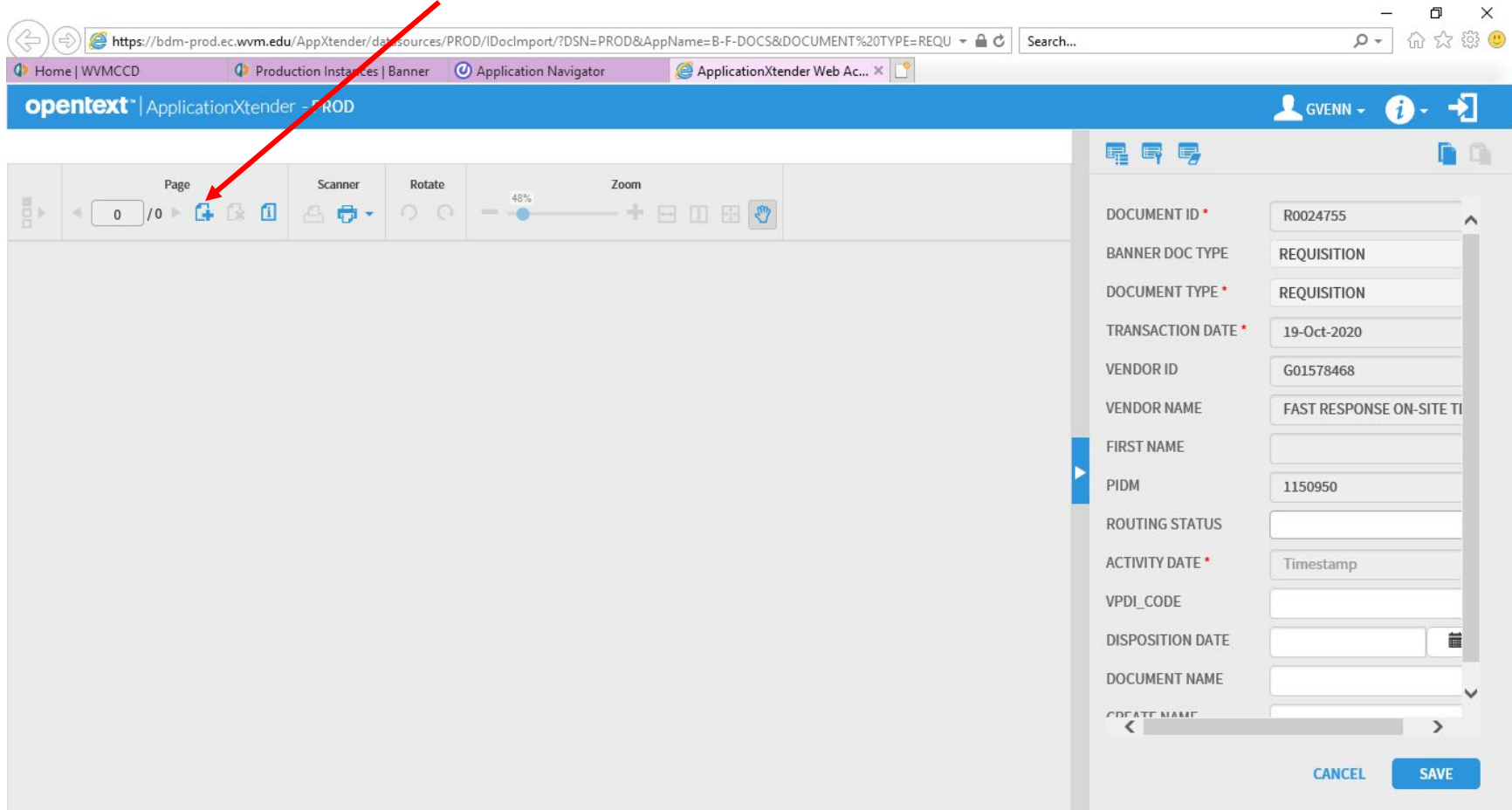
VENDOR INFORMATION	
Vendor	G01578466 ... Fast Response On-Site Testing Inc
<input type="checkbox"/> Vendor Hold	
Address Type	PO ...
Sequence	1 ...
Street Line 1	1840 41st Ave Ste 102
Street Line 2	
Street Line 3	
City	Capitola
State or Province	CA
Zip or Postal Code	95010-2527
Nation	
Contact	
Email	
Phone Area Code	
Phone Number	
Phone Extension	
Fax Area Code	
Fax Number	
Fax Extension	
Discount	
Tax Group	CAD ... California Sales Tax
Currency	

**If you have backup documents that need to be added, you would add them at this time.

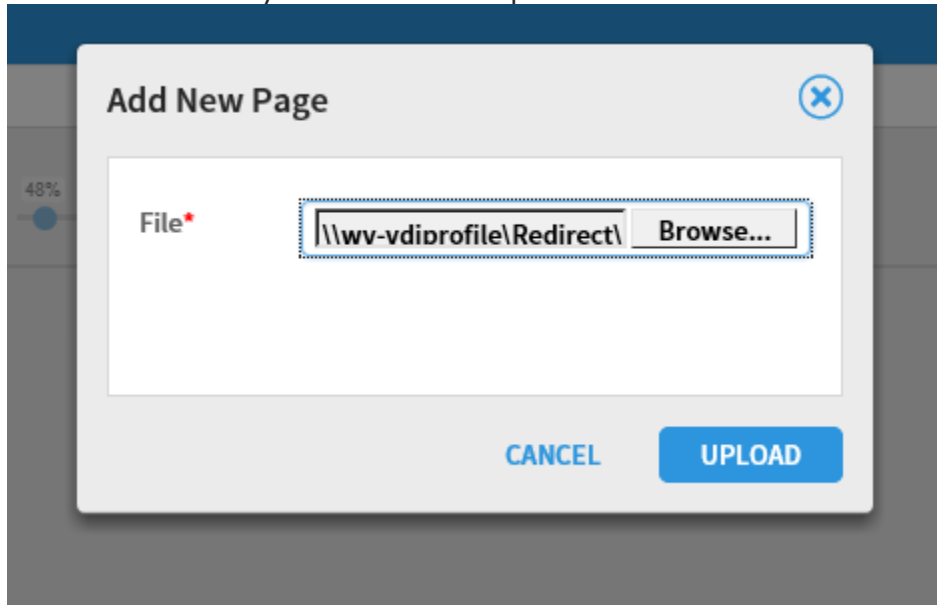
Click the **Add** button on the top right of the page.



You will need to select **Add Page**



Select the file you want to upload.



You then should be able to see the page/pages that were uploaded.

Select **Save** if everything has been uploaded correctly.

The screenshot shows the ApplicationXtender web interface. The main area displays a scanned document titled "WEST VALLEY-MISSION COMMUNITY COLLEGE DIST PURCHASE REQUISITION". The document contains handwritten information including the requisition number (24255), vendor name (Fast Response Onsite Testing), address (1605 Capitola Road, Santa Cruz, CA 95062), and phone number (31-477-2867). A table at the bottom lists items for purchase, with a description: "Open PO for Environmental Health & Safety Regulatory Compliance".

The sidebar on the right contains the following data entry fields:

- DOCUMENT ID: R0024755
- BANNER DOC TYPE: REQUISITION
- DOCUMENT TYPE: REQUISITION
- TRANSACTION DATE: 19-Oct-2020
- VENDOR ID: G01578468
- VENDOR NAME: FAST RESPONSE ON-SITE TI
- FIRST NAME: [Empty]
- PIDM: 1150950
- ROUTING STATUS: [Empty]
- ACTIVITY DATE: Timestamp
- VPDI_CODE: [Empty]
- DISPOSITION DATE: [Empty]
- DOCUMENT NAME: [Empty]
- CREATE NAME: [Empty]

At the bottom right of the sidebar, there are two buttons: "CANCEL" and "SAVE". The "SAVE" button is circled in red.

You can then click the **Next Section** or **Alt+ Page Down** button in the lower left corner of the screen.

The screenshot displays a web application interface for managing requisitions. The browser address bar shows the URL: <https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless>. The application title is "Requisition FPAREQN 9.3.9 (PROD)".

The main content area is titled "Requisition: NEXT" and includes a "Start Over" button. Below this is the "REQUISITION ENTRY: REQUESTOR/DELIVERY" section, which contains fields for Requisition (NEXT), Order Date (10/19/2020), Transaction Date (10/19/2020), and Delivery Date (10/19/2020). It also includes fields for Comments, Commodity Total (0.00), and Accounting Total (0.00), along with checkboxes for "In Suspense", "Document Text", and "Document Level Accounting".

The "Vendor Information" section is active, showing details for Vendor G01578461, "Fast Response On-Site Testing Inc". Fields include Vendor Hold, Address Type (PO), Sequence (1), Street Line 1 (1840 41st Ave Ste 102), City (Capitola), State or Province (CA), and Zip or Postal Code (95010-2527). Contact information fields like Contact, Email, Phone Area Code, Phone Number, Phone Extension, Fax Area Code, Fax Number, and Fax Extension are also present.

In the bottom left corner, there is a navigation bar with several icons. A red arrow points to the "Next Section" button, which is represented by a downward-pointing arrow icon.

The footer of the application shows "EDIT Record: 1/1 FPBREQH.FPBREQH_VENDOR_CONTACT [1]" on the left, "©2000 - 2020 Ellucian. All rights reserved." in the center, and "ellucian." on the right. A "SAVE" button is located in the bottom right corner.

**You now should have a Requisition number at the top left of the page. You will need to write this down.

When working in the Commodity and Accounting fields you want to tab through everything that you can. This will help with Banner calculating.

Never use the Commodity box.

Tab past the Commodity box to enter in the Description. Enter the description of the goods you're purchasing in the **Description** field.

Tab and enter the unit of measure in the **U/M** field.

Tab and enter in Tax Group, CAD or D00. CAD is automatically populated. All physical items need to have tax even if the vendor doesn't collect it.

Tab and enter the quantity in the **Quantity** field.

Tab and enter the price in the **Unit Price** field.

Tab all the way through until you end up back at the line item.

Requisition: R0024755 Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition	R0024755	Comments	<input type="text"/>	<input type="checkbox"/> In Suspend
Order Date	10/19/2020	Commodity Total	5,000.00	<input type="checkbox"/> Document Text
Transaction Date	10/19/2020	Accounting Total	0.00	
Delivery Date	10/19/2020	<input checked="" type="checkbox"/> 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		Open PO for Environment...	EA	D00	1.00	5,000.0000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Extended Amount: 5,000.00 | Tax: 0.00 | Commodity Total: 5,000.00 | Document Total: 5,000.00

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF St
	D										<input type="checkbox"/>	

Extended Amount: % USD

If your description does not fit in the description field, you can enter additional information in the **Item Text**. From the **Related** tab in the upper right corner of the screen, select **Item Text**.

The screenshot shows the ellucian Requisition FPAREQN 9.3.9 (PROD) interface. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The 'RELATED' tab is selected, and a dropdown menu is open, showing the following options: 'Review Commodity Information [FOICOMM]', 'Item Text [FOAPOXT]', 'Document Text [FOAPOXT]', and 'Commodity Text [FOATEXT]'. The 'Item Text [FOAPOXT]' option is highlighted with a red circle. The main content area displays requisition details for R0024755, including Requisition, Order Date, Transaction Date, and Delivery Date. The 'COMMODITY' section shows a table with columns for Item, Commodity, Description, U/M, Tax Group, Quantity, Unit Price, and Commodity Text. The 'ACCOUNTING' section shows a table with columns for Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Actv, and Locn. The bottom of the screen includes a 'SAVE' button and footer information: 'EDIT Record: 1/1 FPRREQD.FPRREQD_COMM_CODE (1) ©2000 - 2020 Ellucian. All rights reserved. ellucian'.

From the item text screen, click **Go** in the upper right corner.

The screenshot shows a web browser window with the URL <https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless>. The browser tabs include 'Purchasing | WVMCCD', 'Production Instances | Banner', and 'Application Navigator'. The application header is blue and contains the text 'ellucian Procurement Text Entry FOAPOXT 9.3.6 (PROD)' and navigation buttons: 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. A blue 'Go' button is located in the top right corner of the application area. A red arrow points from the word 'Go' in the instruction above to this button.

The main content area displays the following information:

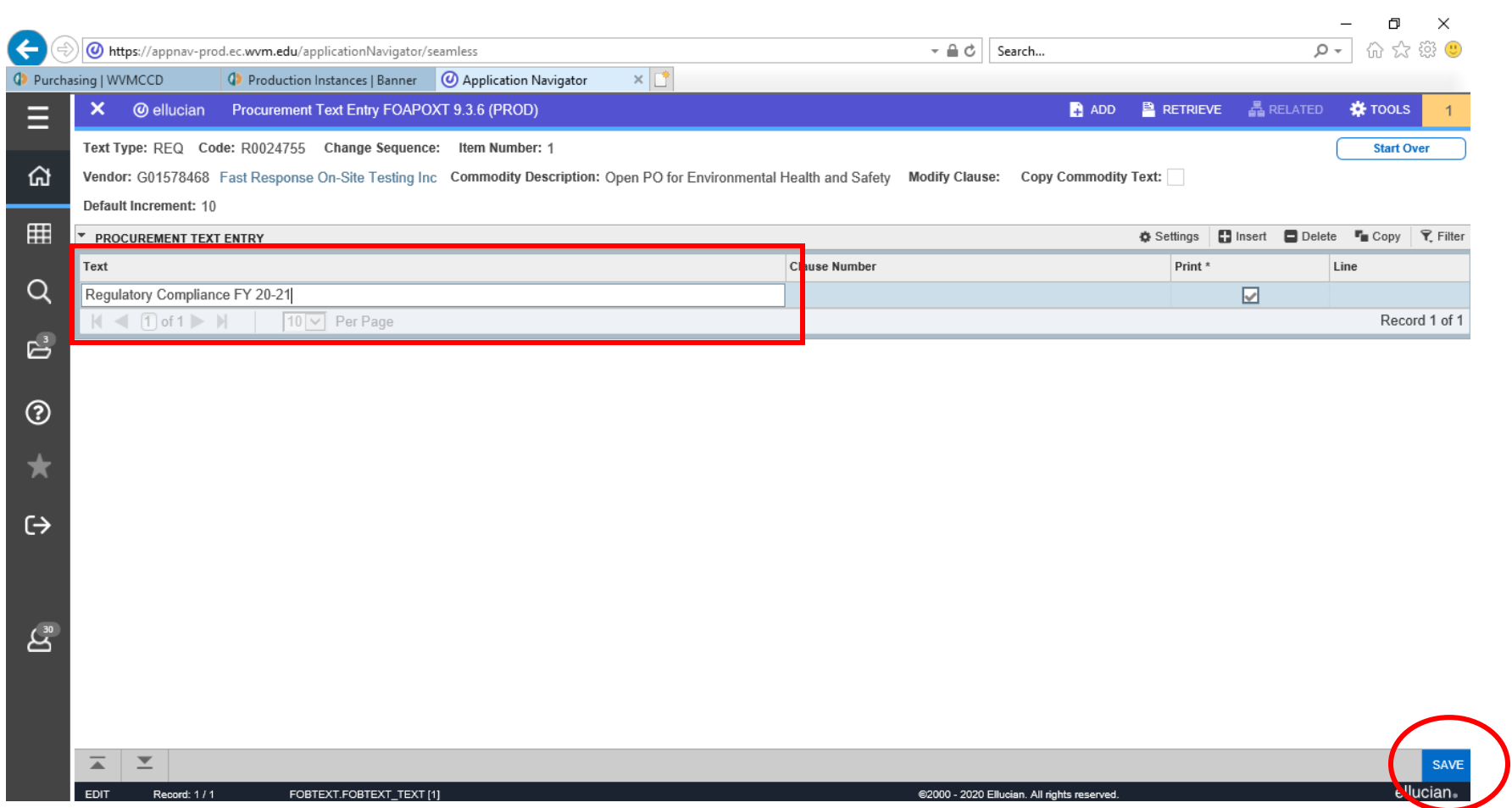
- Text Type: REQ
- Code: R0024755
- Change Sequence:
- Item Number: 1
- Vendor: G01578468 Fast Response On-Site Testing Inc
- Commodity: Open PO for Environmental Ht
- Description
- Modify Clause: ...
- Copy Commodity:
- Text
- Default Increment: 10

A grey instruction bar below the form reads: "Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER."

The footer contains the text: "EDIT Record: 1/1 KEY_BLOCK:KEYBLOK_DTYP_CODE [1] ©2000 - 2020 Ellucian. All rights reserved. ellucian."

Type your additional description in the **Text** field and click **Save** in the bottom right corner of the screen.

Once saved you can exit this screen.



https://appnav-prod.ec.wvm.edu/applicationNavigator/seamless

Purchasing | WVMCCD Production Instances | Banner Application Navigator

ellucian Procurement Text Entry FOAPOXT 9.3.6 (PROD) ADD RETRIEVE RELATED TOOLS 1

Text Type: REQ Code: R0024755 Change Sequence: Item Number: 1 Start Over

Vendor: G01578468 Fast Response On-Site Testing Inc Commodity Description: Open PO for Environmental Health and Safety Modify Clause: Copy Commodity Text:

Default Increment: 10

PROCUREMENT TEXT ENTRY Settings Insert Delete Copy Filter

Text	Case Number	Print *	Line
Regulatory Compliance FY 20-21		<input checked="" type="checkbox"/>	

1 of 1 10 Per Page Record 1 of 1

EDIT Record: 1 / 1 FOBTXT.FOBTXT_TEXT (1) ©2000 - 2020 Ellucian. All rights reserved. ellucian. SAVE

To add additional items, arrow down using your keyboard.
Select the **Next Section or Alt+Page Down** button in lower left corner to proceed to next step.

The screenshot displays the ellucian Requisition FPAREQN 9.3.9 (PROD) application. The interface is divided into several sections:

- Requisition Entry: Requestor/Delivery**: This section contains fields for Requisition (R0024755), Order Date (10/19/2020), Transaction Date (10/19/2020), and Delivery Date (10/19/2020). It also includes a Comments field, Commodity Total (5,000.00), Accounting Total (0.00), and checkboxes for In Suspense, Document Text, and Document Level Accounting.
- Commodity/Accounting**: This section is currently active and displays a table of commodity items. The table has columns for Item, Commodity, Description, U/M, Tax Group, Quantity, Unit Price, Commodity Text, Item Text, and Add Commodity. The first item is listed with Item 1, Commodity, Description "Open PO for Environmer...", U/M EA, Tax Group D00, Quantity 1.00, and Unit Price 5,000.0000. Below the table, there are summary fields for Extended Amount (5,000.00), Tax (0.00), Discount (0.00), Additional (0.00), Commodity Total (5,000.00), and Document Total (5,000.00). There is also a checkbox for Distribute.
- Accounting**: This section displays a table with columns for Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Actv, Locn, Proj, NSF Override, and NSF St. The first row shows Sequence D and NSF Override with a checkbox.

A red arrow points to the "Next Section or Alt+Page Down" button in the lower left corner of the interface. The bottom status bar includes "EDIT", "Record: 1/1", "FPRREQD.DISPLAY_COMM_DESC [1]", "©2000 - 2020 Ellucian. All rights reserved.", and the ellucian logo.

To enter your accounting information in the **Accounting** fields (**Fund, Orgn, Acct, and Prog**) hit the **Tab** button to enter in the information. Then click on the **Next Section or Alt+Page Down** button to proceed to the next screen. If you entered additional item text, you'll notice the **Item Text** box is now checked.

The screenshot displays the ellucian Requisition FPAREQN 9.3.9 (PROD) application. The interface is divided into several sections:

- Requestor/Delivery Information:** Shows Requisition R0024755, Order Date 10/19/2020, Transaction Date 10/19/2020, and Delivery Date 10/19/2020. It also includes fields for Comments, In Suspense, Document Text, and Document Level Accounting (checked).
- Commodity/Accounting:** This section is highlighted with a red box. It contains a table with columns: Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Actv, Locn, Proj, NSF Override, and NSF Su. The values for Fund, Orgn, Acct, and Prog are 110819, 309600, 500104, and 677000, respectively.
- Commodity:** Shows a table with columns: Item, Commodity, Description, U/M, Tax Group, Quantity, Unit Price, Commodity Text, Item Text, and Add Commodity. The first row shows Item 1, Commodity Open PO for Environmen..., U/M EA, Tax Group D00, Quantity 1.00, and Unit Price 5,000.0000. The Item Text checkbox is checked.
- Summary:** Shows Extended Amount 5,000.00, Tax 0.00, Discount 0.00, Additional 0.00, Commodity Total 5,000.00, and Document Total 5,000.00. There is also a Distribute checkbox.

The bottom of the screen shows the status bar with "EDIT Record: 1/1", "FPRREQA.FPRREQA_ACTV_CODE [1]", "©2000 - 2020 Ellucian. All rights reserved.", and the ellucian logo.

On the next screen, if your requisition is complete you can select **Complete**.
At this point your requisition is forward to the approval process.

The screenshot displays the 'ellucian Requisition FPAREQN 9.3.9 (PROD)' interface. The 'Balancing/Completion' tab is selected, showing a table of amounts. A red arrow points to the 'Complete' button at the bottom left of the table.

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition	R0024755	Comments		<input type="checkbox"/> In Suspend
Order Date	10/19/2020	Commodity Total	5,000.00	<input type="checkbox"/> Document Text
Transaction Date	10/19/2020	Accounting Total	5,000.00	
Delivery Date	10/19/2020			<input checked="" type="checkbox"/> Document Level Accounting

BALANCING/COMPLETION

Vendor	G01578468	Fast Response On-Site Testing Inc	Currency	
<input type="checkbox"/> Vendor Hold			Exchange Rate	
COA	D	District Chart	Commodity Record	1
Requestor	Gina Venn		Count	
Organization	309600	Purchasing	Input Amount	5,000.00
			Converted Amount	

AMOUNTS

	Input	Commodity	Accounting	Status
Approved Amount	5,000.00	5,000.00	5,000.00	BALANCED
Discount Amount	0.00	0.00	0.00	BALANCED
Additional Amount	0.00	0.00	0.00	BALANCED
Tax Amount	0.00	0.00	0.00	BALANCED

Buttons: Complete, In Process, SAVE

Footer: EDIT Record: 1/1 POSTING_BLOCK.MARK_COMPLETE_BTN [1] ©2000 - 2020 Ellucian. All rights reserved. ellucian.