Banner Self-Service Requisition Form Instructions
Requisition Form

- There are 3 sections to the Requisition Form:
  - Header
    - This section has all the lead sheet information for the vendor and the requestor.
    - Purchase Justification also is input here.
  - Commodity
    - This section lists out all items being purchased and their price.
  - Accounting
    - This section handles the internal accounting information and the distribution of costs.
## Dates

**Transaction Date** – This field is for the date the requisition is being submitted. This should almost always be the current date.

**Delivery Date** – The expected delivery date. This must be on or after the Transaction Date.

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Date</td>
<td>7 SEP 2020</td>
</tr>
<tr>
<td>Delivery Date</td>
<td>7 SEP 2020</td>
</tr>
<tr>
<td>Vendor ID</td>
<td></td>
</tr>
<tr>
<td>Address Type</td>
<td></td>
</tr>
<tr>
<td>Address Sequence</td>
<td></td>
</tr>
<tr>
<td>Vendor Contact</td>
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<tr>
<td>Vendor E-mail</td>
<td></td>
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<tr>
<td>Requestor Name</td>
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<tr>
<td>Requestor E-mail</td>
<td></td>
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<tr>
<td>Country Area Code</td>
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<tr>
<td>Area Code</td>
<td></td>
</tr>
<tr>
<td>Phone Number</td>
<td></td>
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<tr>
<td>Extension</td>
<td></td>
</tr>
<tr>
<td>Requestor Phone</td>
<td></td>
</tr>
<tr>
<td>Requestor Fax</td>
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</tbody>
</table>
Vendor Information

Vendor ID – Enter Vendor ID # if known.

• If you do not have the Vendor ID #, you can use the “Code Lookup” at the bottom of the page.
• If this is a new vendor, please contact Procurement to set them up in the system.

Once entered, press the “Vendor Validate” button to have the system fill in the remaining information.
## Requisition - Header

### Requestor Information
For this section, enter the Drew contact information for the person requesting the purchases.

If there are any problems or if the requisition needs to be modified, this is the person who is go

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Delivery Date</th>
<th>Vendor ID</th>
<th>Address Type</th>
<th>Address Sequence</th>
<th>Vendor Contact</th>
<th>Vendor E-mail</th>
<th>Requestor Name</th>
<th>Requestor E-mail</th>
<th>Country Area Code</th>
<th>Phone Code</th>
<th>Phone Number</th>
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</table>
Shipping Information

The “Attention to” field defaults to the person who is entering the requisition. If you are ordering something on behalf of another Drew employee, please enter their name here.

[Image of a requisition form with the “Attention To” field highlighted.

The highlighted field contains the name “Vincent Gallo.”]
Requisition - Header

Purchase Justification

All Requisitions must include a justification for purchase. This information is entered on a separate screen accessed by clicking the “Document Text” link.

**PLEASE NOTE** – While the online form will allow you to submit the requisition without doing this step, this is still a required field. If you do not enter a business justification for your purchases, your requisitions will be denied.
How to enter Document Text

• Once you press the “Document Text” link, a new window will pop up with two text boxes.

• Enter your justification for this purchase in the box under “Enter Document Text, Print”

• DO NOT enter your justification under the “Enter Document Text, No Print” box
  • If you do, the approver will not be able to see your justification, and the requisition will be denied.

• Once you have entered your justification, press the “Save” button at the bottom of the page. Once you get a confirmation message, you can close the popup
Writing Appropriate Requests

• All requisitions **MUST** include a detailed justification for the expenses being requested.

• A justification should clearly explain:
  • The business need for the purchase
  • How the purchase benefits Drew University and/or your program
Writing Appropriate Requests

Example Acceptable Reasons

• “Purchase of Lab Supplies for Dr. Smith’s Intro to Bio course for Spring 2021”

• “Emergency purchase of bedding for on-campus students displaced by Hurricane Irene.”

Example Unacceptable Reasons

• “FY21 Supplies”

• “Purchase of blankets as discussed with Bob.”

• “Outstanding Contract”

• “Adobe License (Quote #12345)”
Requisition - Commodities

Commodities

1. Commodity Description – A short description of what you are purchasing.
2. U/M - How what you are purchasing is being measured (Each, Box, etc)
3. Quantity – The amount of the specific item you are purchasing
4. Unit Price – The price of each individual unit of what you are purchasing
5. Discount Amount – Do not use.

Once all of the commodities are entered, press the “Commodity Validate” button to have the system calculate the full amount of the items for the Requisition.
Accounting

This section of the form

Select if you are calculating by Dollars or Percents (Default is Dollar).

Enter the Fund, Organization, and Account, (FOAP) for your purchase. While there is a field for Program, please leave this blank and the system will populate this field.
FOAP String

• Stands for...
  • Fund
  • Organization
  • Account
  • Program

• NOTE – These charts are not directly connected to each other and can be mixed to match the expense purpose
FOAP String - Fund

• 4-6 digits

• A Fund designates the type and/or source of money that you are using

• Types of funds include:
  • Unrestricted
  • Restricted
  • Capital Funds

• Identifies **WHERE** the money comes from
FOAP String - Organization

• 6 Digits

• Follows Organizational Structure

• Determines who approves a given action in Banner

• Identifies **WHO** is spending the money
FOAP String - Account

• 5 digits

• Defines the type of expense.

• Identifies **WHAT** money has been received or spent on.
FOAP String - Program

• 2 digits

1101.111004.70202.12

• Default Program code follows the general purpose of the Organization
  • This generally should not vary from the default setting.
  • If you believe it should be changed for a particular transaction, check with accounting.

• Identifies **WHY** the money is spent.
Validation and Completion

Once all of the FOAP information is entered for the requisition, press the “Validate” button. This will begin the process of the system reviewing the information you have entered.

If the message “Document Validated with no errors,” appears, your document has no technical errors and can be submitted by pressing the “Complete” button. You will then be given the document number, which starts with R.

Please note that this is your only chance to see and record this document number.
FAQ

• What to do if you get an Error Message during Validation
  • Review your Accounting information and make sure that it is entered correctly.
  • If it is entered correctly, please reach out to Vincent Gallo for assistance at vgallo@drew.edu.

• What to do if you do not see the vendor you want to use.
  • Contact Procurement at procure@drew.edu and work with the procurement team to either set up a new vendor or find the best vendor to suit your needs.