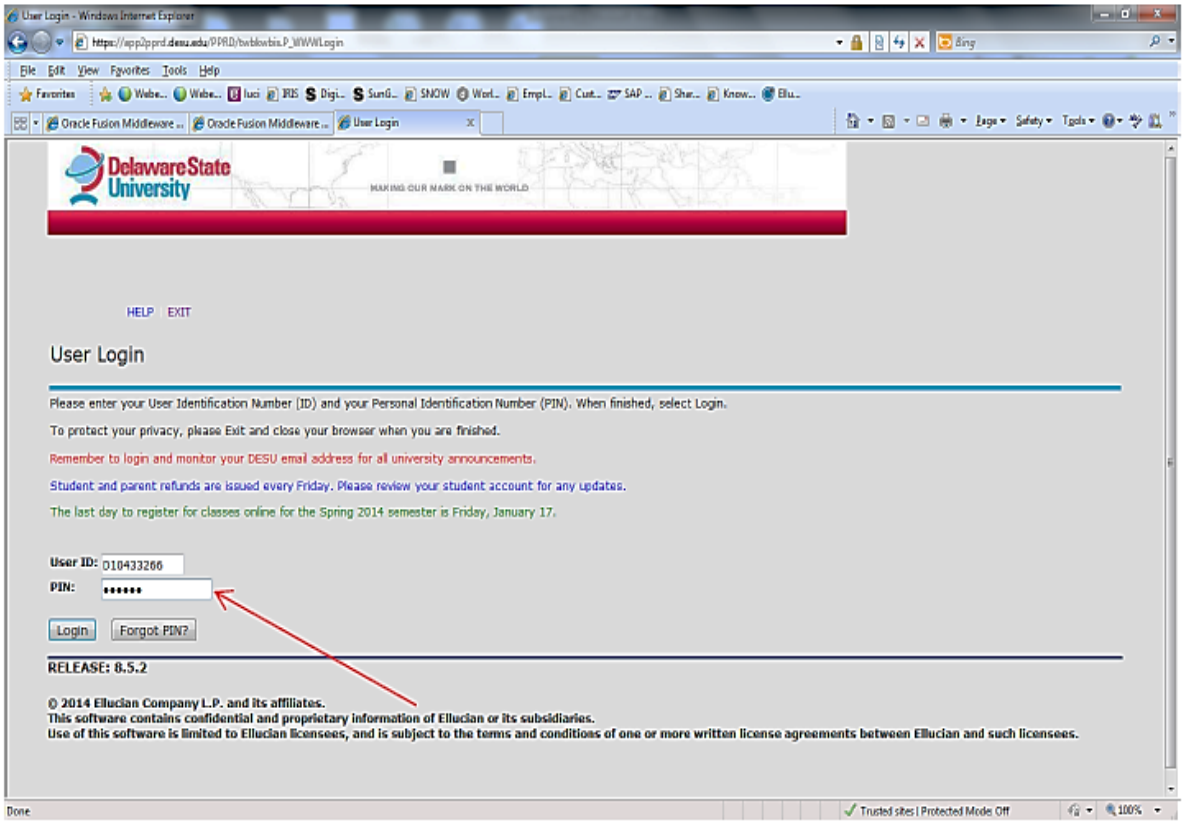
Delaware State University

Making our mark on the world

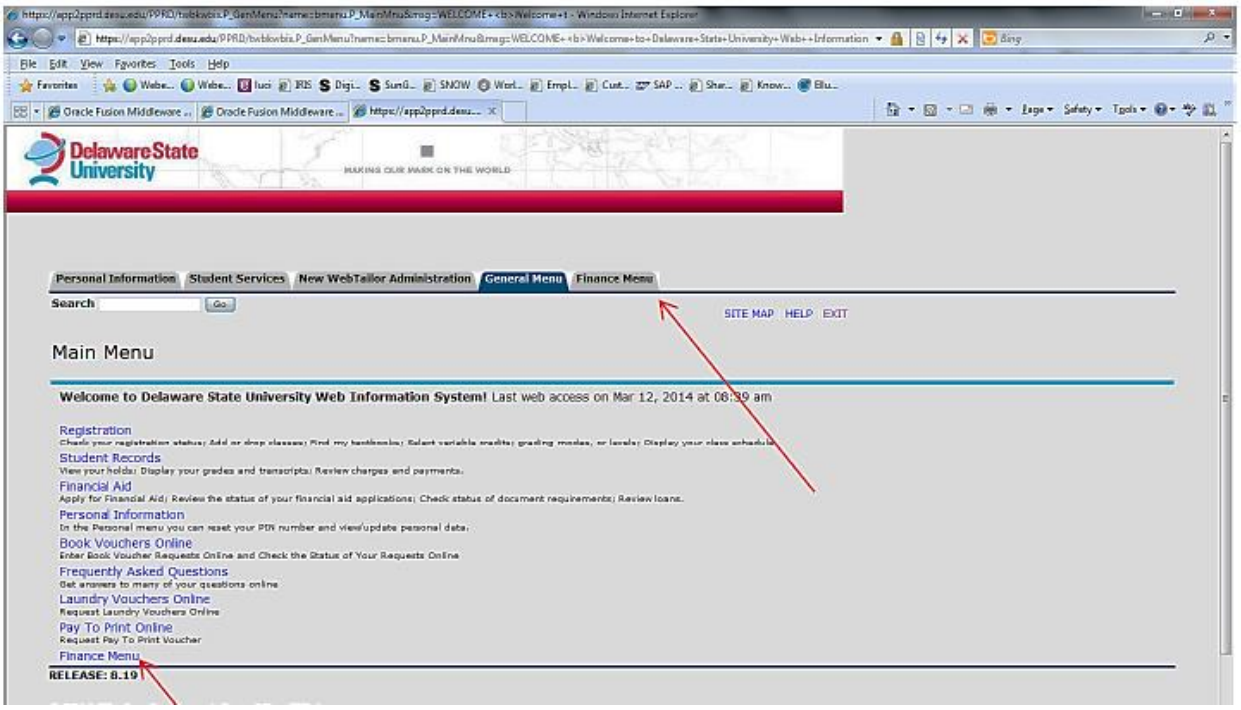
BANNER SELF-SERVICE REQUISITION TRAINING GUIDE

Logging into Self-Service

1. Login to Finance Self Service using your "D Number" and PIN

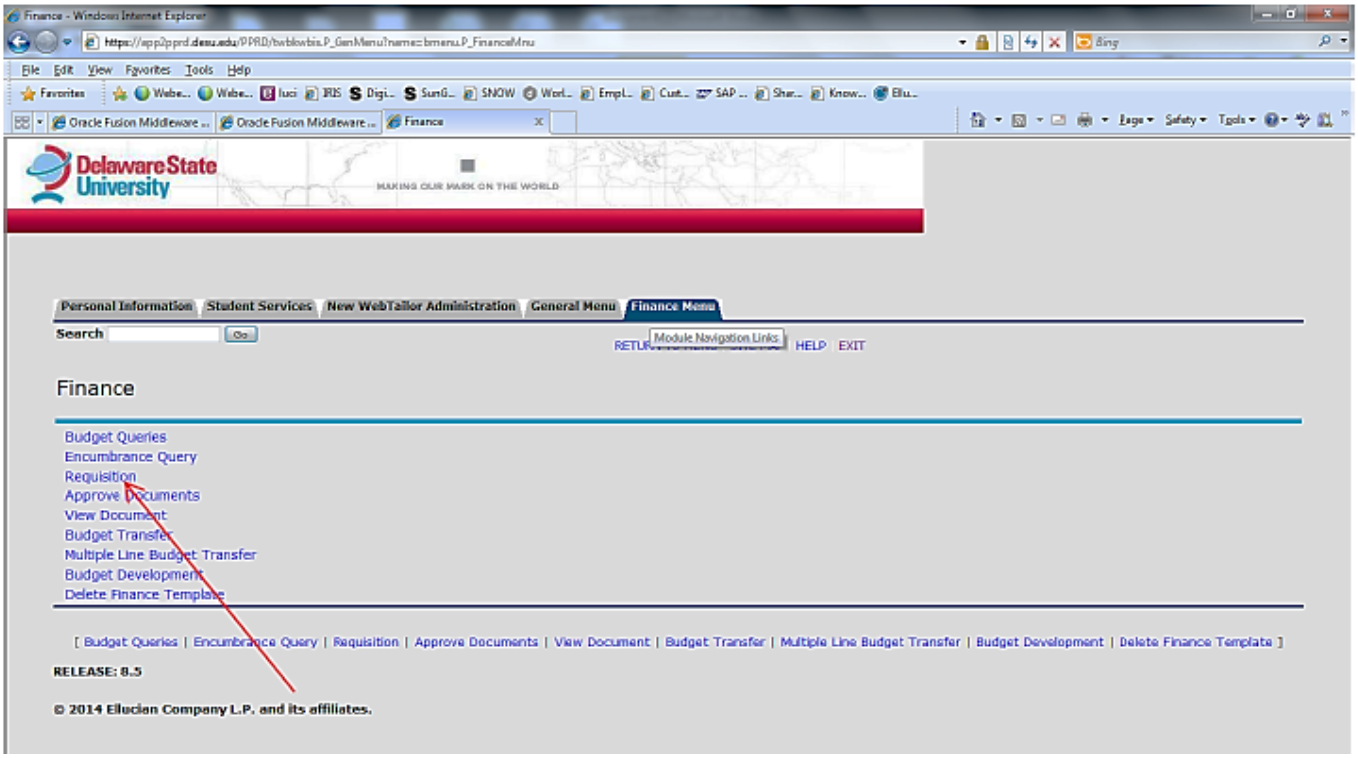


2. Once logged in, you should see the following Main Menu screen which has the "Finance Menu" at the bottom as well as a "Finance Menu" tab on the top. Click either, to take you to the Finance Menu items.

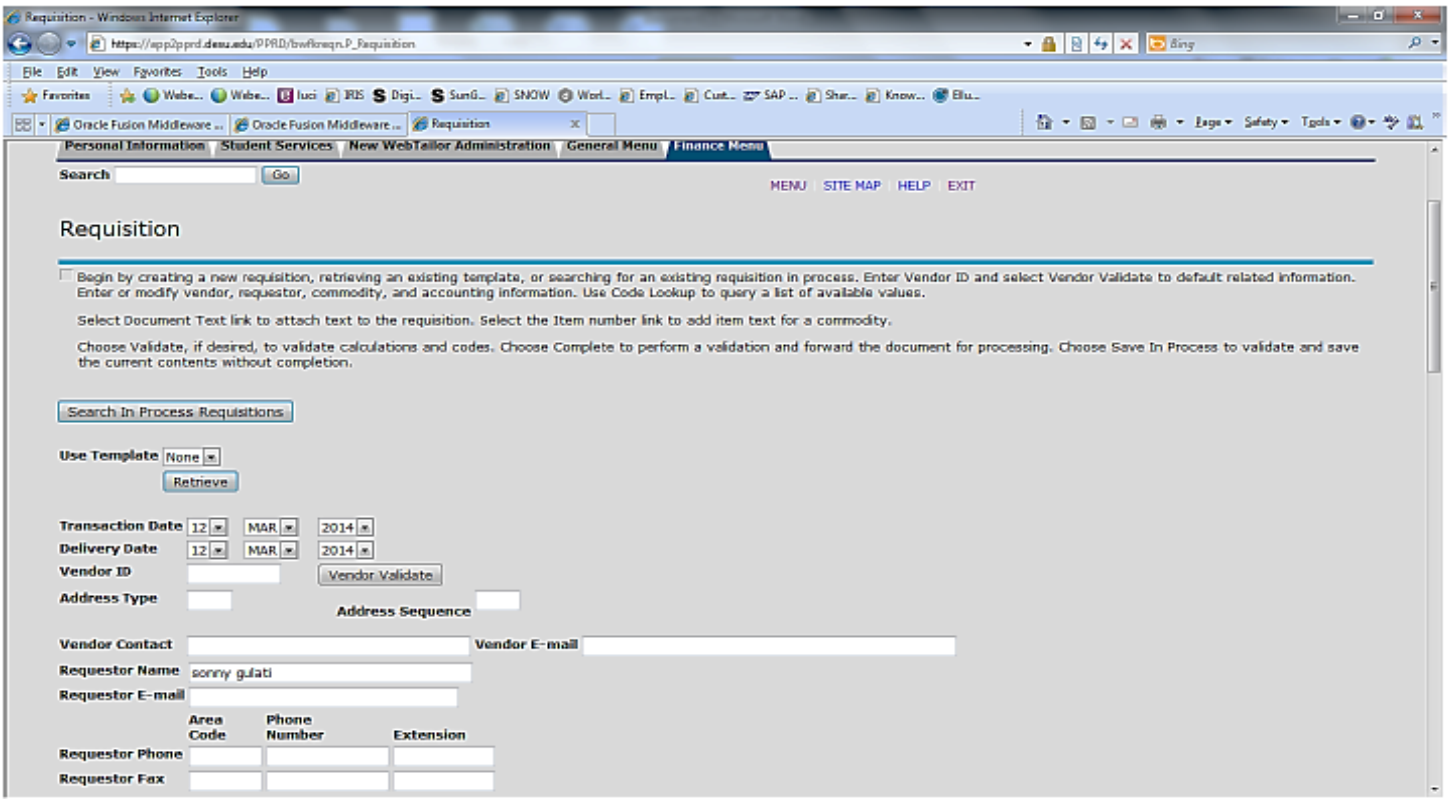


Entering a Requisition

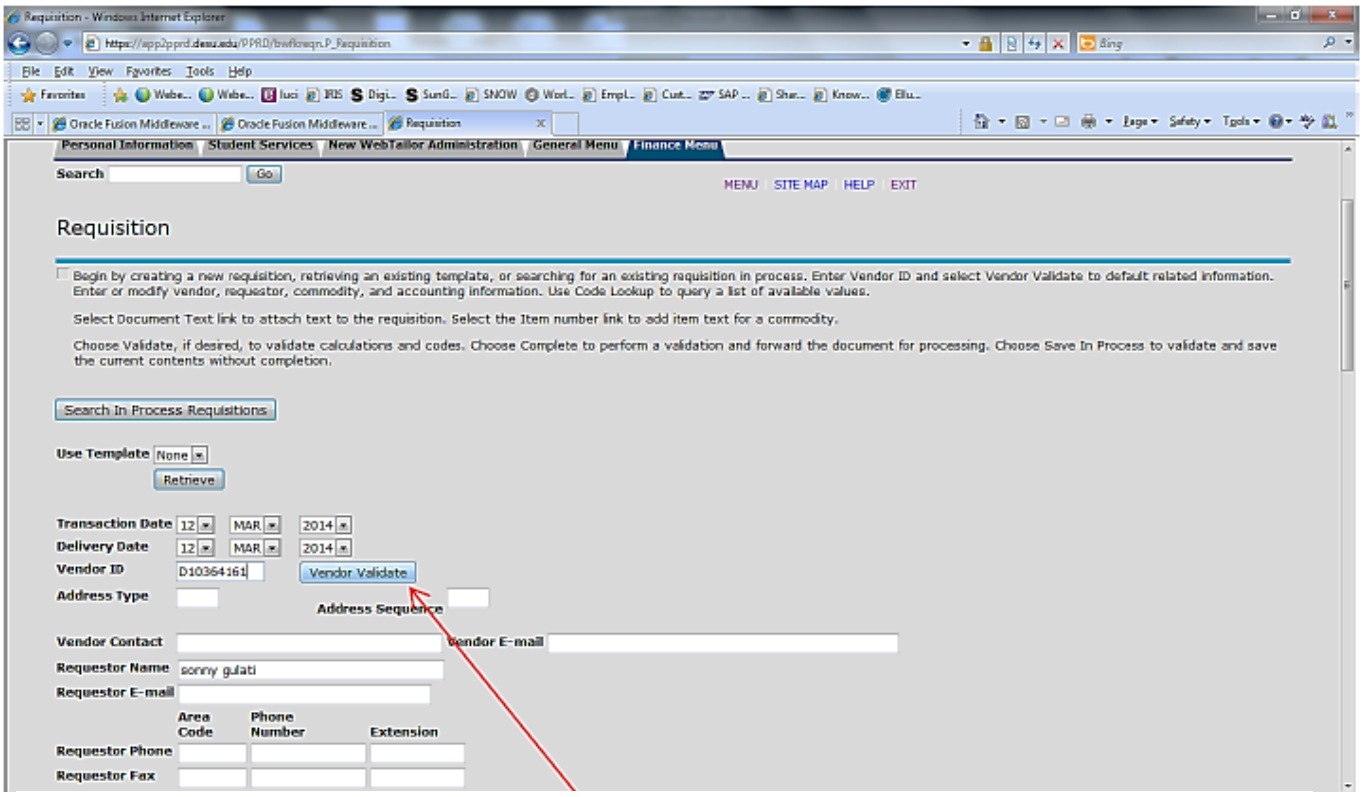
2. Once within the Finance menu- click on the Requisitions link



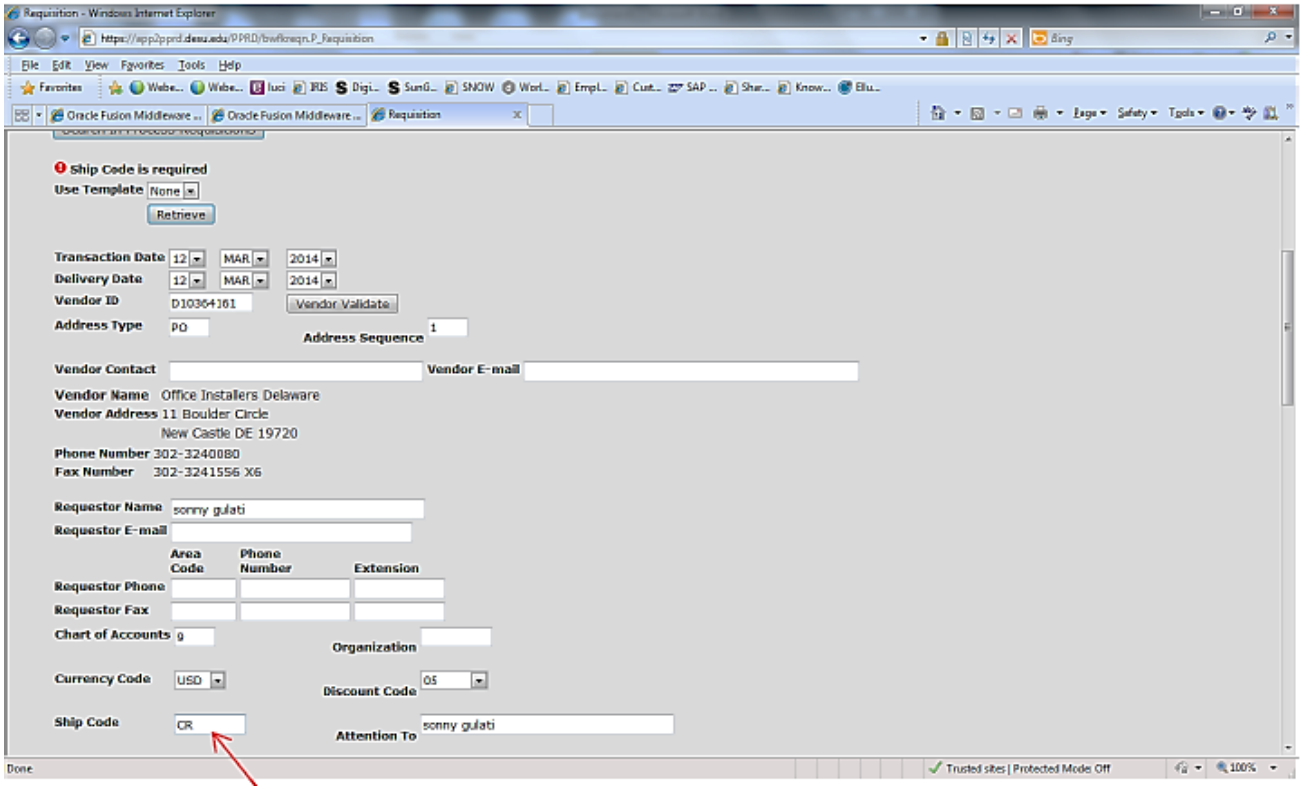
3. This is where you will create a Requisition.



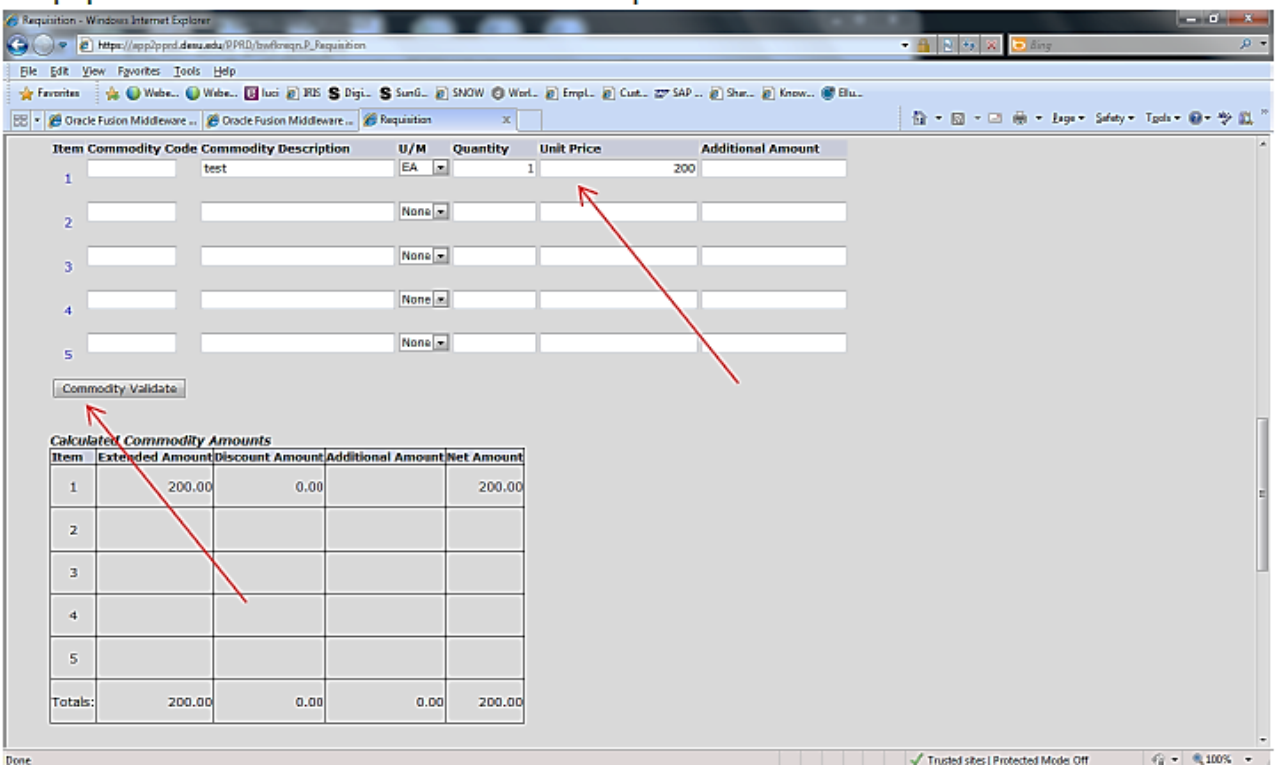
4. Start by entering a Vendor ID and click “Vendor Validate”



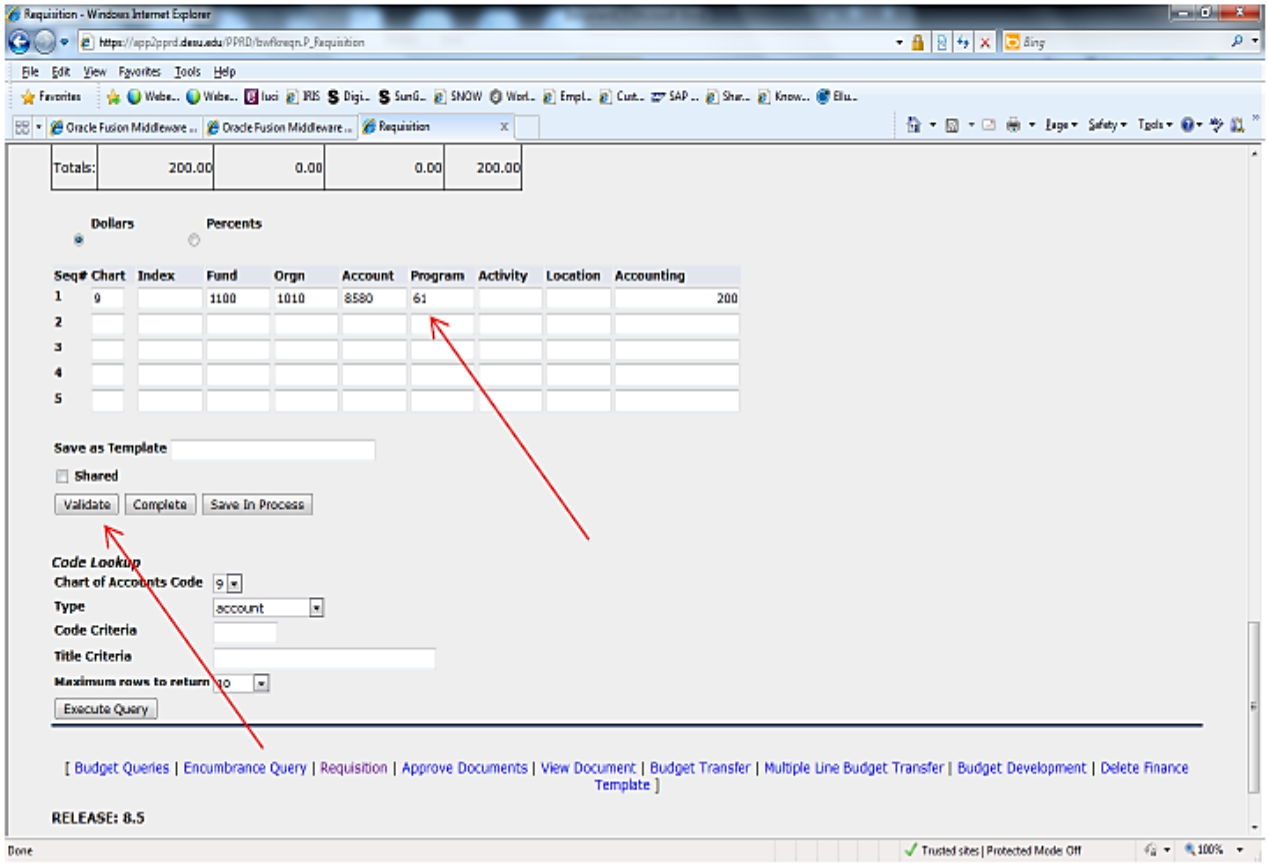
5. Once the vendor is validated, it will prompt you to add the Ship Code. You could also add the ship code before clicking on vendor validate, as then it will not prompt you to add one. Add all the relevant data like – Requestor E-mail, phone etc. similar to how you would enter in Banner.



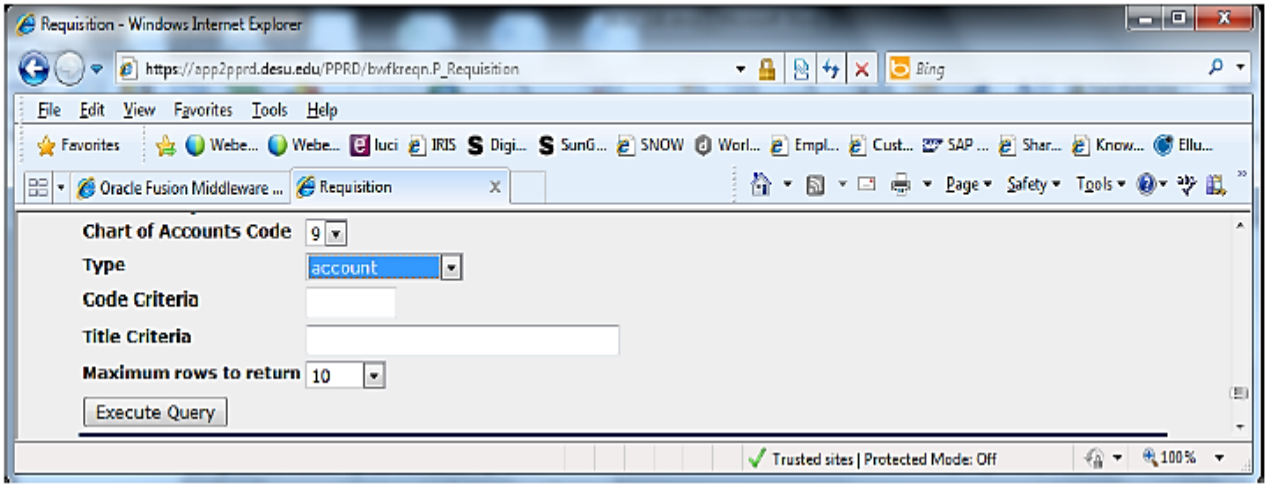
6. Update the Item/Commodity information and click “Commodity Validate” which will populate the table below. You can add multiple item/commodities.



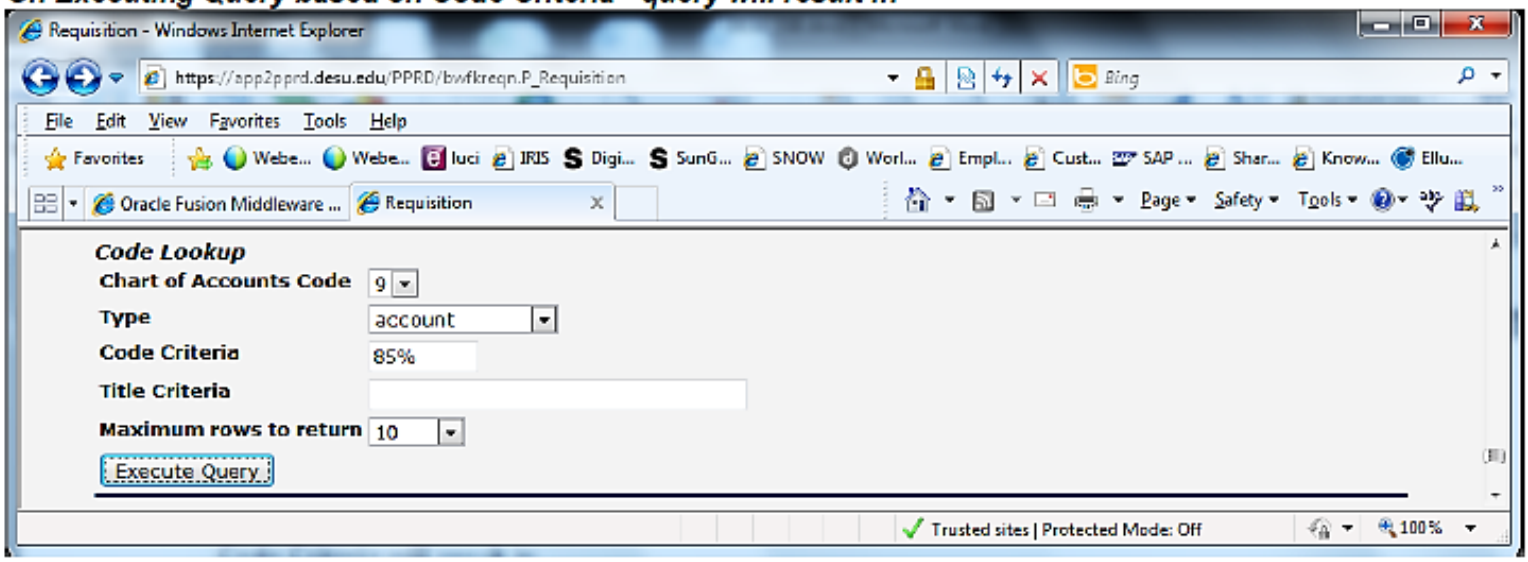
7. Enter the necessary FOAPAL (accounting information). If you have selected the "Dollars" radio check box you will need to enter the net dollar amount in the "Accounting" field otherwise you have selected the "Percent" radio check box and will need to enter 100. Click Validate as this will prompt you for any required fields which needs to be populated but was missed.



Note: if you do not remember and need to lookup the necessary FOAPAL – please use the "Code lookup" section at the bottom of the page. You can either enter the – Code Criteria or Title Criteria as needed.



On Executing Query based on Code Criteria - query will result in



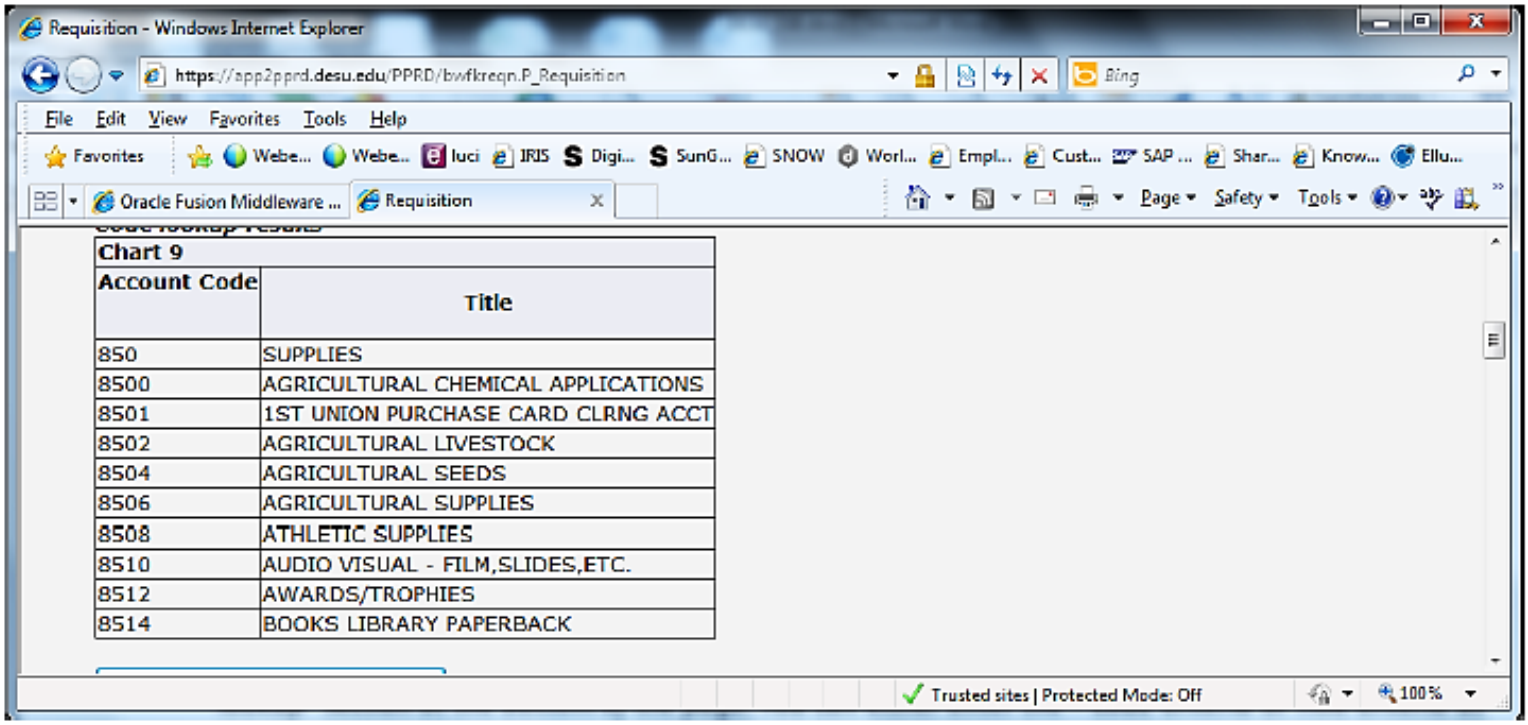
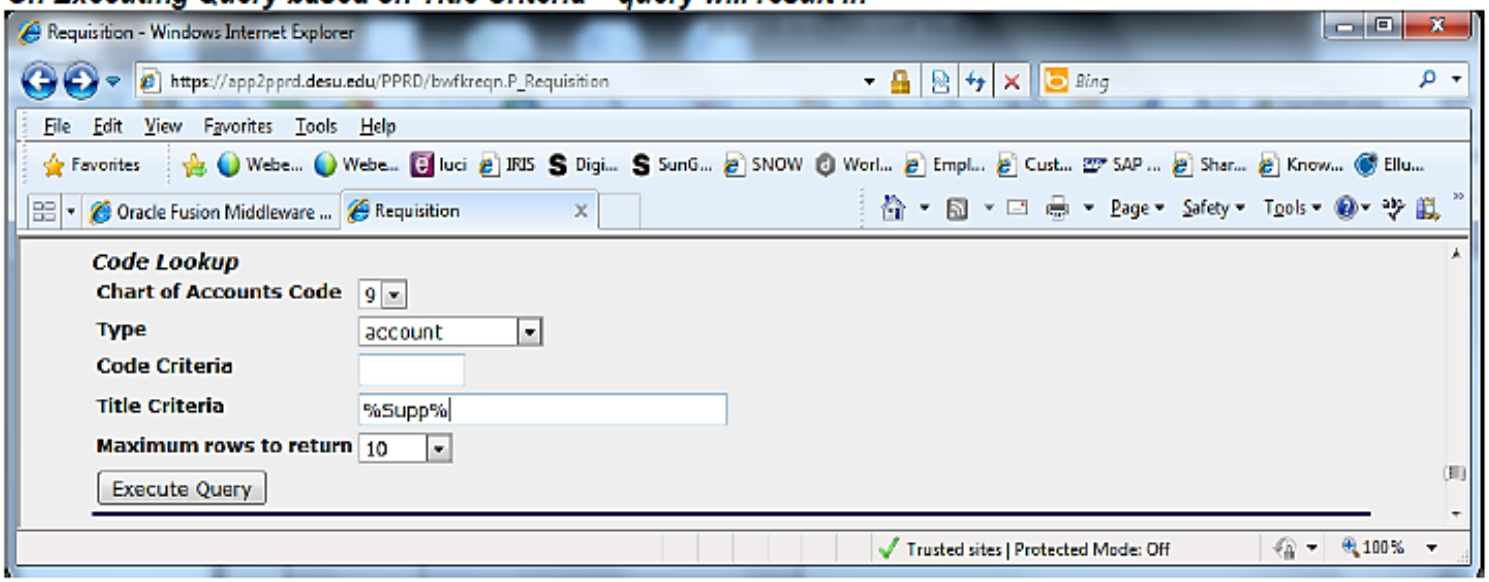
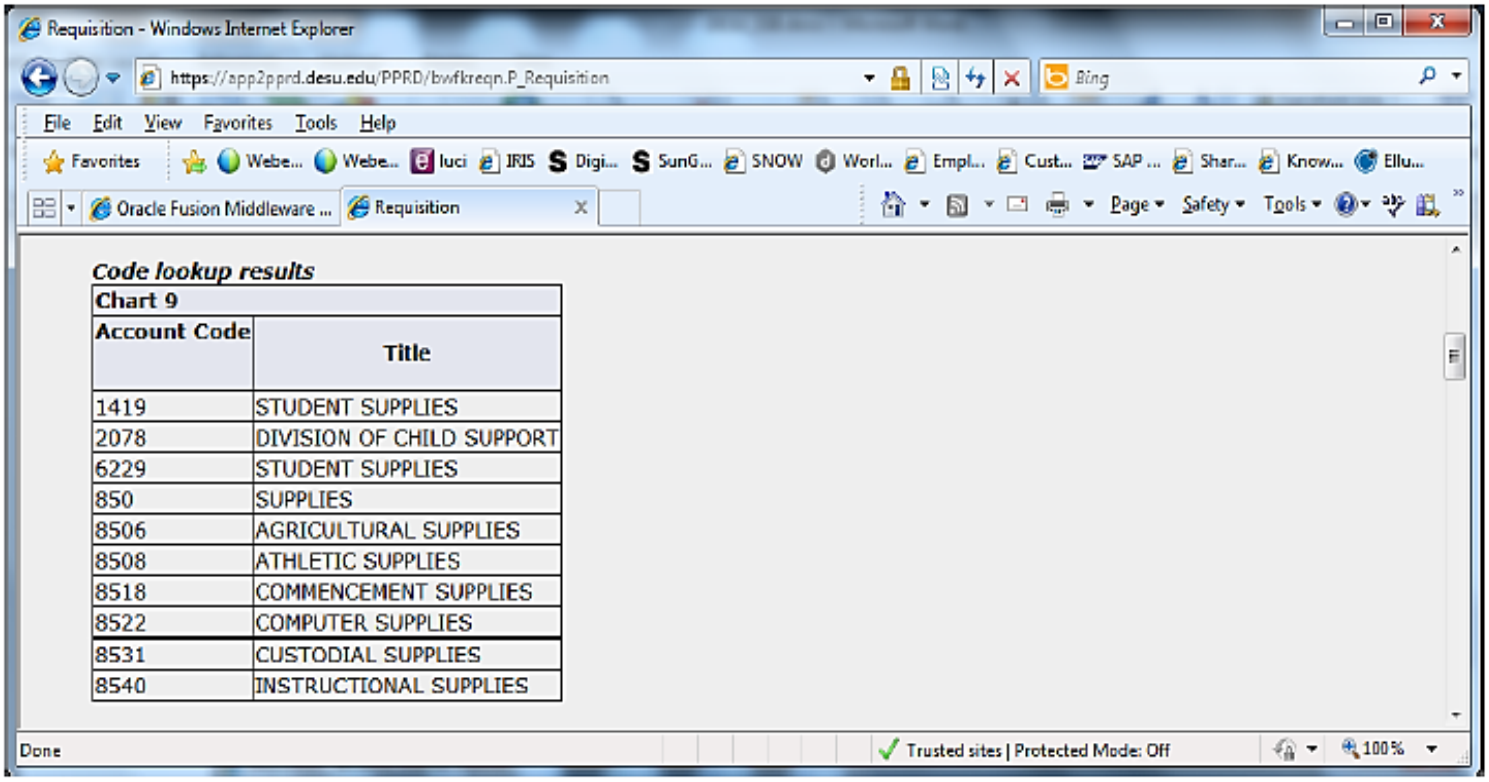


Chart 9	
Account Code	**Title**
850	SUPPLIES
8500	AGRICULTURAL CHEMICAL APPLICATIONS
8501	1ST UNION PURCHASE CARD CLRNG ACCT
8502	AGRICULTURAL LIVESTOCK
8504	AGRICULTURAL SEEDS
8506	AGRICULTURAL SUPPLIES
8508	ATHLETIC SUPPLIES
8510	AUDIO VISUAL - FILM,SLIDES,ETC.
8512	AWARDS/TROPHIES
8514	BOOKS LIBRARY PAPERBACK

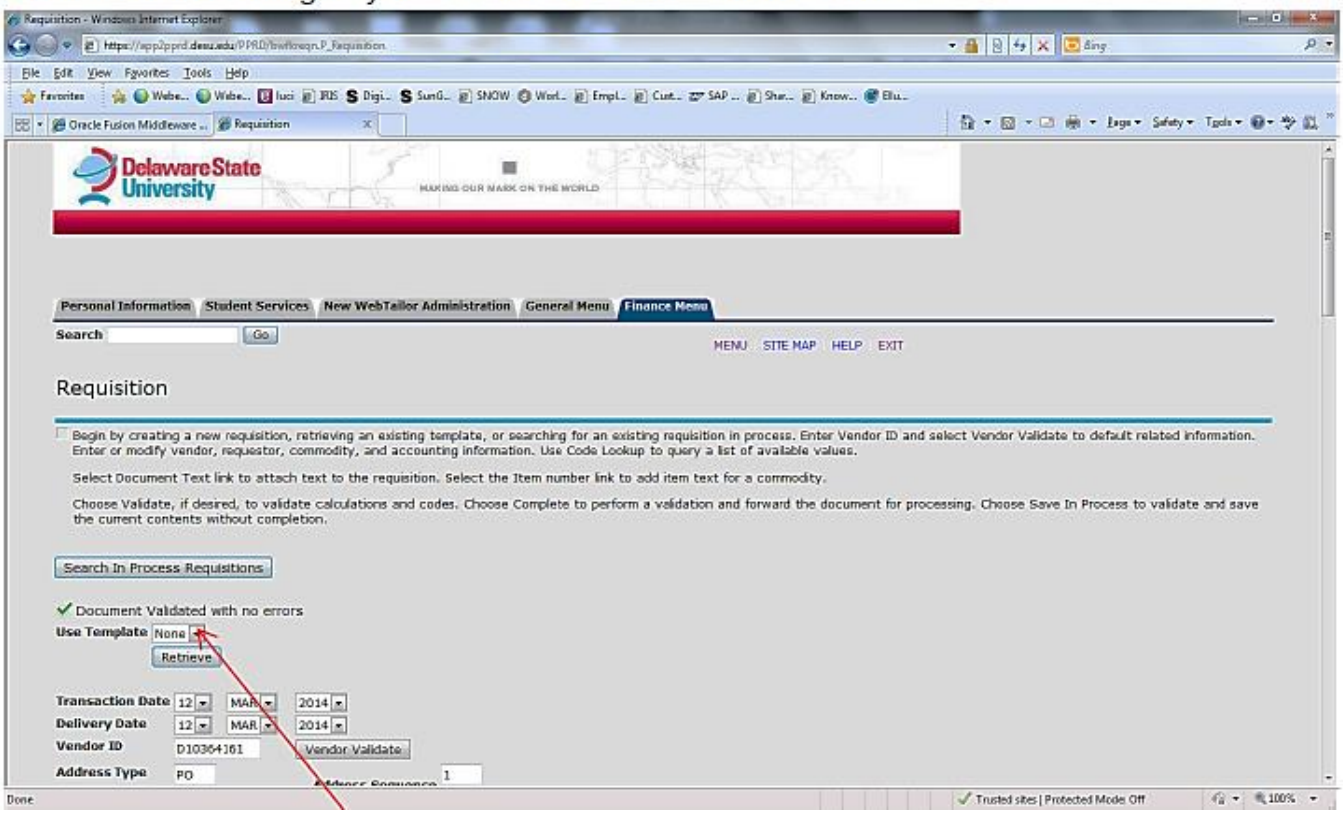
On Executing Query based on Title Criteria – query will result in



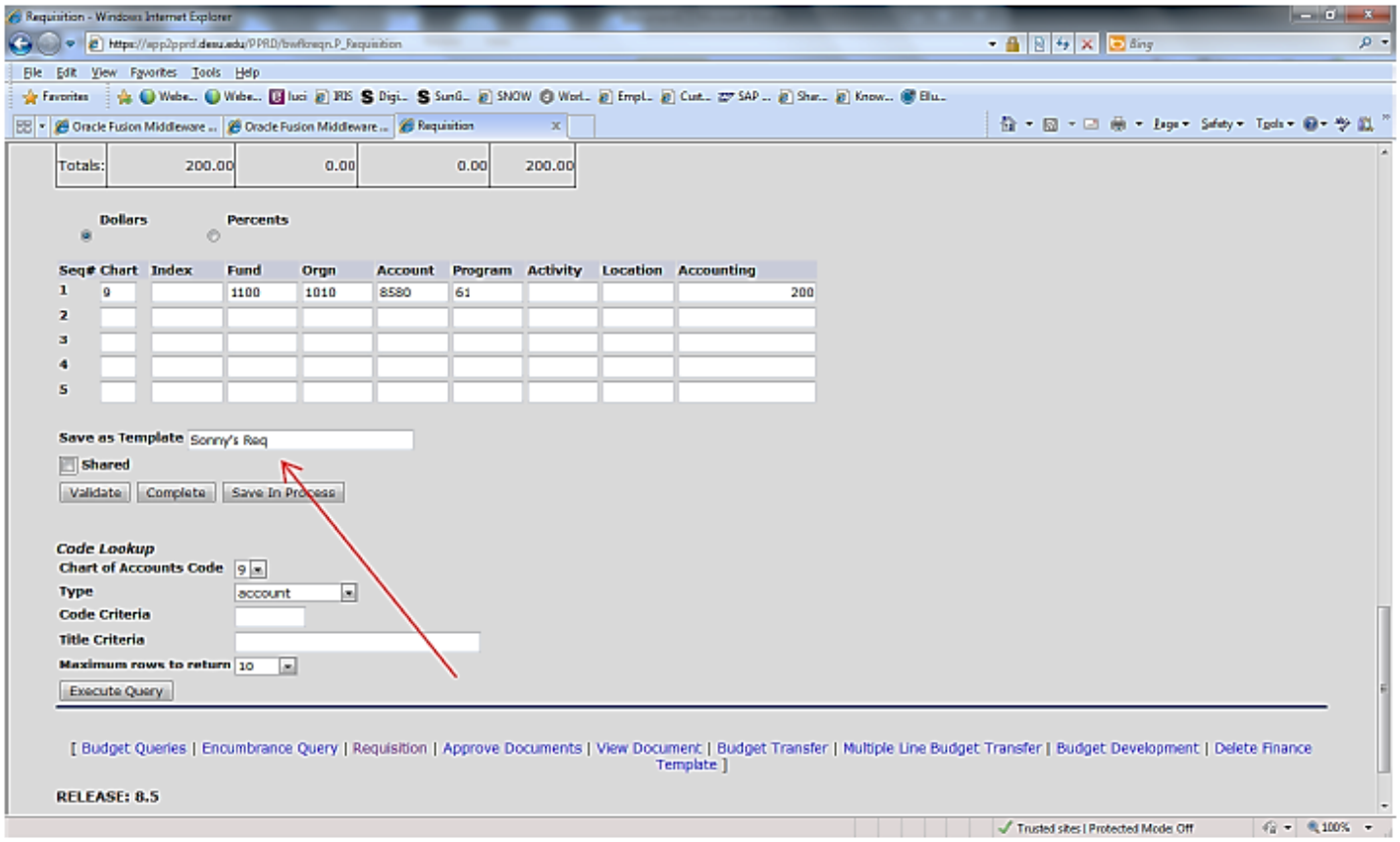


Account Code	Title
1419	STUDENT SUPPLIES
2078	DIVISION OF CHILD SUPPORT
6229	STUDENT SUPPLIES
850	SUPPLIES
8506	AGRICULTURAL SUPPLIES
8508	ATHLETIC SUPPLIES
8518	COMMENCEMENT SUPPLIES
8522	COMPUTER SUPPLIES
8531	CUSTODIAL SUPPLIES
8540	INSTRUCTIONAL SUPPLIES

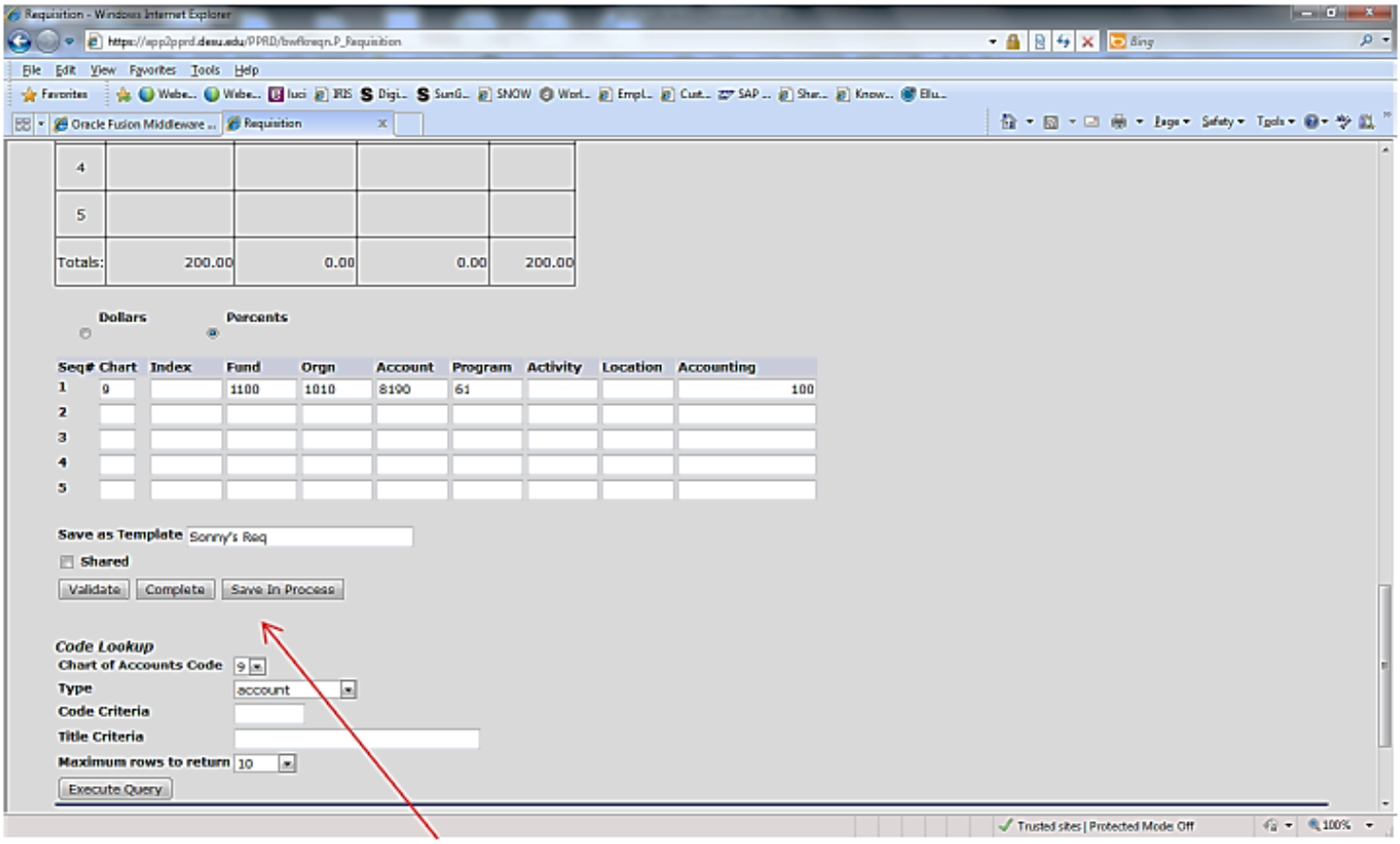
8. Once validated it will give you "Document Validated with no errors" .



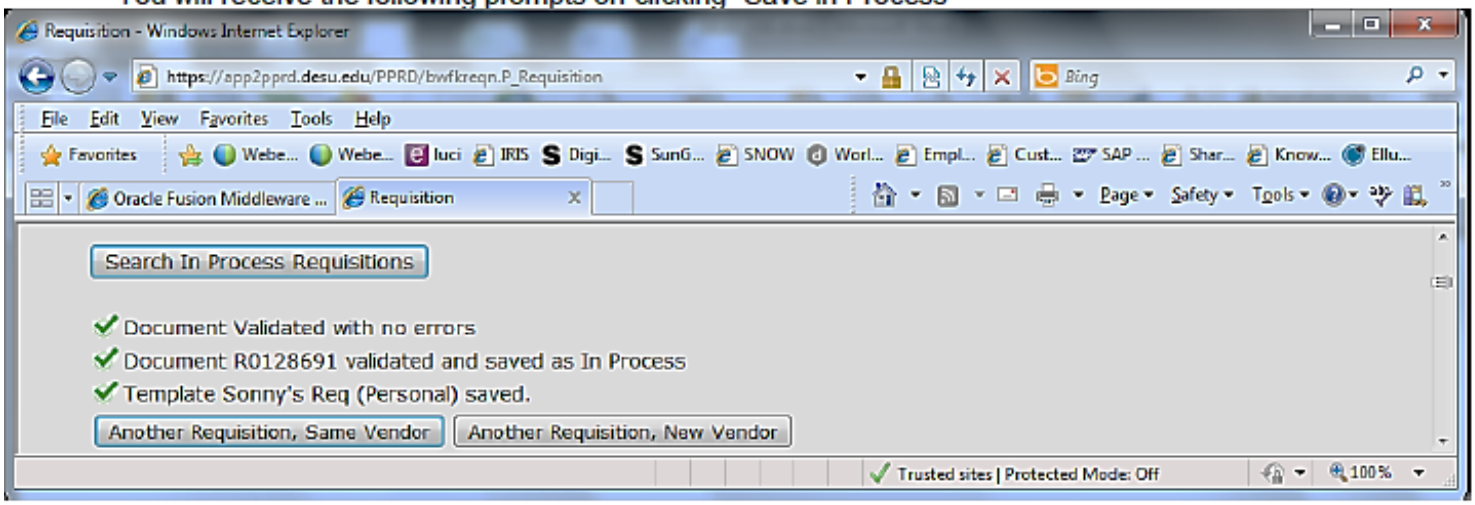
OPTIONAL –9. You can also save the template by entering a name for it.



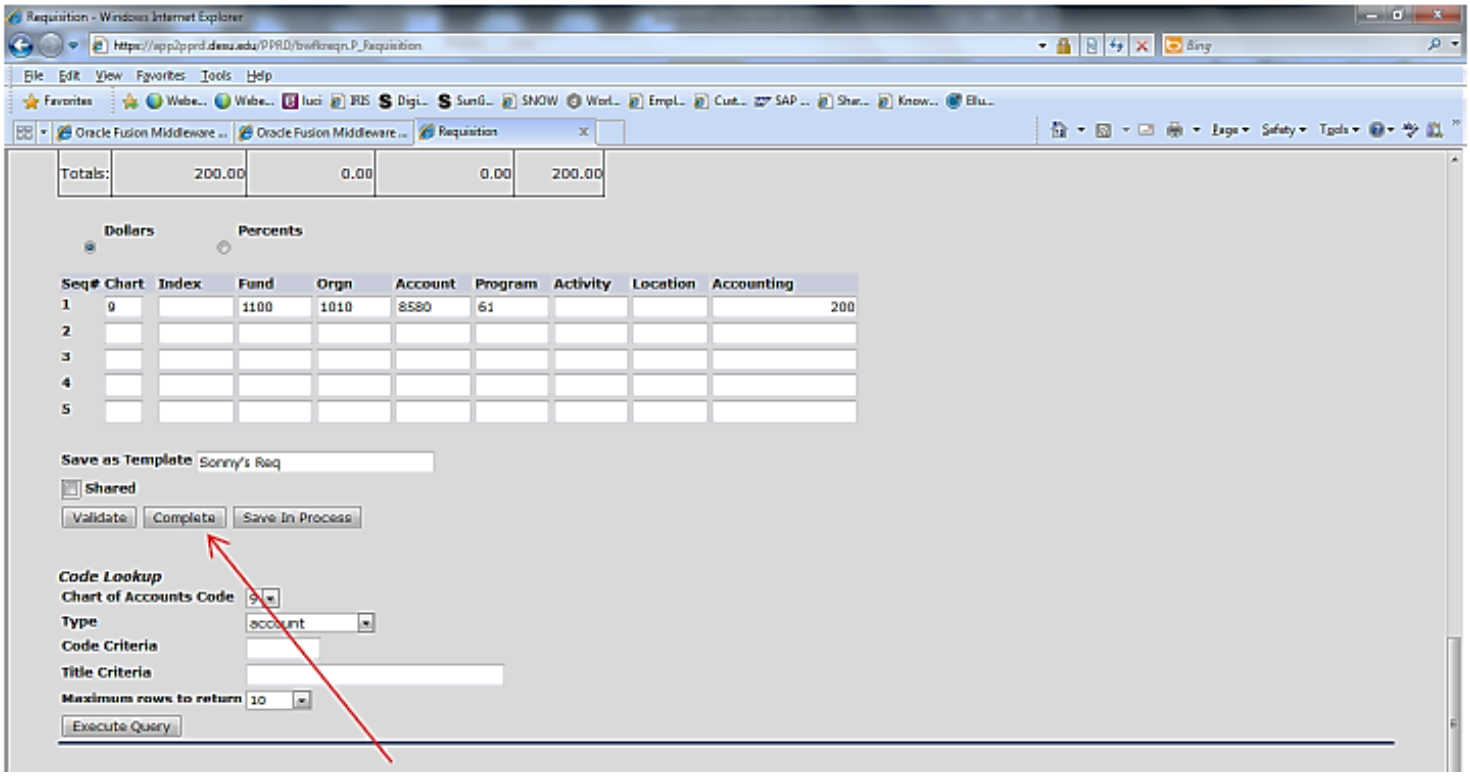
10. Click “Save in Process” to finish the requisition at a later time or go to #11.



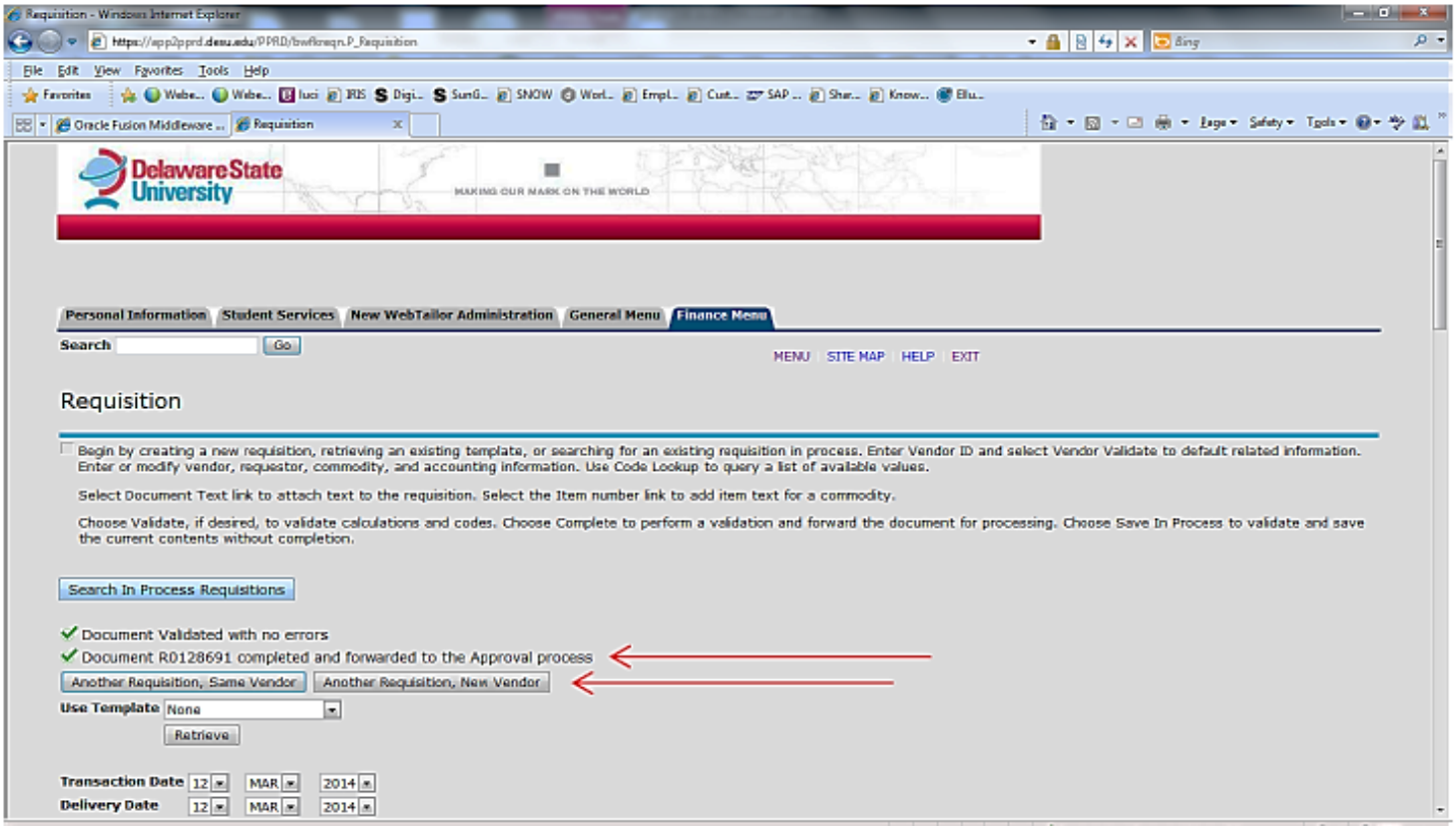
You will receive the following prompts on clicking “Save in Process”



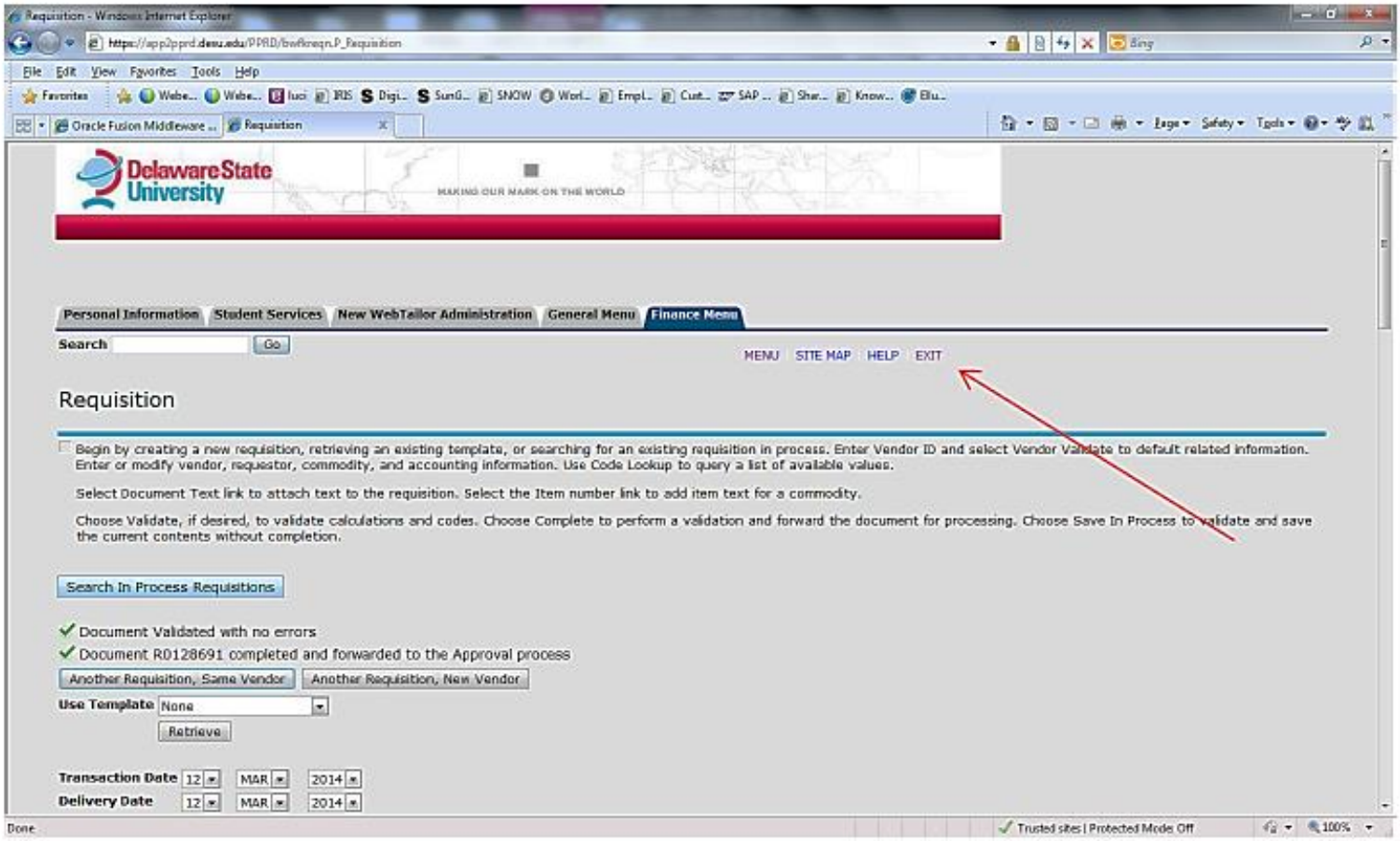
11. Once you receive the success prompt – click on “Complete” to submit the requisition.

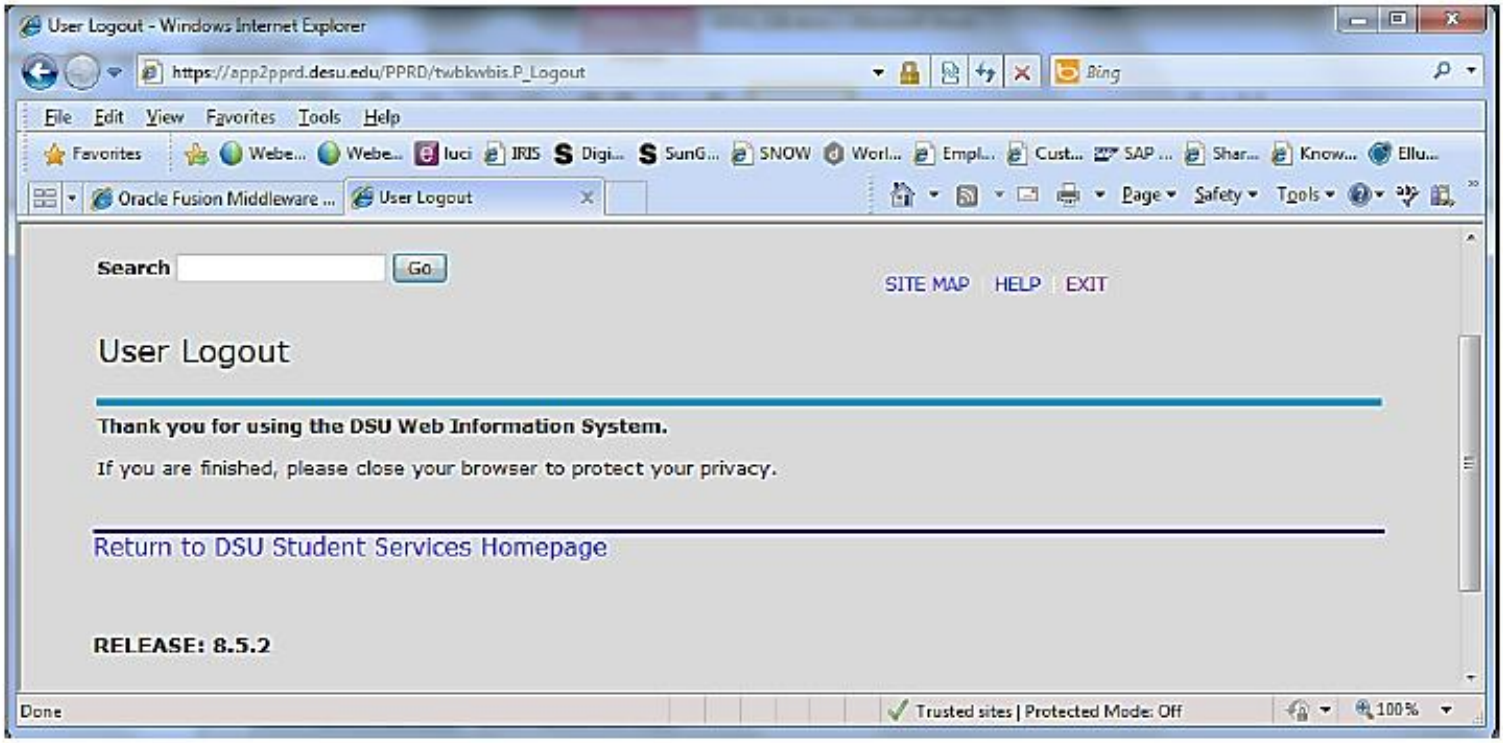


12. You will receive the message “Document Rxxxxxxx was completed and forwarded to the Approval process”. At this point you could either enter another requisition with the same vendor or a new vendor. Click on the buttons as per your choice.



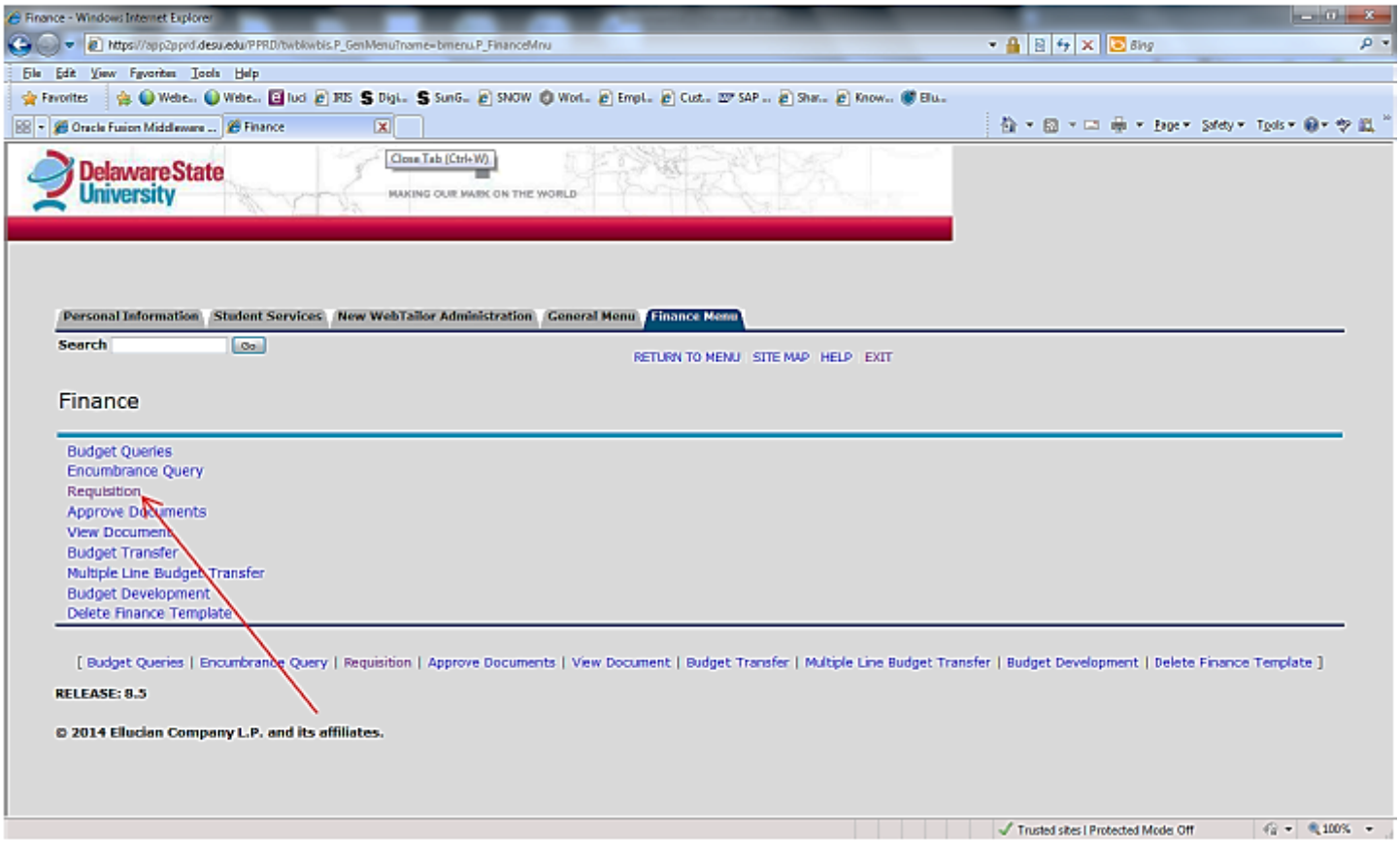
13. If you need to exit then click “EXIT” on top left corner.



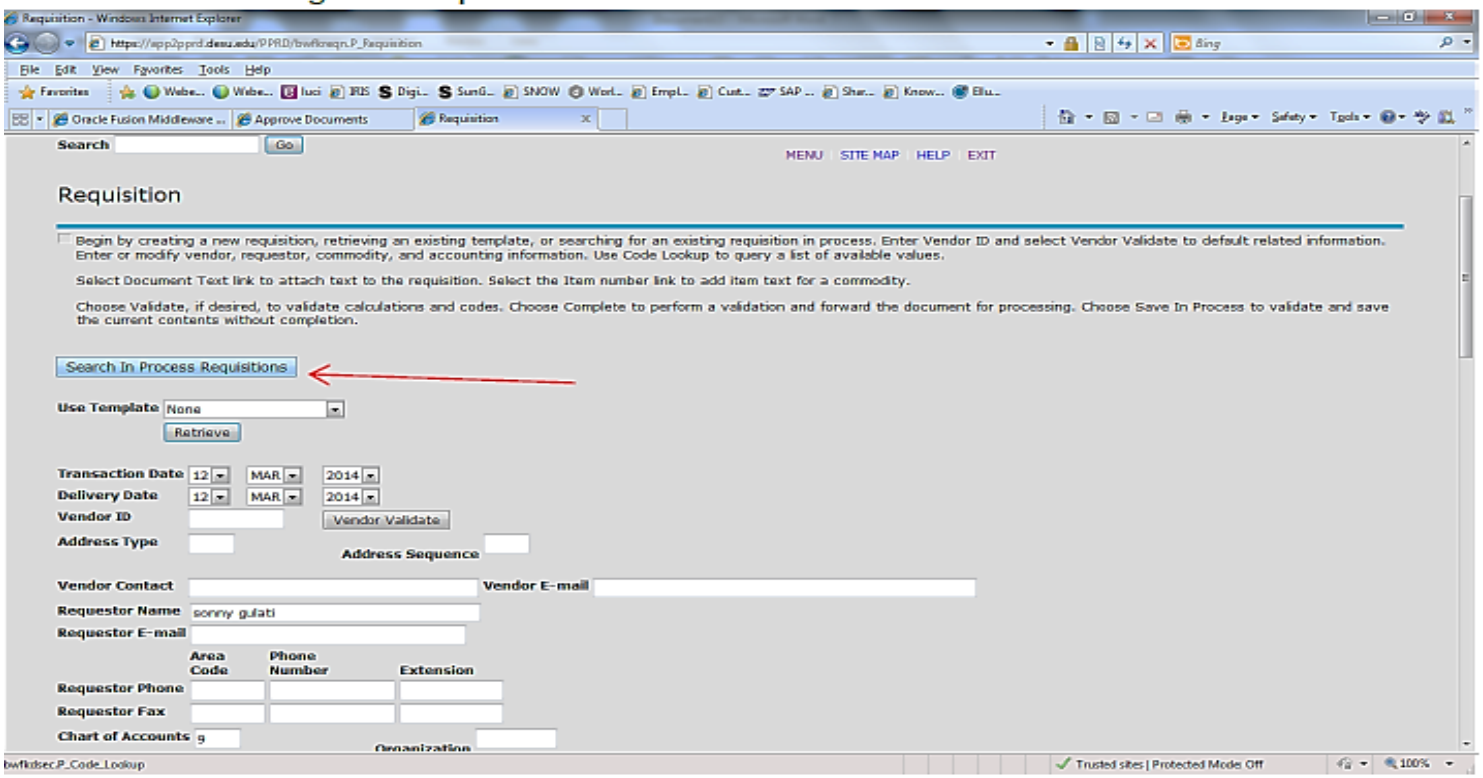


Completing a Requisition in Process

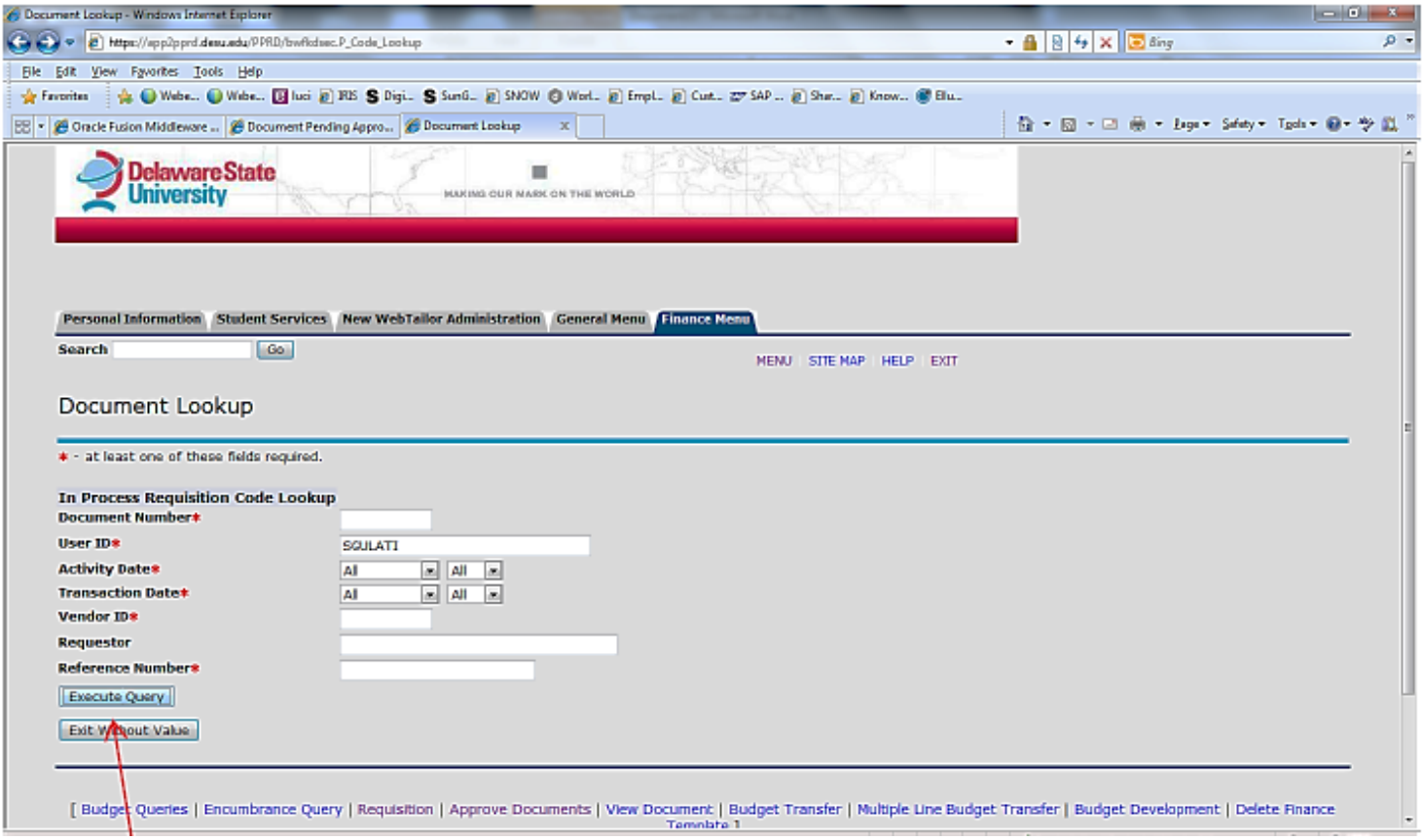
3. Once within the Finance menu- click on the Requisition link



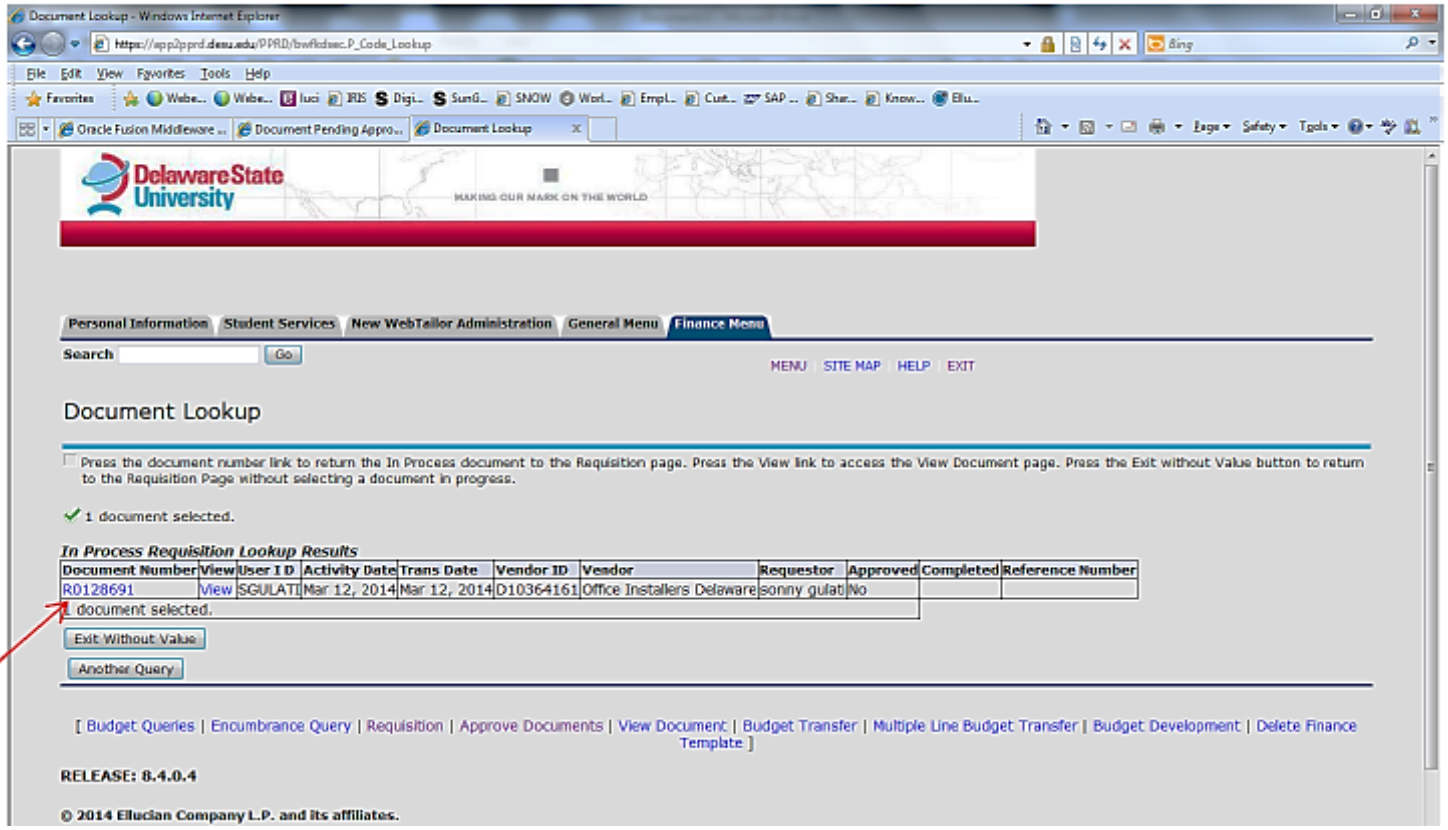
Click "Search in Progress Requisition"



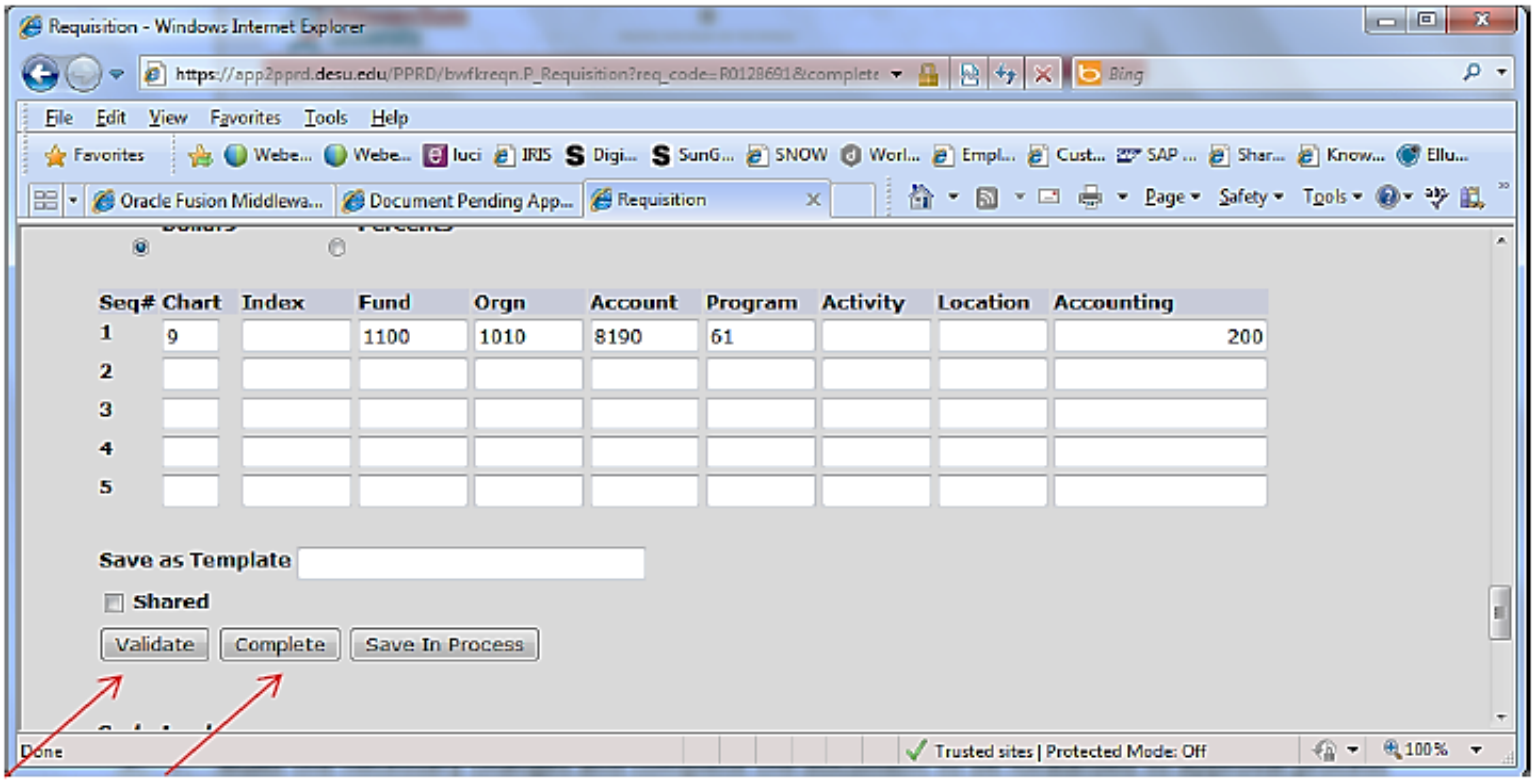
5. Ensure your user id shows and then click "Execute Query"



6. You will see the requisitions which are in progress. Click the requisition number to make changes or complete the document.

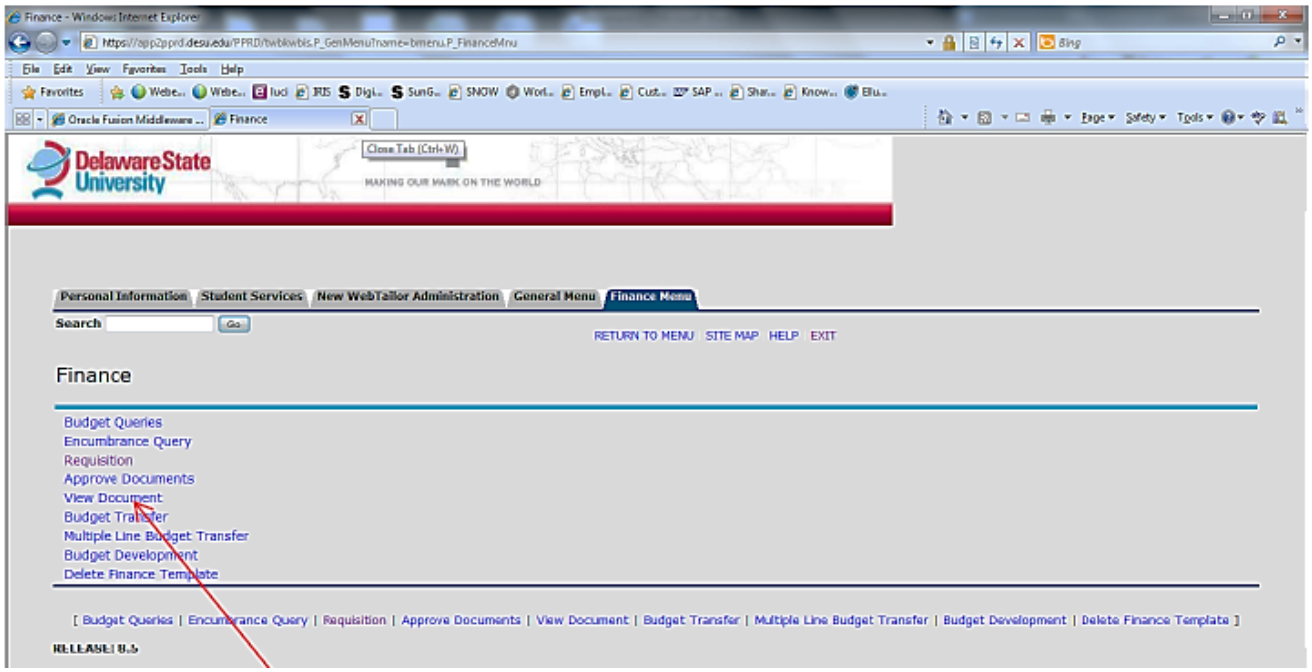


7. Make the necessary changes or continue to complete the document. Click validate and then complete for the document to be forwarded to approval process. (**Note:** ***Follow the same steps as entering a requisition to complete***). Click "Exit" when done.

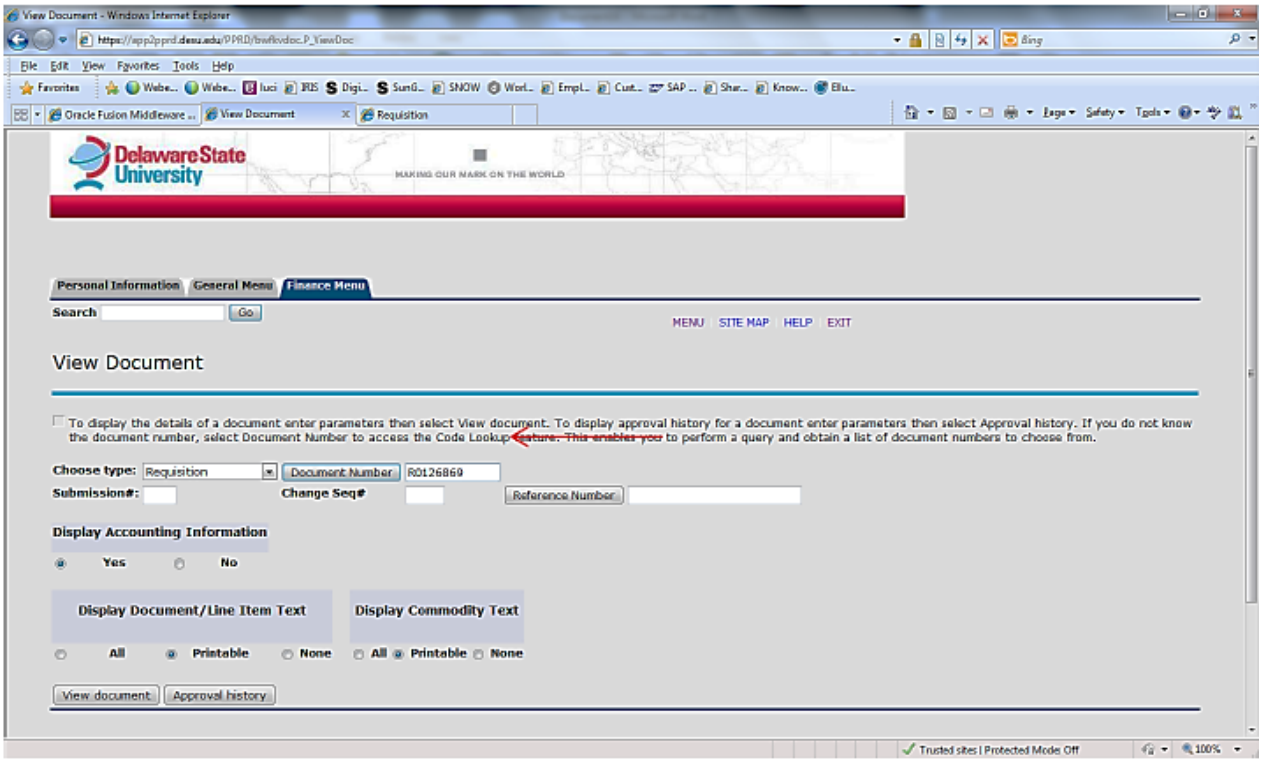


Viewing a Document

3. Once within the Finance menu- click on the View Document link

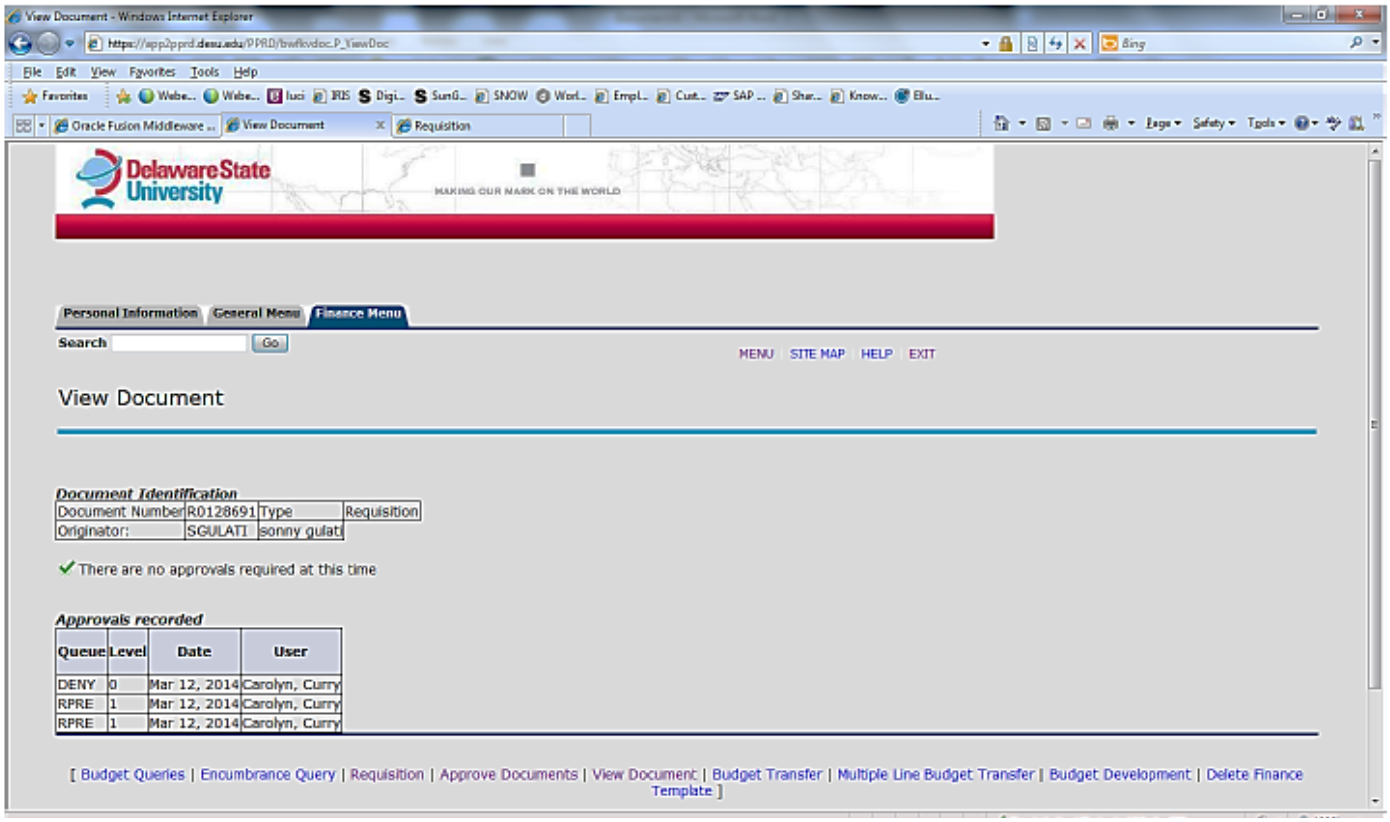


4. Enter the document number and make your selection for the document. You can either click "View Document" or "Approval history".

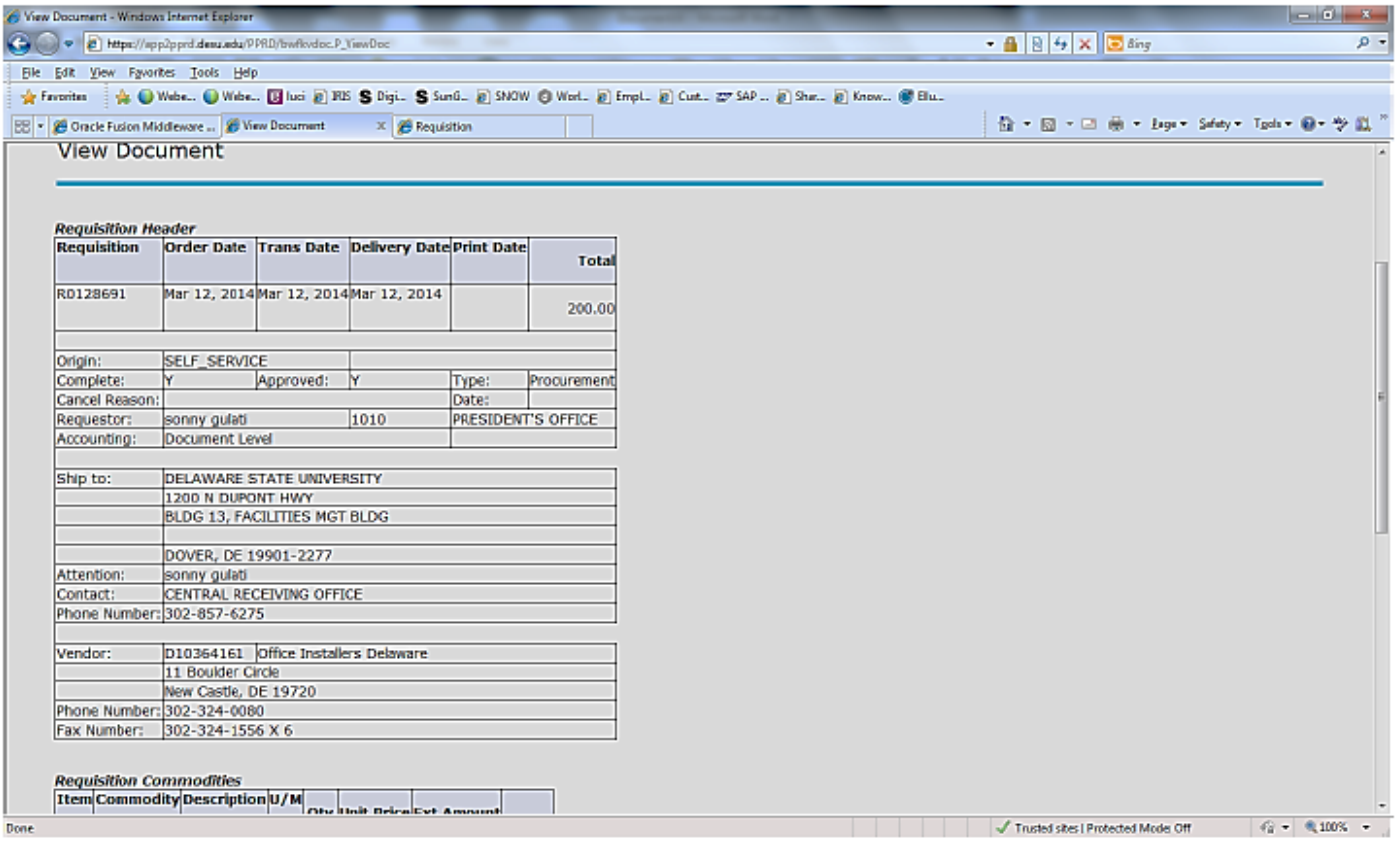


*If you are unsure of your document number, leave it blank and click the document number button. This will allow you to do a document lookup by your name.

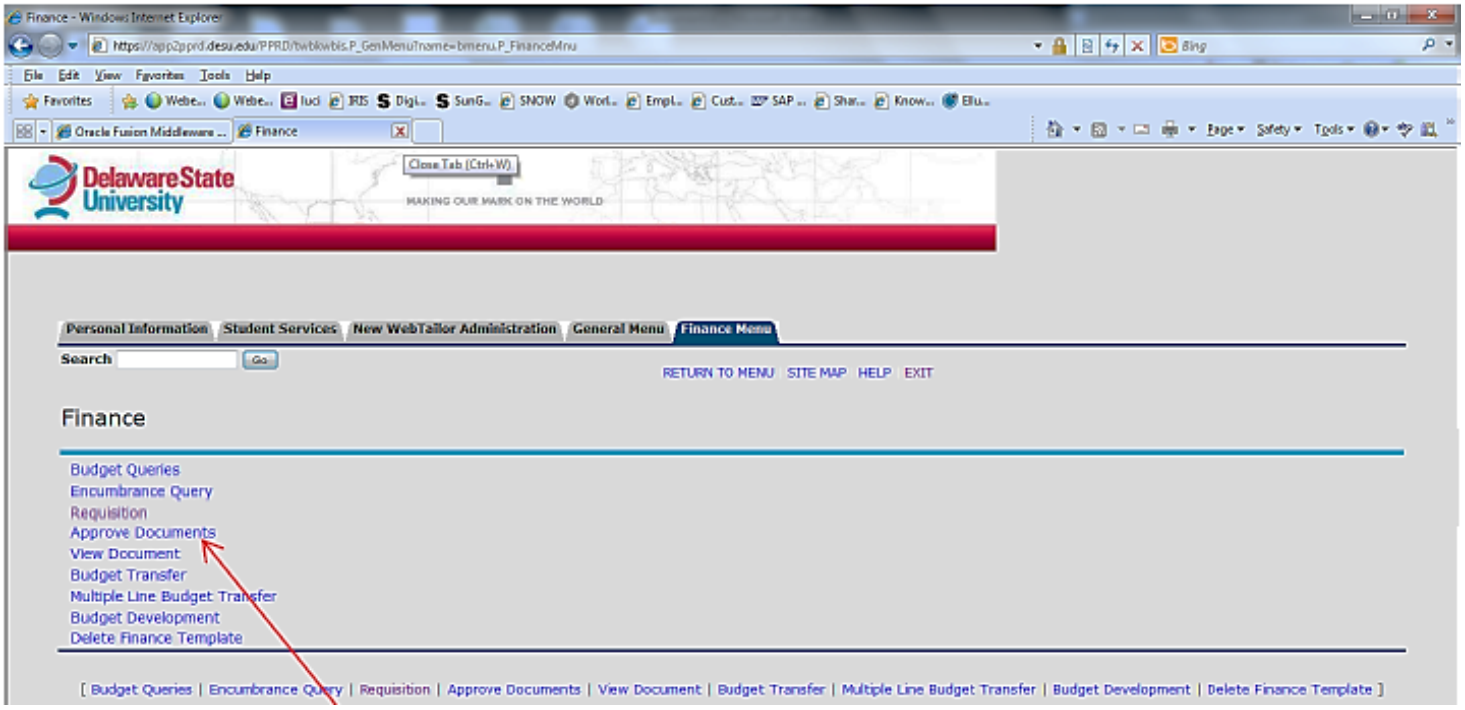
5. On clicking "Approval History" – it displays all the approval associated to the document with queue id, queue level, date and user.



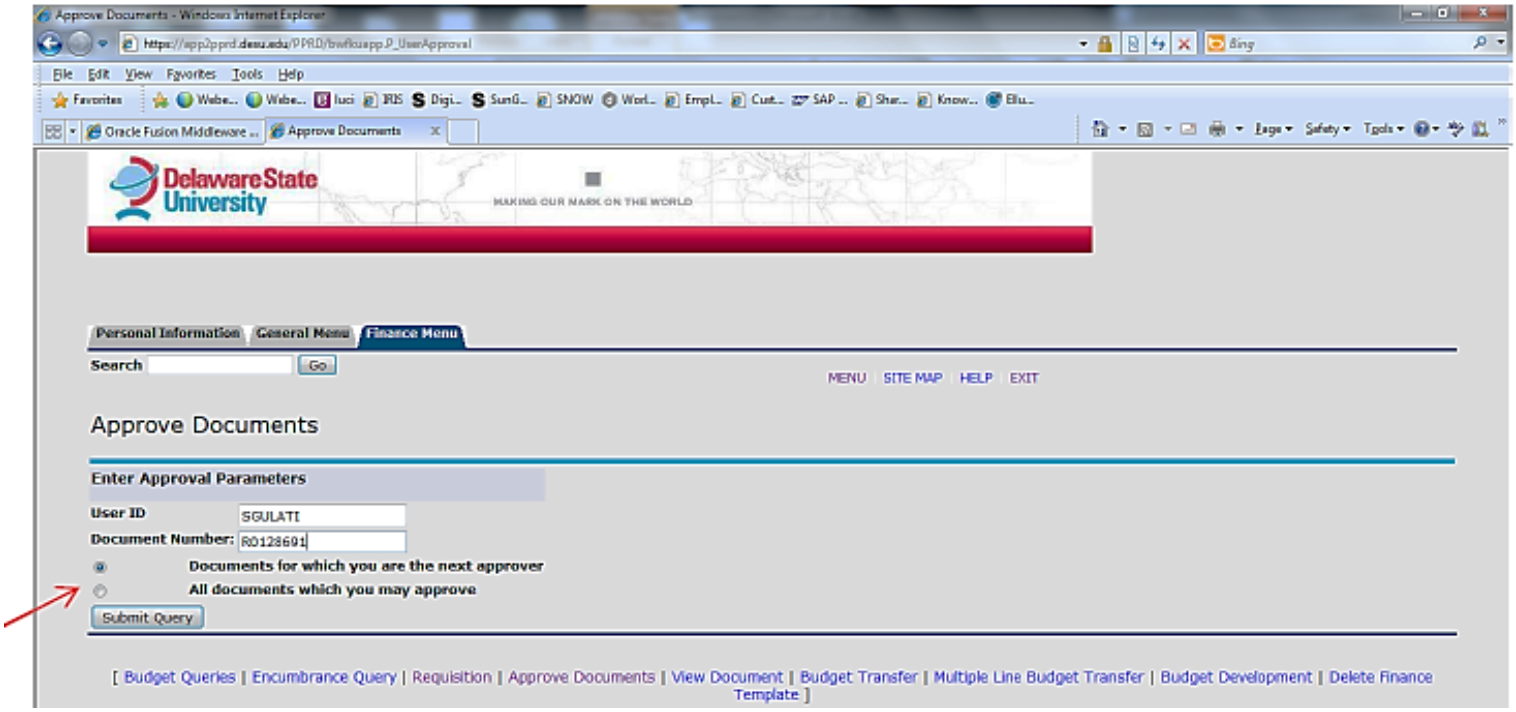
6. On clicking "View Document" – it will display the document details.



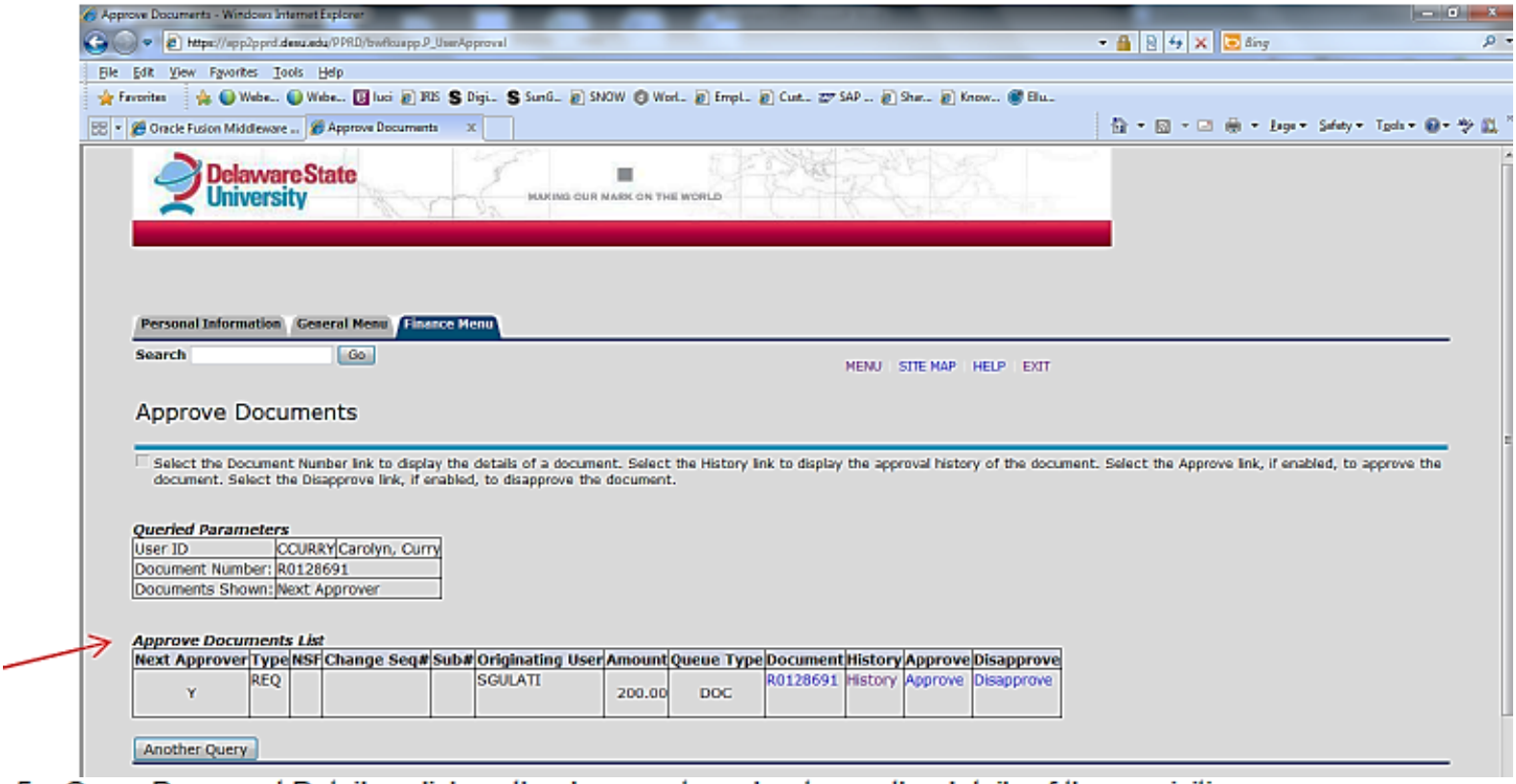
3. Once within the Finance menu- click on the Approve Document link



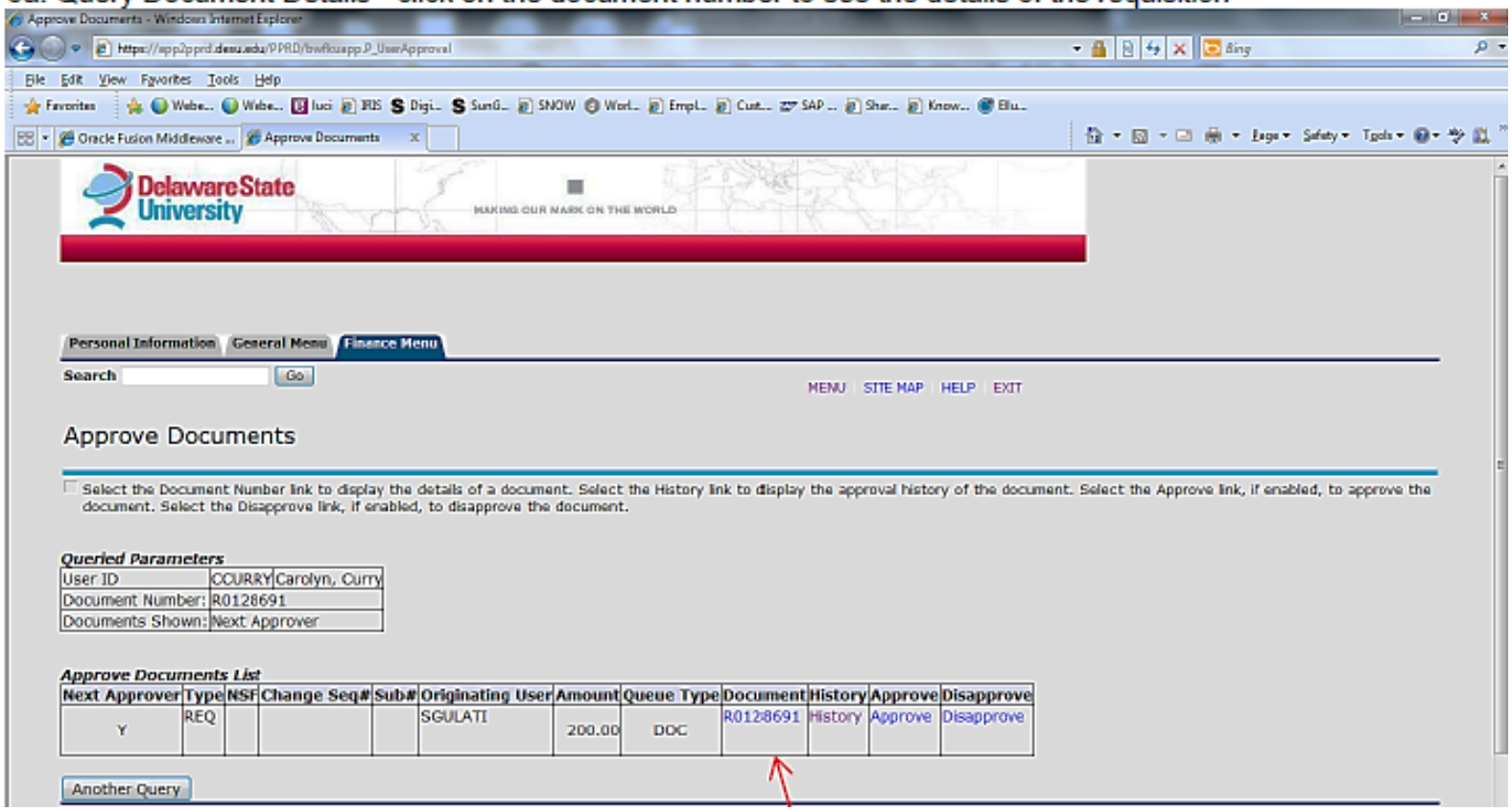
4. Being the approver your User Id will show up. You can select either of the 2 radio check box to search for documents needing approval or enter a document number and click submit query.



5. You will see the Approve Document list waiting for your approval. Once you see the Approve Document list you can do any of the following
    a. Query document details
    b. Approve
    c. Disapprove



5a. Query Document Details - click on the document number to see the details of the requisition



5a. This will give you the details of the requisition document

View Document - Windows Internet Explorer

https://app2pprd.desu.edu/PPRD/bwfkvdoc.P_ViewDoc?action=disp_REQ&global_doc=R0128691&subnum=&chngnum=&disp_actg=Y&disp_text=P&view_doc=View+do

File Edit View Favorites Tools Help

Oracle Fusion Middleware ... | View Document

View Document

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0128691	Mar 12, 2014	Mar 12, 2014	Mar 12, 2014		200.00

Origin:	SELF_SERVICE				
Complete:	Y	Approved:	N	Type:	Procurement
Cancel Reason:				Date:	
Requestor:	sonny gulati		1010	PRESIDENT'S OFFICE	
Accounting:	Document Level				

Ship to:	DELAWARE STATE UNIVERSITY
	1200 N DUPONT HWY
	BLDG 13, FACILITIES MGT BLDG
	DOVER, DE 19901-2277
Attention:	sonny gulati
Contact:	CENTRAL RECEIVING OFFICE
Phone Number:	302-857-6275

Vendor:	D10364161	Office Installers Delaware
	11 Boulder Circle	
	New Castle, DE 19720	
Phone Number:	302-324-0080	
Fax Number:	302-324-1556 X 6	

Requisition Commodities

Done | Trusted sites | Protected Mode Off | 100%

View Document - Windows Internet Explorer

https://app2pprd.desu.edu/PPRD/bwfkvdoc.P_ViewDoc?action=disp_REQ&global_doc=R0128691&subnum=&chngnum=&disp_actg=Y&disp_text=P&view_doc=View+do

File Edit View Favorites Tools Help

Oracle Fusion Middleware ... | View Document

Requisition Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount	
				Disc	Addl	Tax	Cost
1		test	EA	1	200	200.00	
				0.00	0.00	0.00	200.00
					Total:	200.00	

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	9	14		1100	1010	8190	61				N	N	N	200.00
Total of displayed sequences:														200.00

✔ No Related Documents Available

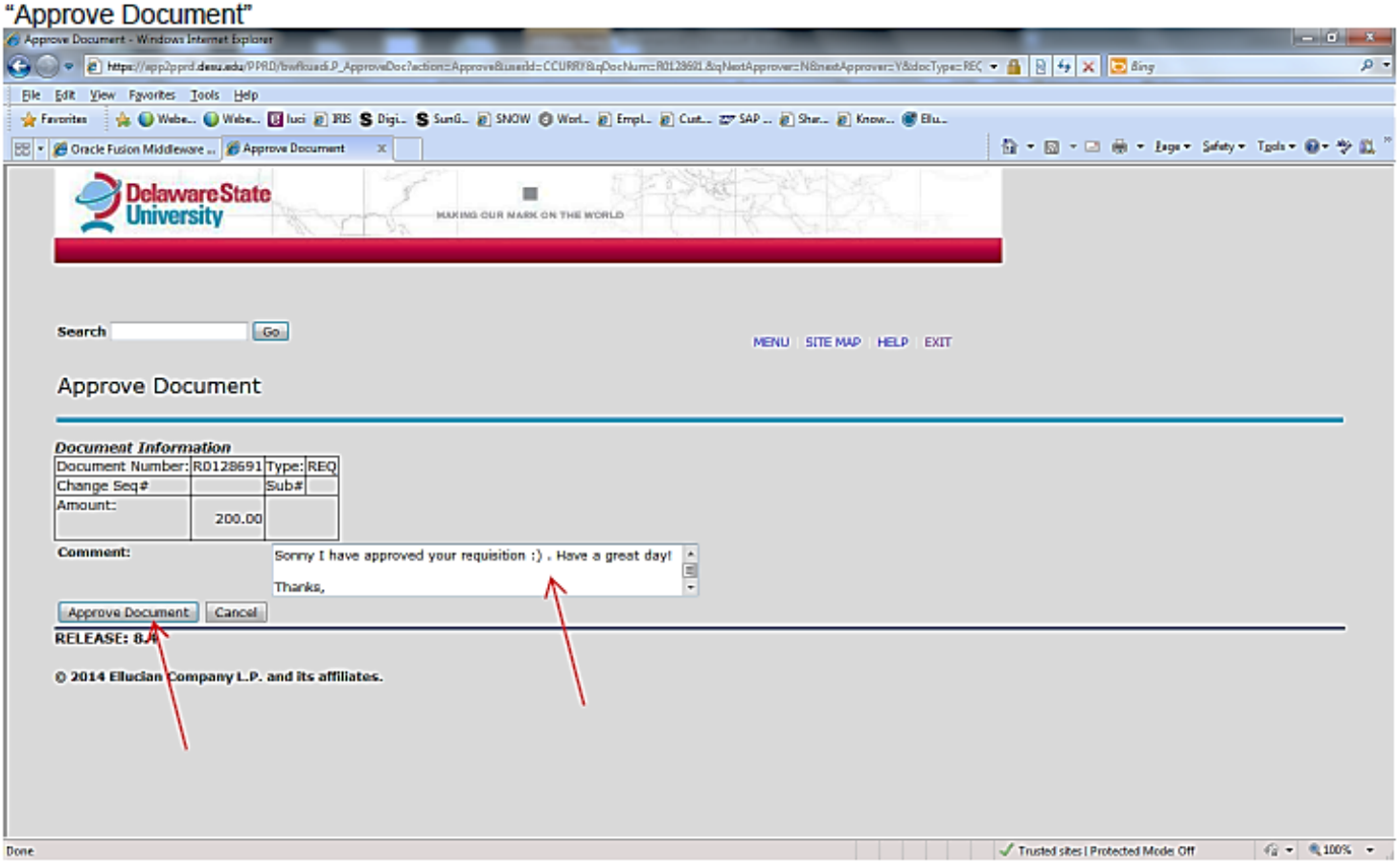
[Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Budget Development | Delete Finance Template]

RELEASE: 8.2

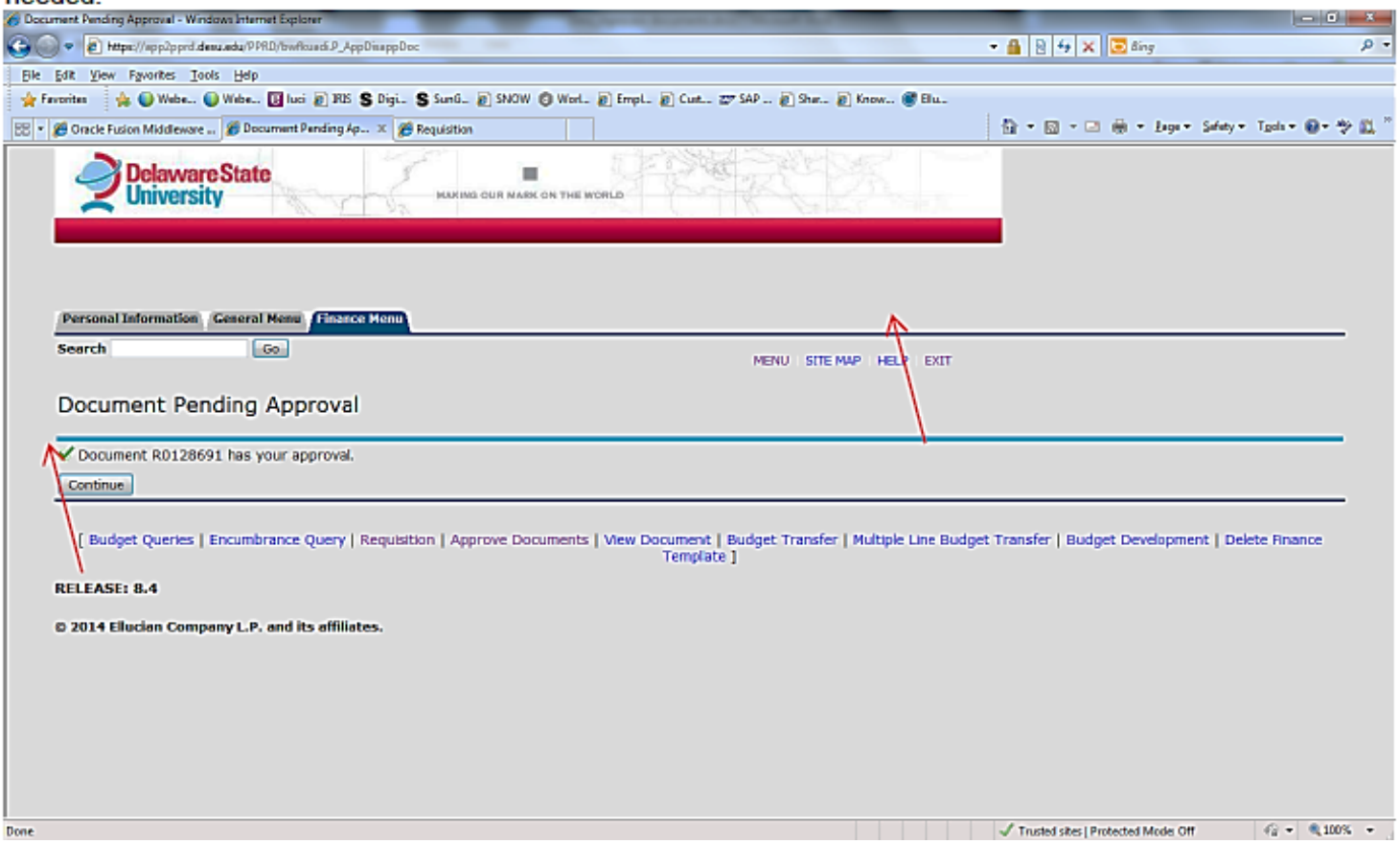
© 2014 Ellucian Company L.P. and its affiliates.

Done | Trusted sites | Protected Mode Off | 100%

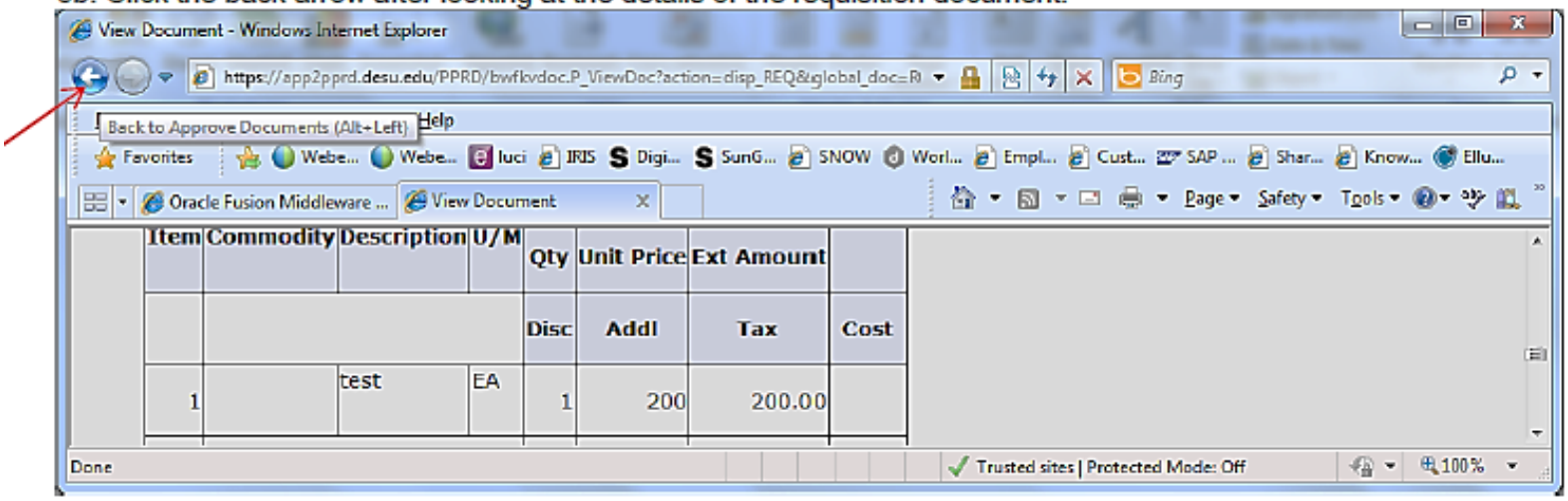
5b. On Choosing Approve - you will receive the following page to enter any comments and click "Approve Document"



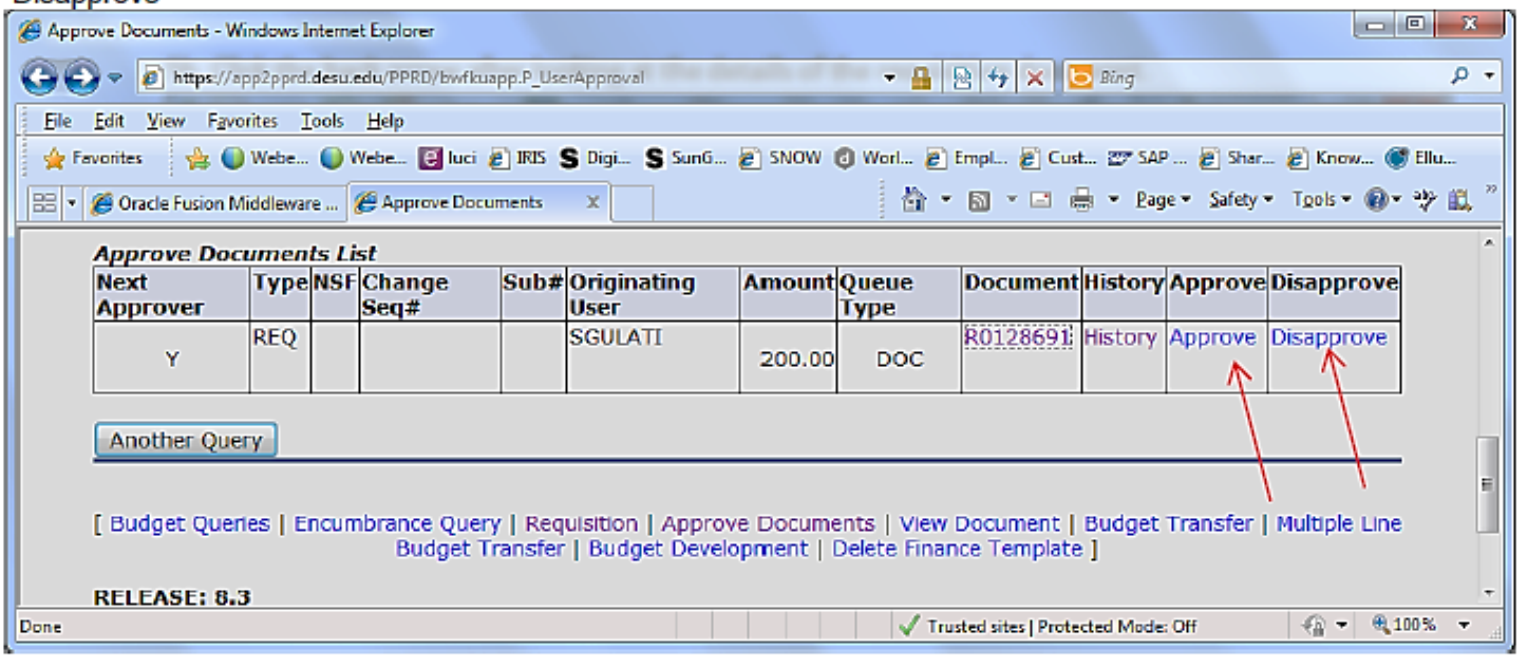
It will bring you to the page showing you have approved the document. Click "Continue" or "EXIT" as needed.



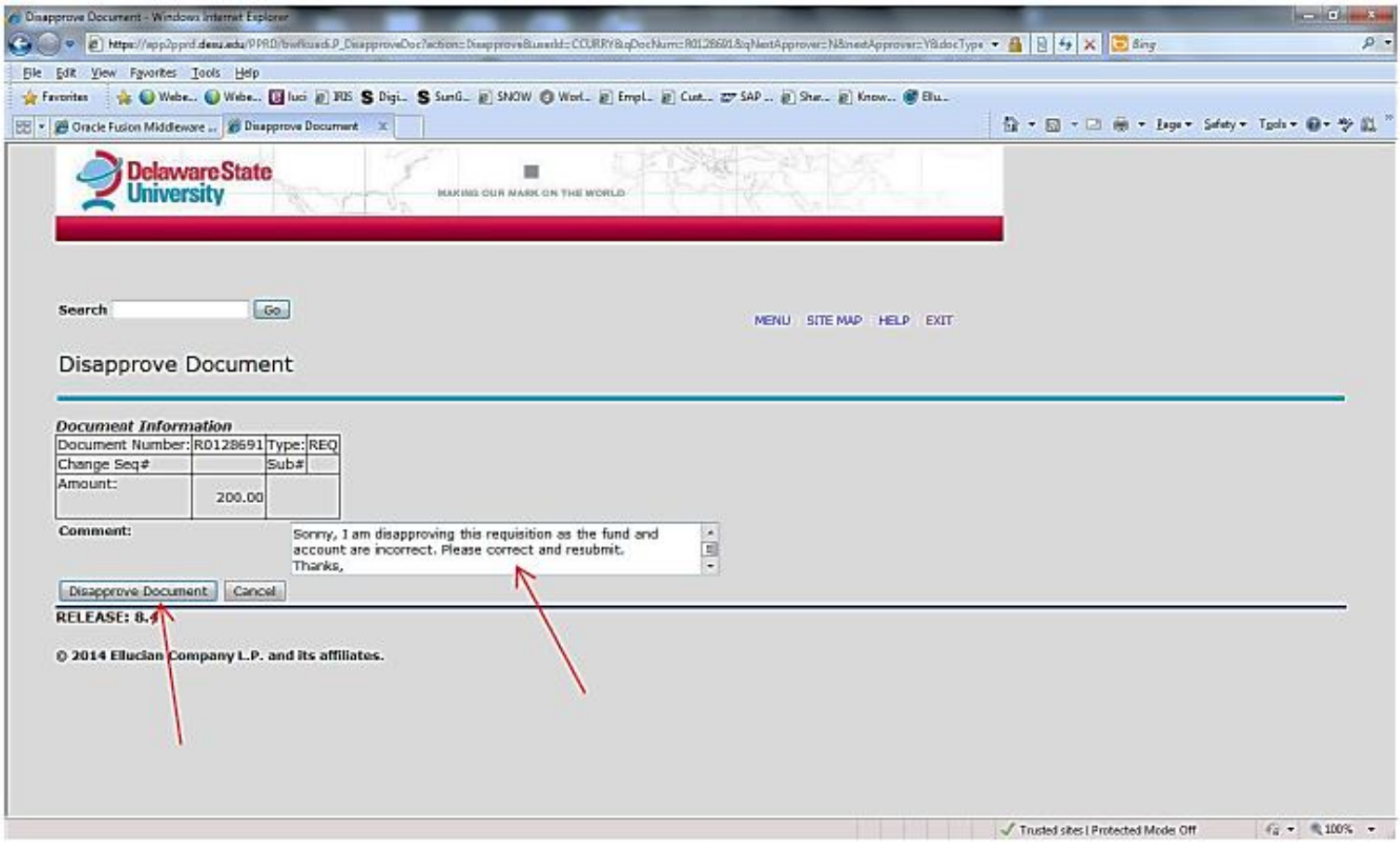
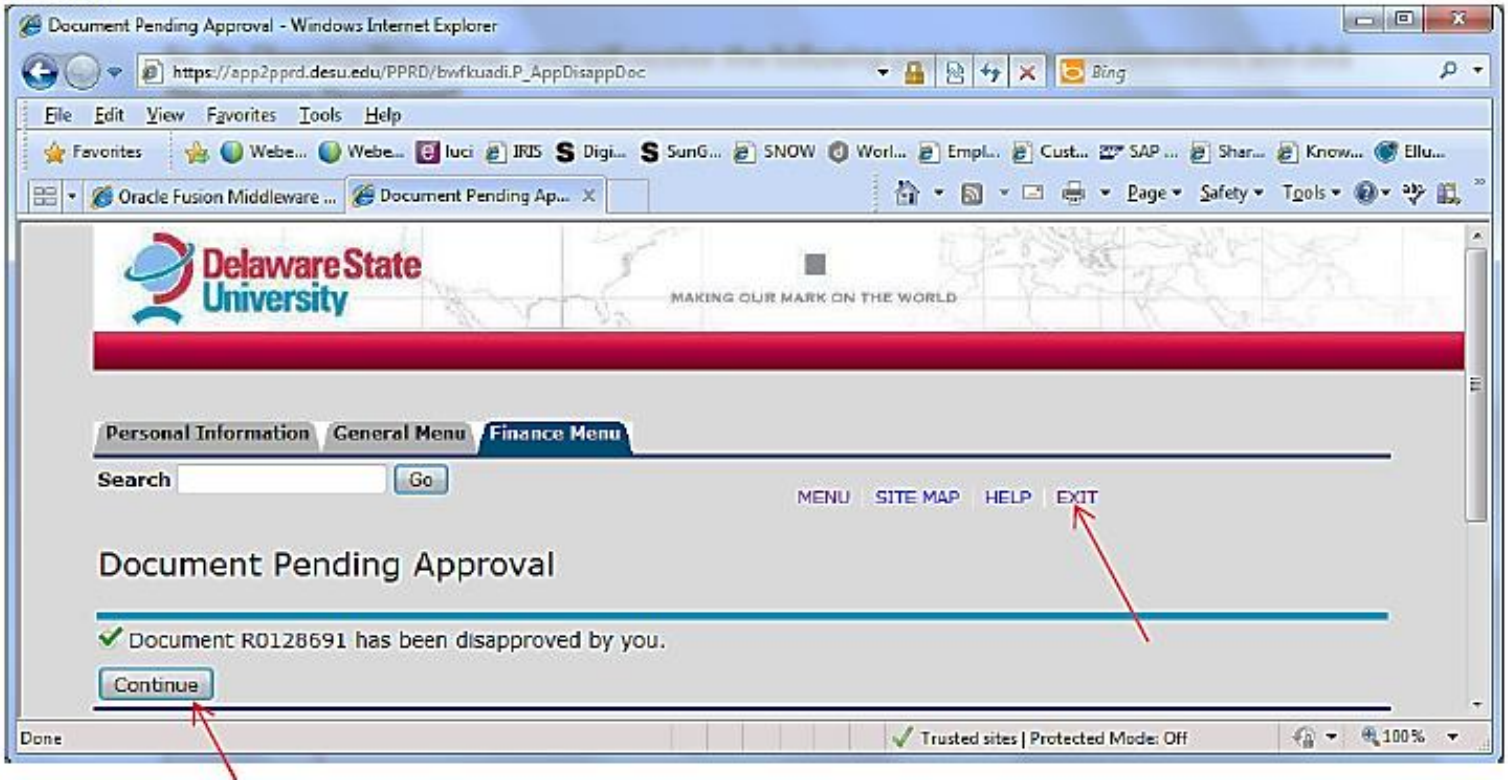
5b. Click the back arrow after looking at the details of the requisition document.



This will bring you back to the Approve Document List and you can either click "Approve" or 'Disapprove"



5c. On Choosing Disapprove - you will receive the following page to enter any comments and click "Disapprove Document"



It will bring you to the page showing you have disapproved the document. Click "Continue" or "EXIT" as needed.