CREATING A REQUISITION and How to check Approval Status

Prior to entering a requisition, the vendor must be setup in Banner. If you have a vendor number, continue with below. If you do not, forward the vendor package to purchasing@fit.edu The vendor number will be created by the Purchasing Dept. and emailed back.

Purchasing cannot process a purchase order without the vendor information in Banner.

To create a requisition, type the Requisition Form (FPAREQN) in the Direct Access box and press ENTER, or select the form from the products menu.

Type NEXT, then navigate to NEXT BLOCK. The following form will appear:

Note: You can copy from an existing requisition using the Copy Icon.
Enter your information in the following fields:

**Delivery Date:** Required – equal to or greater than the order date

**Comments:** Optional - for information like “Rush Order”

**Organization:** Required – enter your department’s code

**Email:** Required

**Phone:** Optional

**Fax:** Optional

**Ship To:** Required - BLDG40

**Attention To:** Required - enter the name of individual this order is for.
To enter information about the quote, go Under Options, select document text. Here you enter information such as quote number, date of the quote and who the item(s) is for. When complete, SAVE and EXIT. This brings you back to REQUISITION ENTRY: REQUESTOR/DELIVERY INFORMATION tab.
Navigate to NEXT BLOCK. The following form will appear:

Vendor: Required - press ENTER

To search for a vendor ID, click on Vendor Search button. Then click on “Entity Name/ID Search (FTIIDEN).”

Click in Last Name Field.
Type % with the vendor name or at least a portion of the vendor name end with % and execute query. Highlight the vendor you are placing the order with, click select. This brings you back to the vendor information page. Verify the address, phone and fax that default into the form are correct. If not, note the correct information in Document Text.

Note: Refer to your Navigation Training Manual for more details on vendor search.
Once your vendor information has been entered, navigate to NEXT BLOCK. The following form will appear:
REQUISITION ENTRY: COMMODITY/ACCOUNTING

NOTE: When preparing a requisition for a Capital Asset Purchase, you MUST use commodity level accounting by deselecting the Document Level Accounting checkbox.

A capital asset is defined by the university as any single item purchased with an acquisition value (cost) of more than $1,500 and a useful life of more than one year. If the useful life is less than one year, the item would be classified as a supply expense. The $1,500 is per item, not per invoice. For a discussion of commodity level accounting versus document level accounting in Banner, refer to Appendix A of this document.

Commodity: Required.
To clear the screen, click on Query, Enter.

Type the first 3 letters of the commodity code you are looking for followed by %. Press F8 or EXECUTE the query.

Select the Commodity Code you want and Banner will take you back to the Commodity/Accounting tab.
The description of the commodity will automatically populate in the description. **DO NOT DELETE.** Start typing the description of the item after the description. If you need more lines to describe the item(s) you are purchasing Under Options, select item text.

Navigate to NEXT BLOCK and enter the description.

**Description:** Enter the description of what you are ordering, including the vendor part number, manufacturer part number and a complete description of the item(s) – then SAVE and EXIT. This brings you back to REQUISITION ENTRY: COMMODITY/ACCOUNTING.
U/M: Required – enter the unit of measure or click on the list of values icon for the list.

Quantity: Required.

Unit Price: Required.

Note: If you have more than one line item, select NEXT RECORD. This will bring you to the next line. Enter all the required fields for each commodity.

ADDITIONAL INFORMATION

Note: No Zero (0) line items. Please enter No Charge Item in Item Text.

Note: If you are ordering an upgrade item for capital equipment, include the Florida Tech tag number that is located on the piece of capital equipment you are upgrading.

Under Options: Click on item text if additional space is needed for the description.

Then choose SAVE and EXIT.
Navigate to NEXT BLOCK to enter Accounting Information.

**Index:** enter the index that will be charged for the items purchased.  
**Fund:** will default  
**Orgn:** will default  
**Acct:** Required  
**Prog:** will default  
**Actv:** Optional  
**Locn:** Not used at this time  
**Proj:** Not used at this time

Tab through the remaining fields. This will default the dollar amount.

Note: If you have more than one accounting string, select NEXT RECORD. This will bring you to the next line. Enter all the required fields for each accounting string.

Navigate to NEXT BLOCK - The following form will appear:

**Complete:** Click on this button to complete the requisition and forward it to the approvals process.  
**In Process:** Click on this button to keep the requisition incomplete.
Appendix A

COMMODITY LEVEL ACCOUNTING:

The system does link each line item to a specific accounting string. For this option, uncheck Document Level Accounting box on the requestor/delivery information tab. This option must be used when creating Standing Purchase Order (in case a commodity line need to be added later) and Capital Asset.

DOCUMENT LEVEL ACCOUNTING:

The system does not link any line item to a specific accounting distribution. Banner defaults to this option. Use Document Level Accounting when all the items (commodity lines) on the requisition are being charged to one or more accounting string.

HOW TO CHECK THE STATUS OF REQUISITIONS & PURCHASE ORDERS:

FOIDOCH – Document History Form - Status “C” = complete. The requisition or purchase order is routing in the approval queue.

Status “A” = approved – The requisition is routed to purchasing to process the purchase order. The purchase order has been processed and sent to the vendor.

HOW TO CHECK APPROVAL STATUS

FOAAINP - Document Approval Form – Indicates who still needs to approve the requisition or purchase order.

FOIAPPH – Document Approval History Form – Indicates who has approved the requisition or purchase order.