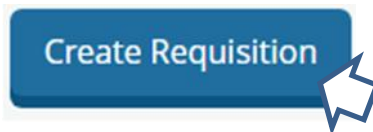# Requisition Procedure Guide: Banner 9
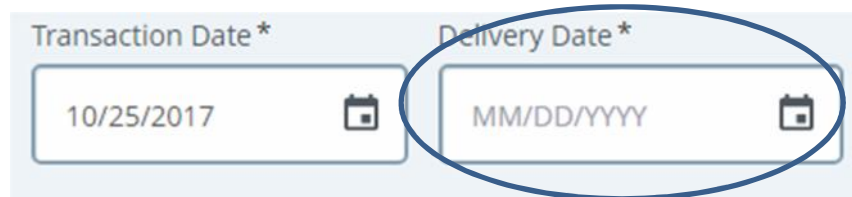
1. **Go to vision.oru.edu**
2. **Click the Finance tab**
3. **Click the Requisition 9 tab**
4. **Click Create Requisition**

5. **Update Delivery Date**. The Purchasing Department processes orders on a first come, first served basis. After the Requisition is submitted, it will go to your Organization Manager(s) for approval. If the Requisition is over $500, the Organization Vice President will need to approve along with a coding representative in the Finance Department.

   After the Requisition is fully approved, the Purchasing Department receives the order automatically. Using the information from your Requisition, they create and process a Purchase Order on the system. If the PO is over $2,000, the Budget Director will need to approve. If the PO is over $5,000, the Budget Director and the Controller will need to approve. Once the PO is fully approved, the Purchasing Department will send the Purchase Order to the vendor and order the product.   If services are being procured, the Purchasing Department will send ORU's Standard Terms and Conditions along with the fully executed contract (if needed).

   **Delays in receiving your product or service are caused by any number of setbacks in the aforementioned process.

6. **Enter Comments specific to the entire Requisition.** Public Comments will be printed on the Purchase Order and seen by the Vendor. Private Comments will not be printed on the Purchase Order and will not be seen by the vendor. On the old system, this was referred to as "Document Text".

Requisition Comments

Public Comment

I have spoken to Darlene at XYZ Corp. Attached is the e-quote 502161061. This quote is good through 12/31. Per attached quote, please deliver to Luke Skywalker's attention at ORU (Stovall 213).

Private Comment

We need this product really bad, but I don't want the vendor to know how desperate we really are. I'm sure glad this is a private comment.

7. **Confirm default profile information is correct.** This information represents your default "home" information. If this information is incorrect, please contact the Administrative Affairs office in Finance.

Chart*

1 Oral Roberts University   ×

Organization*

51120 Undergraduate-Theology & Ministry   ×

Ship To Location*

ORU   ×

8. **Update "Attention To" field.** This indicates who the product or service should be delivered to.

Attention To*

Luke Skywalker

Tax Group

Choose

Ship To Location

Attention: Luke Skywalker
Oral Roberts University
Attn: ORU Receiving Department
7777 S Lewis Ave
Tulsa OK 74171

9. **Click the Next button to move to the Vendor Information tab.**

Back   Next

**Did you notice at the top right of your screen that you already have an R Number?!

✓ Requisition R0057317 created successfully

10. **Find your Vendor by clicking in to the Vendor box and typing a portion of the vendor's name.**
Once you see it, click it!

Vendor

Choose Vendor   ✕ ▲

Abso   🔍

Absolutely Balloons (Z00857949)
5929 E Admiral Pl Tulsa OK 74115-8616

Labsource Inc (Z37905173)
97400 Eagle Way Chicago IL 60678

Labsource Inc (Z37905173)
1260 Garnet Dr Northlake IL 60164-1028

Labsource Inc (Z37905173)
97400 Eagle Way Chicago IL 60678

11. **Confirm the vendor's information is correct (name and address).**

Vendor Information

Absolutely Balloons (Z00857949)
5929 E Admiral Pl
Tulsa OK 74115-8616

**If the information is incorrect, contact vendors@oru.edu to update the vendor record.

   12. Click the Next button to move to the Add Item & Accounting tab.

Back   Next
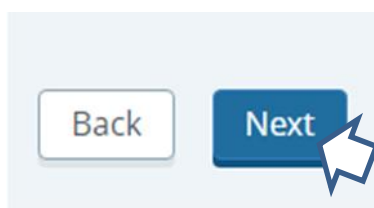
**Did you notice that your Requisition updated?! No more re-doing!!

✔ Requisition R0057317 updated successfully
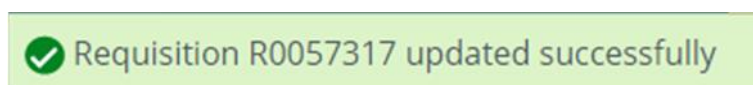
**Did you notice that you are building a summary profile for your Requisition on the right side of the page?!

Requisition Summary	Save as draft
Requisition Number	R0057317
Absolutely Balloons (Z00857949) 5929 E Admiral Pl Tulsa OK 74115-8616	

13. **Add the first item of your order by clicking in the Item box and typing in item.** When completed, click below to add the item.

14. **Choose the Unit of Measure.** This describes how the product or service your ordering is measured (i.e., box, case, inch, EA, etc.)

15. **Type in the Quantity and Unit Price.** The Unit Price is the cost per unit. If you're ordering two of something, your quantity would be 2 and your Unit Price would be the cost for 1. The system will calculate the total order for you, so there's no need to become an Accountant (Yet ☺)

16. **Enter any additional comments for that specific item in the comments section.** As a reminder, Public Comments will be printed on the Purchase Order and seen by the Vendor. Private Comments will not be printed on the Purchase Order and will not be seen by the vendor.

Commodity Comments

Public Comment

> The SKU # is 266260-8463419 and it's the yellowish black one. I want the big balloon, not the kiddie size.

Private Comment

> I checked with 4 other vendors (see attached quotes) and they were much cheaper and better quality. However, they were completely sold out, so I guess I have to settle for this vendor :(

17. **When you're done entering all pertinent information for that item, click the Save button.**

Back   Save

**Did you notice that your Requisition Summary was updated on the right side of the page?!

Requisition Summary	Save as draft
Requisition Number	R0057317

Absolutely Balloons (Z00857949)
5929 E Admiral Pl
Tulsa OK 74115-8616

Commodities (1)

Hot Air Balloon	102.92
Quantity 2.00 @ 51.4600	Discount 0.00
Additional Charges 0.00	Tax 0.00

18. **Add more items to your order by repeating steps 13-17 for all items on your order.** Don't forget to add shipping costs – even if it's an estimate. It'll save you and the Purchasing Office a headache in the future!

**Guess what?! There is NO limit to the amount of items you can have on a Requisition!

19. **When you have entered all of your items, click the Add Accounting button to supply coding for the order.**
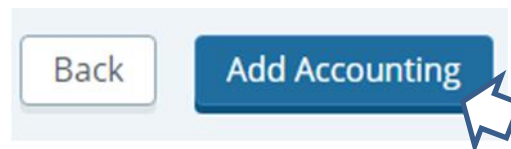
20. **Enter the Chart, Fund, Organization, Account, and Program code to be charged for this purchase.** Below is a summary of what each of these elements mean:

- **Chart**: Legal Entity. If your department is under the ORU umbrella, choose Chart 1.
- **Fund**: Source of funding. For Unrestricted Operating purchases, choose Fund 110000. Restricted Funds (donated funds for a specific purpose) begin with 133 or a 2. Please contact the Restricted Accounting office for a list of your Restricted Funds (if you have any).
- **Organization:** Specific to your department that will be charged for this purchase. If you're unclear as to which Organization code to use, contact your supervisor or the Budget Office.
- **Account:** Specific number for what is being purchased. General Operating purchases begin with 710 or 711, Contract and professional services begin with 704, Scholarships begin with 714, and Fixed Assets begin with 90. If you're unclear as to which Account code to use, contact the Accounting Office.
- **Program:** Reporting number. This is used for Financial Reporting purposes. If you're unclear as to which Program code to use, contact your supervisor or the Accounting Office.
- **Activity:** Not a required field. This is only used for those departments set up to assign specific Activity Codes for certain purchases.
- **Location:** Not a required field *unless* you are purchasing a Fixed Asset – which is a tangible asset over $2,000 and has a useful life of greater than 1 year. If you are unclear whether or not you're purchasing a Fixed Asset, please contact the Accounting Office.
- **Project:** Not a required field and shouldn't be used unless authorized to do so.

**If you'd like to split the order between different accounts, change the Distribution Amount or Distribution Percent to the amount you want charged to the coding you just entered. Then click the "Split Accounting" button towards the bottom. Repeat these steps for each split.

   21. Click the Save button.

**You should get a confirming message that Accounting has been added to your Requisition. Congratulations, you just became an Accountant!

Accounting added to requisition R0057317

**If you split the accounting by amount or percentage, repeat steps 20 and 21 for the remaining portion of the Requisition.
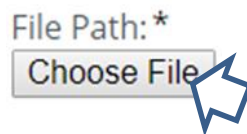
22. **Add attachments to your Requisition by clicking the Attachments button at the top of the page.** Yes, you get to add attachments before you submit the Requisition!

Attachments
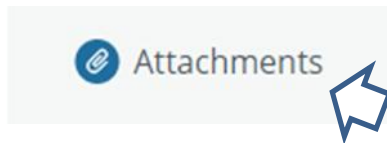
23. Click Attach File button.

Refresh Attachments   **Attach File**
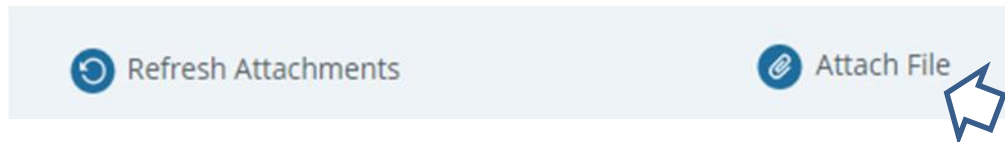
24. **Click Choose File button.** Find the file you've previously scanned in and click open.

File Path: *
Choose File
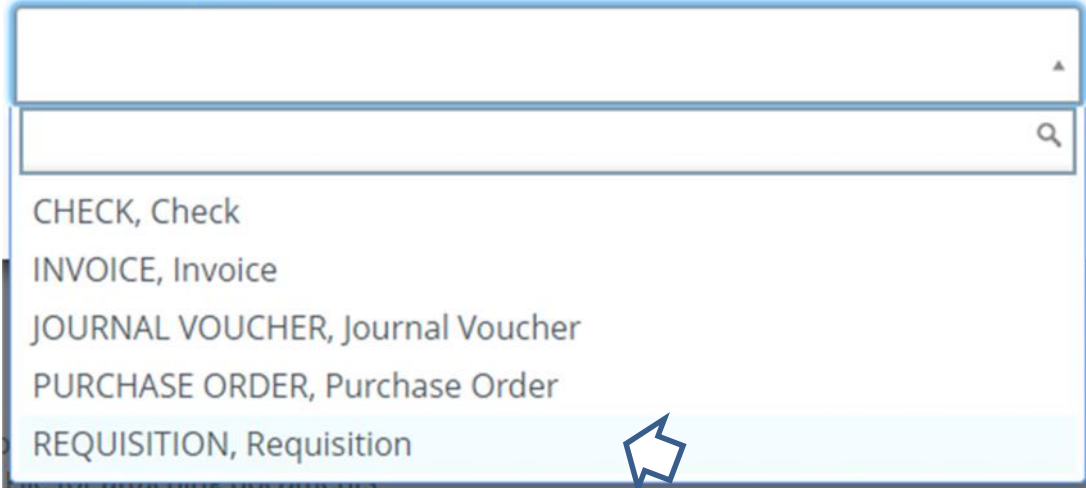
25. **Select Requisition as the Document Type.**

File Path: *
[Choose File] Wire 825.pdf

Document Type: *

[ ] ▲

[🔍]

CHECK, Check
INVOICE, Invoice
JOURNAL VOUCHER, Journal Voucher
PURCHASE ORDER, Purchase Order
REQUISITION, Requisition

26. **Click Upload button.** Repeat steps 23-27 for multiple attachments.

[Cancel] [**Upload**]

27. **To double check all of your work before submitting the Requisition, click the View as PDF button to see a summary of your Requisition.**

[View as PDF] [**Submit Requisition**]
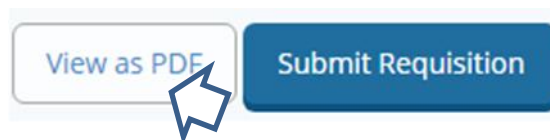
28. **Upon confirming the information in your Requisition is correct, click the Submit Requisition button.**

[View as PDF] [**Submit Requisition**]
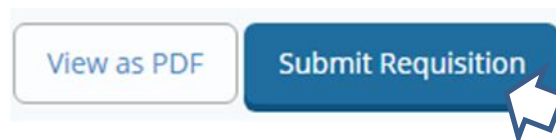
**You should receive a confirming message that basically tells you you're awesome!!

✓ Requisition R0057317 completed successfully

08/14/2018