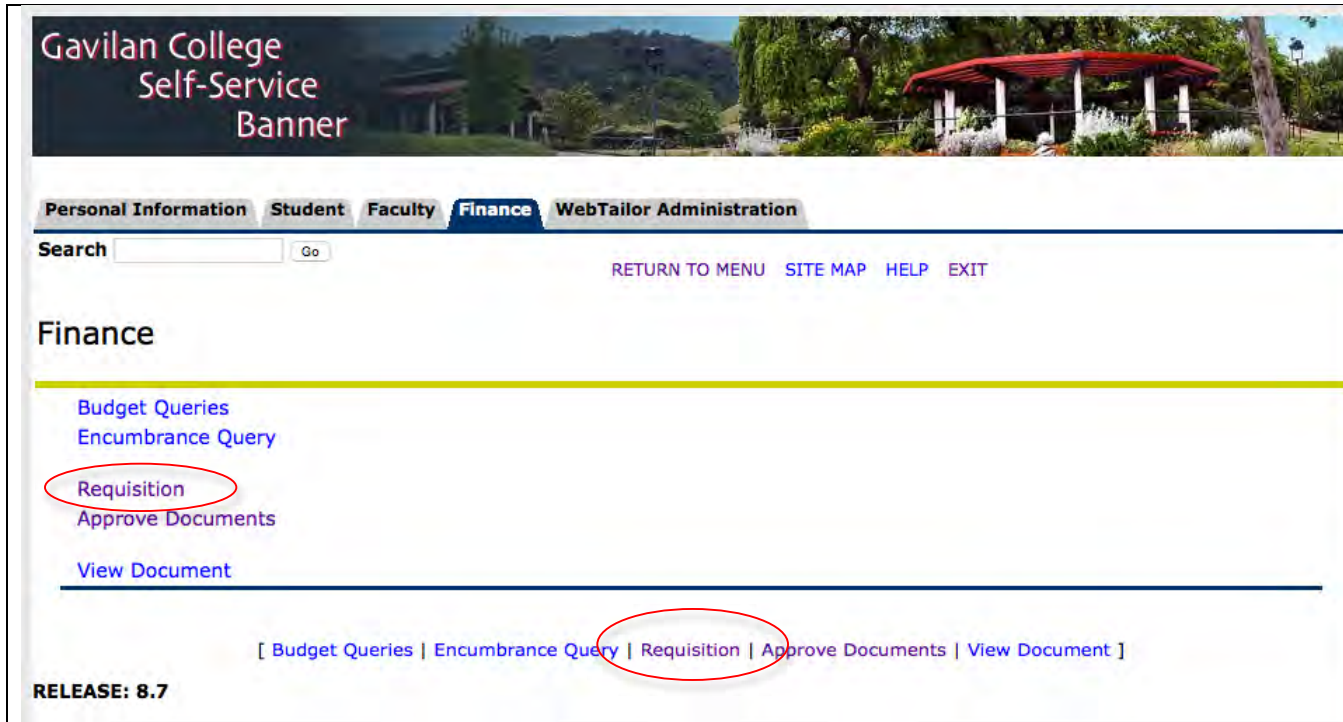


HOW TO

eProcurement Quick Reference Guide for Self-Service Banner

Create a New Requisition	Approve Requisition	Find Status of Requisition
<ol style="list-style-type: none"> 1. From My Gav select the “Finance” Tab 2. Click on Self Service Banner button 3. Click on the “Finance” Tab 4. Click on “Requisition” <ul style="list-style-type: none"> • Select a Vendor, Validate • Complete information: Part No./Item, U/M,Tax Group/Quantity/Unit Price • Complete Accounting information (Index = Org Code/Accounting total) • Validate, Complete • R-Number will be assigned, make note of it for follow up as needed 2. Follow steps 2 – 6 under “Approve” Requisition” to provide initial approval and begin routing queue <p><i>Note: In case of errors “Disapprove” to cancel and allow changes to be made; requisition can then be resubmitted</i></p>	<ol style="list-style-type: none"> 1. From My Gav select the “Finance” Tab 2. Click on Self Service Banner button 3. Click on the “Finance” Tab 4. Click on “Approve Documents” 5. User ID = Banner INB user name (not G00#) 6. Click on “Submit Query” 7. For each requisition, you will be able to click on the following links: <ul style="list-style-type: none"> • R00000xx = View Requisition • History = View who approved (or has not approved) the requisition • Approve = Approve Requisition by selecting “Approve Document” on the next screen • Disapprove = Disapprove Requisition by selecting “Disapprove Document” on the next screen 	<ol style="list-style-type: none"> 1. From My Gav select the “Finance” Tab 2. Click on Self Service Banner button 3. Click on the “Finance” Tab 4. Click on “View Documents” 5. Select “Requisition” in the Document Type drop down list 6. Enter the R-Number in the Document Number input box. <ul style="list-style-type: none"> • If R-Number is not known, click the Document Number button to reach the Document Look up Screen and search by known information. • Select the document from the list and click on it to populate the Document Number input box • Click “Execute Query” and click on the document number to populate the Doc # input box 2. Click the “View Document” or “Approval History” button at bottom of the screen

How to Create a Requisition



The screenshot displays the Gavilan College Self-Service Banner interface. At the top, there is a navigation bar with tabs for Personal Information, Student, Faculty, Finance, and WebTailor Administration. Below this is a search bar and a set of utility links: RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled "Finance" and contains a list of links: Budget Queries, Encumbrance Query, Requisition, Approve Documents, and View Document. The "Requisition" link is circled in red. At the bottom of the page, there is a breadcrumb trail: [Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document], where "Requisition" is also circled in red. The version number "RELEASE: 8.7" is visible in the bottom left corner.

1. From My Gav select the “Finance” Tab
2. Click on Self Service Banner button
3. Click on the “Finance” Tab
4. Click on “Requisition”

Personal Information Student Faculty **Finance** WebTailor Administration

Search Go

MENU SITE MAP HELP EXIT

Requisition

Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and select Vendor Validate to default related information. Enter or modify vendor, requestor, commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select the Item number link to add item text for a commodity.


Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing. Choose Save In Process to validate and save the current contents without completion.


Search In Process Requisitions

✓ Document R0000050 retrieved is in process
 ✓ Document Validated with no errors

Use Template Retrieve

Transaction Date

Delivery Date 

Vendor ID Vendor Validate 

Address Type Address Sequence

Vendor Contact Vendor E-mail

Vendor Name Computerland Of Silicon Valley
 Vendor Address 482 W San Carlos St
 San Jose CA 95110
 Phone Number 408-5193221
 Fax Number 408-5193260

5. Enter Delivery Date (default is 2 weeks)
6. Enter Vendor ID
 If you do not know the Vendor ID number, query using Code Lookup at the bottom of the page. Select type "vendor" and enter "Title Criteria" (vendor name) to search.
Note: To use a wildcard symbol, enter a percent sign ("%"). If you add a "%" character to the front of your query criteria, you will retrieve all search results that end with your query string. If you add a "%" character at the end of your query, you will retrieve all search results that begin with your query string. If you add a "%" character to the beginning and end of your query string, you will retrieve all results that contain your query string anywhere in the name
7. Vendor ID (i.e.G00###) can be copied and pasted into the Vendor ID field, click the "Vendor Validate" button next to the Vendor ID input box.
 This will populate the vendor address, Address Type, Address Sequence, Vendor Contact, and Vendor Email input boxes for you.

Comments

Document Text

Item	Part No. / Item	U/M	Tax Group	Quantity	Unit Price
1	Creative Cloud EDU ETLA 1 YR St	EA	NTAX	288	55
2	Contribute ETLA Site Licensing 1	EA	NTAX	288	0
3		None	None		
4		None	None		
5		None	None		

Part No. / Item Validate

8. Fill in the fields below for each item requested and a separate line for shipping.
- Part No. / Item - Enter the complete description in the Part number/Item field. Be very specific - use catalog numbers, brand names, manufacturing model numbers, colors, sizes, etc.
 - U/M Unit of Measure
 - Tax Group (CA5 or NTAX for no tax)
 - -Quantity
 - -Unit Price

Dollars Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Total Amount or Percentage
1	X		100	670210	5636	678000			15840
2									
3									
4									
5									

Save as Template

Shared

Dollars Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Total Amount or Percentage
1	X		100	670210	5636	678000			100
2									
3									
4									
5									

Save as Template

Shared

9. Complete Accounting Information
- Index = Org Code
 - Total Amount or Percentage from Order information above
 - Use of Dollars or Percentages to validate totals

Dollars
 Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Total Amount or Percentage
1	X		100	670210	5636	678000			15840
2									
3									
4									
5									

Save as Template

Shared

10. Click the Validate button to check for errors.
- Check that no errors exist; a message "Document Validated with no errors" will be displayed at the top of the form


Requisition

Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and select Vendor Validate to default related information. Enter or modify vendor, requestor, commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select the Item number link to add item text for a commodity.

Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing. Choose Save In Process to validate and save the current contents without completion.

Document R0000050 retrieved is in process

Total of Accounting percents does not equal 100


Use Template

Transaction Date

Delivery Date

Vendor ID

Address Type Address Sequence

Dollars
 Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Total Amount or Percentage
1	X		100	670210	5636	678000			15840
2									
3									
4									
5									

Save as Template

Shared

11. Click the "Complete" button at the bottom of the requisition form.
12. You will see message at the top of the screen indicating the status of the requisition. If any errors occur, the requisition will not move into the Approval queue; otherwise, you will see messages indicating the R-Number assigned by the system and additional status messages
Note: You may want to make a note of the R# for follow up as needed.
13. Requisition must be approved by requestor before approvals begin – See instructions for "How to Approve Requisitions"

Requisition

Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and select Vendor Validate to default related information. Enter or modify vendor, requestor, commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select the Item number link to add item text for a commodity.

Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing. Choose Save In Process to validate and save the current contents without completion.

Document Validated with no errors

Document R0000050 completed and forwarded to the Approval process

Use Template



How to Approve Requisitions

The screenshot shows the Gavilan College Self-Service Banner interface. At the top, there is a navigation bar with tabs for Personal Information, Student, Faculty, Finance, and WebTailor Administration. Below this is a search bar and a row of links: RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled "Finance" and contains a list of links: Budget Queries, Encumbrance Query, Requisition, Approve Documents, and View Document. The "Approve Documents" link is circled in red. At the bottom of the page, there is a breadcrumb trail: [Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document], where "Approve Documents" is also circled in red. The version number "RELEASE: 8.7" is displayed in the bottom left corner.

1. From My Gav select the “Finance” Tab
2. Click on Self Service Banner button
3. Click on the “Finance” Tab
4. Click on “Approve Documents”

Search

[MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Approve Documents

Enter Approval Parameters

User ID

Document Number:

Documents for which you are the next approver

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#)]

RELEASE: 8.3

5. User ID = Banner INB user name
(not G00#)

6. Click on the "Submit Query"

Search Go

[MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Queried Parameters

User ID	KBILLUPS	Kyle Billups
Document Number:		
Documents Shown:	Next Approver	



Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
	REQ				KBILLUPS	15,747.00	DOC	R0000054	History	Approve	Disapprove
	REQ				KBILLUPS	1,000.00	DOC	R0000112	History	Approve	Disapprove

[Another Query](#)

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#)]

RELEASE: 8.3

7. For each requisition, you will be able to click on the following links:

- R00000xx = View Requisition
- History = View who approved (or has not approved) the requisition
- Approve = Approve Requisition
- Disapprove = Disapprove Requisition

View Document

Requisition Header

Requisition	Order Date	Trans Date	Delivery Date	Print Date	Total
R0000054	Jul 02, 2015	Jul 02, 2015	Jul 12, 2015		15,747.00

Origin: SELF SERVICE
 Complete: Y Approved: N Type: Procurement
 Cancel Reason: Date:
 Requestor: Kyle Billups 670210 Management Information Systems
 Phone Number: 408-846-4901
 E-mail: kbillups@gavilan.edu
 Accounting: Document Level

Ship to: 5055 Santa Teresa Blvd
 Receiving
 Gilroy, CA 95020
 Attention: Receiving
 Contact: Receiving
 Phone Number: 408-427-2725

Vendor: G00212590 Sehi Computer Products
 1275 Puerta Del Sol
 San Clemente, CA 92673
 Phone Number: 800-346-6315
 Fax Number: 855-329-7344

Document Text: Quote #Q00070587

Requisition Commodities

Item	Commodity Description	U/M	Qty	Unit Price	Ext Amount	Disc	Addl	Tax	Cost
1	Canon DR-G1100 (item # 8074B002)	EA	2	4250	6,500.00				
			0.00	0.00	743.75				9,243.75
2	Ecarepak for Low Volume Production	EA	2	2990	5,980.00				
			0.00	0.00	523.25				6,503.25
Part No. = 5353B003. Canon eCarePAK Extended Service Plan - 3 Year Extended Service - On-site - Maintenance - Parts Labor - Physical Service									
Total:					15,747.00				

Requisition Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	X	16		600	680660	6411	710000				N	N	N	15,747.00
Total of displayed sequences:														15,747.00

No Related Documents Available

8. View Requisition



Search Go

[MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

View Document

Document Identification

Document Number	R0000054	Type	Requisition
Originator:	KBILLUPS	Kyle Billups	

Approvals required

Queue	Description	Level	Approvers
I404	IT - Technology, Phase 2	3	Fred Harris
I404	IT - Technology, Phase 2	4	Steven Kinsella
PDIR	PURCHASING DIRECTOR QUEUE	1	Connie Campos Wade Ellis



Approvals recorded

Queue	Level	Date	User
I272	1	Jul 02, 2015	Kyle Billups
I404	1	Jul 02, 2015	Kyle Billups
DENY	0	Jul 02, 2015	Mimi Arvizu
I404	2	Jul 02, 2015	Mimi Arvizu
ZIT	1	Jul 02, 2015	Mimi Arvizu

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#)]

RELEASE: 8.5.0.4

9. View Approval History
 - a. Approvals Required – who needs to approve requisitions
 - b. Approvals Records – who have approved or disapproved requisitions

Approve Document

Document Information

Document Number:	R0000050	Type:	REQ
Change Seq#		Sub#	
Amount:	15,840.00		

Comment:

This document has been approved.

Approve Document Cancel

Disapprove Document

Document Information

Document Number:	R0000050	Type:	REQ
Change Seq#		Sub#	
Amount:	15,840.00		

Comment:

Approval has been denied.

Disapprove Document Cancel

10. Approve Requisition by clicking on "Approve Document"

11. Disapprove Requisition by clicking on "Disapprove Document"

Note: You can enter a comment on either Approve or Disapprove Document.