# HOW TO
**eProcurement Quick Reference Guide for Self-Service Banner**

<table>
<thead>
<tr>
<th>Create a New Requisition</th>
<th>Approve Requisition</th>
<th>Find Status of Requisition</th>
</tr>
</thead>
</table>
| 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”  
  • 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 | 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:  
  • 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 | 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  
   • If R-Number is not known, click the Document Number button to reach the Document Lookup 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 |

*Note: In case of errors “Disapprove” to cancel and allow changes to be made; requisition can then be resubmitted*
# How to Create a Requisition

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

<table>
<thead>
<tr>
<th>Seq# Chart</th>
<th>Index</th>
<th>Fund</th>
<th>Orgn</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Total Amount or Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
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<td>670210</td>
<td>5636</td>
<td>678000</td>
<td></td>
<td></td>
<td>15840</td>
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Save as Template
- Shared
  - Validate
  - Complete
  - Save in Process

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Save as Template
- Shared
  - Validate
  - Complete
  - Save in Process
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.
11. Click the “Complete” button at the bottom of the requisition form.

12. You will see a 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 the requestor before approvals begin – See instructions for “How to Approve Requisitions”
How to Approve Requisitions

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 the “Submit Query”
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
8. View Requisition

```
<table>
<thead>
<tr>
<th>Requisition Header</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Requisition</td>
<td>R0000054</td>
</tr>
<tr>
<td>Order Date</td>
<td>Jul 02, 2015</td>
</tr>
<tr>
<td>Transfer Date</td>
<td>Jul 02, 2015</td>
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<tr>
<td>Delivery Date</td>
<td>Jul 12, 2015</td>
</tr>
<tr>
<td>Total</td>
<td>15,747.00</td>
</tr>
</tbody>
</table>

Origin: SELF_SERVICE  
Complete: Y  
Approved: N  
Type: Procurement  
Cancels Reason:  
Delete:  
Requestor: Kyle Bills  
Phone Number: 408-846-4900  
E-mail: Kbills@gavilan.edu  
Accounting: Document Level  
Ship to: 8055 Santa Teresa Blvd  
Receiving: Gilroy, CA 95020  
Attention: Receiving  
Contact: Receiving  
Phone Number: 408-427-3723  
Vendor: Q00212590 Bens Computer Products  
1275 Puerta Del Sol  
San Carlos, CA 94070  
Phone Number: 800-346-6315  
Fax Number: 855-325-7344  
Document Text: Quote #Q000706587

<table>
<thead>
<tr>
<th>Requisition Commodities</th>
<th></th>
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<tbody>
<tr>
<td>Item</td>
<td>Commodity/Description</td>
</tr>
<tr>
<td>1</td>
<td>Canon JK-G1100 (Item # 807460002) EA</td>
</tr>
<tr>
<td>2</td>
<td>Esarex for Low Volume Production EA</td>
</tr>
</tbody>
</table>

Part No. = 53538000.  
Union farePAK Extended Service Plan - 3 year  
Extended Service - On-site - Maintenance - Parts  
Labor - Physical Service

<table>
<thead>
<tr>
<th>Requisition Accounting</th>
<th></th>
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<tbody>
<tr>
<td>Sec Code</td>
<td>COA</td>
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<tr>
<td>X</td>
<td>16</td>
</tr>
</tbody>
</table>

Total of displayed sequences: 15,747.00

Total of displayed sequences: 15,747.00

No Related Documents Available
```
9. View Approval History
   a. Approvals Required – who needs to approve requisitions
   b. Approvals Records – who have approved or disapproved requisitions
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.