



Self-Service Banner 9 Guide

Purchasing Department

3/15/24

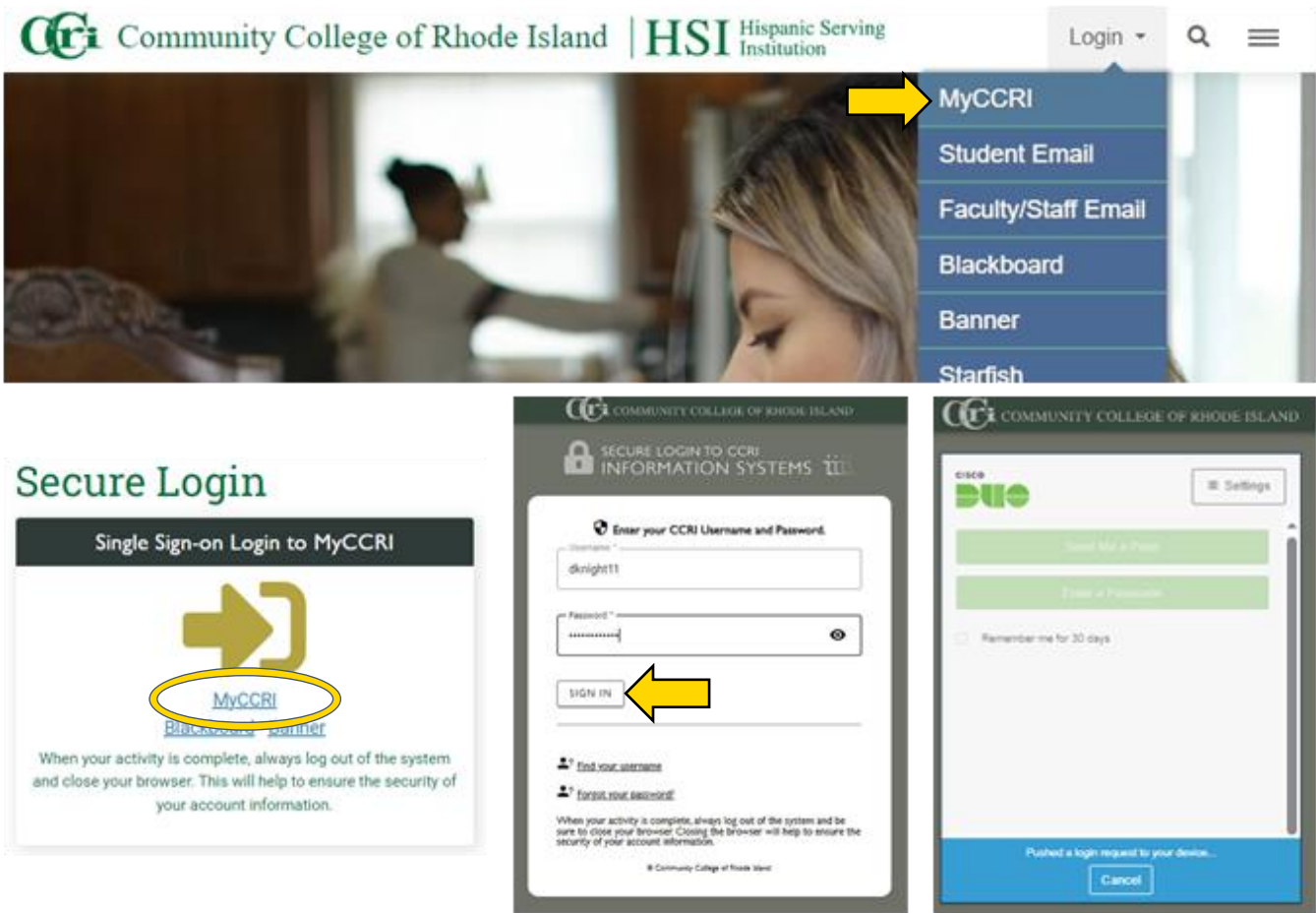
Table of Contents

Creating a Purchase Requisition.....	2
Copying a Requisition.....	4
Requestor Information.....	5
Vendor Information.....	6
Add Item & Accounting.....	7
Adding Attachments.....	9
Editing a Submitted Requisition.....	11
Approving, Reviewing, and Disapproving Requisitions.....	15
Deleting a Purchase Requisition.....	18
E-mail, Export, and Print Documents.....	19

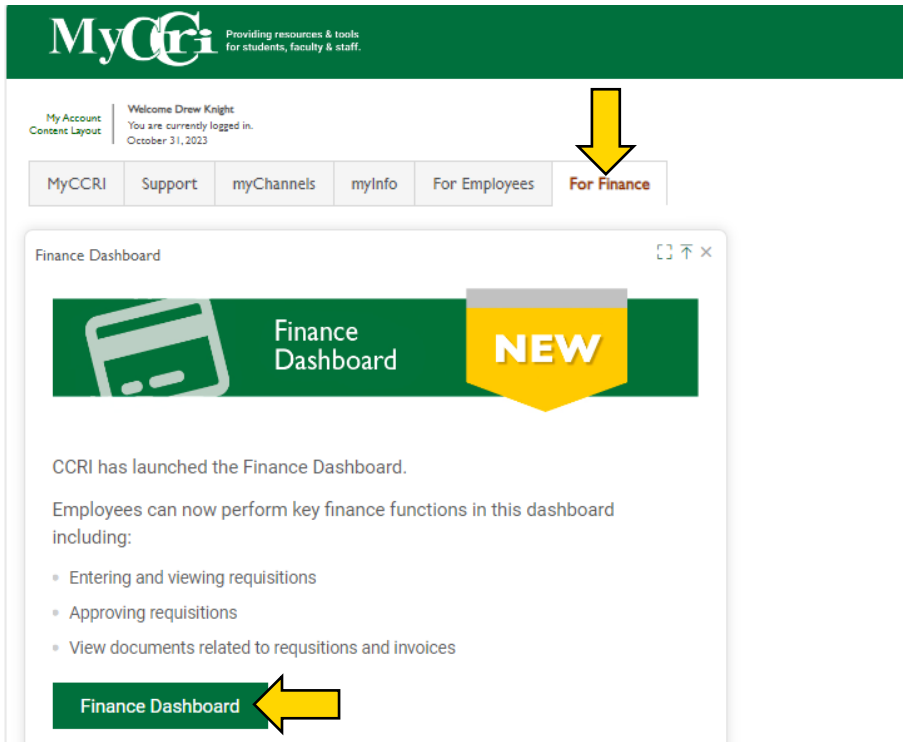
Please note that in order to enter purchase requisitions, you must first be granted access to the Banner Finance Module. If you do not have access, please complete the [Data Access Authorization Request Form](#) at this [link](#) and submit to the Budget Office for approval and processing.

Creating a Purchase Requisition

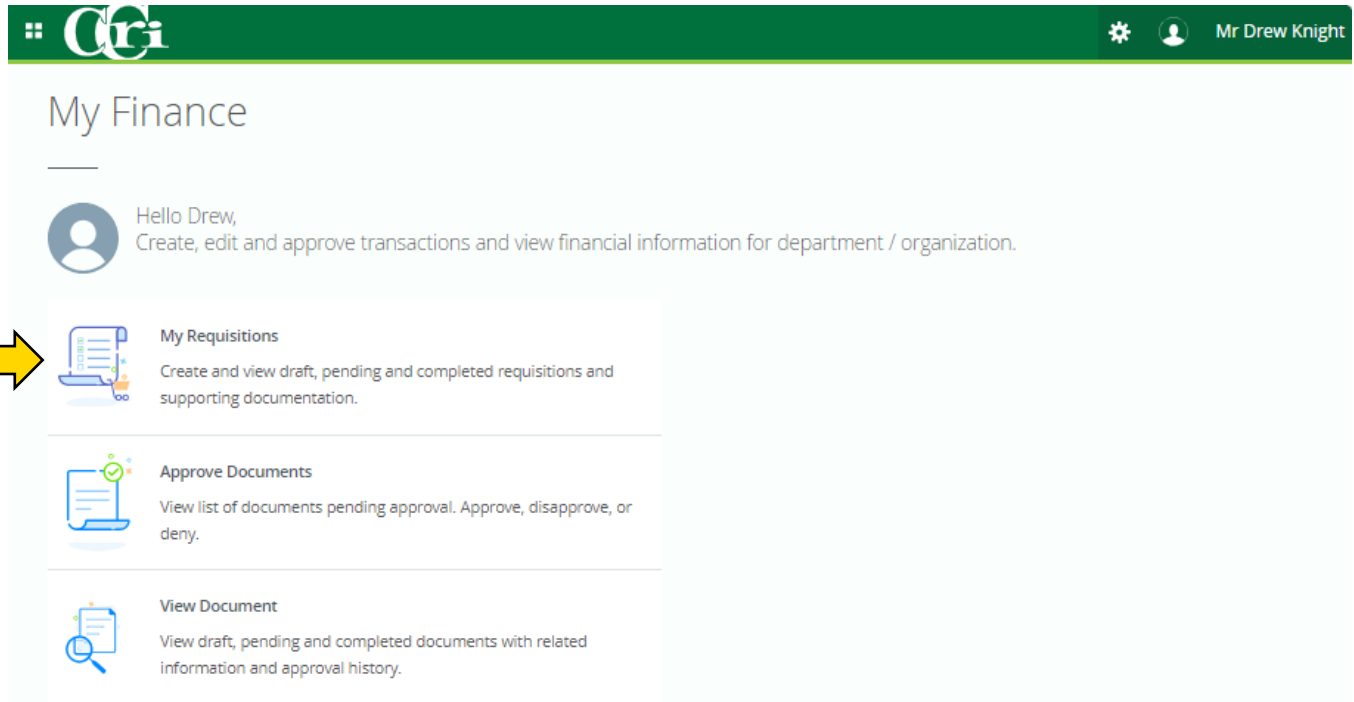
First, sign in to [MyCCRI](#) with your CCRI ID and Password.



In MyCCRI, click on the “For Finance” tab and select “Finance Dashboard.”



On the new My Finance homepage, select “My Requisitions.”



My Finance

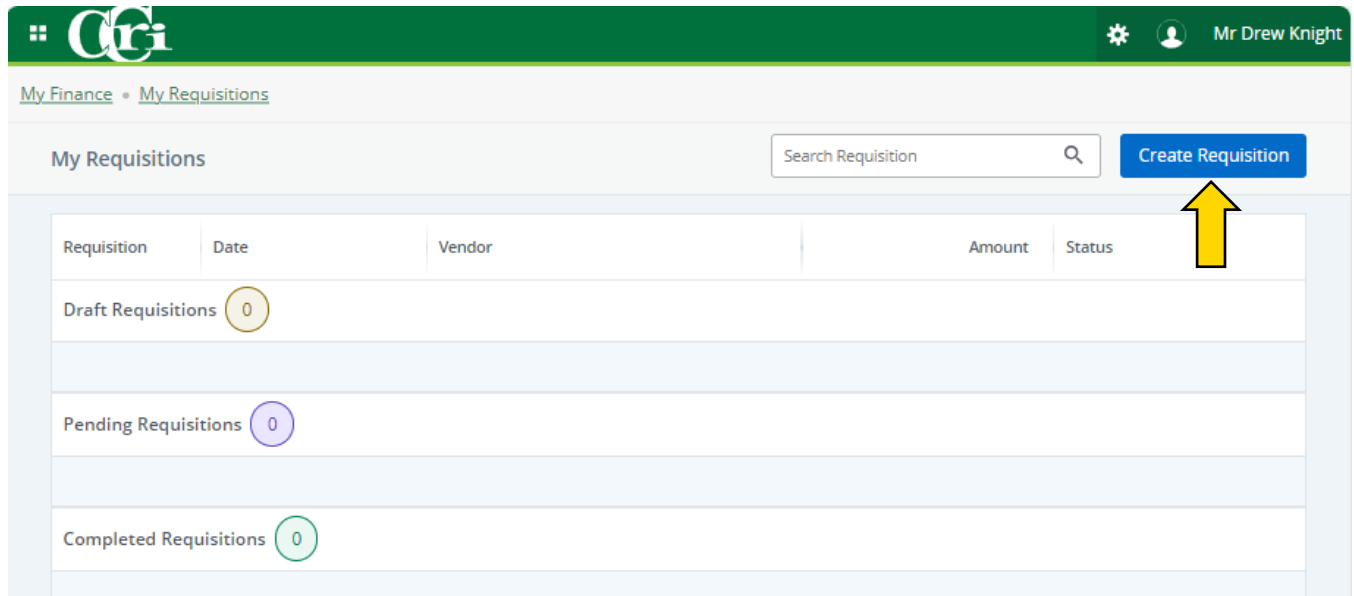
Hello Drew,
Create, edit and approve transactions and view financial information for department / organization.

My Requisitions
Create and view draft, pending and completed requisitions and supporting documentation.

Approve Documents
View list of documents pending approval. Approve, disapprove, or deny.

View Document
View draft, pending and completed documents with related information and approval history.

On this screen, you will be able to view all your requisitions that are drafts, pending approval, or already completed. Select the “Create Requisition” button to get started.



My Finance > My Requisitions

My Requisitions

Search Requisition

Create Requisition

Requisition	Date	Vendor	Amount	Status
Draft Requisitions (0)				
Pending Requisitions (0)				
Completed Requisitions (0)				

Know your FOAPAL string (Fund, Organization, Account, Program, Location codes) before beginning the requisition entry process.

Copying a Requisition

Instead of starting a new draft, you can also copy a previously completed requisition. To do this, go to “My Requisitions” on the home screen and choose the requisition from the “Completed Requisitions” section.

The screenshot shows the 'My Requisitions' page. At the top, there is a search bar labeled 'Search Requisition' and a 'Create Requisition' button. Below this is a table with columns: Requisition, Date, Vendor, Amount, and Status. The table is divided into sections: Draft Requisitions (0), Pending Requisitions (0), and Completed Requisitions (26). A yellow arrow points to a requisition in the 'Completed Requisitions' section with the following details: Requisition: R0069955, Date: 08/24/2023, Vendor: Dell Marketing L.P., Amount: \$1,732.00, Status: Converted to PO. A 'View More' link is visible at the bottom right of the table.

You can also use a requisition number to help search for a specific requisition. Type the number in the search bar provided and press “Enter” on your keyboard.

Once opened, click “Copy Document” in the upper right-hand corner. This will create a new requisition draft with the same information entered when the completed requisition was originally created.

The screenshot shows the requisition detail page for R0069955. The page has a green header with the CCI logo and the user name 'Ms Bethany Liston'. Below the header, there is a navigation bar with tabs: 1 Requestor Information, 2 Vendor Information, 3 Add Item & Accounting, and Requisition Summary. In the top right corner, there are two buttons: 'View Attachments' and 'Copy Requisition'. A yellow arrow points to the 'Copy Requisition' button.

A notification will appear confirming your selection. Press “Yes” and you’ll get a notification confirming that the requisition has been copied successfully.

The first screenshot shows a dialog box with a warning icon and the text 'Do you want to copy this requisition?'. There are two buttons: 'No' and 'Yes'. A yellow arrow points to the 'Yes' button. The second screenshot shows a success notification with a green checkmark and the text 'Requisition R0069005 copied successfully'.

The copied draft will now be open on your screen.

Requestor Information

Fields with stars (*) must be completed.

1. **Requestor** – This field will auto-populate with your name but can be changed if necessary.
2. **Transaction Date** – Automatically populates with the current date.
3. **Delivery Date** – Enter the date the delivery is needed. (Use the calendar button to choose the date)
4. **Requestor Email** - This field will auto-populate with your email but can be changed if needed.
5. **Choose Accounting Type** – Commodity Level Accounting should ALWAYS be selected.
6. **Public Comment** (*Previously Document Text*) – Use this field for Quote Numbers or any justification.
7. **Chart** – This field will auto-generate with “C Community College of Rhode Island.” Please leave this as is.
8. **Organization** – This field will auto-populate with your assigned organization field. If not, enter the appropriate department Organization Code in this field.
9. **Ship To Location** – Enter the code that the order will be delivered to. Ship-to codes are your org code and the first number of the location code. For example, if your org code is 30005, and your order is being shipped to the Warwick campus (500), your ship-to code is 300055. To search ship-to codes, visit [Tools and Resources](#). Once entered, a yellow box will appear below, with the full address.
10. **Attention To** – Enter your first name, last name, and a room number for the delivery if needed.

When finished, select “Next” at the bottom to move on to the Vendor Information section.

Vendor Information

In the “Vendor” field, begin typing the vendor’s name with percent signs (*ex. %Dell%*) or their Banner ID number. Click on the appropriate option from the results that appear.

The screenshot shows the CRI Vendor Information form. The 'Vendor' dropdown menu is open, displaying 'Choose Vendor' with a search icon. A yellow arrow points to this dropdown. The 'Currency' dropdown menu is also open, displaying 'Choose Currency' with a search icon. The form includes a 'Requestor Information' tab, a 'Vendor Information' tab (which is active), and an 'Add Item & Accounting' tab. A 'Requisition Summary' table is visible on the right, showing 'Requisition Number' as 'R0069311'. A 'Save as draft' button is also present.

Once selected, a yellow box with the vendor information will appear, along with a “Vendor Email” text field.

The screenshot shows the CRI Vendor Information form with the 'Vendor' dropdown menu selected. The selected vendor is 'Dell Marketing L.P. (91001816)'. A yellow box displays the vendor information: 'Dell Marketing L.P. (91001816)', '1 Dell Way', and 'Round Rock TX 78682-7000'. The 'Vendor Email' dropdown menu is open, displaying 'Choose/Enter Email' with a search icon. The 'Currency' dropdown menu is also open, displaying 'Choose Currency' with a search icon. The form includes a 'Requestor Information' tab, a 'Vendor Information' tab (which is active), and an 'Add Item & Accounting' tab. A 'Requisition Summary' table is visible on the right, showing 'Requisition Number' as 'R0069311'. A 'Save as draft' button is also present.

1. **Vendor Email** – Select or type the correct vendor email address.
2. **Currency** – Only USD will be used.

Please note that the department **MUST** provide Purchasing with an E-Verify W-9 form which is completed by the vendor. Write the requisition number on the W-9 and e-mail a PDF version of the document to Purchasing (purchasing@ccri.edu). Requisitions **cannot** be processed until this form has been received.

Add Item & Accounting

The third section contains the descriptions of what is being purchased and the associated accounting information.

By this point, the requisition number has been automatically assigned. It is displayed in the upper left corner of the document and in the Requisition Summary on the right-hand side. It is important to take note of this number for your records.

The screenshot shows the CCRi requisition system interface. At the top, the requisition number R0069311 is circled in yellow. Below it, there are three tabs: 1 Requestor Information, 2 Vendor Information, and 3 Add Item & Accounting. The 'Add Item(s)' field is a dropdown menu with 'Choose Item' selected, and a yellow arrow points to it. On the right, the 'Requisition Summary' section shows the requisition number R0069311 and the vendor information: Dell Marketing L.P. (91001816), 1 Dell Way, Round Rock TX 78682-7000.

In the “Add Item(s)” field, type the item description and press enter. The following fields will now appear:

The screenshot shows the CCRi requisition system interface with the 'Add Item & Accounting' step. The requisition number R0069311 is visible at the top. The 'Add Item(s)' field now contains 'Desktop Computer'. Below this, there are five numbered fields: 1 Commodity Description (Desktop Computer), 2 Unit Of Measure* (Choose...), 3 Quantity* (0.00), 4 Unit Price* (0.0000), and 5 Public Comment (Enter comments for the commodity item). The 'Requisition Summary' section on the right shows the requisition number R0069311 and the vendor information: Dell Marketing L.P. (91001816), 1 Dell Way, Round Rock TX 78682-7000.

1. **Commodity Description** – Enter the name/description of the item being purchased.
2. **Unit of Measure** – In the drop-down menu, select which unit the product is sold by.
3. **Quantity** – Enter how many of the same items are being purchased.
4. **Unit Price** – Enter the individual cost of the item.
5. **Public Comment** (*Previously Item Text*) – Type anything that did not fit in the Commodity Description.

Once you have verified that all the information is correct, select the “Add Accounting” button at the bottom of the screen.

The screenshot shows the bottom of the CCRi requisition system interface. There are four buttons: Back, Add Accounting, View as PDF, and Submit Requisition. A yellow arrow points to the 'Add Accounting' button.

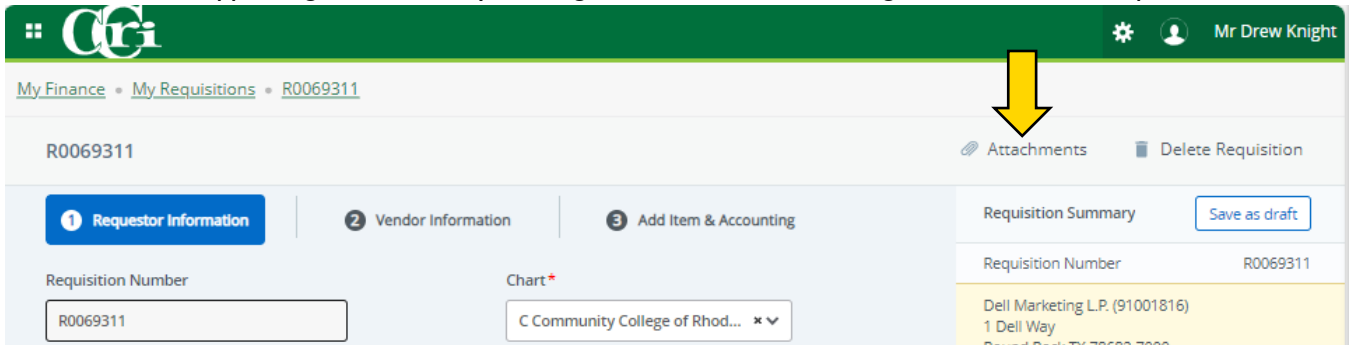
Next, you will enter the information for this item's funding source(s).

1. **Choose Chart** – This field will auto-fill with “C.” Leave this as is.
2. **Fund** – Type in the correct Fund number or use the drop-down menu for options.
3. **Organization** – This field will auto-fill with your Organization Code. You can change it if necessary.
4. **Account** – Type in the correct Account Code.
5. **Program** – Type in the correct Program Code.
6. **Location** – Choose the CCRI campus this requisition pertains to.
7. **Distribution Amount** – The amount should auto-populate from the Quantity and Unit Price entered on the previous screen.
8. **Distribution Percent** – The percentage will default to 100.00, you can edit this text field if you are including multiple FOAPAL strings. *For example, type “50” in the box to the right to assign 50% of the costs of the purchase to the FOAPAL string. For additional assistance, contact the [Purchasing Department](#).*

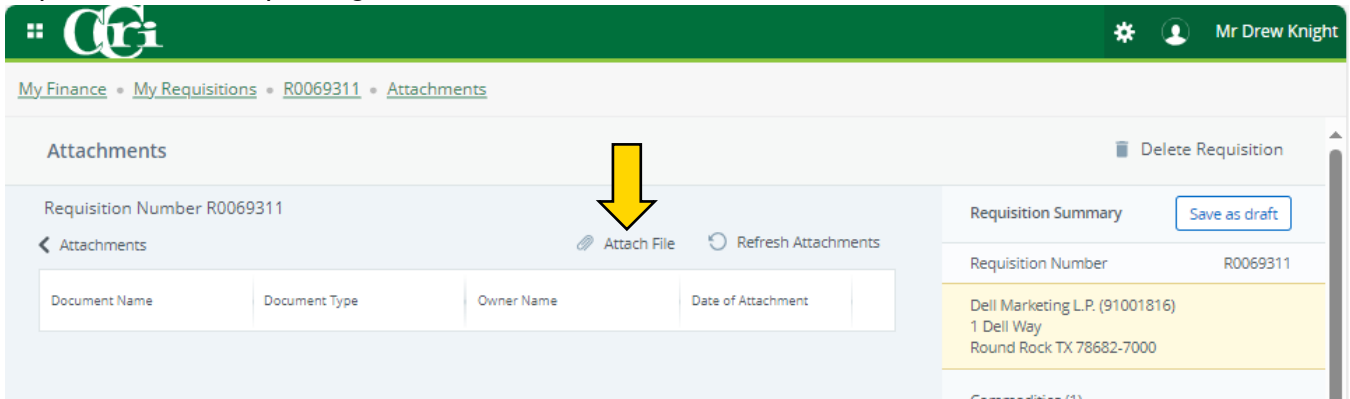
Note: Do not enter a zero-dollar amount on a line item. In some cases, if there is no charge for the item, enter it as 0.01 and note “No Charge” in the item text.

Once the Commodity/Accounting section has been completed, click “Save” at the bottom of the screen.

You can attach supporting documents by clicking “Attachments” on the right-hand side of a requisition.

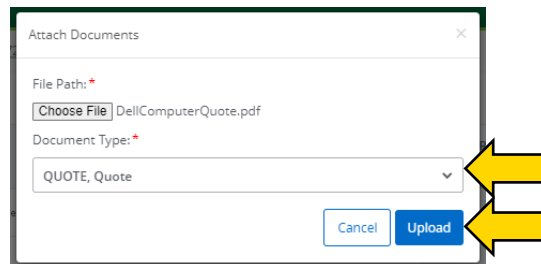


On this screen, you can upload attachments and see which documents have already been attached to the requisition. To start uploading, select “Attach File.”



A box will appear where you can choose a file for upload and select the Document Type via the drop-down menu.

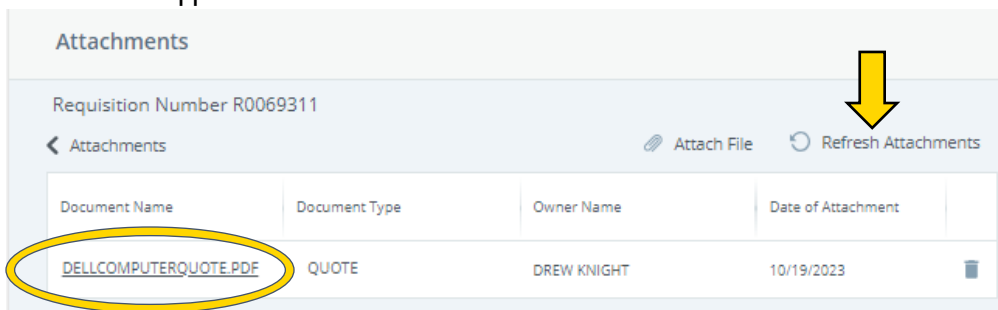
For this example, a price quote is being uploaded so you would choose “QUOTE.” Then, press “Upload” when you are all set.



Once you have successfully attached a document, a notification will appear in the upper right-hand corner.



The attachment will also appear in the list below. Press “Refresh Attachments” if it does not.



You can repeat these steps to add more items to the requisition if you are purchasing multiple, unique items.

My Finance • My Requisitions • R0069311

R0069311 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x v

Commodities (1)

Desktop Computer	300.00
Quantity 2.00 @ 150.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding	Amount
C-101010-30005-703105-00	300.00
Accounting Total	300.00
Commodity Total	300.00
Balanced	100%

Requisition Summary Save as draft

Requisition Number R0069311

Dell Marketing L.P. (91001816)
1 Dell Way
Round Rock TX 78682-7000

Commodities (1)

Desktop Computer	300.00
Quantity 2.00 @ 150.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding	Amount
	100%

If all items have been accounted for and you have uploaded all relevant documents, press “Submit Requestion” to submit. At this point you can also view a PDF version of the requisition which will open in a new tab.

Grand Total - All Commodities	300.00
Grand Total - All Accounting	300.00

Back View as PDF Submit Requisition

A notification will appear in the upper right-hand corner of the screen if you have successfully submitted.

Mr Drew Knight 1

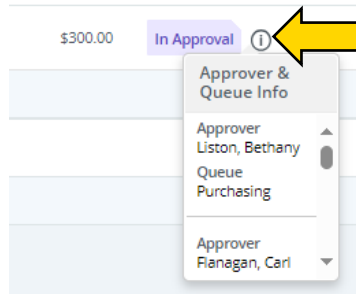
✓ Requisition R0069311 completed successfully

Note: Attachments can only be added to a draft requisition. If you need to add more attachments, recall the requisition and attach the additional documents in the requisition draft before submitting again.

The requisition will now appear in “Pending Requisitions” as it goes through the approval queue process.

Pending Requisitions 1					
R0069311	10/11/2023	Dell Marketing L.P.	\$300.00	In Approval	1

You can check the approval queue by clicking the information icon next to the requisition status.



If you need to make changes and/or add more attachments, click on the pending requisition under “My Requisitions” and select “Recall My Requisition” in the upper right-hand corner.

A screenshot of the requisition details page for R0069311. The page is titled 'My Finance • My Requisitions • R0069311'. The user is identified as 'Mr Drew Knight'. The requisition details include: Requestor: Knight, Drew; Transaction Date: 10/11/2023; Delivery Date: 10/25/2023; Requestor Email: dkinght11@ccri.edu; Chart: C Community College of Rhode Island; Organization: 30005 Office of VP of Admin and Finance; Ship To Location: 100055 Community College of RI Office of the President, 400 East Avenue, Warwick RI 02886. The 'Requisition Summary' section shows: Requisition Number: R0069311; Vendor: Dell Marketing L.P. (91001816) 1 Dell Way Round Rock TX 78682-7000; Commodities (1): Desktop Computer (Quantity 2.00 @ 150.0000, Discount 0.00, Additional Charges 0.00, Tax 0.00). The 'Recall My Requisition' button is highlighted with a yellow arrow.

A notification will appear confirming your selection. Press “Yes” and you’ll get a notification confirming that the requisition has been recalled successfully.

A screenshot showing a confirmation dialog box with the text 'Do you want to recall this Requisition?' and two buttons: 'No' and 'Yes'. A yellow arrow points to the 'Yes' button. Below the dialog box, a green notification banner displays a checkmark and the text 'Requisition R0069311 recalled successfully'.

The requisition will now again appear in your “Draft Requisitions” where you can make changes and resubmit.

Note: If the requisition needs to be edited or corrected and was previously completed and approved by your department, contact the Purchasing Department to ask that it be disapproved at their level, which will then enable you to make any necessary corrections. Also, if the Purchasing Department has already approved a requisition, the document cannot be disapproved. It will need to be canceled by Purchasing and a new requisition will need to be entered by the department.

If you cannot recall the requisition and/or need to disapprove a requisition, go to “Approve Documents” on the My Finance home screen.

My Finance

Hello Drew,
Create, edit and approve transactions and view financial information for department / organization.

My Requisitions
Create and view draft, pending and completed requisitions and supporting documentation.

Approve Documents
View list of documents pending approval. Approve, disapprove, or deny.

View Document
View draft, pending and completed documents with related information and approval history.

Your User ID will autopopulate. Enter the Requisition number in the “Document Number” text field. After, press “Submit” and you will be brought to a new screen showing all matching documents.

My Finance > Approve Documents

Approve Documents

The radio buttons related to next approver apply when a User ID is present.

User ID: DKNIGHT Document Number: R0069311 Submit

User ID is next approver All documents User may approve

Press the “Disapprove” button on the right. You will not be able to press “Approve” unless you are next in the approval queue.

Approve Documents List 1

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT	300.00	-	Yes	DOC	-	🕒	Disapprove	Approve

A new box will appear where you can enter a reason for the disapproval in the “Comment” text field. Lastly, press “Disapprove” to disapprove the requisition.

Disapprove Document

Document Number: R0069311 | Document Type: REQ

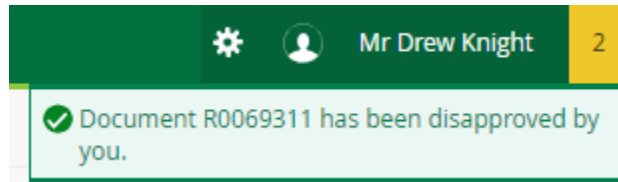
Change Sequence: - | Submission: -

Amount: 300.00

Comment: Approval has been denied!

Buttons: Cancel, Disapprove

A notification will appear in the upper right-hand corner confirming the document has been disapproved.



The disapproval will be shown in the “Approval History” of the requisition. You can view the approval history by going to “View Document” on the My Finance home screen.

My Finance

Hello Drew,
Create, edit and approve transactions and view financial information for department / organization.

- My Requisitions**
Create and view draft, pending and completed requisitions and supporting documentation.
- Approve Documents**
View list of documents pending approval. Approve, disapprove, or deny.
- View Document**
View draft, pending and completed documents with related information and approval history.

First, choose “Requisition” for the document type, “Choose Document Number” for the method of document search, and then enter the recorded requisition number in the last text field.

My Finance • View Document

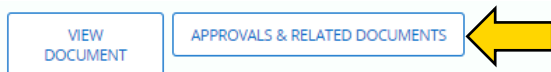
View Document

Document Type
Requisition x v

Document Search
Choose Document Number x v

Document Number *
R0069311

Next, press “Approvals & Related Documents” to search. Selecting “View Document” will only bring up the requisition itself.



Lastly, you will be brought to this screen where you can check attachments, approval history, and any approvals that are required.

My Finance • View Document • Approval & Related Documents - Requisition

Approval & Related Documents - Requisition

Related Documents
No Related Documents information available for R0069311

Attachments
No Attachments for R0069311

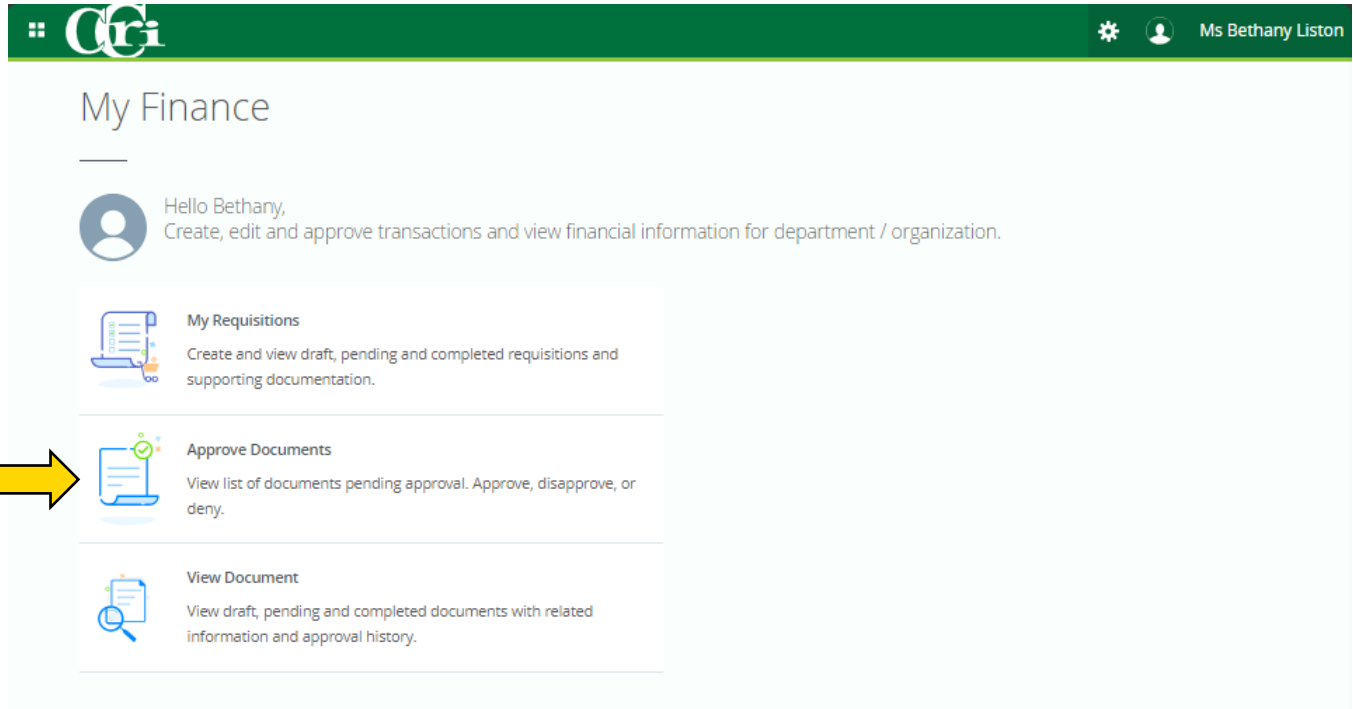
Approval History
(DENY) (0)
Knight, Drew | 10/16/2023
(DENY) (0)
Knight, Drew | 10/16/2023

Approvals Required
Purchasing (P001) (1)
Liston, Bethany
Flanagan, Carl

BACK TO VIEW DOCUMENT

Approving, Disapproving, and Reviewing Requisitions

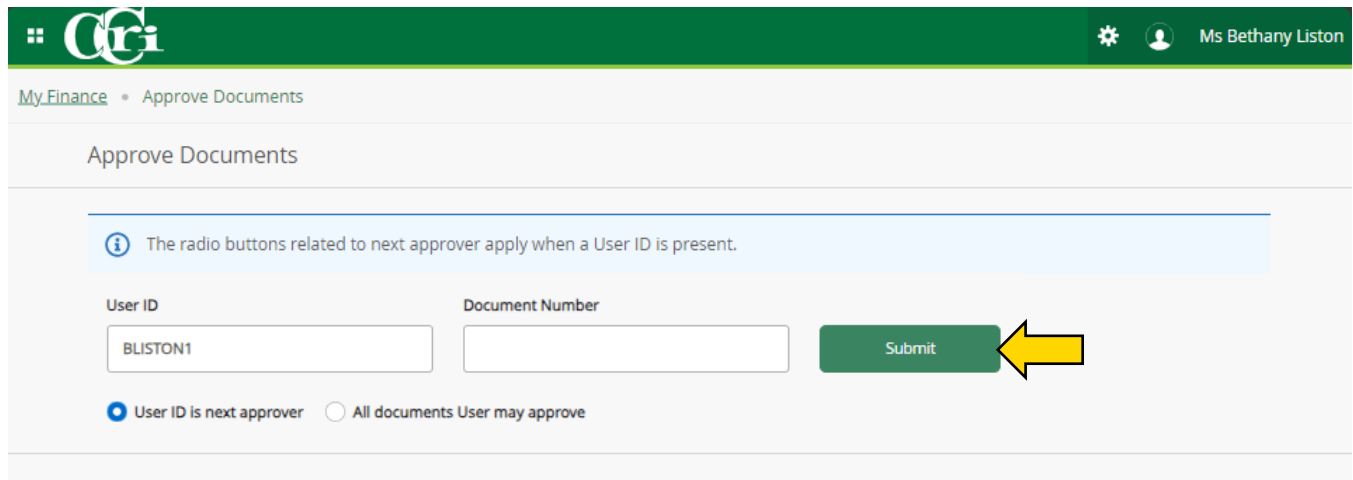
To review a requisition awaiting your review and approval, go to “Approve Documents.”



The screenshot shows the 'My Finance' dashboard. At the top, there is a green header with the CCI logo and the user name 'Ms Bethany Liston'. Below the header, the page title 'My Finance' is displayed. A greeting message says 'Hello Bethany, Create, edit and approve transactions and view financial information for department / organization.' There are three main menu items: 'My Requisitions' (Create and view draft, pending and completed requisitions and supporting documentation), 'Approve Documents' (View list of documents pending approval. Approve, disapprove, or deny.), and 'View Document' (View draft, pending and completed documents with related information and approval history.). A yellow arrow points to the 'Approve Documents' option.

Your username will automatically populate in the “User ID” text field. You can press “Submit” to show all documents awaiting your approval.

To search for a specific requisition, enter the requisition number in the “Document Number” text field and then press “Submit.”



The screenshot shows the 'Approve Documents' form. At the top, there is a green header with the CCI logo and the user name 'Ms Bethany Liston'. Below the header, the breadcrumb 'My Finance > Approve Documents' is visible. The page title 'Approve Documents' is displayed. A blue information box contains the text: 'The radio buttons related to next approver apply when a User ID is present.' There are two text input fields: 'User ID' (containing 'BLISTON1') and 'Document Number'. To the right of these fields is a green 'Submit' button, which is highlighted by a yellow arrow. Below the input fields, there are two radio buttons: 'User ID is next approver' (selected) and 'All documents User may approve'.

A list of documents will appear that you are eligible to approve.

My Finance • Approve Documents

Approve Documents

Queried Parameters

Another Query

Approve Documents List 1

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

To review the requisition, click on the requisition number in the “Document” column.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

To review any attachments, press the paperclip icon under “Attachments.”

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

After you have reviewed the requisition, press either “Disapprove” or “Approve” on the righthand side of the document list.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

A new box will appear where you can add a comment in the text field provided if necessary. Then, press “Approve” to approve the requisition.

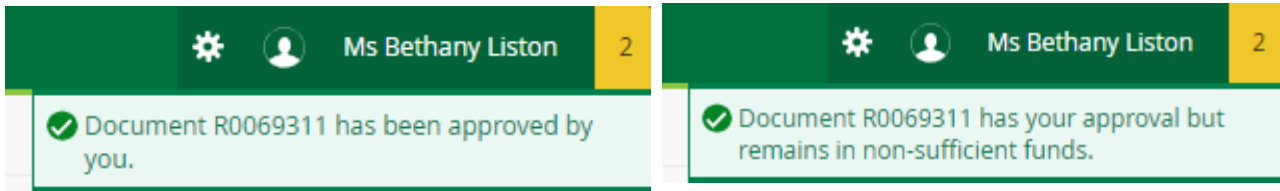
Approve Document

Document Number: R0069311
Document Type: REQ
Change Sequence: -
Submission: -
Amount: 300.00

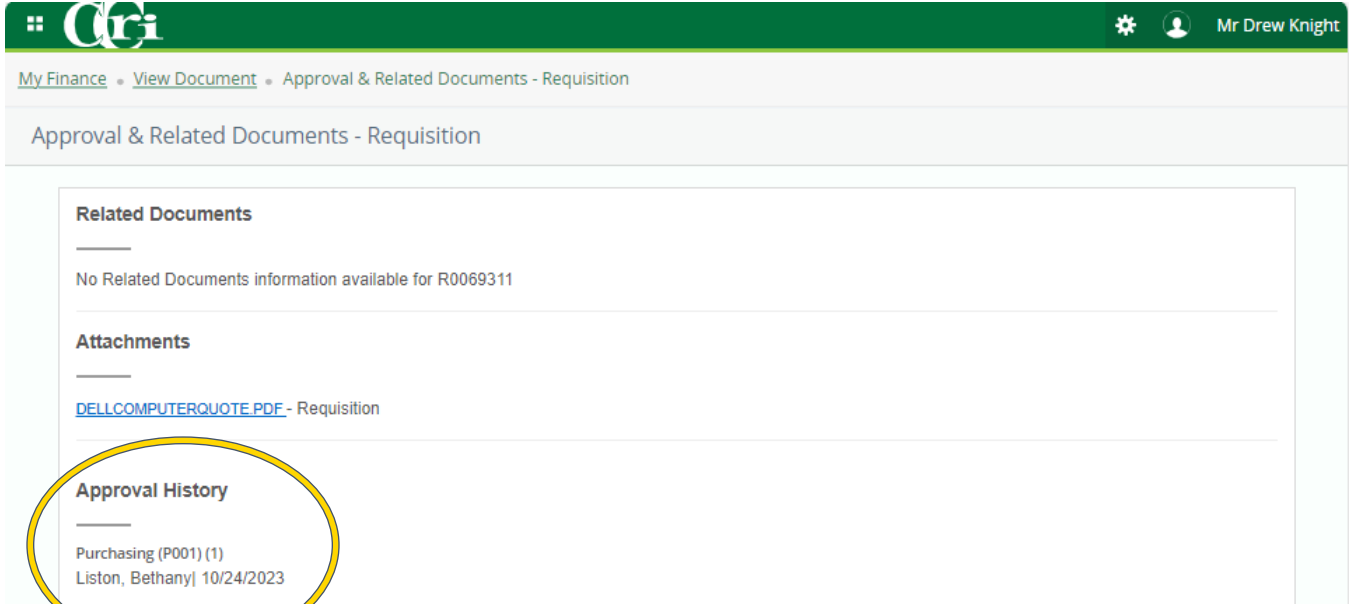
Comment: This document has been approved.

Cancel Approve

A notification will appear in the upper right-hand corner of the screen. Depending on where you are in the approval process, you will see one of two notifications:



Your approval will now be recorded in the "Approval History" of the requisition.



Deleting a Purchase Requisition

Occasionally, there are situations where a requisition is not needed and should be deleted from Banner. A requisition can be deleted if it is not completed or approved.

If the requisition has been completed and is awaiting approval, you can recall/disapprove the requisition where it will be accessible again in your drafts.

If the requisition has been approved by Purchasing, contact the [Purchasing Department](#) so the requisition can be canceled. At this point, it can no longer be deleted from the system.

To delete a draft requisition, go to “My Requisitions” on the My Finance home screen and select the draft requisition you wish to delete.

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 1				
R0069312	10/13/2023	Dell Marketing L.P.	\$0.00	Draft

Once opened, select “Delete Requisition” on the right-hand side of the screen above the Requisition Summary.

R0069312 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number: R0069312
Requestor: Knight, Drew
Organization: C Community College of Rhode Island

Requisition Summary Save as draft

Requisition Number: R0069312
Dell Marketing L.P. (91001816)
1 Dell Way
Round Rock TX 78682-7000

A notification in the upper right-hand corner will appear confirming your selection. Press “Yes,” and you’ll get another notification confirming that the draft requisition has been deleted successfully.

Mr Drew Knight 1

⚠ Do you want to delete this requisition?

No Yes

Mr Drew Knight 1

✓ Requisition R0069312 deleted successfully

E-mail, Export, and Print Attachments

To share documents and attachments, go to “View Document” on the My Finance home screen.



View Document

View draft, pending and completed documents with related information and approval history.

For Document Type, choose “Requisition”, “Invoice”, or “Purchase Order.”

Next, select “Choose Document Number” as your Document Search method.

Then, enter the recorded Document Number and press “Approvals & Related Documents.”

View Document

Document Type

Requisition



Document Search

Choose Document Number



Document Number *

R0012345



[VIEW DOCUMENT](#)

[APPROVALS & RELATED DOCUMENTS](#)

On the “Approval & Related Documents” screen, scroll down to the “Attachments” section and click on a file you would like to share.



[My Finance](#) • [View Document](#) • [Approval & Related Documents - Requisition](#)

Approval & Related Documents - Requisition

Related Documents

No Related Documents information available for R0012345

Attachments

[Attachment - Quote](#)

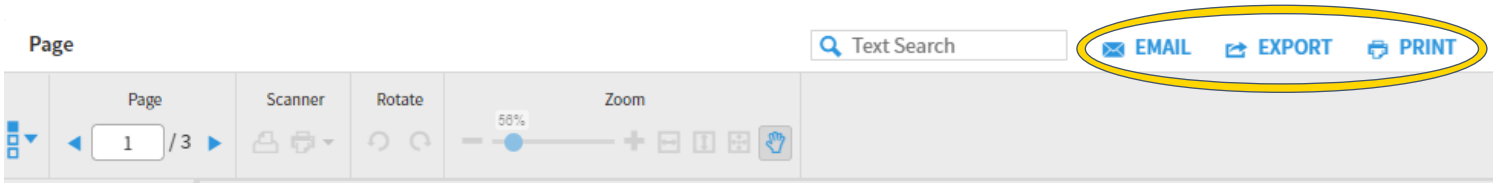
[Attachment - Misc docs 1](#)

[Attachment - Sole/single source](#)

[Attachment - Quote](#)

The document will now be shown on a new screen.

Above the document, in the upper right-hand corner, you will see “Email”, “Export”, and “Print” options.

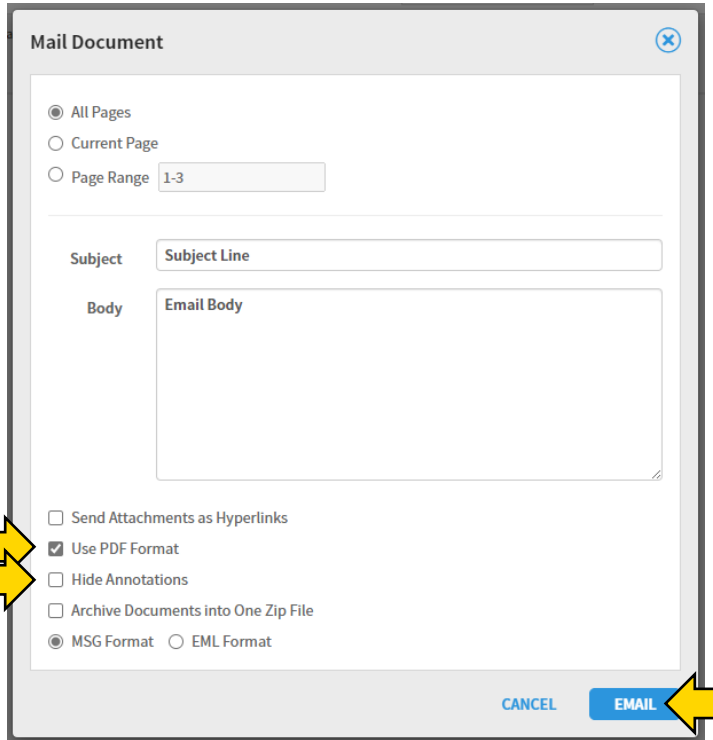
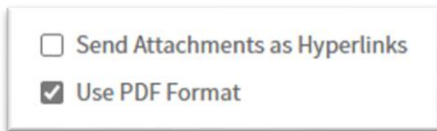


Email – First, uncheck “Send Attachments as Hyperlinks.” Then, select “Use PDF Format.”

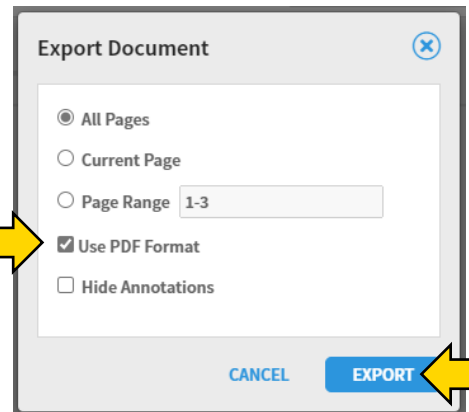
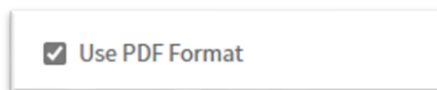
The email draft, with the PDF attachment, will open automatically in the Outlook desktop application.

Then you will add an email recipient address and be able to edit the subject line and body then.

If you do not have Outlook on your device, you will have to manually open the email draft by opening the .msg file that will download automatically.



Export – Select “Use PDF Format” and then press “Export.”



Print – Confirm your settings and press “Print.”

Additional page and print formatting options can be found by clicking “More Options.”

