



CREATING A REQUISITION: FPAREQN

Requisition form is to initiate the procurement process by defining an internal request to acquire goods or services. It enables you to define departmental needs by identifying the requestor, vendor, commodity, and accounting information.

- Log in to Banner through the PCC website:

<https://pasadena.edu/business-administrative-services/its/banner-links.php>

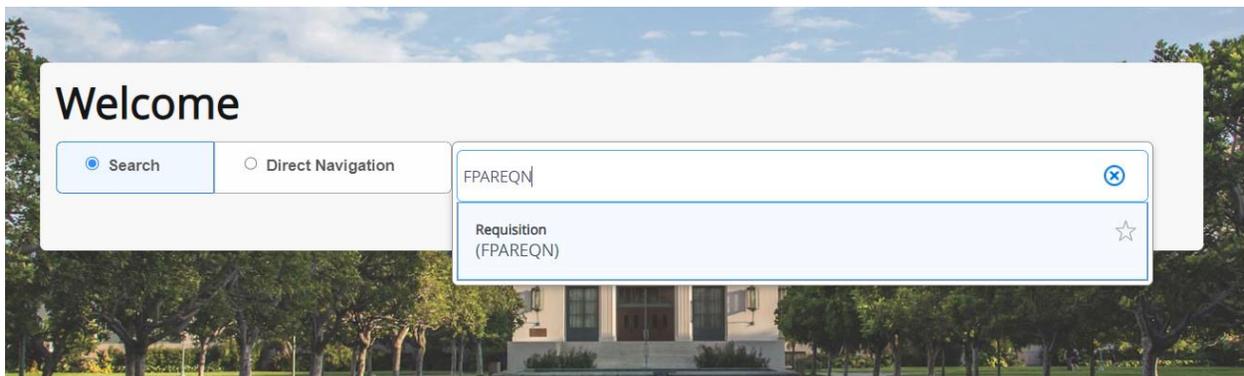
INFORMATION TECHNOLOGY SERVICES

LancerPoint / Banner Menu

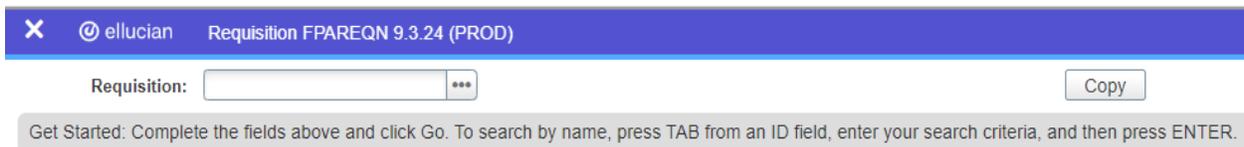
Banner PROD

Banner PROD

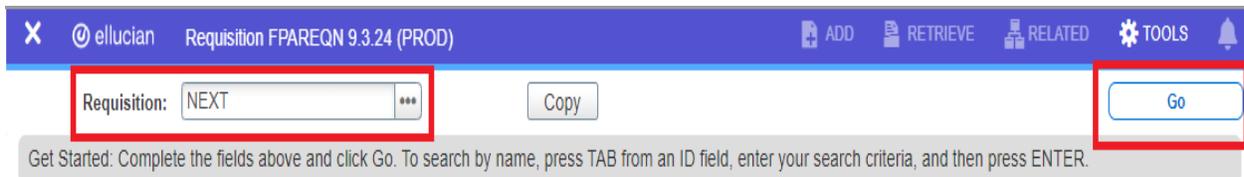
- Main Dashboard → Type in code: **FPAREQN**



- Press **Enter** on the keyboard and it will bring you to the following page:



- Type in **NEXT** → **Go**



TAB 1: Requestor/Delivery Information

- Fill in the following required (*) fields:
 - **Order Date** and **Transaction Date**
 - will be automatically generated but it can also be modified to a future date.
 - **Delivery Date**
 - **Requestor**
 - will be automatically generated based on your login, but it can also be modified.
 - **Organization**
 - ORG Code from the Funding Line for this Requisition.
 - **Email Address** (of the Requestor)
 - **Ship To**
 - MAIN – non-good/supplies delivery, such as Professional Services, Maintenance Agreements, Licenses, etc.
 - OCDC – on campus delivery center for deliverable goods and supplies, such as office supply orders.
 - **Attention To**

Requisition: NEXT

Requisition FPAREQN 9.3.24 (PROD) ADD RETRIEVE

Requisition: NEXT

REQUISITION ENTRY: REQUESTOR/DELIVERY

| | | | |
|--------------------|------------|---|------|
| Requisition | NEXT | Comments | |
| Order Date * | 03/04/2024 | Commodity Total | 0.00 |
| Transaction Date * | 03/04/2024 | Accounting Total | 0.00 |
| Delivery Date * | 03/15/2024 | <input checked="" type="checkbox"/> Document Level Accounting | |

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

REQUESTOR/DELIVERY INFORMATION

| | | | |
|-----------------|-----------------------------------|--------------------|--------------------------|
| Requestor * | Emily Luo | Street Line 2 | 150 S. Hill Ave |
| Organization * | 360000 Purchasing Services Office | Street Line 3 | |
| COA * | D Pasadena City College | Contact | |
| Email | eluo@pasadena.edu | Attention To * | George Chidiac/Emily Luo |
| Phone Area Code | | Building | |
| Phone Number | | Floor | |
| Phone Extension | | City | Pasadena |
| Fax Area Code | | State or Province | CA |
| Fax Number | | Zip or Postal Code | 91106 |
| Fax Extension | | Nation | |
| Ship To * | OCDC | Area Code | |
| Street Line 1 | Pasadena City College District | Phone Number | |
| | | Extension | |

- Click **Save** at the bottom right corner of the page to save your entries.

Area Code

Phone Number

Extension

SAVE

- Click on the Down Arrow for the next page or Up Arrow for the previous page on the bottom left corner of the page.

Street Line 1 *Pasadena City College District*

Navigation arrows (up and down)

TAB 2: Vendor Information

- Provide the following information:
 - Vendor
 - Enter the **Vendor Banner ID#** and press **Enter**

Requestor/Delivery Information | **Vendor Information** | Commodity/Account

▼ VENDOR INFORMATION

Vendor ...

Vendor Hold

Address Type ...

Sequence ...

- Or by **Search** using the following steps:
 1. Put your mouse/pointer over the ellipsis for Vendor.

Requestor/Delivery Information | **Vendor Information** | Commodity/Account

· VENDOR INFORMATION

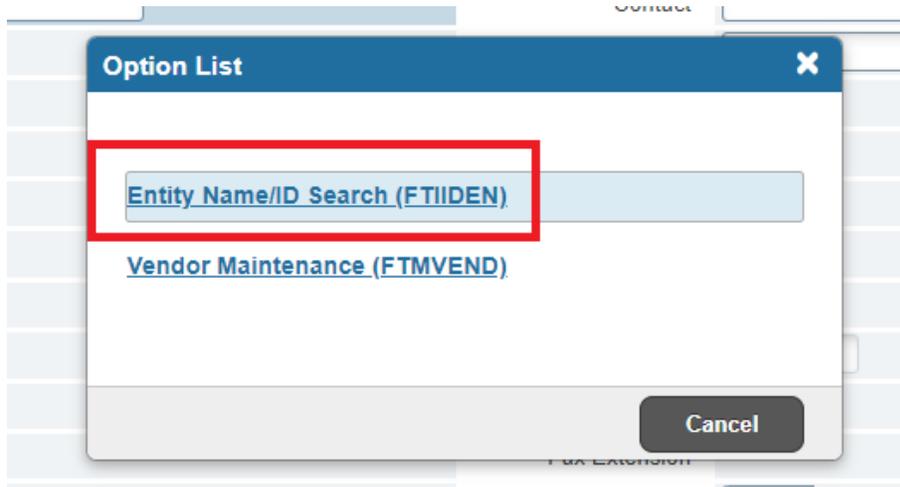
Vendor ...

Vendor Hold

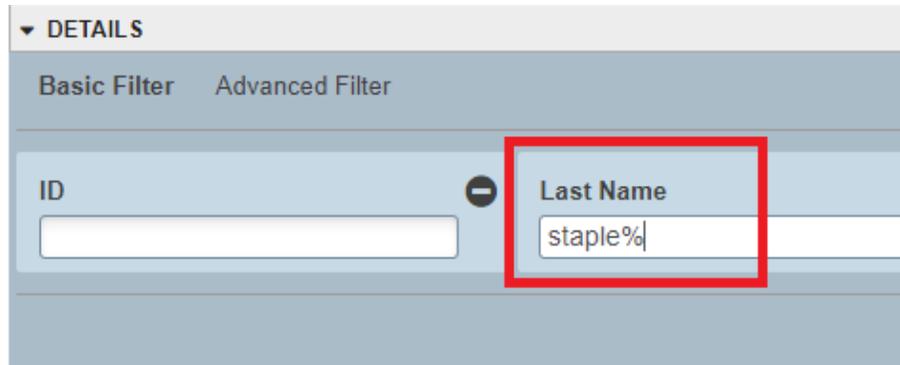
Address Type ...

Sequence ...

2. Click on **Entity Name/ID Search (FTIIDEN)**



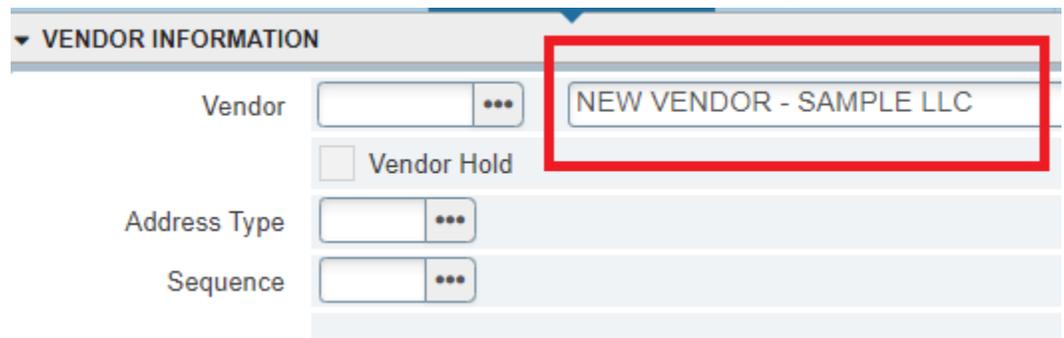
3. Type in partial of the **Vendor Name** followed by a percent sign: %.



4. Double click the correct **Vendor**.

| | | |
|----------|--------------------------------|--|
| 022005 | Staples | |
| 10206847 | Staples Advantage | |
| 10206847 | Staples Advantage Dept LA | |
| 10129536 | Staples Contract and Commer... | |
| 10206847 | Staples Store #0616 | |
| 10137354 | Staples Technology Solutions | |

- For new Vendor that has not been added to the system, you can do the following and provide the Requisition # to the department designed Purchasing staff for reference.



- Address Type and Sequence
 - will be automatically generated.

▼ **VENDOR INFORMATION**

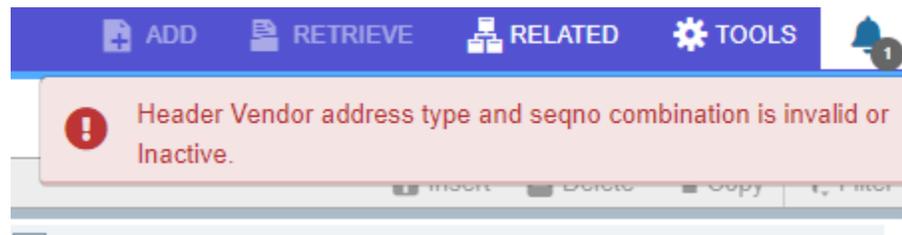
Vendor Staples

Vendor Hold

Address Type

Sequence

- If error occurred:
 - Address Type and Sequence combo is invalid/inactive.



- Put your mouse/pointer over the ellipsis for Address Type.

Address Type

Sequence

- **Review** and **Select** the correct Address Type and Sequence Number
 - **Review**, to view additional address records, use the left and right arrows.

ID: 022005 Staples

▼ **ADDRESS INFORMATION QUERY**

Address Type

Sequence Number

Source

From Date

To Date

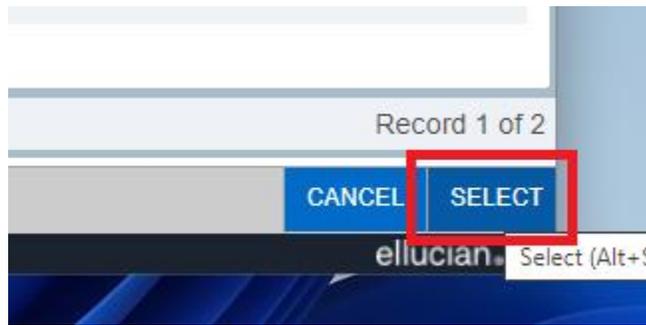
Status Indicator

Street Line 1

1 of 2

1 Per Page

- **Select**, by clicking Select at the lower right corner of the page.



- The Address will be automatically generated upon selection.

| | | | |
|--------------------|--------------------------|-------------|---------|
| Vendor | 022005 | ... | Staples |
| | <input type="checkbox"/> | Vendor Hold | |
| Address Type | AP | ... | |
| Sequence | 3 | ... | |
| Street Line 1 | PO Box 660409 | | |
| Street Line 2 | | | |
| Street Line 3 | | | |
| City | Dallas | | |
| State or Province | TX | | |
| Zip or Postal Code | 75266-0409 | | |

- **Save** your work and go to the **next page**.

TAB 3: Commodity/Accounting

***Please be sure to use “Tab” on the keyboard for each field to avoid errors when the Purchasing department encumber funds.**

Part 1: Commodity

- Commodity: Tab → Leave it blank
- Description of the product/service
 - Please include item# for itemized orders
 - Amazon orders: Please email the link(s) of the product to the Buyer for placing orders.
 - If extra space is needed for description of the product.
 - Go to **Related** at the upper right corner of the page and select **Item Text**.

ADD RETRIEVE RELATED TOOLS

Search

Review Commodity Information [FOICOMM]

In Suspense

Document Text

Item Text [FOAPOXT]

Document Text [FOAPOXT]

- Click **Go**.
- It will direct you to the following page to add additional content to the product description. You can also insert additional line(s) or delete.

PROCUREMENT TEXT ENTRY Settings Insert Delete

| Text | Clause Number | Print * |
|------|---------------|-------------------------------------|
| | | <input checked="" type="checkbox"/> |

[1] of 1 10 Per Page

- Select the appropriate unit of measure.
- Tax Group
 - NT – for non-taxable, such as services or if the total value already included tax.
 - PCC – to automatically calculate and include tax (10.25%) to Document Total.
- Quantity
- Unit Price
- Item: will be automatically generated at this point.
 - Example for NT Tax Group.

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

COMMODITY

| Item | Commodity | Description | U/M | Tax Group | Quantity | Unit Price |
|------|-----------|-----------------|-----|-----------|----------|------------|
| 1 | | Office Supplies | EA | NT | 1.00 | 10.0000 |

Extended Amount 10.00 Tax 0.00

Discount 0.00 Commodity Total 10.00

Additional 0.00 Document Total 10.00

- Example for PCC Tax Group.

COMMODITY

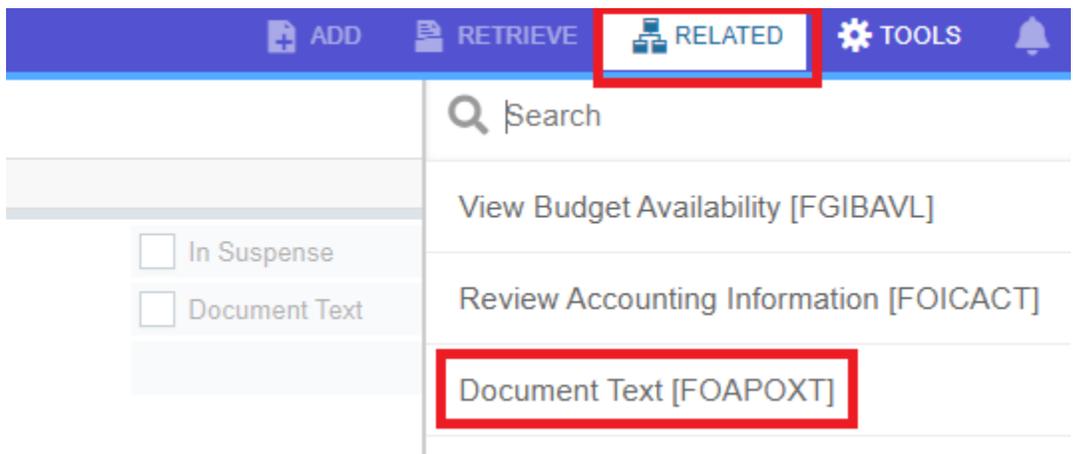
| Item | Commodity | Description | U/M | Tax Group | Quantity | Unit Price |
|------|-----------|-----------------|-----|-----------|----------|------------|
| 1 | | Office Supplies | EA | PCC | 1.00 | 10.0000 |

Extended Amount 10.00 Tax 1.03

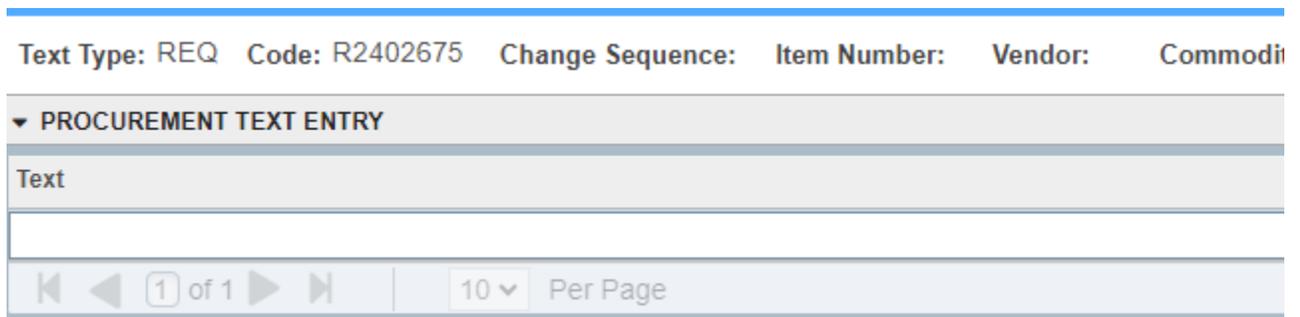
Discount 0.00 Commodity Total 11.03

Additional 0.00 Document Total 11.03

- Go to Related at the upper right corner of the page and selection Document Text.



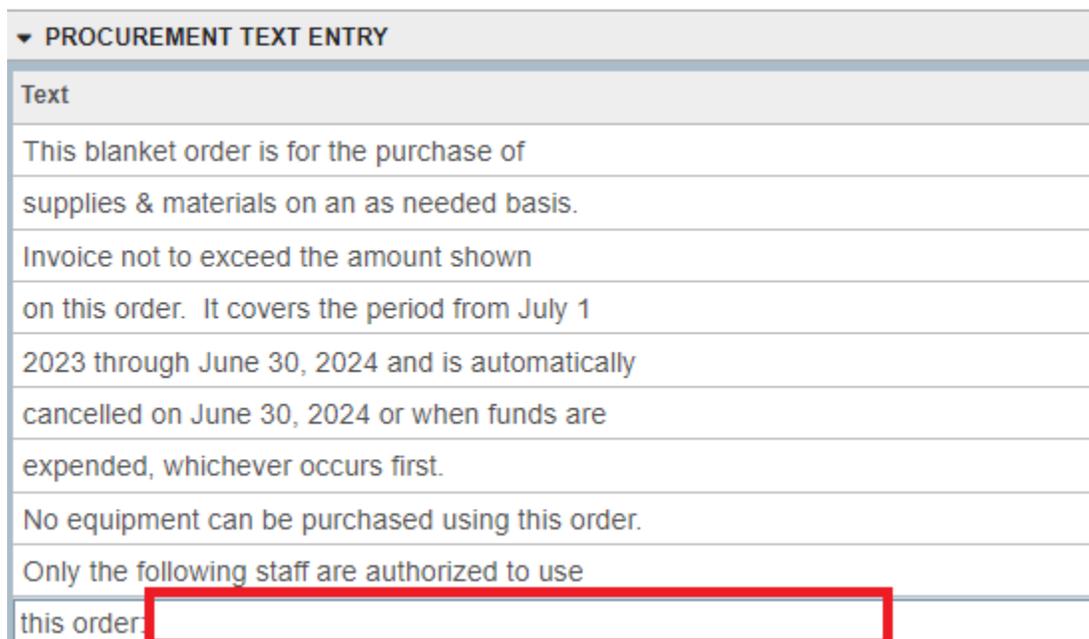
- Press **Go** and it will direct you to the **Procurement Text Entry** where you can include notes related to this order.



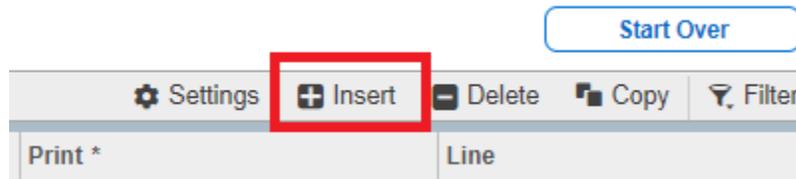
- If the Requisition is a **Blanket Order**, type in **4** for **Modify Clause** and click **Go**.

Modify Clause:

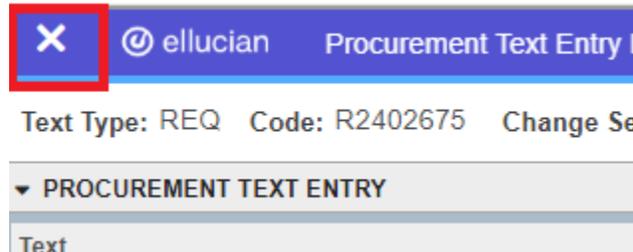
- The following will be automatically generated in **Procurement Text Entry**, where you will need to include the authorized users of the Requisition.



- Click **Insert** for additional fields if needed.



- Click Save and exit after you are done.



- Save your work and go to the **next page**.

TAB 4: Balancing/Completion

- Review page to make sure all fields are completed correctly. Write down the **Requisition #** for your record and tracking purposes.

Requisition: R2402675

REQUISITION ENTRY: REQUESTOR/DELIVERY

| | | | |
|------------------|------------|---|-------|
| Requisition | R2402675 | Comments | |
| Order Date | 03/08/2024 | Commodity Total | 11.03 |
| Transaction Date | 03/08/2024 | Accounting Total | 11.03 |
| Delivery Date | 03/15/2024 | <input checked="" type="checkbox"/> Document Level Accounting | |

Requestor/Delivery Information Vendor Information Commodity/Accounting **Balancing/Completion**

BALANCING/COMPLETION

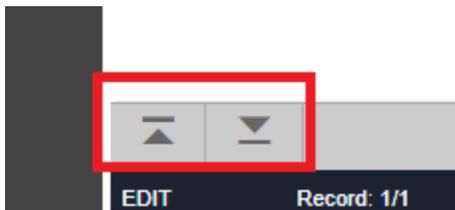
| | | | |
|--------------------------------------|-----------------------------------|---------------------|--------------|
| Vendor | 022005 Staples | Currency | |
| <input type="checkbox"/> Vendor Hold | | Exchange Rate | |
| COA | D Pasadena City College | Commodity Record | 1 |
| Requestor | Emily Luo | Count | |
| Organization | 360000 Purchasing Services Office | Input Amount | 11.03 |
| | | Converted Amount | |

- Review to make sure the **status** for Amounts is all Balanced.

AMOUNTS Insert Delete Copy

| | Input | Commodity | Accounting | Status |
|-------------------|-------|-----------|------------|----------|
| Approved Amount | 10.00 | 10.00 | 10.00 | BALANCED |
| Discount Amount | 0.00 | 0.00 | 0.00 | BALANCED |
| Additional Amount | 0.00 | 0.00 | 0.00 | BALANCED |
| Tax Amount | 1.03 | 1.03 | 1.03 | BALANCED |

- Use the Up and Down arrows to review previous pages if needed.



- Click on **Complete** to submit Requisition or **In Process** to save the work for a later submission.

