

CREATING A REQUISITON: 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

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Search	O Direct Navigation	FPAREQN	8
		Requisition (FPAREQN)	7

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

×	🖉 ellucian	Requisition FPAREQN 9.3.24 (PROD)
	Requisition:	Copy
G	et Started: Comple	te the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

• 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.
 - o Delivery Date
 - o 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.
 - o Email Address (of the Requestor)
 - o 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

×	@ ellucian	Requisition FPAREQN 9.3.24 (PROD)		l	🔒 ADD		Ŧ
Requi	sition: NEXT							
▼ REQ	UISITION ENTRY: F	REQUESTOR/DELIVERY					🚼 Inse	rt
	Requisition	NEXT	Comments					ī
	Order Date *	03/04/2024	Commodity Total			0.00		
1	Fransaction Date *	03/04/2024	Accounting Total			0.00		
	Delivery Date *	03/15/2024		V Do	cument Level Accounting	1		
Requ	estor/Delivery Info	rmation Vendor Information	Commodity/Accounting	Ba	lancing/Completion			
▼ REQ	UESTOR/DELIVER	YINFORMATION					🚼 Inse	rt
	Requestor *	Emily Luo			Street Line 2	150	S. Hill Ave	
	Organization *	360000 ••• Purchasing S	ervices Office		Street Line 3			
	COA *	D Pasadena City C	ollege					
	Email	eluo@pasadena.edu			Contact			
					Attention To ³	* Geor	rge Chidiac/Emily Luo	
P	hone Area Code				Building			
	Phone Number				Floor			
F	Phone Extension				City	Pasa	idena	
					State or Province	CA		
	Fax Area Code				Zip or Postal Code	9110	6	
	Fax Number				Nation			
	Fax Extension							
	Ship To *	OCDC •••			Area Code			
					Phone Number			
	Street Line 1	Pasadena City College District			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.

4	Street	t Line 1	Pasadena City College District	
	•			

TAB 2: Vendor Information

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

Requestor/D	elivery Info	rmation	Vendor	Information	Commodity/Account
VENDOR IN	FORMATIO	N		•	
	Vendor	022005	•••		
		Vend	or Hold		
Addr	ess Type		•••		
S	equence		•••		

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

Requestor/Delivery Info	rmation	Vendo	r Information	Commodity/Accour
VENDOR INFORMATION	N	_		
Vendor		•••		
	Vend	or Hold	Search	
Address Type		••••		
Sequence		•••		

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

Option List			×	
Entity Name/ID Search (F	<u>TIIDEN)</u>			
Vendor Maintenance (FTM	IVEND)			
		Canco		

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

▼ DETAILS				
Basic Filter	Advanced Filter			
		_		
ID		•	Last Name	
			staple%	

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

1				onergi	
	022005	Staples			
	10206847	Staples Advantage			
	10206847	Staples Advantage Dept LA			
	10129536	Staples Contract and Commer			
	10206847	Staples Store #0616			
	10137354	Staples Technology So	olutions		

• 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.

 VENDOR INFORMATIO 	N	
Vendor	••••	NEW VENDOR - SAMPLE LLC
	Vendor Hold	
Address Type	•••	
Sequence	•••	

- Address Type and Sequence
 - will be automatically generated.

VENDOR INFORMATION				
Vendor	022005 ••• Staples			
	Vendor Hold			
Address Type	AP •••			
Sequence	1 •••			

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



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

Address Type	AP	•••	
Sequence		1 ••• S	earch

- **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 INFORMATIC	DN QUERY
Address Type	AP
Sequence Number	3
Source	
From Date	
To Date	
Status Indicator	
Street Line 1	PO Box 660409
🖌 🚽 🗍 of 2 🕨	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	
	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 \rightarrow 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.
 - o 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		RELATED	🇱 TOOLS				
	Q Search	Q Search					
] In Suspense	Review Co [FOICOMN	mmodity Inforr 1]	nation				
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	Insert	E Delete	
Text	Clause Number		Print *
1 of 1 1 10 v Per Page			

- Select the appropriate unit of measure.
- Tax Group
 - \circ 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 In	nformation	Vendor Informat	ion Commodity/Accounti	ing Balar	ncing/Completion				
COMMODITY			•						
tem	Commo	odity	Description	U/N	Λ	Tax Group	Quantity	Unit Price	
	1	••	Office Supplies	EA	١	NT	1.00		10.0000
1 of 1		10 🗸 Per Pag	e						
Extended Amoun	it	10.	00		Tax	0	.00		
Discour	it	0.	00		Commodity Total	10	.00		
Additiona	ıl 🦳	0.0	0		Document Total	10.	00		

• Example for PCC Tax Group.

COMMODITY									
Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price			
1	1 Office Supplies		EA	PCC	1.00		10.0000		
		ye							
Extended Amount	10	.00	Тах		1.03				
Discount 0.00		.00	Commodity Total	1	1.03				
Additional	C	00	Document Total	1	1.03				

• To Insert/Delete/Copy a line item:

Commodity/A	ccounting	Balancing/Completion						
					🌣 Settings	Insert	E Delete	е 🖪 Сору
	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text		Add Commod
lies	EA	PCC	1.00	10.0000				
								Reco

- Save your work and go to the next page.
- The **Requisition** # should now be generated, write it down for record.

Part 2: Accounting

• **COA** will be automatically generated – press **Tab** on the keyboard.

 ACCOUNTING 							
Sequence	СОА	Year	Index	Fund	Orgn	Acct	Prog
	•••						
4							

• The Year, Org#, and Program# shall be automatically generated.

СОА	Year	Index	Fund	Orgn	Acct	Prog
D	24	•••		360000		6770
10 ¥ Per Pa	ge					

- Press **Tab** when it's in **Index** \rightarrow Leave it blank.
- Complete the funding line by filling in **Fund** and **Acct** #.
- **Tab** through the rest of the fields until it hits **USD**. The tax will be automatically calculated and added to the total commodity amount.

							Settings
Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog
1	D	24		100000	360000	430100	6770
4							
🔰 ┥ 🗍 of 1 🕨	10	 Per Page 					
		%		USD			
Extended Amour	nt				10		
Discour	nt				0.00		
Addition	al				0.00		
Та	IX				1.03		
FOAPAL Tota	al				11.03		
Document Tota	al				10.00		
Remainin	g				1.03		
Commodity Amour	nt				1.00		

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

🔒 ADD		RELATED	🌞 tools 🛛 🔔				
	Q Search						
	View Budg	jet Availability [F	GIBAVL]				
Document Text	Review Accounting Information [FOICAC						
	Document Text [FOAPOXT]						

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

Text Type: REQ	Code: R2402675	Change Sequence:	Item Number:	Vendor:	Commodi
 PROCUREMENT 	TEXT ENTRY				
Text					
📕 ┥ 🗍 of 1		0 🗸 Per Page			

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

Modify Clause:	4	•••	
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• The following will be automatically generated in **Procurement Text Entry**, where you will need to include the authorized users of the Requisition.

▼ PROCUREMENT TEXT ENTRY
Text
This blanket order is for the purchase of
supplies & materials on an as needed basis.
Invoice not to exceed the amount shown
on this order. It covers the period from July 1
2023 through June 30, 2024 and is automatically
cancelled on June 30, 2024 or when funds are
expended, whichever occurs first.
No equipment can be purchased using this order.
Only the following staff are authorized to use
this order:

Click Insert for additional fields if needed.

			. (Start C)ver
	Settings	🖶 Insert	Delete	🖪 Сору	👻 Filter
Print *			Line		

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: R240267	5			
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		Document Level Accounting	
Requestor/Delivery Inf	ormation Vendor Information Commodity/Account	ing Balancing/Completion		
- BALANCING/COMPLE	TION			
Vendor	022005 Staples			Currency
	Vendor Hold		Excha	nge Rate
COA	D Pasadena City College		Commodit	ty Record 1
				Count
Requestor	Emily Luo		Inpu	it Amount 11.03
Organization	360000 Purchasing Services Office		Converte	d Amount

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

- AMOUNTS			🕀 Inser	t 🖪 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.

Complete	In Process