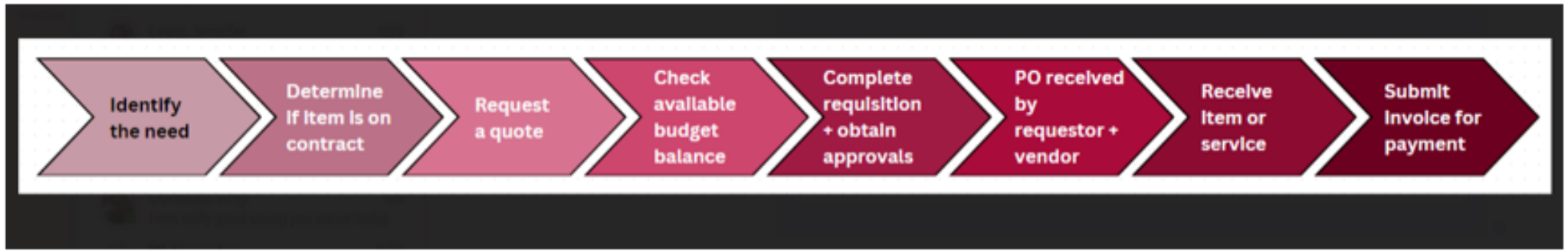
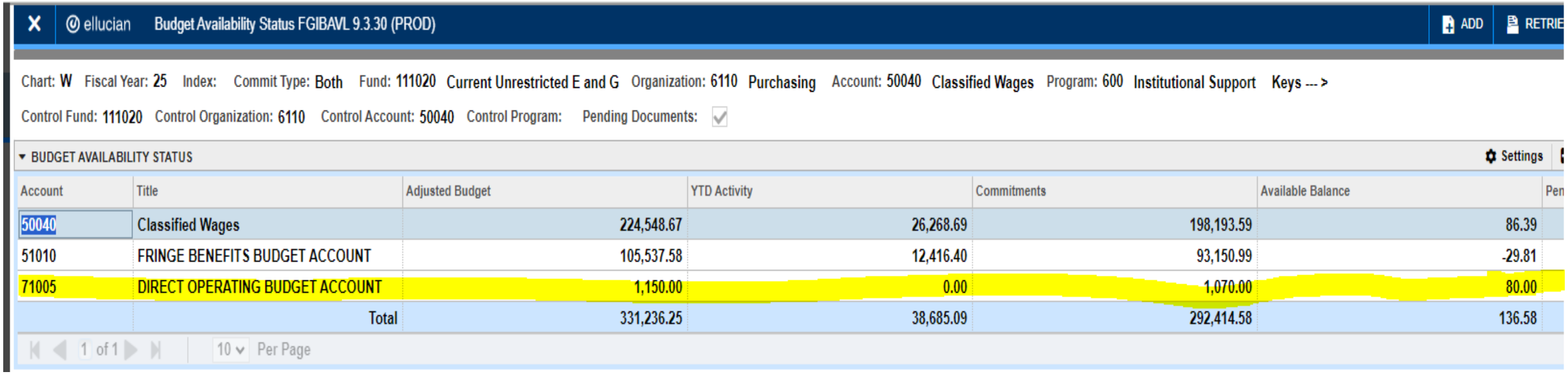
What is a requisition?

- A requisition is a request to order an item(s) or service that will result in a Purchase Order being issued to the requested vendor.



- Only one quote is required for transactions under the "no competition (fair and reasonable) threshold of $10,000.
- Transactions great than $10K-$50K require three bona fide quotes (advertised in SCBO if unavailable).
- Transactions great than $50K-$250K will require you working directly with Procurement team to issue a solicitation.
- Transactions greater than $250K potential spend will require you to work with the Procurement team who will work directly with South Carolina M.M.O. team.
    - Current MMO Lead times for solicitations:
        - IFB – 4 Months
        - RFP for Goods & Services – 8 Months
        - IT – 12 Months

How to check your budget FGIBAVL



[Statewide Goods and Services Contracts]

[Statewide Technology Contracts]

- What if there is no quote, just a bill/invoice?/What if the service has already happened? Do I still need to submit a requisition?

  Yes, but this is considered an unauthorized, illegal procurement. You will be asked to complete an Unauthorized or Illegal Procurement form.
- There are exceptions for not following the procurement process and receiving invoices that may be processed.
  - Memberships/Subscriptions
  - Utilities

Unauthorized Procurements

An unauthorized procurement is a transaction that's completed without prior approval and a university-approved purchase order in place, or a transaction initiated by a party that is not authorized to bind the University to an agreement. The acquisition of products or services on behalf of the University requires appropriate review and approval(s) **PRIOR** to the purchase being made. Unauthorized procurements can apply to the P-Card purchasing process as well as the purchase order process.

Examples of unauthorized procurements:

- An invoice has been received or commencement of work from a vendor without an existing purchase order or contract in place prior to its receipt.
- Items listed on mandatory contracts are purchased from other vendors without Procurement Office approval.
- Signing agreements without University binding authority.
- Using the P-Card for personal or unauthorized purposes.
- Use of P-Card by someone other than the cardholder.

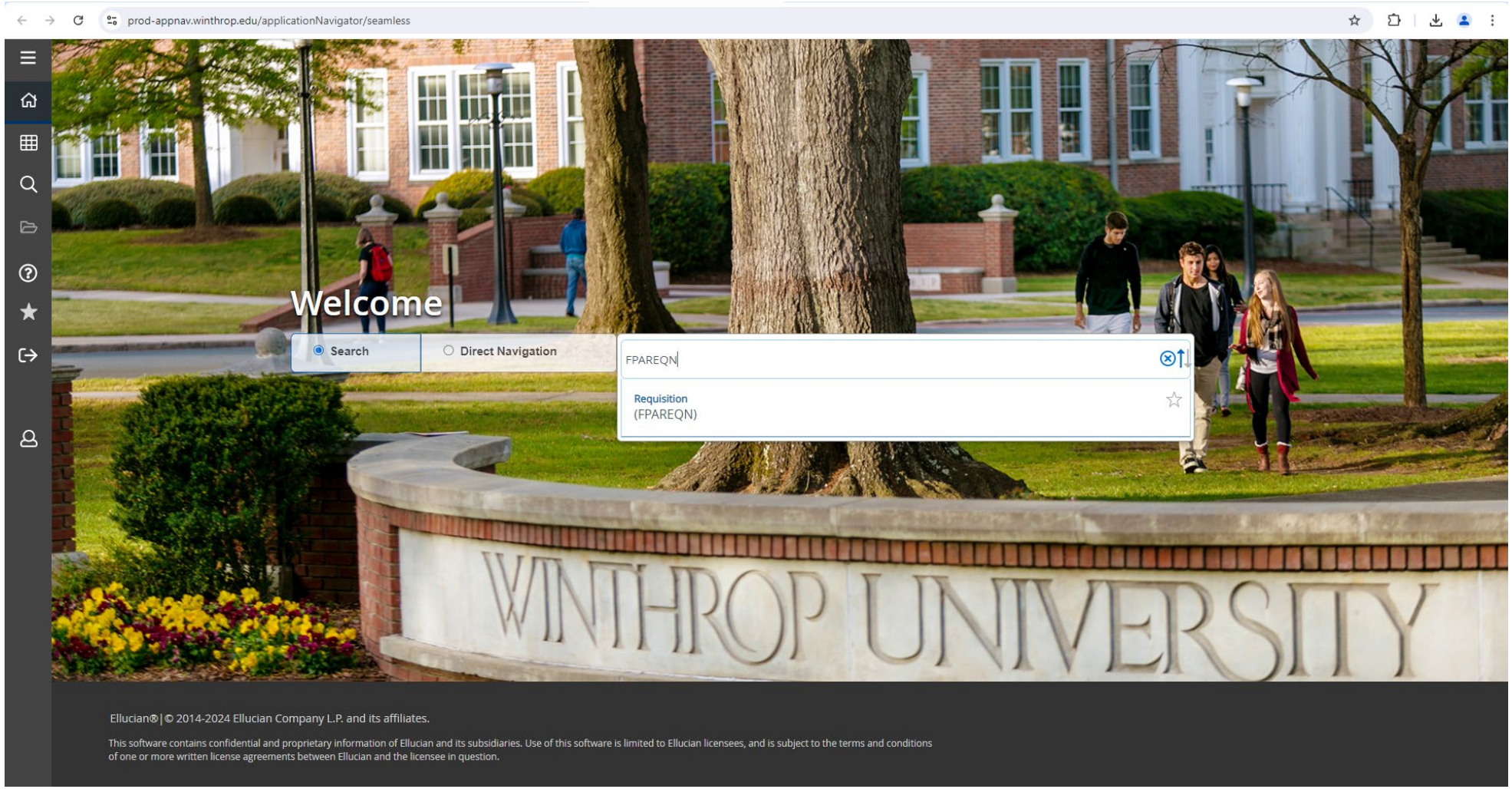
Risks of Unauthorized Procurements

Unauthorized procurement infractions are serious violations that could result in detrimental consequences to the University's resources and reputation. Additional risks include, but are not limited to:

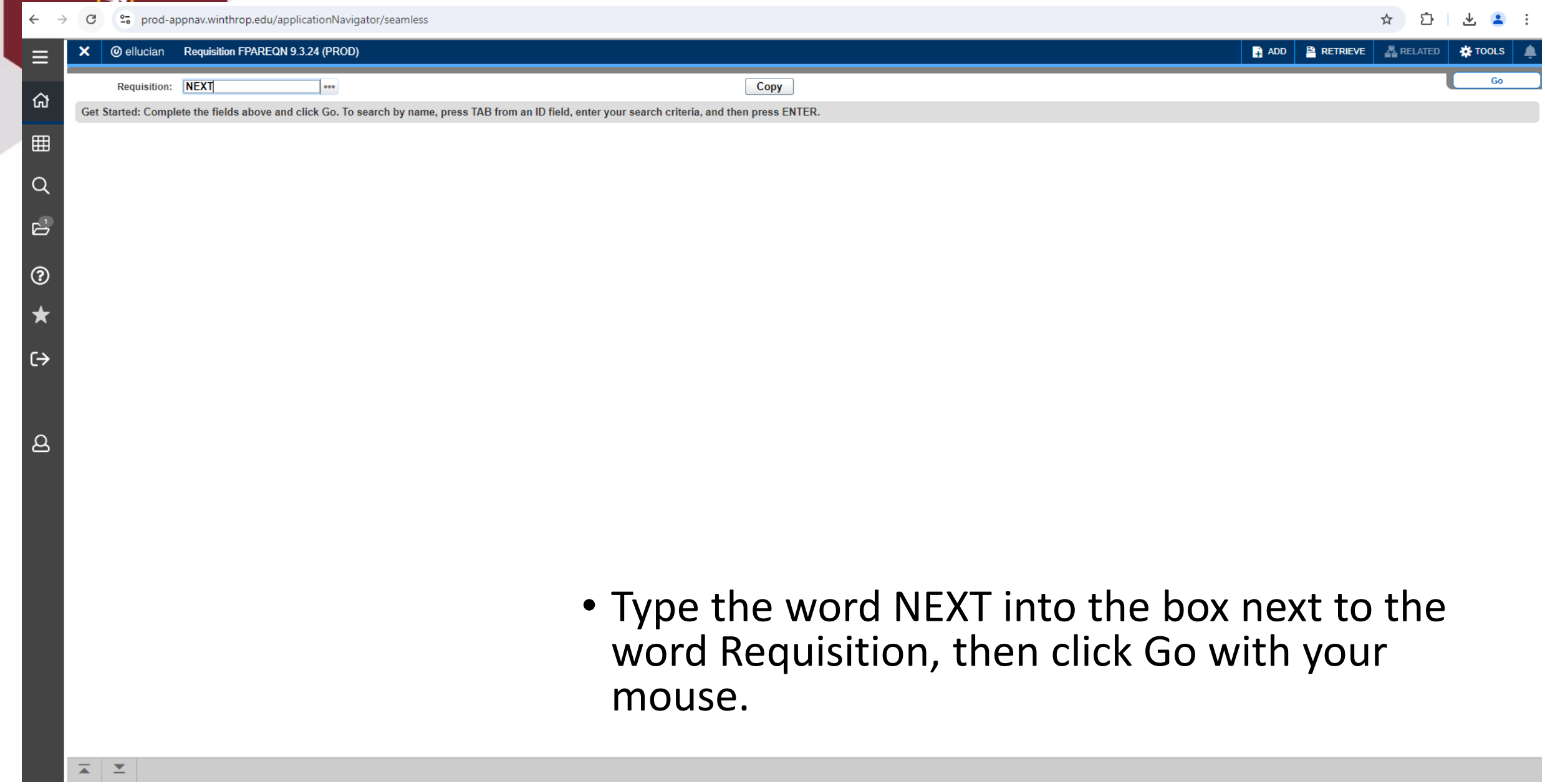
- Reduction/loss of funding to the University.
- Missing out on savings negotiated through the State or University by not utilizing active agreements.
- Vendor receiving late, disrupted or voided payment.
- Equipment non-compliance or non-compatibility with existing equipment and systems.

How to create a requisition in Banner

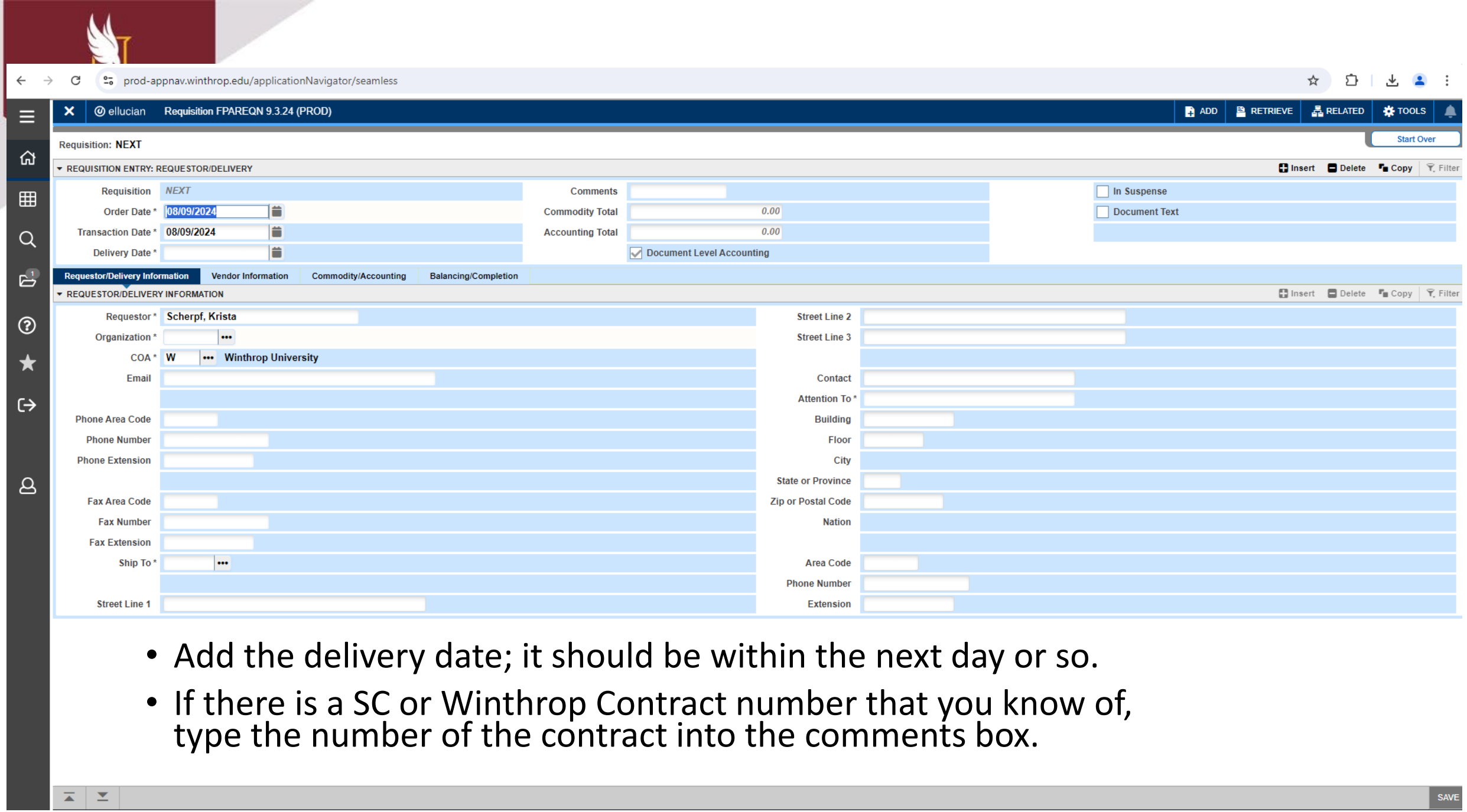
- https://bannerlinks.winthrop.edu



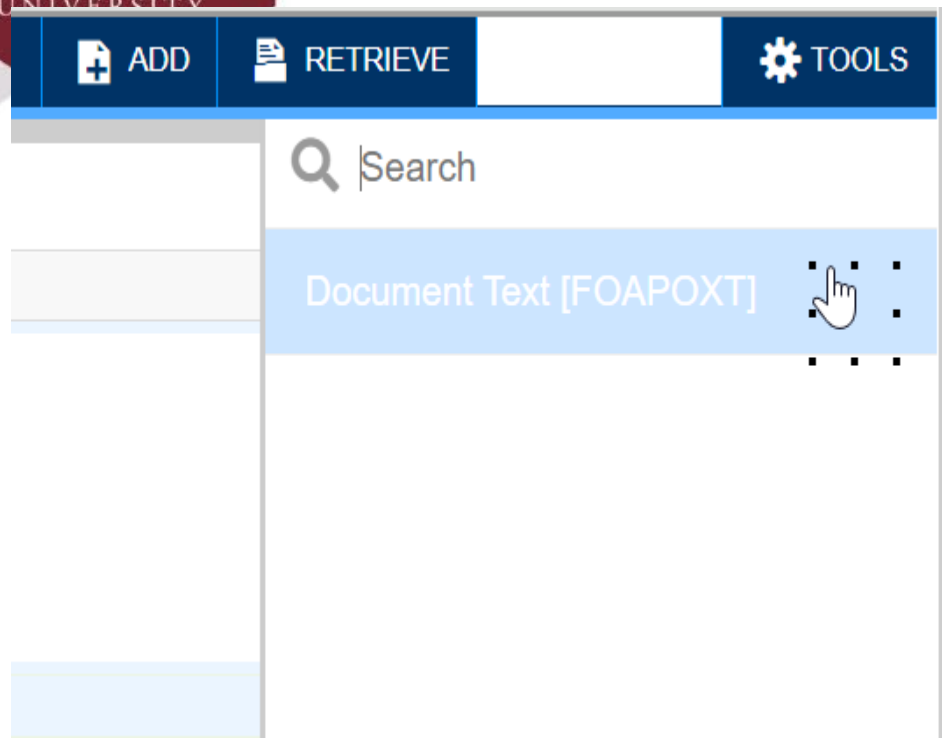
- Type in FPAREQN or search by the term requisition

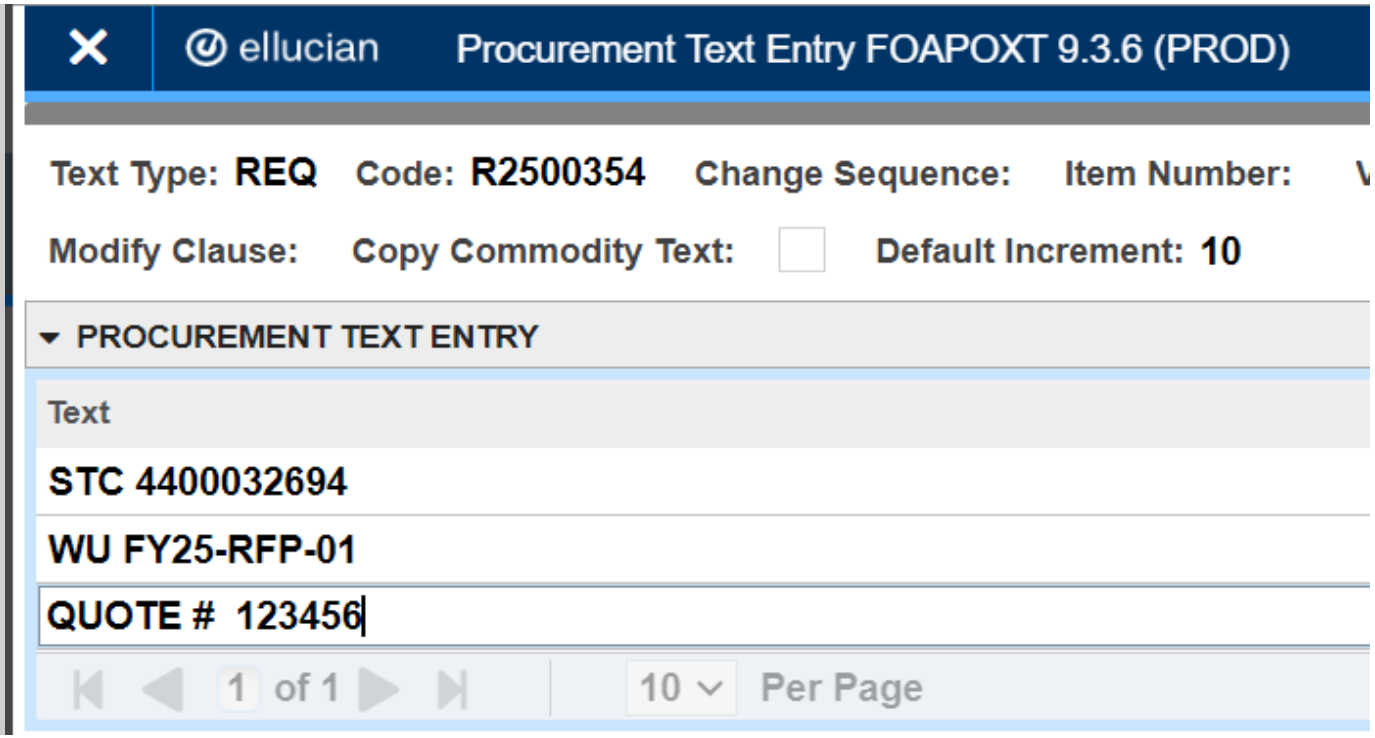


- Type the word NEXT into the box next to the word Requisition, then click Go with your mouse.



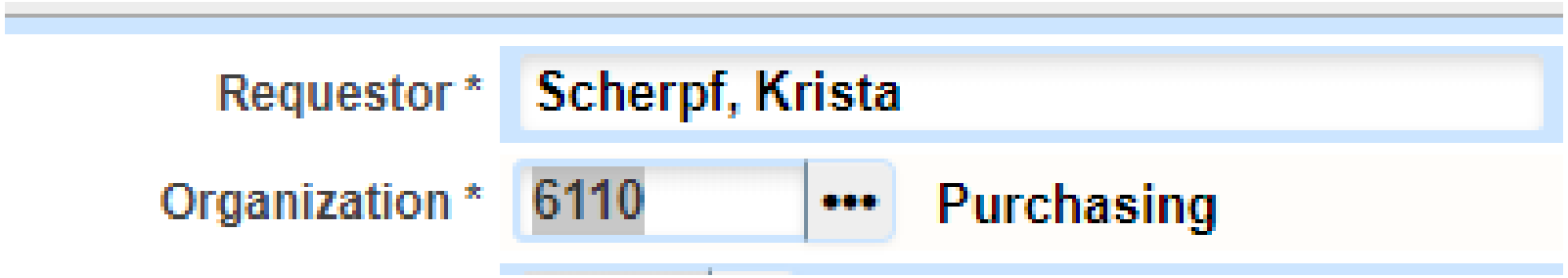
- Add the delivery date; it should be within the next day or so.
- If there is a SC or Winthrop Contract number that you know of, type the number of the contract into the comments box.

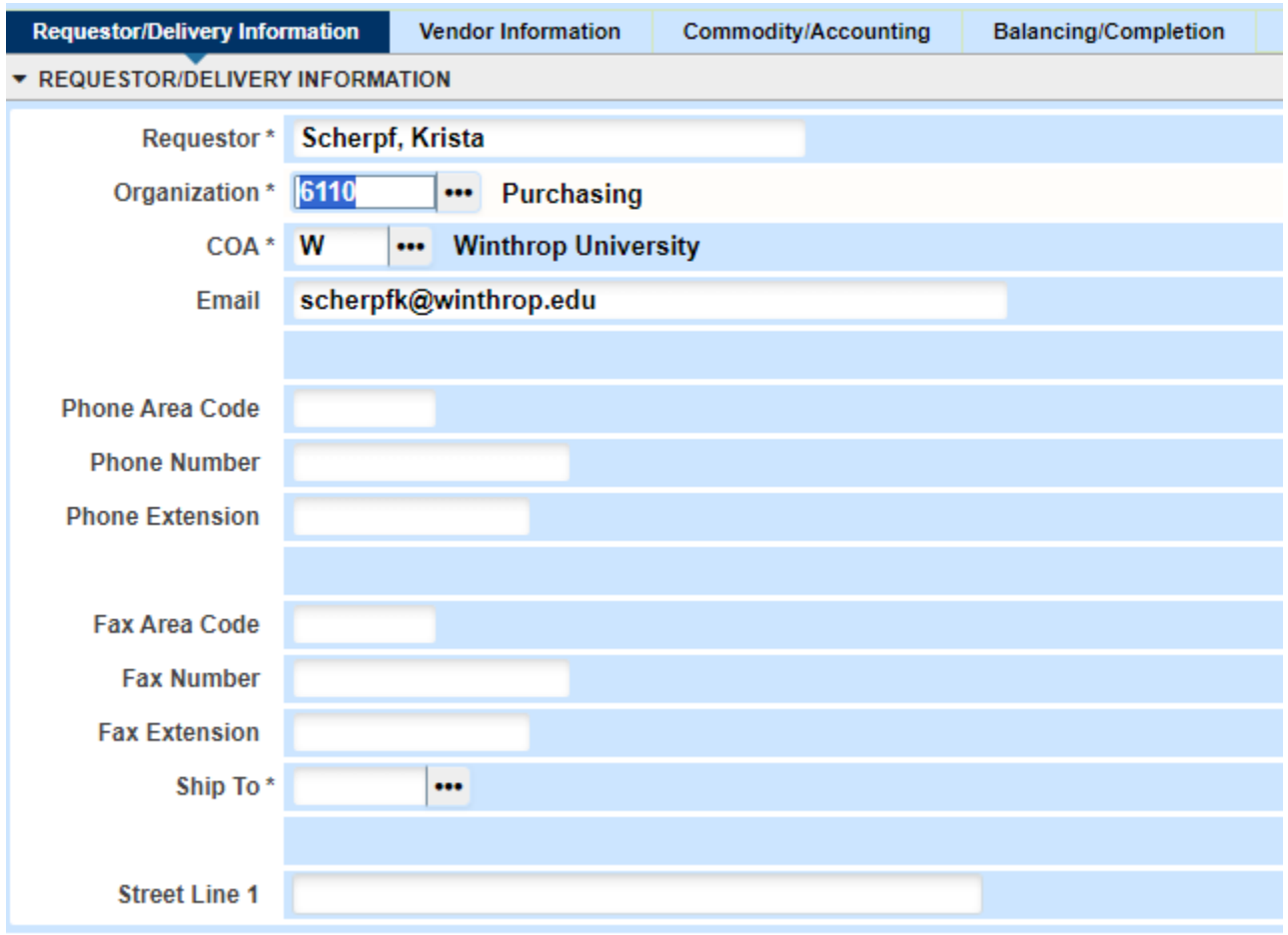


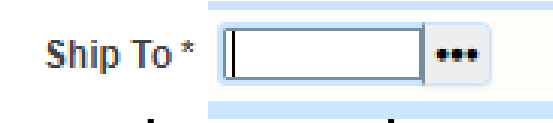


- To add contract and/or quote information select RETRIEVE on the Requestor/Delivery Information
- Select Document Text (FOAPOXT) as shown in the first image, the GO
- Insert your notes as shown on the second image. Please note this should reference the contract statewide or Agency Specific and/or Quote #.

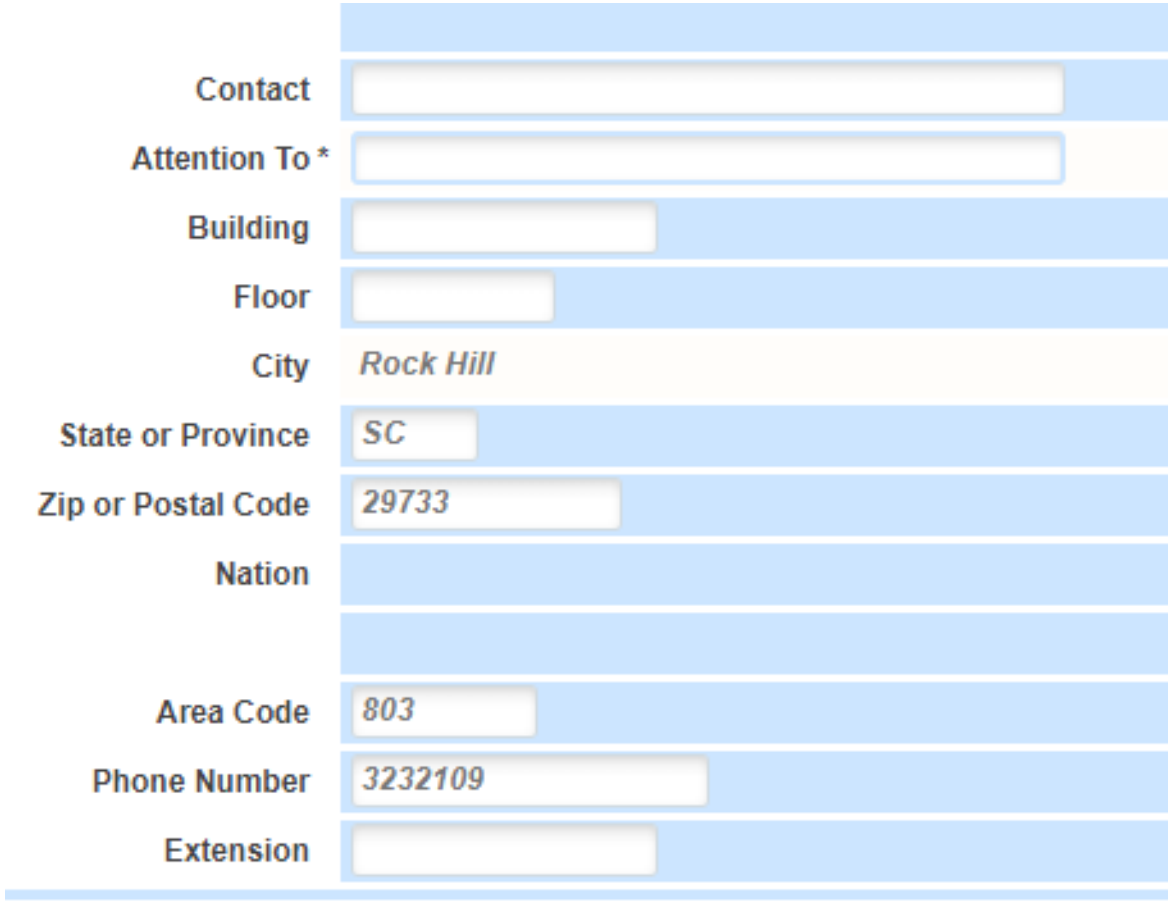
- Use your mouse to click the next section down arrow to get down t Requestor/Delivery Information Information section.
- Type your four digit organization code/number into the Organization box or choose your organization code by clicking on the three dots next to the empty Organization box and scrolling through the organizations.





- Add your email address and phone number
- Unde 

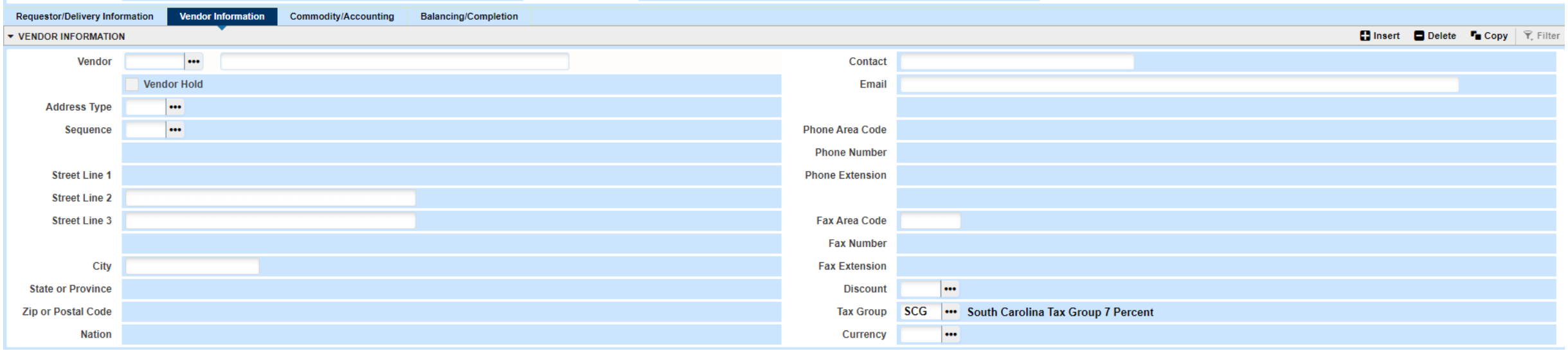
, click the three dots to choose CENTR. It does not matter which one you choose.
- Your shipping address will likely already be populated.

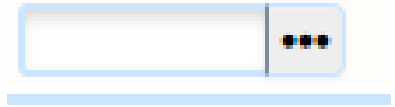


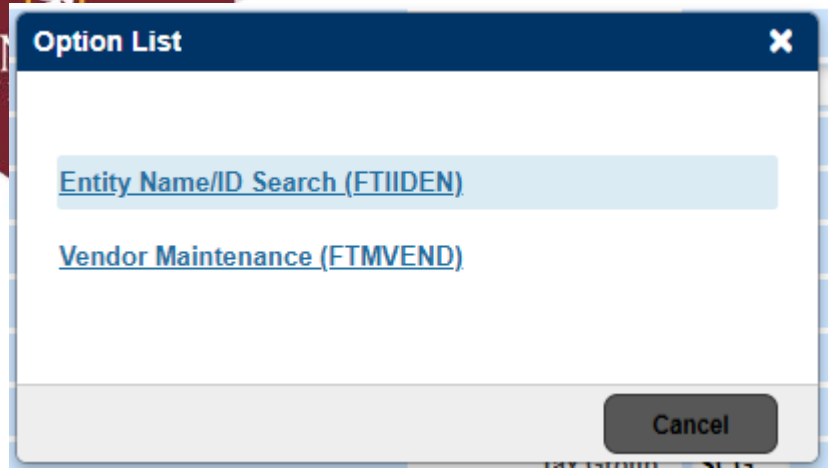
- Type the contact information for who to contact for the requisition. This is a way for Central Receiving to know where you are.

- Use your mouse to click the next section down arrow to get to the

tab.

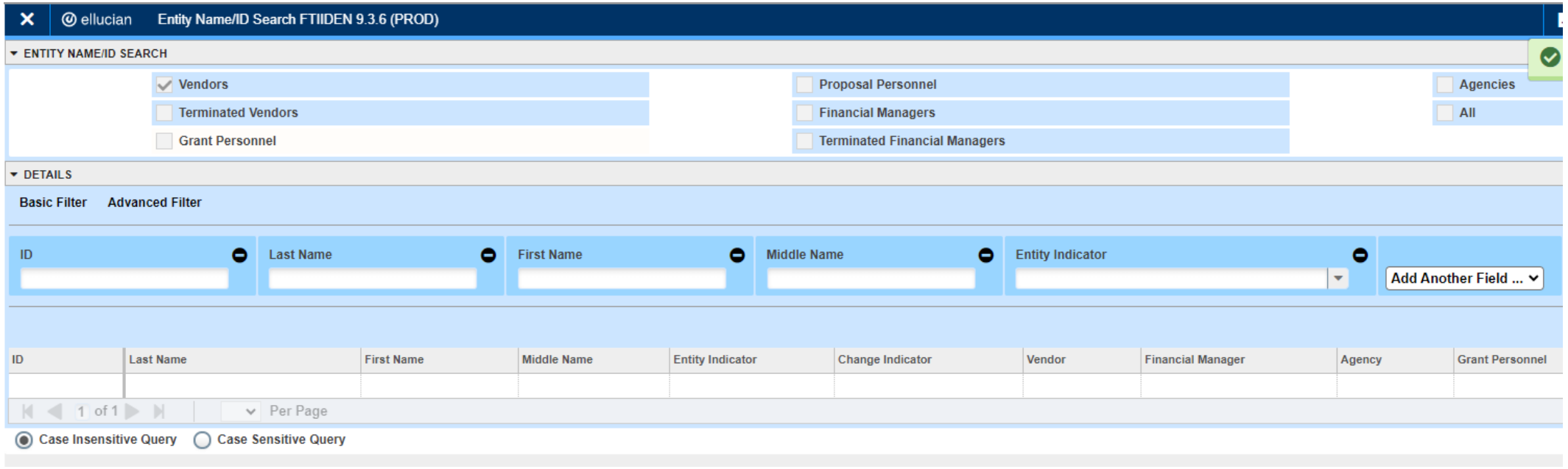


- This is what the Vendor Information tab will look like.
- Choose your Vendor (by CWID) by clicking on the three dots next to the blank Vendor box. 

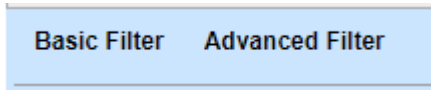


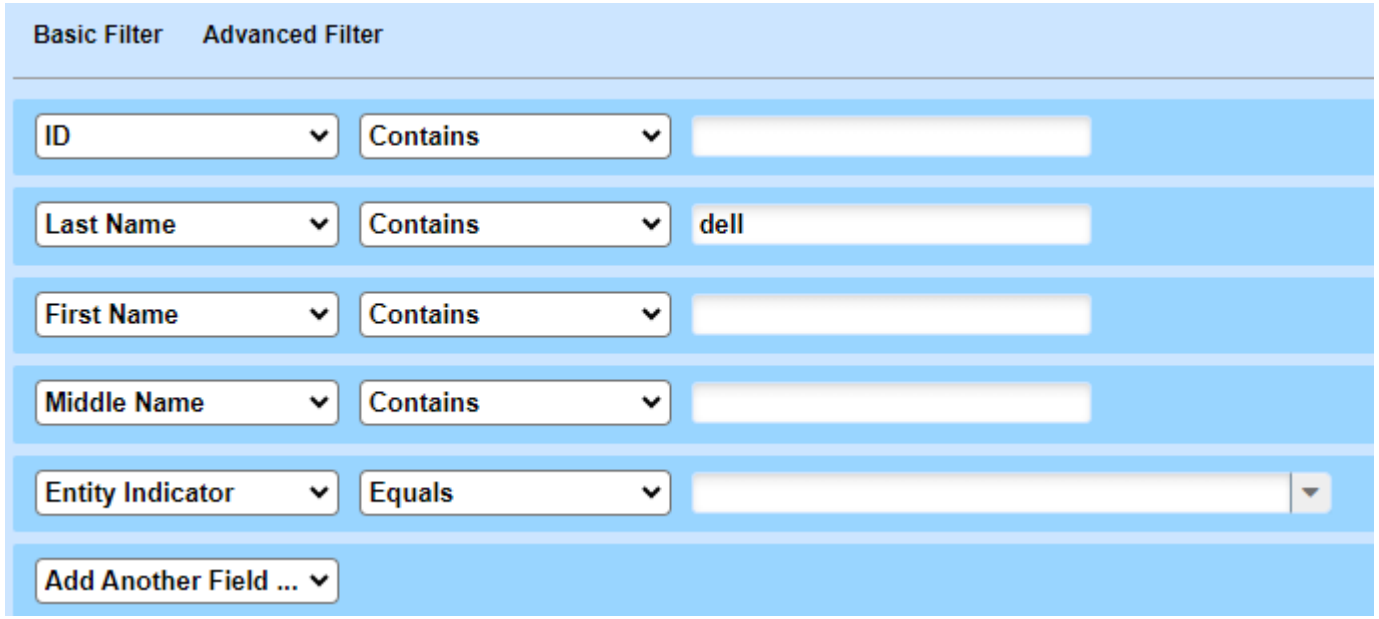
- Choose one of the two options. Let's first click on Entity Name/ID Search (FTIIDEN).

- This screen below will show up. Click on Advanced Filter, next to Basic Filter.



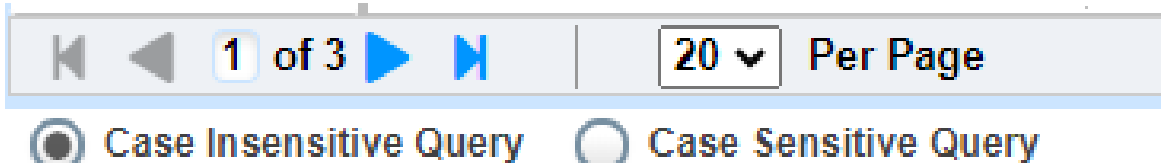
- If you do not click on Advanced Filter, searching by ID, Last Name First Name, etc. may say your vendor doesn't exist in the system even though it does– in this section, the name must be exact.
- Go to Advanced Filter



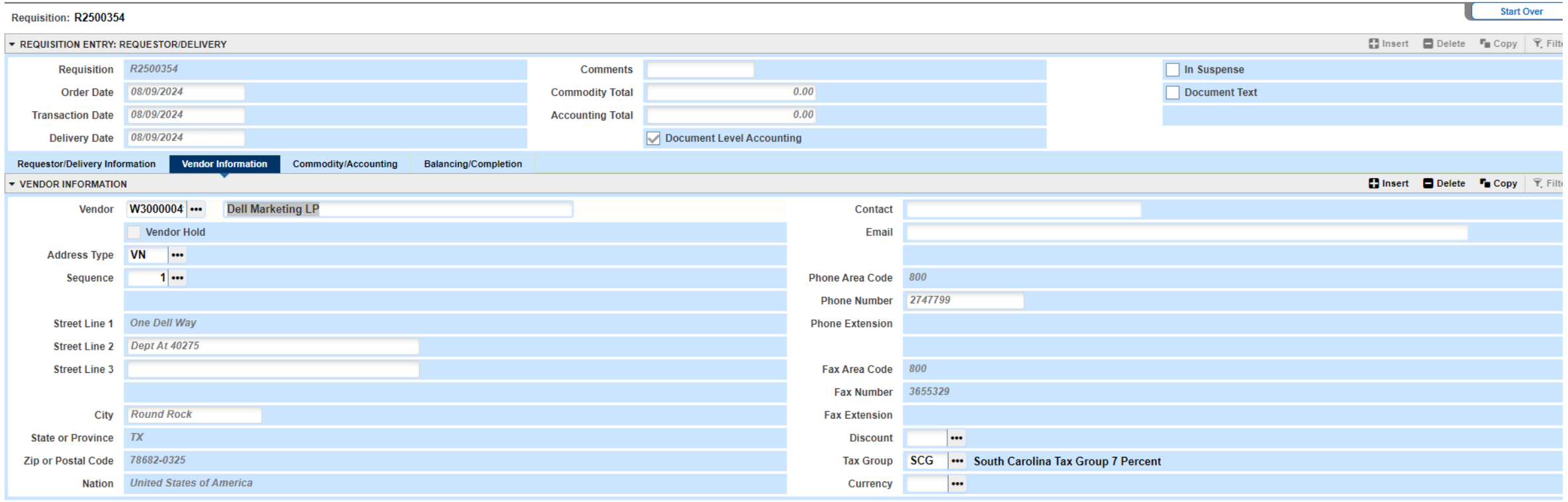


- Under Last Name, type in the name you have for the vendor. You may need to type in a partial name.
- Click Go in the right hand side of your screen

Choose your Vendor from the list by double clicking on your vendor. If the list is long, you may need to click over to the next page(s).

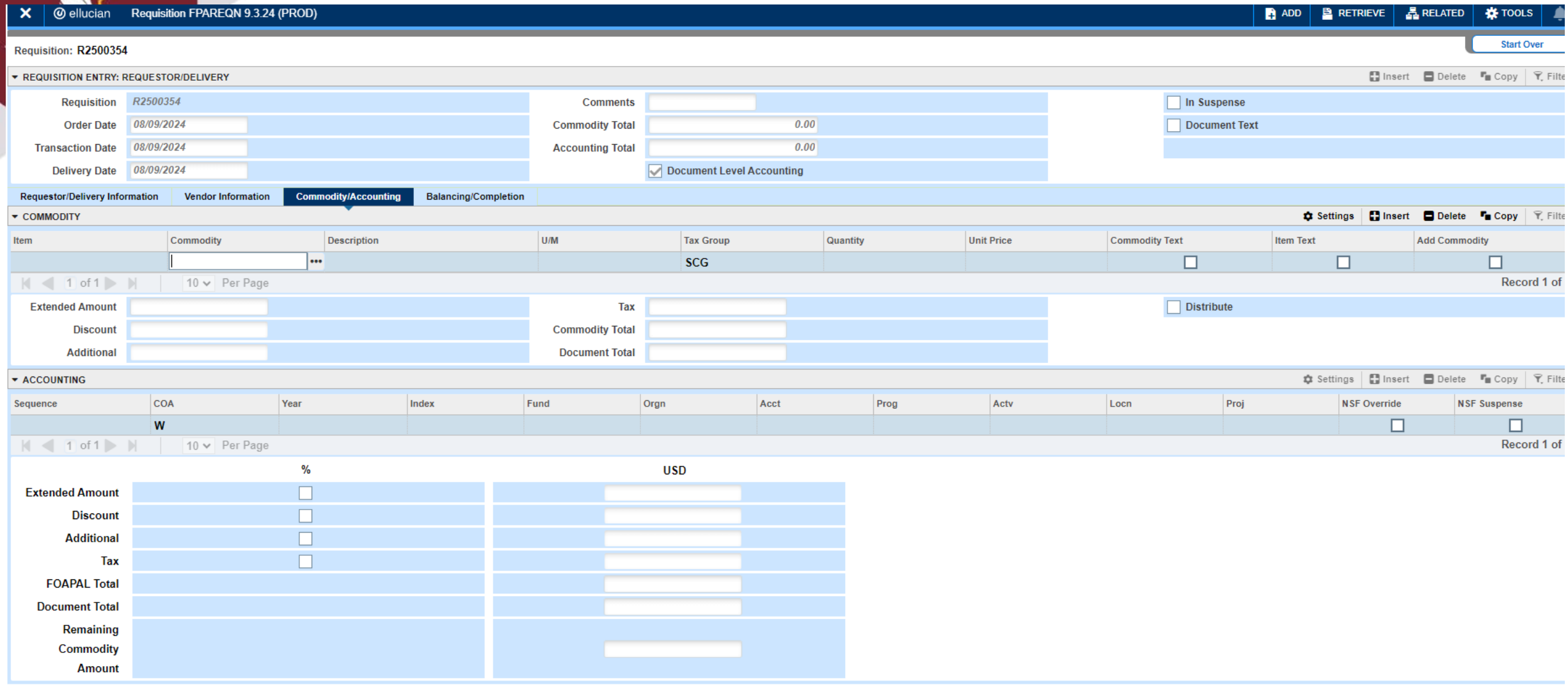


Once you choose your vendor, it will bring you back to your requisition.



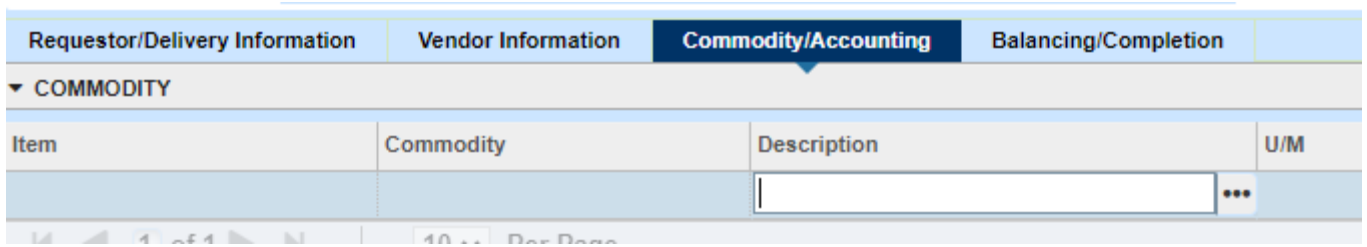
- Type in your contact person for the company, ***as well as their email address*** in the correct fields. Do not put it in the description instead.

- Continue on to the Commodity/Accounting tab by clicking the next section down arrow at the bottom left of your screen

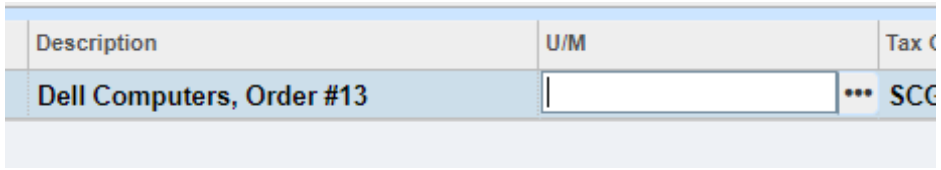


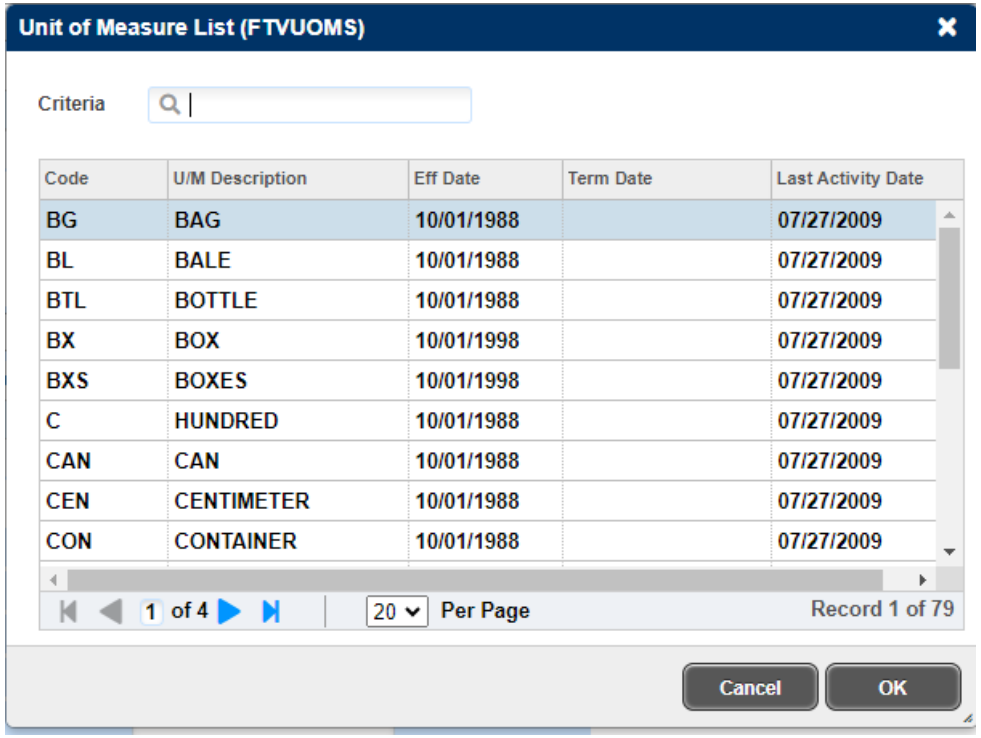
- Your screen should look like this. **Please write down your requisition number.**

- Click on the Commodity Field– the box beneath Commodity. DO NOT enter any information here.
- Hit “tab” on your computer or click over on the box beneath Description. Type the item description from your quote into this box.

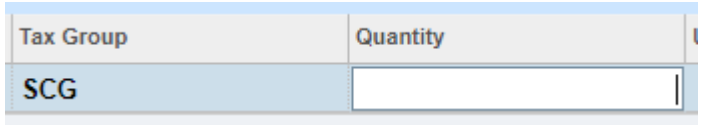


- This description can be a maximum of 50 characters per line.

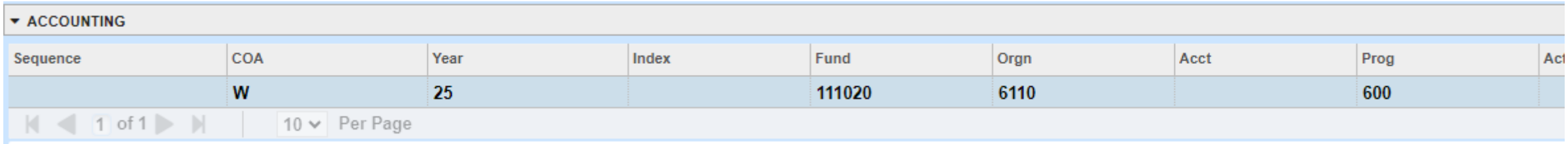




- Tab over to or click on U/M to enter or choose the Unit of Measurement.
- If you click on the three dots under U/M, you will see all of the options. Click through to choose the appropriate one.



- Enter the quantity.
- Enter the unit price– the price per unit (item).
- Click the next section down arrow until it puts you into the Accounting tab.



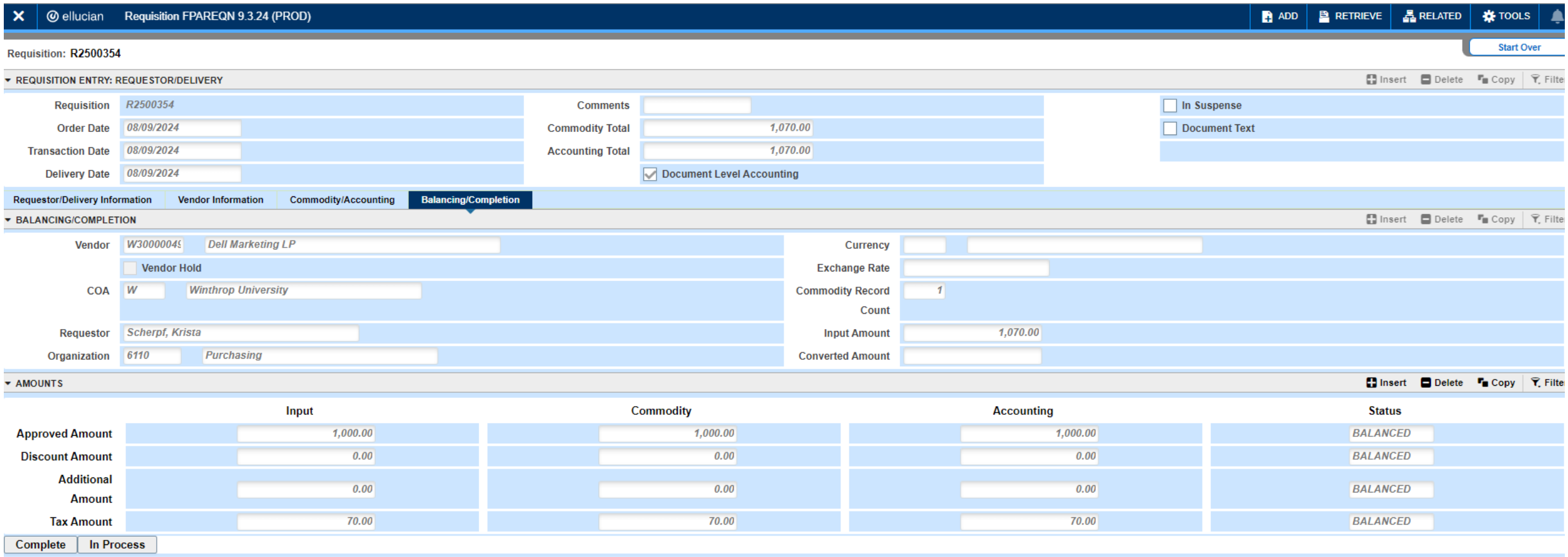
- Type in the appropriate Fund, Organization, Account, Program, and Activity numbers, if applicable.

Index	Fund	Orgn	Acct	Prog	Actv
	111020	6110		600	

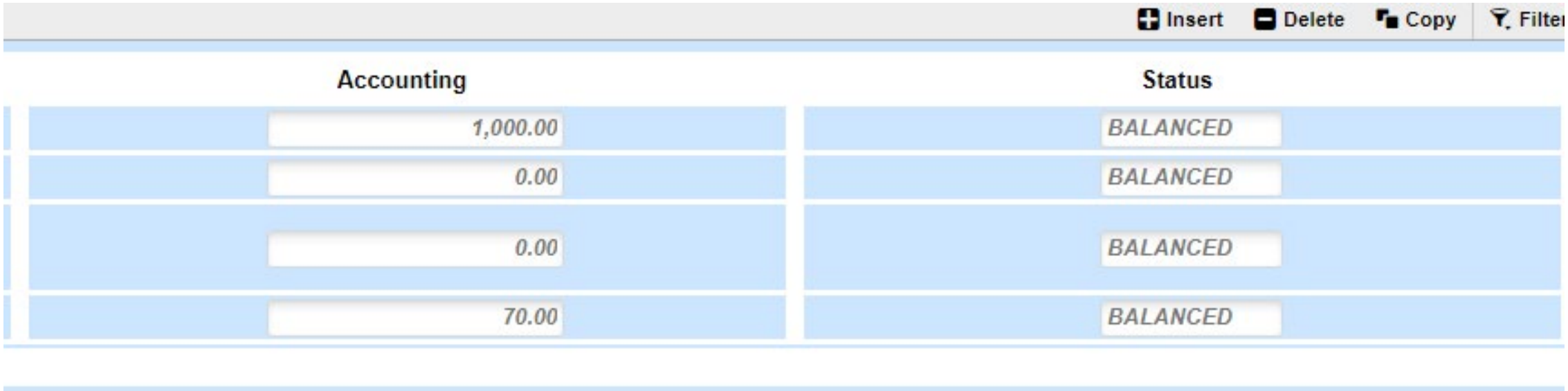
- You can choose the Account Index Code from a list. You can find a listing of Banner account codes for reference here:

  https://www.winthrop.edu/uploadedFiles/controllersoffice/BannerAccountCodes.pdf
- Note: Capital equipment (74XXX) for one item greater than $5000 only

- Use the next section down arrow to get to the next section, Balancing/Completion.

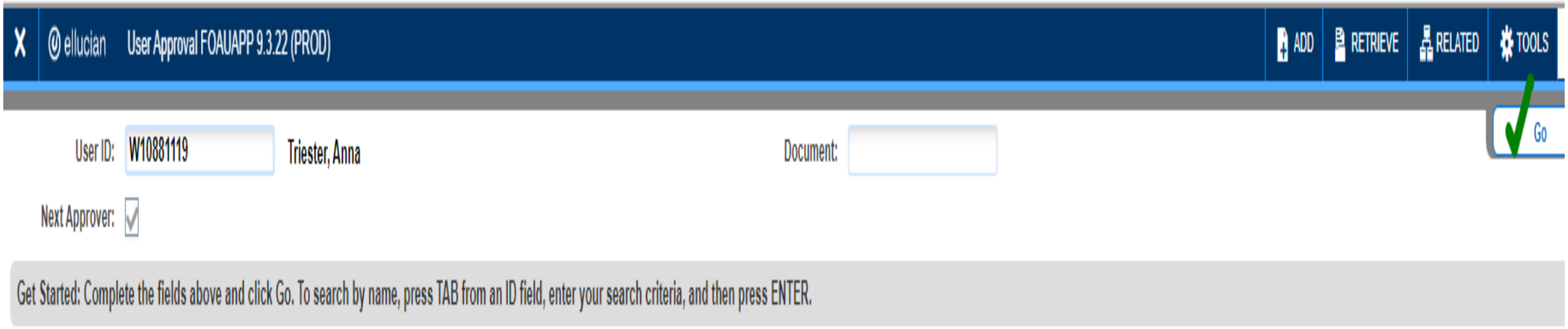

ellucian
Requisition FPAREQN 9.3.24 (PROD)
ADD
RETRIEVE
RELATED
TOOLS
Requisition: R2500354
Start Over
REQUISITION ENTRY: REQUESTOR/DELIVERY
Insert
Delete
Copy
Filte
Requisition
R2500354
Order Date
08/09/2024
Transaction Date
08/09/2024
Delivery Date
08/09/2024
Comments
Commodity Total
1,070.00
Accounting Total
1,070.00
Document Level Accounting
In Suspense
Document Text
Requestor/Delivery Information
Vendor Information
Commodity/Accounting
Balancing/Completion
BALANCING/COMPLETION
Insert
Delete
Copy
Filte
Vendor
W3000004
Dell Marketing LP
Vendor Hold
COA
W
Winthrop University
Requestor
Scherpf, Krista
Organization
6110
Purchasing
Currency
Exchange Rate
Commodity Record Count
1
Input Amount
1,070.00
Converted Amount
AMOUNTS
Insert
Delete
Copy
Filte
Input
Commodity
Accounting
Status
Approved Amount
1,000.00
1,000.00
1,000.00
BALANCED
Discount Amount
0.00
0.00
0.00
BALANCED
Additional Amount
0.00
0.00
0.00
BALANCED
Tax Amount
70.00
70.00
70.00
BALANCED
Complete
In Process

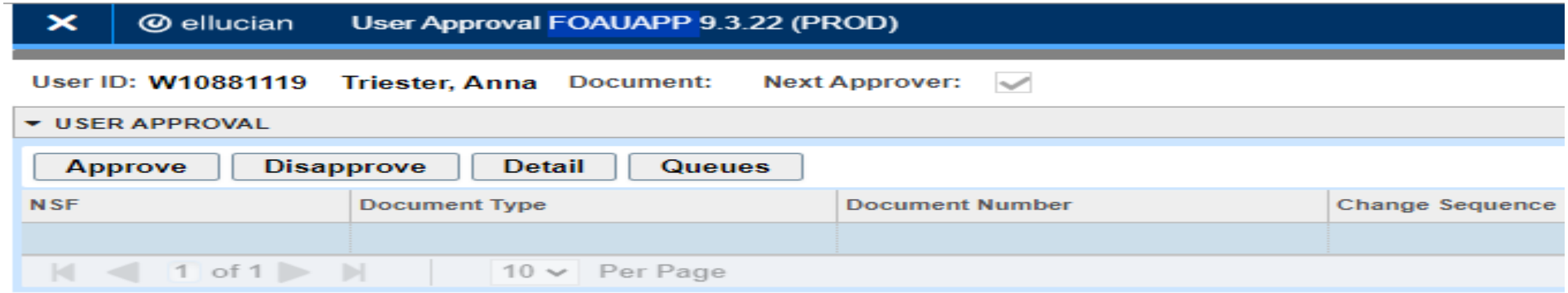
- Make sure that when you get to the Balancing/Completion tab, everything says it is Balanced under the Amounts section.



- Use your mouse to click the next section down arrow until the bottom section so that you can hit Save in the bottom right corner of the page.
- Click Complete on the left side of your screen to complete and submit the requisition.

Approve your requisition go to FOAUAPP





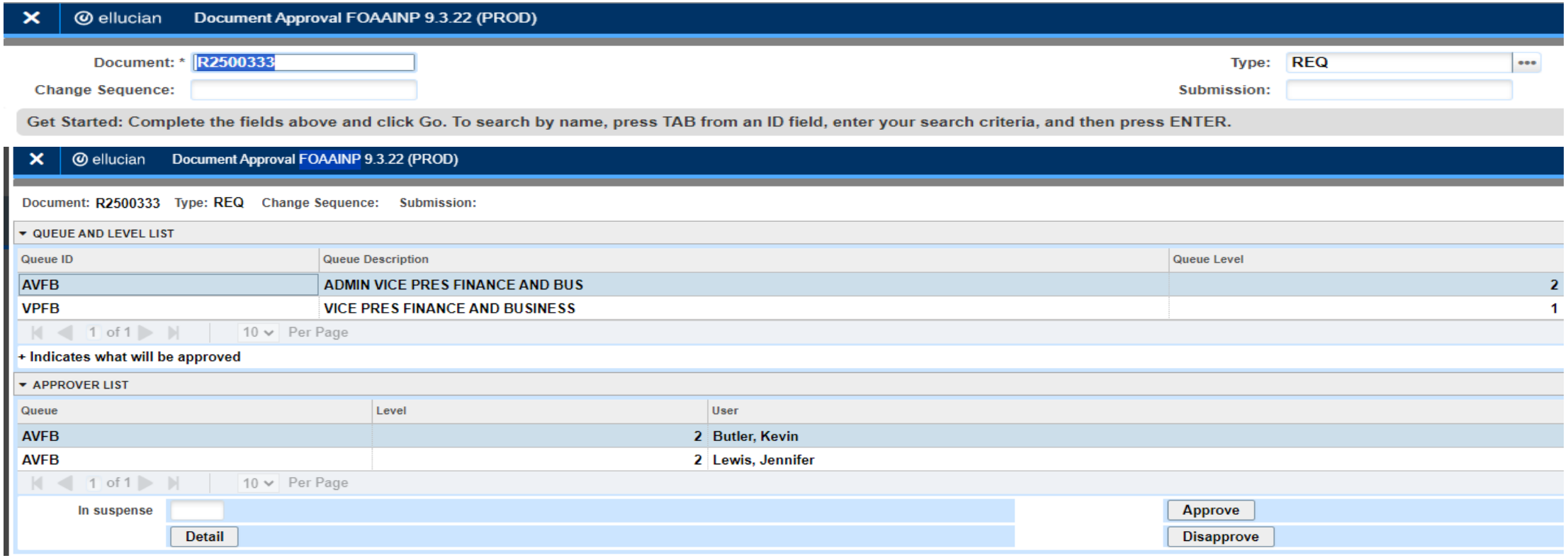
- You will receive an email that your requisition has been submitted.
- You can also check on the status of your requisition in Banner per slide 29.

Frequently Asked Questions and Information

- Has my requisition been approved/how do I know if my requisition has been approved?

  You can check on the status of your requisition in Banner.
- Send quote and contract information to purchasing@winthrop.edu with Subject referencing the requisition number

- You can **check on a Requisition in Banner** by searching Document History OR by typing in FOAAINP
- Input your requisition number



- Do I need to send the PO to the vendor?

  No, the Procurement Services office will send it to the vendor. However, please ensure that the email address for the vendor is correct and that you have entered it into the email section of the Vendor Information tab within the requisition before you submit the requisition.

Reminders

- Please ensure that the vendor address is the correct remit to address.
- For the current version of Banner, please send all documentation to the Procurement/Purchasing email address when you submit your requisition. Your requisition cannot be processed without backup paperwork.

WINTHROP UNIVERSITY

Questions?