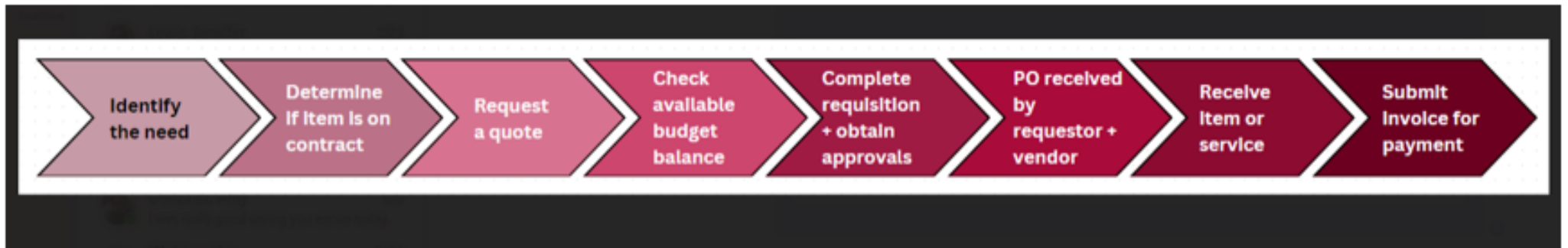


# What is a requisition?

- 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

ellucian Budget Availability Status FGIBAVL 9.3.30 (PROD) ADD RETRIE

Chart: W Fiscal Year: 25 Index: Commit Type: Both Fund: 111020 Current Unrestricted E and G Organization: 6110 Purchasing Account: 50040 Classified Wages Program: 600 Institutional Support Keys --->

Control Fund: 111020 Control Organization: 6110 Control Account: 50040 Control Program: Pending Documents:

▼ BUDGET AVAILABILITY STATUS Settings

Account	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance	Per
50040	Classified Wages	224,548.67	26,268.69	198,193.59	86.39	
51010	FRINGE BENEFITS BUDGET ACCOUNT	105,537.58	12,416.40	93,150.99	-29.81	
71005	DIRECT OPERATING BUDGET ACCOUNT	1,150.00	0.00	1,070.00	80.00	
	Total	331,236.25	38,685.09	292,414.58	136.58	

1 of 1 10 Per Page



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>





prod-appnav.winthrop.edu/applicationNavigator/seamless

Winthrop University

Welcome

Search  Direct Navigation

FPAREQN

Requisition (FPAREQN)

WINTHROP UNIVERSITY

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This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

The image shows a screenshot of a web application interface for Winthrop University. The background is a photograph of a university campus with a large stone wall in the foreground engraved with "WINTHROP UNIVERSITY". Several students are walking on a path in the background. The interface includes a dark sidebar on the left with navigation icons. At the top, there is a browser address bar showing the URL "prod-appnav.winthrop.edu/applicationNavigator/seamless". Below the address bar, the word "Welcome" is displayed in white text. A search bar is active, showing the text "FPAREQN" and a dropdown menu with the result "Requisition (FPAREQN)". There are radio buttons for "Search" (which is selected) and "Direct Navigation". At the bottom of the page, there is a copyright notice for Ellucian.

- Type in FPAREQN or search by the term requisition



prod-appnav.winthrop.edu/applicationNavigator/seamless

ellucian Requisition FPAREQN 9.3.24 (PROD)

ADD RETRIEVE RELATED TOOLS

Requisition:  Copy

Go

Get Started: Complete 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 the word NEXT into the box next to the word Requisition, then click Go with your mouse.

prod-appnav.winthrop.edu/applicationNavigator/seamless

ellucian Requisition FPAREQN 9.3.24 (PROD)

ADD RETRIEVE RELATED TOOLS

Requisition: NEXT Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY Insert Delete Copy Filter

Requisition: NEXT  
 Order Date: 08/09/2024  
 Transaction Date: 08/09/2024  
 Delivery Date:

Comments:   
 Commodity Total: 0.00  
 Accounting Total: 0.00  
 In Suspense  
 Document Text  
 Document Level Accounting

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

REQUESTOR/DELIVERY INFORMATION Insert Delete Copy Filter

Requestor: Scherpf, Krista  
 Organization:   
 COA: W Winthrop University  
 Email:

Street Line 2:   
 Street Line 3:

Contact:   
 Attention To:   
 Building:   
 Floor:   
 City:   
 State or Province:   
 Zip or Postal Code:   
 Nation:

Phone Area Code:   
 Phone Number:   
 Phone Extension:

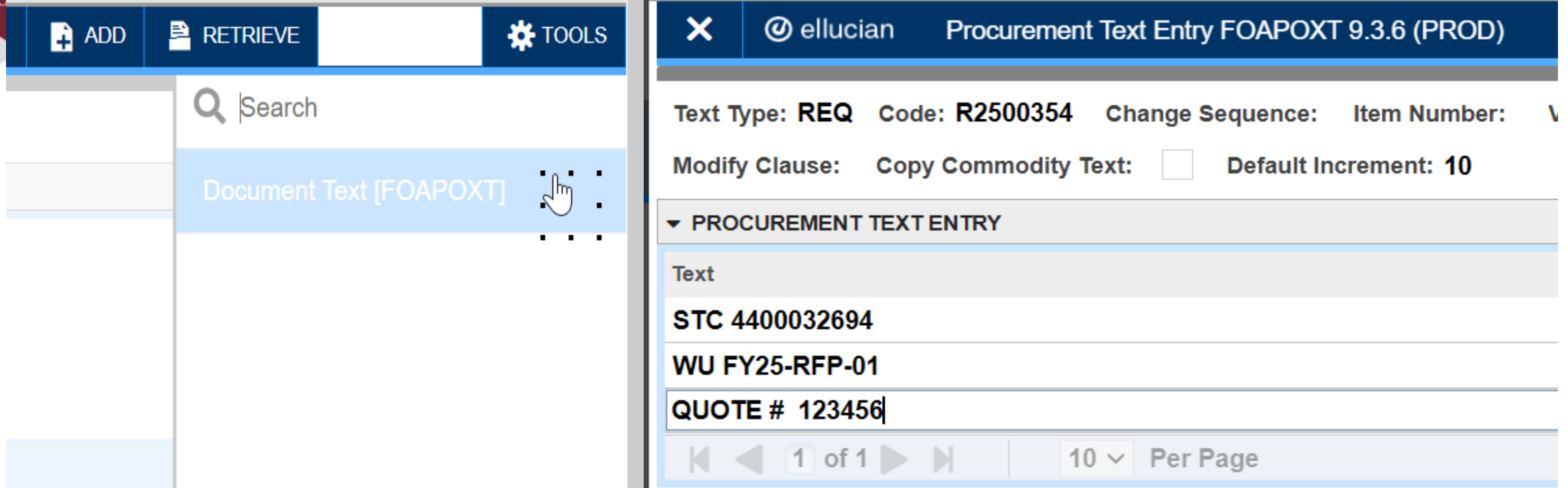
Fax Area Code:   
 Fax Number:   
 Fax Extension:

Ship To:   
 Street Line 1:

Area Code:   
 Phone Number:   
 Extension:

SAVE

- 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.



ADD RETRIEVE TOOLS

Search

Document Text [FOAPOXT]

ellucian Procurement Text Entry FOAPOXT 9.3.6 (PROD)

Text Type: **REQ** Code: **R2500354** Change Sequence: Item Number:

Modify Clause: Copy Commodity Text:  Default Increment: **10**

PROCUREMENT TEXT ENTRY

Text

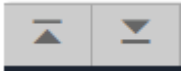
**STC 4400032694**

**WU FY25-RFP-01**

**QUOTE # 123456**

1 of 1 10 Per Page

- 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 to **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.

Requestor \* Scherpf, Krista

Organization \* 6110 ... Purchasing

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
REQUESTOR/DELIVERY INFORMATION			
Requestor *	Scherpf, Krista		
Organization *	6110	...	Purchasing
COA *	W	...	Winthrop University
Email	scherpfk@winthrop.edu		
Phone Area Code			
Phone Number			
Phone Extension			
Fax Area Code			
Fax Number			
Fax Extension			
Ship To *		...	
Street Line 1			

- Add your email address and phone number
- Under **Ship To \***  **...**, click the three dots to choose CENTR. It does not matter which one you choose.
- Your shipping address will likely already be populated.

Contact	<input type="text"/>
Attention To *	<input type="text"/>
Building	<input type="text"/>
Floor	<input type="text"/>
City	Rock Hill
State or Province	SC
Zip or Postal Code	29733
Nation	
Area Code	803
Phone Number	3232109
Extension	<input type="text"/>

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

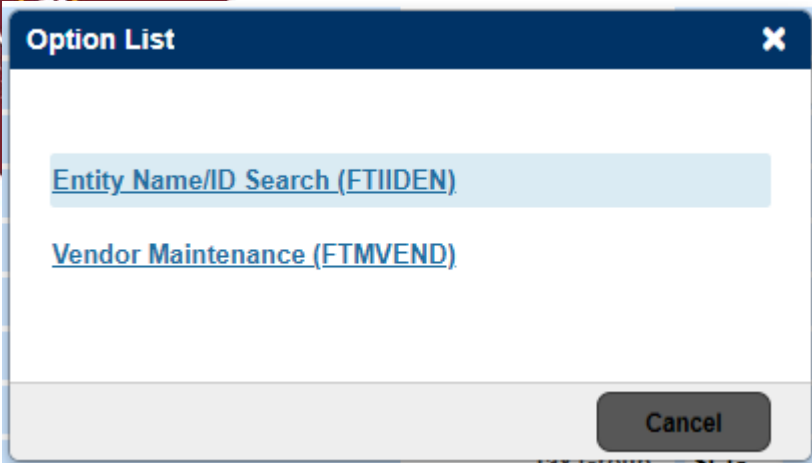
- Use your mouse to click the next section down arrow  to get to the  tab.

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
<div style="text-align: right;"> <input type="button" value="Insert"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Filter"/> </div>			
<b>VENDOR INFORMATION</b>			
Vendor	<input type="text"/> ...	Contact <input type="text"/>	
	<input type="checkbox"/> Vendor Hold	Email <input type="text"/>	
Address Type	<input type="text"/> ...	Phone Area Code <input type="text"/>	
Sequence	<input type="text"/> ...	Phone Number <input type="text"/>	
Street Line 1	<input type="text"/>	Phone Extension <input type="text"/>	
Street Line 2	<input type="text"/>	Fax Area Code <input type="text"/>	
Street Line 3	<input type="text"/>	Fax Number <input type="text"/>	
City	<input type="text"/>	Fax Extension <input type="text"/>	
State or Province	<input type="text"/>	Discount <input type="text"/> ...	
Zip or Postal Code	<input type="text"/>	Tax Group <b>SCG</b> ... South Carolina Tax Group 7 Percent	
Nation	<input type="text"/>	Currency <input type="text"/> ...	

- 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. Vendor  ...

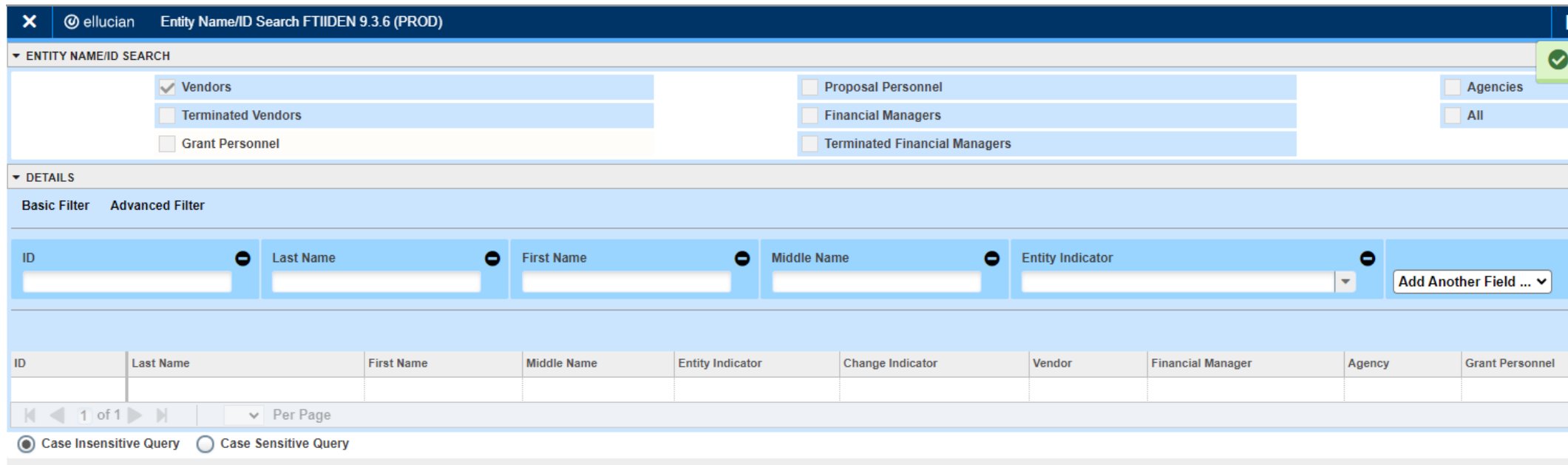
Vendor  ...





- 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

Basic Filter   **Advanced Filter**

Basic Filter   **Advanced Filter**

ID	Contains	
Last Name	Contains	dell
First Name	Contains	
Middle Name	Contains	
Entity Indicator	Equals	
Add Another Field ...		

- 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

W30000049	Dell Marketing LP	Corporation
-----------	-------------------	-------------

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).

Navigation controls: 1 of 3, 20 Per Page, Case Insensitive Query (selected), Case Sensitive Query

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



Requisition: R2500354

Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY

Insert Delete Copy Filter

Requisition	R2500354	Comments		<input type="checkbox"/> In Suspense
Order Date	08/09/2024	Commodity Total	0.00	<input type="checkbox"/> Document Text
Transaction Date	08/09/2024	Accounting Total	0.00	
Delivery Date	08/09/2024	<input checked="" type="checkbox"/> Document Level Accounting		

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

VENDOR INFORMATION

Insert Delete Copy Filter

Vendor	W3000004 ... Dell Marketing LP	Contact	
<input type="checkbox"/> Vendor Hold		Email	
Address Type	VN ...	Phone Area Code	800
Sequence	1 ...	Phone Number	2747799
Street Line 1	One Dell Way	Phone Extension	
Street Line 2	Dept At 40275	Fax Area Code	800
Street Line 3		Fax Number	3655329
City	Round Rock	Fax Extension	
State or Province	TX	Discount	... ..
Zip or Postal Code	78682-0325	Tax Group	SCG ... South Carolina Tax Group 7 Percent
Nation	United States of America	Currency	... ..

- 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 | 

ellucian Requisition FPAREQN 9.3.24 (PROD) ADD RETRIEVE RELATED TOOLS

Requisition: R2500354 Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY Insert Delete Copy Filter

Requisition: R2500354	Comments: <input type="text"/>	<input type="checkbox"/> In Suspense
Order Date: 08/09/2024	Commodity Total: 0.00	<input type="checkbox"/> Document Text
Transaction Date: 08/09/2024	Accounting Total: 0.00	
Delivery Date: 08/09/2024	<input checked="" type="checkbox"/> Document Level Accounting	

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

COMMODITY Settings Insert Delete Copy Filter

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
				SCG			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 of 1 | 10 Per Page Record 1 of 1

Extended Amount: <input type="text"/>	Tax: <input type="text"/>	<input type="checkbox"/> Distribute
Discount: <input type="text"/>	Commodity Total: <input type="text"/>	
Additional: <input type="text"/>	Document Total: <input type="text"/>	

ACCOUNTING Settings Insert Delete Copy Filter

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspense
	W										<input type="checkbox"/>	<input type="checkbox"/>

1 of 1 | 10 Per Page Record 1 of 1

	%	USD
Extended Amount	<input type="text"/>	<input type="text"/>
Discount	<input type="text"/>	<input type="text"/>
Additional	<input type="text"/>	<input type="text"/>
Tax	<input type="text"/>	<input type="text"/>
FOAPAL Total	<input type="text"/>	<input type="text"/>
Document Total	<input type="text"/>	<input type="text"/>
Remaining Commodity Amount	<input type="text"/>	<input type="text"/>

- 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.

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
COMMODITY			
Item	Commodity	Description	U/M
		<input type="text"/>	...

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

Description	U/M	Tax C
Dell Computers, Order #13	<input type="text"/>	SCC

**Unit of Measure List (FTVUOMS)** ✕

Criteria

Code	U/M Description	Eff Date	Term Date	Last Activity Date
BG	BAG	10/01/1988		07/27/2009
BL	BALE	10/01/1988		07/27/2009
BTL	BOTTLE	10/01/1988		07/27/2009
BX	BOX	10/01/1998		07/27/2009
BXS	BOXES	10/01/1998		07/27/2009
C	HUNDRED	10/01/1988		07/27/2009
CAN	CAN	10/01/1988		07/27/2009
CEN	CENTIMETER	10/01/1988		07/27/2009
CON	CONTAINER	10/01/1988		07/27/2009

1 of 4  Per Page Record 1 of 79

- 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.



Tax Group	Quantity
SCG	<input type="text"/>

- 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.

▼ ACCOUNTING								
Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Act
	<b>W</b>	<b>25</b>		<b>111020</b>	<b>6110</b>		<b>600</b>	

⏪ ⏩ 1 of 1 ⏪ ⏩ | 10 ▼ Per Page

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

Index	Fund	Orgn	Acct	Prog	Actv
<input type="text"/>	*** 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.

**Balancing/Completion**



Requisition: R2500354 Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY Insert Delete Copy Filter

Requisition	R2500354	Comments		<input type="checkbox"/> In Suspense
Order Date	08/09/2024	Commodity Total	1,070.00	<input type="checkbox"/> Document Text
Transaction Date	08/09/2024	Accounting Total	1,070.00	
Delivery Date	08/09/2024			<input checked="" type="checkbox"/> Document Level Accounting

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

BALANCING/COMPLETION Insert Delete Copy Filter

Vendor	W3000004 Dell Marketing LP	Currency	
<input type="checkbox"/> Vendor Hold		Exchange Rate	
COA	W Winthrop University	Commodity Record	1
		Count	
Requestor	Scherpf, Krista	Input Amount	1,070.00
Organization	6110 Purchasing	Converted Amount	

AMOUNTS Insert Delete Copy Filter

	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.

Accounting		Status
	1,000.00	BALANCED
	0.00	BALANCED
	0.00	BALANCED
	70.00	BALANCED

- 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

**X** @ellucian User Approval FOAUAPP 9.3.22 (PROD) ADD RETRIEVE RELATED TOOLS

User ID:  Triester, Anna Document:

Next Approver:

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

**X** @ellucian User Approval **FOAUAPP** 9.3.22 (PROD)

User ID: **W10881119** Triester, Anna Document: Next Approver:

▼ USER APPROVAL

NSF	Document Type	Document Number	Change Sequence

◀ ◁ 1 of 1 ▷ ▶ 10 Per Page

- 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](mailto: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 FOAINP
- Input your requisition number

ellucian Document Approval FOAINP 9.3.22 (PROD)

Document: \*  Type:

Change Sequence:  Submission:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

ellucian Document Approval FOAINP 9.3.22 (PROD)

Document: R2500333 Type: REQ Change Sequence: Submission:

▼ QUEUE AND LEVEL LIST

Queue ID	Queue Description	Queue Level
AVFB	ADMIN VICE PRES FINANCE AND BUS	2
VPFB	VICE PRES FINANCE AND BUSINESS	1

1 of 1 Per Page

+ Indicates what will be approved

▼ APPROVER LIST

Queue	Level	User
AVFB	2	Butler, Kevin
AVFB	2	Lewis, Jennifer

1 of 1 Per Page

In suspense

- 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.



Questions?