

# Entering Requisitions

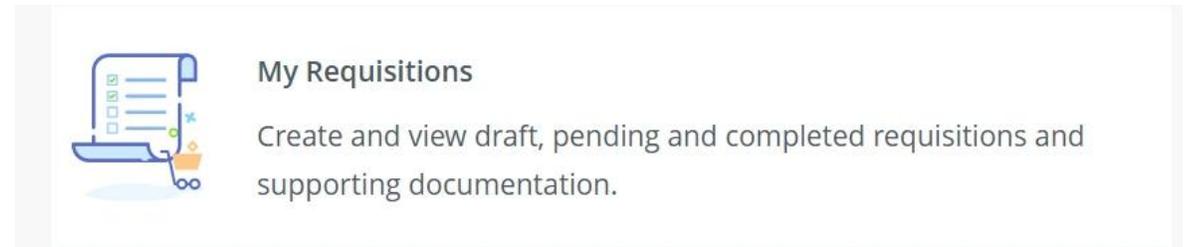
Finance Self-Service Banner 9



*the* FRIENDLIEST CAMPUS *in the* SOUTH

# Entering Requisitions

- Login to your MyJaxState.
- Select Finance Self Service.
- Select “My Requisitions”
- Select “Create Requisition” in the top righthand corner of the screen.



Create Requisition

# Entering Requisitions – Requestor Information

- Enter “Delivery Date” as one month after the transaction date to allow sufficient time for recording of approvals and PO processing. This is not the PO date. PO date will be assigned when processed by Procurement.
- Requestor Information (including email) defaults from the Banner Finance user profile maintenance form. • ‘Organization’ code defaults (Can be changed if entering for another org) • ‘Ship To Location’ & ‘Attention To’ defaults (Select from list or enter directly if entering for another dept.) – if ‘Ship To’ information is incorrect, email purchasing@jsu.edu, providing ‘Ship To’ code and correct information.
- Select “Next”

Create Requisition

1 Requestor Information   2 Vendor Information   3 Add Item & Accounting

Requestor \*  
Chloe White

Transaction Date \*   Delivery Date \*  
04/18/2025   5/18/2025

Requestor Email  
Enter Requestor Email

Choose Accounting Type  
 Document Level Accounting  
 Commodity Level Accounting

Requisition Comments  
Public Comment  
Enter comments for the requisition  
Private Comment  
Enter comments for the requisition

Chart \*  
J Jacksonville State University

Organization \*  
61001 Controller

Ship To Location \*  
CONT Chloe White

Attention To \*   Tax Group  
Chloe White   Choose Tax Group

Ship To Location  
Attention: Chloe White  
Office of the Controller  
700 Pelham Road N  
Room 249  
Jacksonville AL 36265

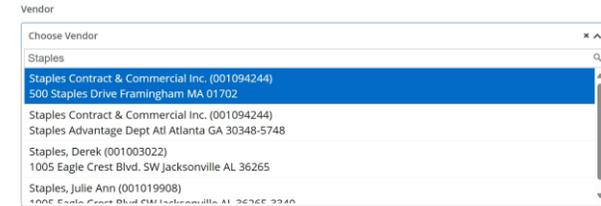
Back   Next

## Other notes:

- Do not change the ‘Accounting Type’; leave as ‘Document Level Accounting.’
- Enter document text or supporting comments in ‘Public Comments.’

# Entering Requisitions – Vendor Information

- Enter the Vendor ID or the Vendor name (a listing will appear from which you can select).



- Select the vendor. Information will auto populate. No vendor email is necessary. System will override any email address entered. PO vendor and receiving copies are emailed to the Requestor. Exception: Apple, CDWG or Dell vendor copy is emailed to IT for ordering with receiving copy emailed to Requestor.

Vendor

Staples Contract & Commercial Inc. (001094244)

- Select 'Next' at the bottom of the screen.

Vendor Information

Staples Contract & Commercial Inc. (001094244)  
500 Staples Drive  
Framingham MA 01702

Vendor Email

Choose/Enter Email

Discount

Choose Discount

Currency

Choose Currency

## Other notes:

- No entry in the 'Discount' field.
- No entry in the 'Currency' field.
- For a new vendor, please provide the vendor's signed W-9 to Procurement at purchasing@jsu.edu.

# Entering Requisitions – Adding Items

- Enter the item description in the 'Add Item(s)' box.
- If you have a list of items or a quote (non-capital equipment only), you can enter 'See attached list of supplies' or 'See attached quote'
- NOTE: For capital equipment (individual item costing \$5,000 or more; not total of all items) the item description must be entered for inventory description/tracking. Capital equipment items cannot be included on the same requisition as noncapital item.
- Select 'Unit of Measure'
- Enter the 'Quantity' and net 'Unit Price'
- Leave 'Discount Amount' or 'Additional Amount' and 'Tax Amount' fields blank.
- Comments specific to the item can be entered in 'Public Comments'
- Select 'Save' at the bottom of the screen.
- Repeat above steps for a requisition with multiple line items.

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x ^

Office Supplies

Office Supplies (Add as new item)

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Commodity Description

Office Supplies

Unit Of Measure\* EACH (EA) x v

Tax Group\* Choose Tax Group

Quantity\* 1.00

Unit Price\* 20.0000

(Quantity) X (Unit Price) USD 20.00

Discount Amount 0.00

Additional Amount 0.00

Tax Amount 0.00

Commodity Item Total USD 20.00

# Entering Requisitions – Add Accounting Information

- Once all items have been entered select “Add Accounting” in the bottom right.

1 Requestor Information   2 Vendor Information   **3 Add Item & Accounting**

Add Item(s)

Choose Item

Commodities (1)

Office Supplies	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Requisition Summary Save as draft

Requisition Number R0118128

Staples Contract & Commercial Inc. (001094244)  
500 Staples Drive  
Framingham MA 01702

Commodities (1)

Office Supplies	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Grand Total - All Commodities 20.00

Grand Total - All Accounting 0.00

Back Add Accounting View as PDF Submit Requisition



# Entering Requisitions – Add Accounting Information

- Fund, Organization, Program will automatically populate based on the requestor's Banner set-up.
- Select the correct 'Account' number (must begin with a '7'; 70000 cannot be used for requisitions).  
Any FOAP changes can be entered on this screen.
- Once entered select "Save" in the bottom right corner.
- If all items will be charged to the same FOAP, the default 'Distribution Amount' and 'Distribution Percent' should match the total of all items entered.
- "Grand Total - All Commodities" and "Grand Total - All Accounting" in the bottom right should match. as well.

Chart\* J Jacksonville State University x v

Index Choose Index x v

Fund\* 10000 Current Unrestricted x v

Organization\* 61001 x v

Account\* Choose Account x v

72010

72010 Office Supplies

Location Choose Location x v

Project Choose Project x v

Requester Information Vendor Information **Add Item & Accounting**

Add Items

Choose Item

Commodities (1)

Office Supplies	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 100%

Requisition Summary Save as draft

Requisition Number 80118128

Staples Contract & Commercial Inc. (001094244)  
900 Staples Drive  
Framingham MA 01702

Commodities (1)

Office Supplies	20.00
Quantity 1.00 @ 20.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 100%

Grand Total - All Commodities 20.00

Grand Total - All Accounting 20.00

## Other Notes:

- If additional accounting information is required, continue to the next page.
- Once accounting is complete select 'Save'
- Select 'View as PDF' to review entries.
- If your Requisition will not submit at the end of the process, there may have been an error in this step.

# Entering Requisitions- Using Multiple FOAPs

- When Requisition items need to be allocated to multiple FOAPs - Click 'Add Accounting' at bottom of the form.

A screenshot of the requisition form's bottom section. It features a summary table with two rows: 'Grand Total - All Commodities' with a value of 20.00, and 'Grand Total - All Accounting' with a value of 0.00. Below the table are four buttons: 'Back', 'Add Accounting' (highlighted in red), 'View as PDF', and 'Submit Requisition'.

- The Accounting detail screen appears - update FOAP as required.

A screenshot of the 'Add Item & Accounting' screen for requisition R0118129. The screen is divided into several sections:

- Requestor Information:** Requisition Number (R0118129), Currency USD.
- Chart:** Jacksonville State University.
- Fund:** 10000 Current Unrestricted.
- Organization:** 61002 Office of Student Accounts.
- Account:** 72010 Office Supplies.
- Program:** 70 Institutional Support.
- Activity:** Choose Activity.
- Location:** Choose Location.
- Project:** Choose Project.

Financial details include:

- Distribution Amount: 10.00
- Distribution Percent: 50.00000000
- Discount Amount: 0.00
- Additional Amount: 0.00
- Tax Amount: 0.00
- Distribution Total: 10.00
- Remaining: 0.00

Requisition Summary (Save as draft):

- Requisition Number: R0118129
- Supplier: Staples Contract & Commercial Inc. (001094244), 500 Staples Drive, Frammingham MA 01702

Commodities (1):

Commodity	Quantity	Unit Price	Amount	Discount	Tax
Office Supplies	2.00	10.00000	20.00	0.00	0.00

Funding:

Funding	Amount
j:10000-61001-72010-70	10.00
Accounting Total	10.00
Commodity Total	20.00
Balanced	50%

Summary table at the bottom:

Grand Total - All Commodities	20.00
Grand Total - All Accounting	10.00

Buttons: Back, Save, View as PDF, Submit Requisition.

SKIP THIS SLIDE IF ALL FUNDING IS COMING FROM ONE FOAP.

# Entering Requisitions- Using Multiple FOAPs

- Enter the corresponding dollar amount to be charge to the new FOAP in the “Distribution Amount”
- The ‘Distribution Percent’ will auto adjust.
- The ‘Split Accounting’ option appears - Click on it or Click Save in the bottom right then Click “Add Accounting” again to add an additional FOAP.
- Requisition amount remaining to be distributed is displayed.
- Update FOAP as required – Update ‘Distribution Amount’ if needed.
- If the ‘Distribution Amount’ is updated, the ‘Split Accounting’ option will again appear for selection.
- Repeat above steps until all required accounting information and amounts are correct.
- Select ‘Save’
- Confirm that the Grand Total amounts equal requisition items and funding is 100%.
- Select ‘View as PDF’ to view and confirm all information appears correct on requisition.

The screenshot displays a requisition entry form with the following sections:

- Requestor Information:** Requisition Number (R0118129), Chart (Jacksonville State University), Fund (10000 Current Unrestricted), Organization (61002 Office of Student Accounts), Account (72010 Office Supplies), Program (70 Institutional Support), Location, and Project.
- Vendor Information:** Index (Choose Index).
- Add Item & Accounting:** Distribution Amount (10.00), Distribution Percent (50.00000000), Discount Amount (0.00), Additional Amount (0.00), Tax Amount (0.00), Distribution Total (10.00), and Remaining (0.00).
- Requisition Summary:** Requisition Number (R0118129), Vendor (Staples Contract & Commercial Inc. (001094244)), and a table of commodities.

Commodities (1)	Amount
Office Supplies	20.00
Quantity 2.00 @ 10.0000	Discount 0.00
Additional Charge 0.00	Tax 0.00
Funding	Amount
J-10000-61001-72010-70	10.00
Accounting Total	10.00
Commodity Total	20.00
Balanced	50%

Grand Total - All Commodities: 20.00  
Grand Total - All Accounting: 10.00

Buttons: Back, Save, View as PDF, Submit Requisition

SKIP THIS SLIDE IF ALL FUNDING IS COMING FROM ONE FOAP.

# Attachments – Supporting Documentation

- **All** required documentation must be obtained and attached to the requisition prior to submitting.
- A requisition can be saved as a 'Draft' until all documents are obtained - Requisition # is assigned.
- Procurement will disapprove or delete requisitions submitted without proper documentation.
- Supporting documentation may include:
  - Meal Request Form and backup documentation including agenda (Dynamic form must reflect all approvals)
  - IT Request for Approval to Purchase Computer Hardware and Software and all backup documentation
    - Applies to all computer systems / device purchases, regardless of price
    - Applies to peripherals and software purchases over \$500
  - Dynamic form must reflect all approvals
  - Quote
  - Invoice (required for pre-payments)
  - Contract
  - State of Alabama Vendor Disclosure Statement (when over \$5,000) - Form must be signed and notarized
  - Copy of Chrome River travel pre-authorization when requisition is travel related

# Attachments – Supporting Documentation

Select 'Attachments' to upload all required supporting documentation - Save as a draft until all documents are obtained.

[Attachments](#) [Delete Requisition](#)

[Save as draft](#)

R0118129

Once all documents have been uploaded the requisition can be submitted for approval(s).

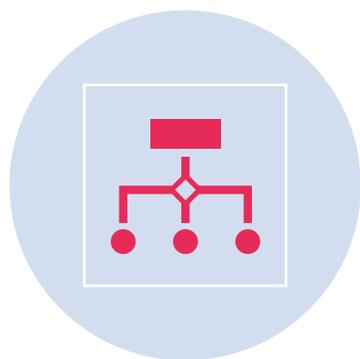
Grand Total - All Accounting

[Back](#) [View as PDF](#) [Submit Requisition](#)

The Requisition status can be viewed in Banner 9 Finance SSB in “My Requisitions.”



# Post Approval Procedure



ONCE THE REQUISITION MOVES THROUGH THE APPROVAL QUEUE, IT WILL BE CONVERTED INTO A PURCHASE ORDER.



THE VENDOR AND RECEIVING COPIES ARE SENT TO THE REQUESTORS EMAIL.



ONCE THE PRODUCT IS RECEIVED, HAVE THE BUDGET MANAGER SIGN THE RECEIVING COPY AND SEND TO ACCOUNTS PAYABLE THROUGH CAMPUS MAIL OR EMAIL.

# Additional Notes and View Document

Additional information is located on Procurement's webpage:  
<https://www.jsu.edu/purchasing/my-requisitions-view-document.html>

- Recalling a Requisition
- View Document
- View Approvals & Related Documents

# Questions?

Email: [purchasing@jsu.edu](mailto:purchasing@jsu.edu)

Thank you!



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