

# Creating A Purchase Requisition

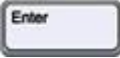
*Commodity-level accounting is the default for myGate purchase requisitions. Each commodity (or item) requested will have its own accounting record(s). Charts of Account may not be mixed on purchase requisitions.*

*NOTE: Recommended browsers are Firefox, Safari, Chrome, and Edge.  
Internet Explorer is not recommended.*

*To create a purchase requisition, you must know the following.*

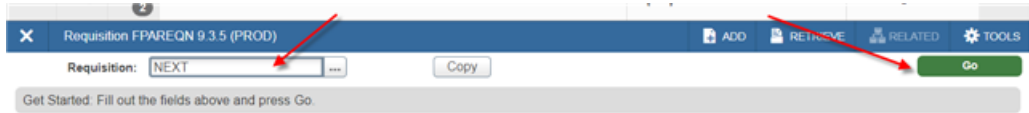
- *Delivery date for the goods/services ordered*
- *FOAPAL string(s) against which purchase requisition items will be encumbered*
- *Vendor code or vendor name that exists in Banner  
You may search for vendor using FTIIDEN from the home screen.*
- *(If the vendor name is known but vendor name code or address sequence does not exist, complete and submit the [Vendor Request \(VR\) Form](#) to Procurement Services.)*
- *Description of each commodity (item)*
- *Quantity of each commodity (item)*
- *Price of each commodity (item)*

1. To create a myGate purchase requisition, log in to Application Navigator.

2. Enter FPAREQN (case does not matter) in the Search Box, then press .

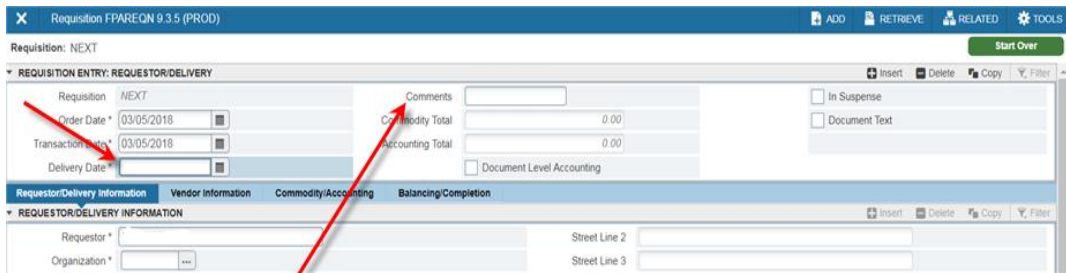


3. Key the word NEXT into the Requisition field. Click on Go.



4. Tab through Order Date and Transaction Date to Delivery Date. Order Date and Transaction Date default to current date.

Use calendar icon to choose delivery date or enter delivery date in MM/DD/YY format. Delivery Date must be equal to or later than the Transaction Date and allow time for order processing and delivery of merchandise.



5. Tab to enter special instructions in the Comments field, if applicable. (For example, December delivery required)

6. Tab to Requestor/Delivery Information section to enter requestor's name and contact information. Tab through fields marked below to accept or change defaulted information.

The screenshot shows a software interface with a tabbed menu at the top: 'Requestor/Delivery Information', 'Vendor Information', 'Commodity/Accounting', and 'Balancing/Completion'. The 'Requestor/Delivery Information' tab is active. The form contains several fields: 'Requestor \*', 'Organization \*' (with a search icon), 'COA \*' (with a dropdown arrow), 'Email', 'Phone Area Code', 'Phone Number', 'Phone Extension', 'Fax Area Code', 'Fax Number', 'Fax Extension', 'Ship To \*' (with a dropdown arrow), 'Street Line 2', 'Street Line 3', 'Contact', 'Attention To', 'Building', 'Floor', 'City', 'State or Province', 'Zip or Postal Code', 'Nation', 'Area Code', and 'Phone Number'. Red arrows point to specific fields: arrow 7 points to the COA dropdown, arrow 8 points to the Organization search icon, arrow 9 points to the Phone Number field, and arrow 10 points to the Ship To dropdown. The status bar at the bottom shows 'EDIT', 'Record: 1/1', 'FPREQH.FPREQH\_REQD\_DATE [1]', and 'ellucian'.

7. COA (Chart of Accounts) field may auto-populate according to the user's Banner profile. Change COA to be used for this purchase requisition, if necessary.
8. Tab to enter desired Organization code in the Organization field. If Organization code is unknown, click  (Search) to query for and select the correct code from Organization Code Validation Form (FTVORGN).
9. Tab to enter Requestor's Email address, Phone and Fax Numbers, if blank or different than defaulted information. NOTE: Do not use dashes or hyphens in the phone number.
10. Tab to the Ship To field. Key CNR into the field. In rare cases, another Ship To code can be used. Enter the appropriate code.
11. Click  to proceed to the Vendor Information Section.

- Enter vendor's ID (M00000000) in Vendor field. Tab to populate remaining fields in section. If vendor's information matches what appears on your quotation, skip to step 14.

The screenshot shows the 'Vendor Information' section of a requisition entry form. The form is titled 'Requisition FPAREQN 9.3.5 (PROD)'. It includes fields for Vendor, Vendor Hold, Address Type, Sequence, and three Street Lines. A red arrow points to the Vendor field.

An address type (BU) and sequence defaults, but you can choose another address sequence, if necessary. Purchase requisitions should always use the BU address type. Because a vendor can have multiple effective addresses, you can key the sequence number needed or search for other addresses by clicking on the three dots to the right of the Sequence field. View next or previous records using the blue arrow(s) or pressing the down arrow on your keyboard.

The screenshot shows the address selection interface. It includes a list of address records with a dropdown menu for selecting a record. A red arrow points to the '3' option in the dropdown menu. Another red arrow points to the 'SELECT' button in the bottom right corner.


Make your selection by double-clicking on the record address type or click Select in the lower right-hand corner.

Click on the X in upper left corner to return to the purchase requisition.


The screenshot shows the 'Address Information Query' form. It includes fields for Address Type, Sequence Number, Source, and From Date. A red arrow points to the 'X' button in the upper left corner.

- If vendor ID is not found in Banner, submit completed [Vendor Request \(VR\) Form](#) to Procurement Services. This form is not used to generate or update an ID, but to provide vendor's contact information to Procurement Services staff.

If vendor is not known, you may include suggested vendors and/or other pertinent information in the field marked below. Or, you may leave the Vendor field blank.

- Click  to move to the Commodity/Accounting section. The purchase requisition field is now populated with a purchase requisition number. Please write down the number for future reference.

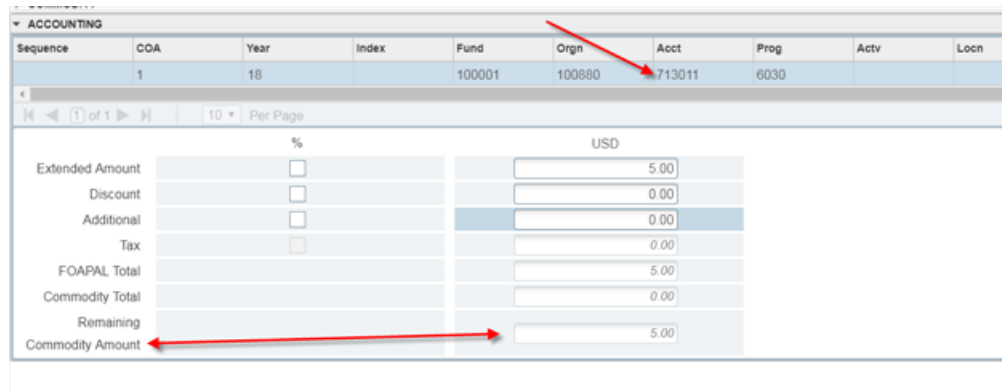
- Tab through fields to enter Description, U/M, Quantity, and Unit Price fields. Continue tabbing through fields so that Commodity Total field is populated.

16. When you have populated all required fields for this line item, click  to move to the Accounting section.

17. Tab through fields in Accounting section to auto-populate Fund, Orgn (Organization), Acct (Account), and Prog (Program) fields according to Organization number entered in an earlier section. You will have to key the account code. There is no default for this field.

If FOAPAL string elements are not correct for this purchase requisition, delete the accounting record and tab through each field to key correct FOAPAL string elements.



Continue tabbing through Accounting section so that Commodity Amount field is populated.

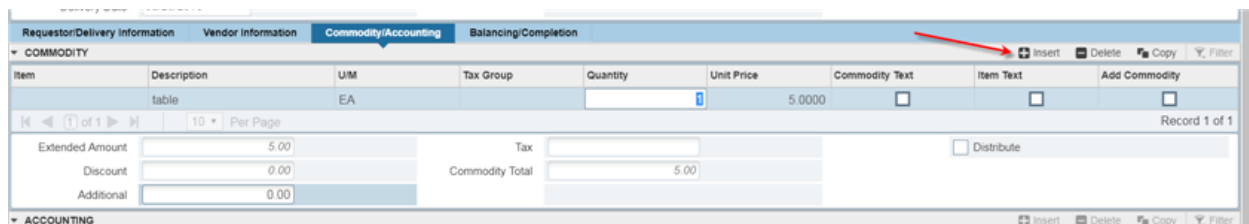


Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn
1	18			100001	100880	713011	6030		

	%	USD
Extended Amount	<input type="checkbox"/>	5.00
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	0.00
FOAPAL Total		5.00
Commodity Total		0.00
Remaining		5.00
Commodity Amount		5.00

If entering more line items, click on  in the lower left corner of the screen to move to the previous section. Once returned to Commodity section, click insert or press the down arrow on your keyboard () to move to an empty line.




Item	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
table	EA			5.0000	5.0000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

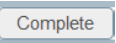
Extended Amount	5.00	Tax		<input type="checkbox"/>	Distribute
Discount	0.00	Commodity Total	5.00		
Additional	0.00				

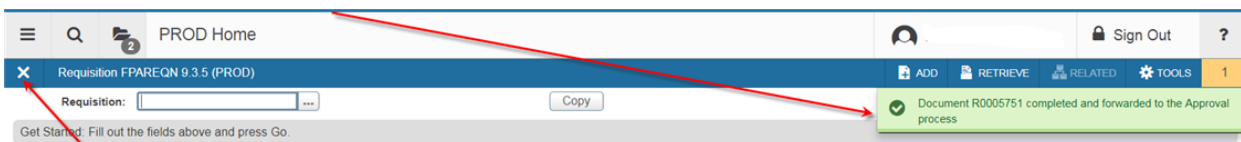
Repeat steps 15 through 17 until all items and FOAPAL strings have been entered. Then proceed from step 18.

18. Click  in lower left corner to move to the next section: Balancing/Completion Section. Confirm that Status column reads BALANCED for the Approved, Discount, and Additional amounts.

	Input	Commodity	Accounting	Status
Approved Amount	12.50	12.50	12.50	BALANCED
Discount Amount	0.00	0.00	0.00	BALANCED
Additional Amount	0.00	0.00	0.00	BALANCED
Tax Amount	0.00	0.00	0.00	BALANCED

Complete In Process

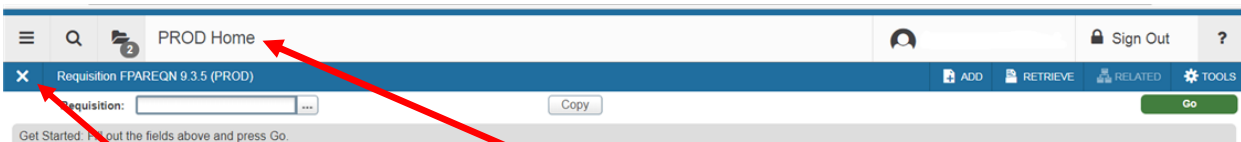
19. Once confirmed, click  to send the Purchase Requisition to the electronic approval process. You will be returned to the key block and can see the completion confirmation message in the upper right-hand corner of the screen.



Click on X in upper right-hand corner to return to FPAREQN. If preferred, you may click on PROD Home to return to Welcome page.

OR

Click  to put the purchase requisition "In Process" to work with it again at a later time. You will be returned to the key block.



20. Click on X in upper right-hand corner or PROD Home to close FPAREQN and return to the Welcome screen.

