



Self-Service Banner 9 Guide

Purchasing Department

11/10/23

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*Please note that in order to enter purchase requisitions, you must first be granted access to the Banner Finance Module. If you do not have access, please complete the [Data Access Authorization Request Form](#) at this [link](#) and submit to the Budget Office for approval and processing.*

## Creating a Purchase Requisition

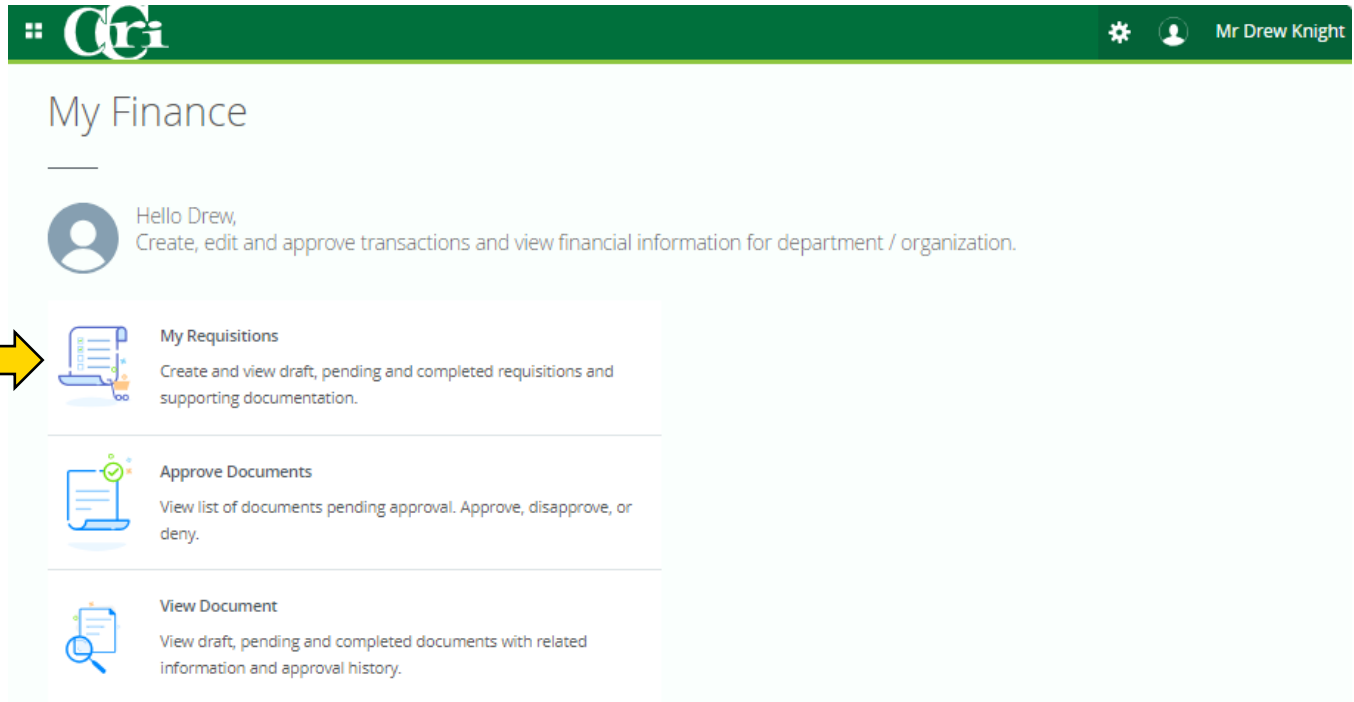
First, sign in to [MyCCRI](#) with your CCRI ID and Password.

The first screenshot shows the CCRI website header with the 'Login' dropdown menu open, highlighting the 'MyCCRI' option with a yellow arrow. The second screenshot is a 'Secure Login' page titled 'Single Sign-on Login to MyCCRI' with a yellow arrow pointing to the 'MyCCRI' link. The third screenshot is a 'SECURE LOGIN TO CCRI INFORMATION SYSTEMS' form with fields for 'Username' (dknight11) and 'Password', and a 'SIGN IN' button highlighted with a yellow arrow. The fourth screenshot shows the Cisco Duo mobile app interface with a 'Push Me a Push' button.

In MyCCRI, click on the “For Finance” tab and select “Finance Dashboard.”

The screenshot shows the MyCCRI user interface. At the top, the 'For Finance' tab is selected and highlighted with a yellow arrow. Below the navigation bar, the 'Finance Dashboard' is displayed, featuring a calculator icon, the text 'Finance Dashboard', and a yellow 'NEW' badge. A yellow arrow points to the 'Finance Dashboard' link at the bottom of the dashboard content area.

On the new My Finance homepage, select “My Requisitions.”



My Finance

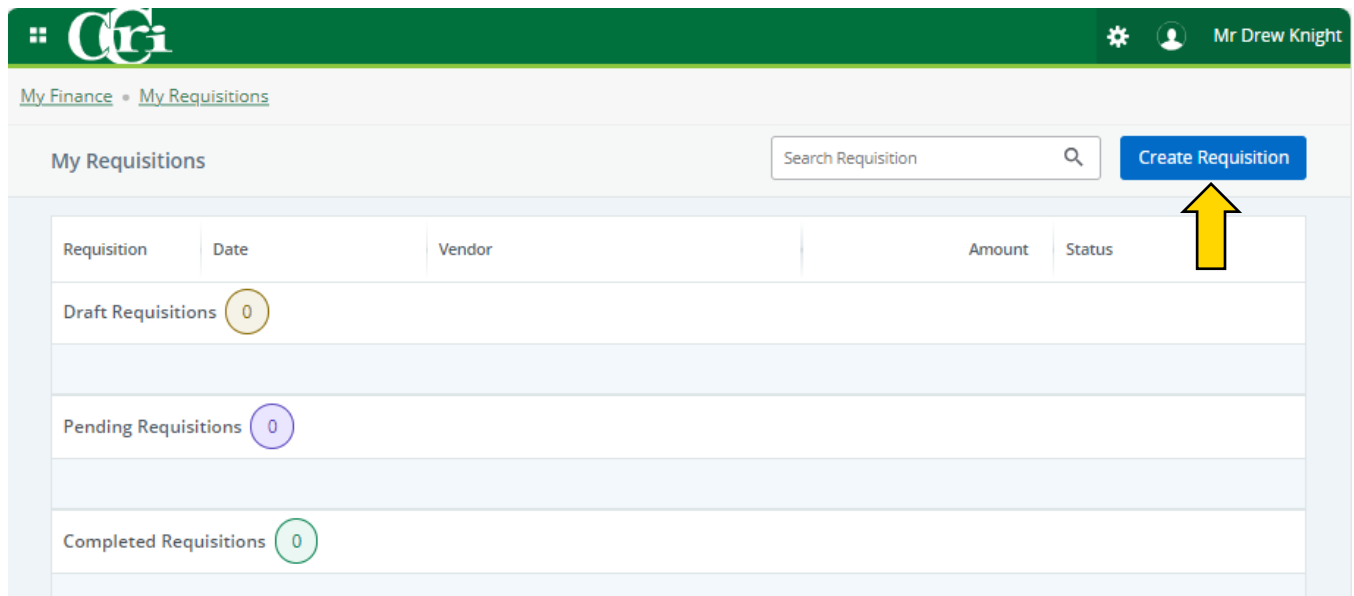
Hello Drew,  
Create, edit and approve transactions and view financial information for department / organization.

**My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.

**Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.

**View Document**  
View draft, pending and completed documents with related information and approval history.

On this screen, you will be able to view all your requisitions that are drafts, pending approval, or already completed. Select the “Create Requisition” button to get started.



My Finance > My Requisitions

My Requisitions

Search Requisition

Create Requisition

Requisition	Date	Vendor	Amount	Status
Draft Requisitions	0			
Pending Requisitions	0			
Completed Requisitions	0			

Know your FOAPAL string (Fund, Organization, Account, Program, Location codes) before beginning the requisition entry process.

## Copying a Requisition

Instead of starting a new draft, you can also copy a previously completed requisition. To do this, go to “My Requisitions” on the home screen and choose the requisition from the “Completed Requisitions” section.

My Requisitions

Search Requisition  Create Requisition

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 0				
Pending Requisitions 0				
Completed Requisitions 26				
R0069955	08/24/2023	Dell Marketing L.P.	\$1,732.00	Converted to PO ⓘ

View More

You can also use a requisition number to help search for a specific requisition. Type the number in the search bar provided and press “Enter” on your keyboard.

Once opened, click “Copy Document” in the upper right-hand corner. This will create a new requisition draft with the same information entered when the completed requisition was originally created.

My Finance • My Requisitions • R0069955

R0069955 View Attachments Copy Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting Requisition Summary

A notification will appear confirming your selection. Press “Yes” and you’ll get a notification confirming that the requisition has been copied successfully.

Ms Bethany Liston 1

⚠ Do you want to copy this requisition?

No Yes

Ms Bethany Liston 1

✔ Requisition R0069005 copied successfully

The copied draft will now be open on your screen.

## Requestor Information

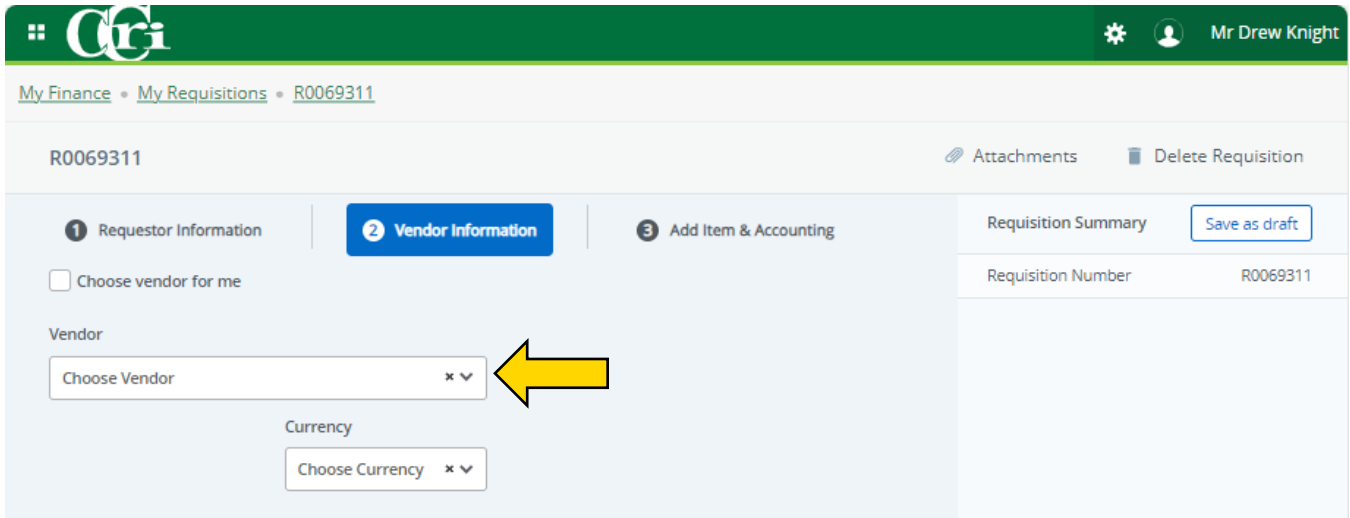
Fields with stars (\*) must be completed.

1. **Requestor** – This field will auto-populate with your name but can be changed if necessary.
2. **Transaction Date** – Automatically populates with the current date.
3. **Delivery Date** – Enter the date the delivery is needed. (Use the calendar button to choose the date)
4. **Requestor Email** - This field will auto-populate with your email but can be changed if needed.
5. **Choose Accounting Type** – Commodity Level Accounting should ALWAYS be selected.
6. **Public Comment** – Use this field for Quote Numbers or any justification. *(Previously Document Text)*
7. **Chart** – This field will auto-generate with “C Community College of Rhode Island.” Please leave this as is.
8. **Organization** – This field will auto-populate with your assigned organization field. If not, enter the appropriate department Organization Code in this field.
9. **Ship To Location** – Enter the code that the order will be delivered to. Ship-to codes are your org code and the first number of the location code. For example, if your org code is 30005, and your order is being shipped to the Warwick campus (500), your ship-to code is 300055. To search ship-to codes, visit [Tools and Resources](#). Once entered, a yellow box will appear below, with the full address.
10. **Attention To** – Enter your first name, last name, and a room number for the delivery if needed.

When finished, select “Next” at the bottom to move on to the Vendor Information section.

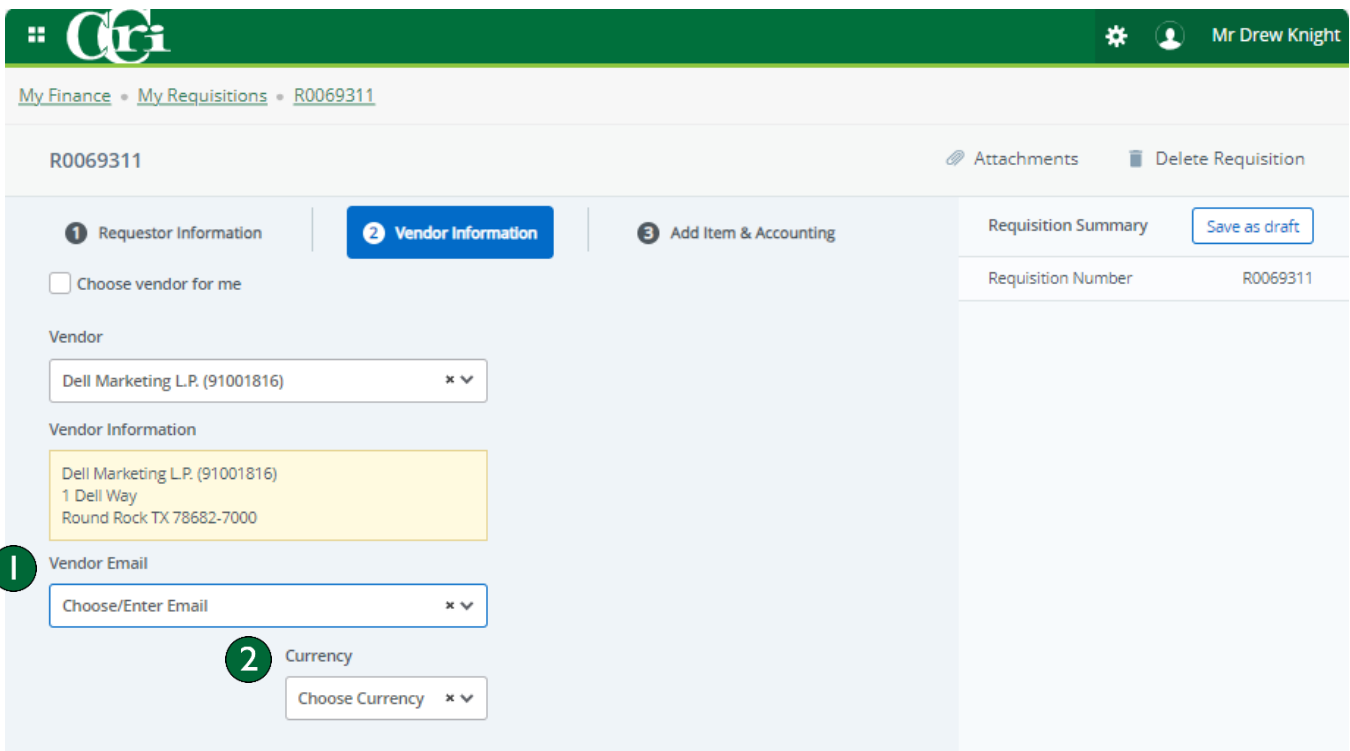
## Vendor Information

In the “Vendor” field, begin typing the vendor’s name with percent signs (*ex. %Dell%*) or their Banner ID number. Click on the appropriate option from the results that appear.



The screenshot shows the CRI Vendor Information form. The top navigation bar includes the CRI logo, a settings gear, a user profile icon for Mr Drew Knight, and the breadcrumb trail: My Finance > My Requisitions > R0069311. The main header displays the requisition number R0069311 and options for Attachments and Delete Requisition. The form is divided into three tabs: 1 Requestor Information, 2 Vendor Information (active), and 3 Add Item & Accounting. A checkbox for 'Choose vendor for me' is present. The Vendor field is a dropdown menu with the text 'Choose Vendor' and a yellow arrow pointing to it. Below it is a Currency dropdown menu with the text 'Choose Currency'.

Once selected, a yellow box with the vendor information will appear, along with a “Vendor Email” text field.



The screenshot shows the CRI Vendor Information form with the Vendor field selected. The dropdown menu displays 'Dell Marketing L.P. (91001816)'. Below the dropdown is a yellow box containing the following vendor information: Dell Marketing L.P. (91001816), 1 Dell Way, Round Rock TX 78682-7000. A 'Vendor Email' field is present with a dropdown menu and a circled '1' next to it. Below it is a Currency dropdown menu with a circled '2' next to it.

1. **Vendor Email** – Select or type the correct vendor email address.
2. **Currency** – Only USD will be used.

Please note that the department **MUST** provide Purchasing with an E-Verify W-9 form which is completed by the vendor. Write the requisition number on the W-9 and e-mail a PDF version of the document to Purchasing ([purchasing@ccri.edu](mailto:purchasing@ccri.edu)). Requisitions **cannot** be processed until this form has been received.

## Add Item & Accounting

The third section contains the descriptions of what is being purchased and the associated accounting information.

By this point, the requisition number has been automatically assigned. It is displayed in the upper left corner of the document and in the Requisition Summary on the right-hand side. It is important to take note of this number for your records.

My Finance • My Requisitions • R0069311

R0069311

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x v

Requisition Summary Save as draft

Requisition Number R0069311

Dell Marketing L.P. (91001816)  
1 Dell Way  
Round Rock TX 78682-7000

In the “Add Item(s)” field, type the item description and press enter. The following fields will now appear:

My Finance • My Requisitions • R0069311

R0069311 Attachments

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

1 Commodity Description

Desktop Computer

2 Unit Of Measure\*

Choose... x v

3 Quantity\* 4 Unit Price\*

0.00 0.0000

(Quantity) X (Unit Price) USD 0.00

Commodity Item USD 0.00

Total

5 Public Comment

Enter comments for the commodity item

Requisition Summary Save as draft

Requisition Number R0069311

Dell Marketing L.P. (91001816)  
1 Dell Way  
Round Rock TX 78682-7000

1. **Commodity Description** – Enter the name/description of the item being purchased.
2. **Unit of Measure** – In the drop-down menu, select which unit the product is sold by.
3. **Quantity** – Enter how many of the same items are being purchased.
4. **Unit Price** – Enter the individual cost of the item.
5. **Public Comment** – Type anything that did not fit in the Commodity Description. *(Previously Item Text)*

Once you have verified that all the information is correct, select the “Add Accounting” button at the bottom of the screen.

Back Add Accounting View as PDF Submit Requisition



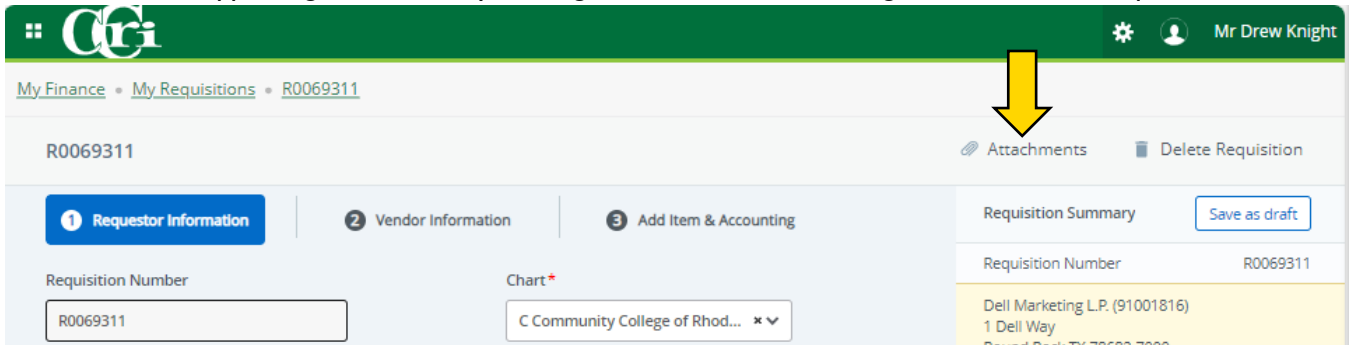
Next, you will enter the information for this item's funding source(s).

1. **Choose Chart** – This field will auto-fill with “C.” Leave this as is.
2. **Fund** – Type in the correct Fund number or use the drop-down menu for options.
3. **Organization** – This field will auto-fill with your Organization Code. You can change it if necessary.
4. **Account** – Type in the correct Account Code.
5. **Program** – Type in the correct Program Code.
6. **Location** – Choose the CCRI campus this requisition pertains to.
7. **Distribution Amount** – The amount should auto-populate from the Quantity and Unit Price entered on the previous screen.
8. **Distribution Percent** – The percentage will default to 100.00, you can edit this text field if you are including multiple FOAPAL strings. *For example, type “50” in the box to the right to assign 50% of the costs of the purchase to the FOAPAL string. For additional assistance, contact the [Purchasing Department](#).*

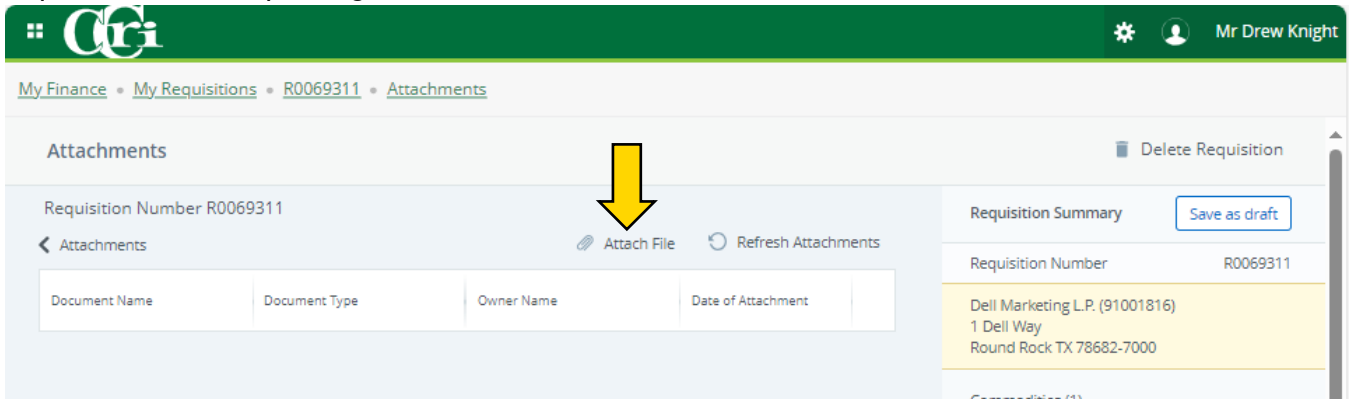
*Note: Do not enter a zero-dollar amount on a line item. In some cases, if there is no charge for the item, enter it as 0.01 and note “No Charge” in the item text.*

Once the Commodity/Accounting section has been completed, click “Save” at the bottom of the screen.

You can attach supporting documents by clicking “Attachments” on the right-hand side of a requisition.

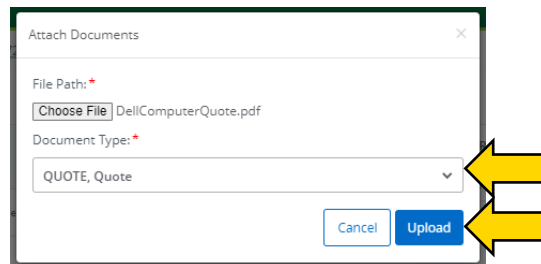


On this screen, you can upload attachments and see which documents have already been attached to the requisition. To start uploading, select “Attach File.”



A box will appear where you can choose a file for upload and select the Document Type via the drop-down menu.

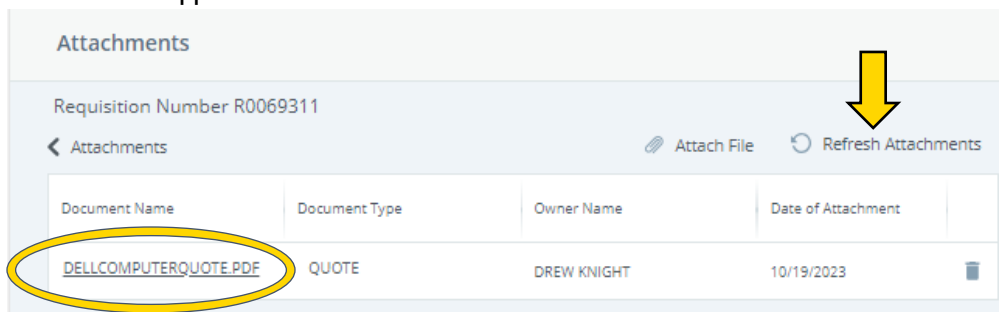
For this example, a price quote is being uploaded so you would choose “QUOTE.” Then press “Upload” when you are all set.



Once you have successfully attached a document, a notification will appear in the upper right-hand corner.



The attachment will also appear in the list below. Press “Refresh Attachments” if it does not.



You can repeat these steps to add more items to the requisition if you are purchasing multiple, unique items.

The screenshot shows the 'Add Item & Accounting' step of a requisition form. A yellow arrow points to the 'Choose Item' dropdown menu. The form displays a table for 'Desktop Computer' with a quantity of 2.00 and a total amount of 300.00. The 'Balanced' status is shown as 100%.

Funding	Amount
C-101010-30005-703105-00	300.00
Accounting Total	300.00
Commodity Total	300.00
Balanced	100%

If all items have been accounted for and you have uploaded all relevant documents, press “Submit Requestion” to submit. At this point you can also view a PDF version of the requisition which will open in a new tab.

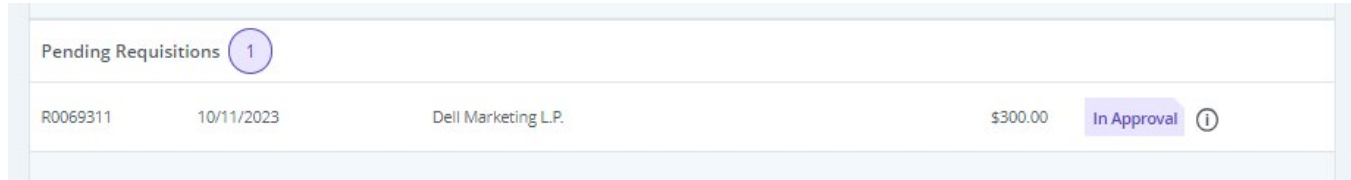
The screenshot shows the bottom of the requisition form. A yellow arrow points to the 'Submit Requestion' button. The 'View as PDF' button is circled in yellow.

Grand Total - All Commodities	300.00
Grand Total - All Accounting	300.00

A notification will appear in the upper right-hand corner of the screen if you have successfully submitted.

The screenshot shows a notification bar with a green checkmark and the text 'Requisition R0069311 completed successfully'.

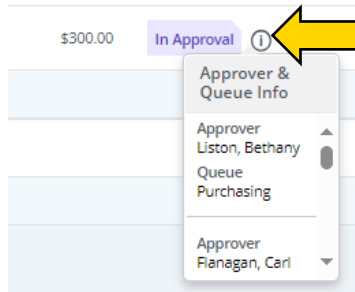
The requisition will now appear in “Pending Requisitions” as it goes through the approval queue process.



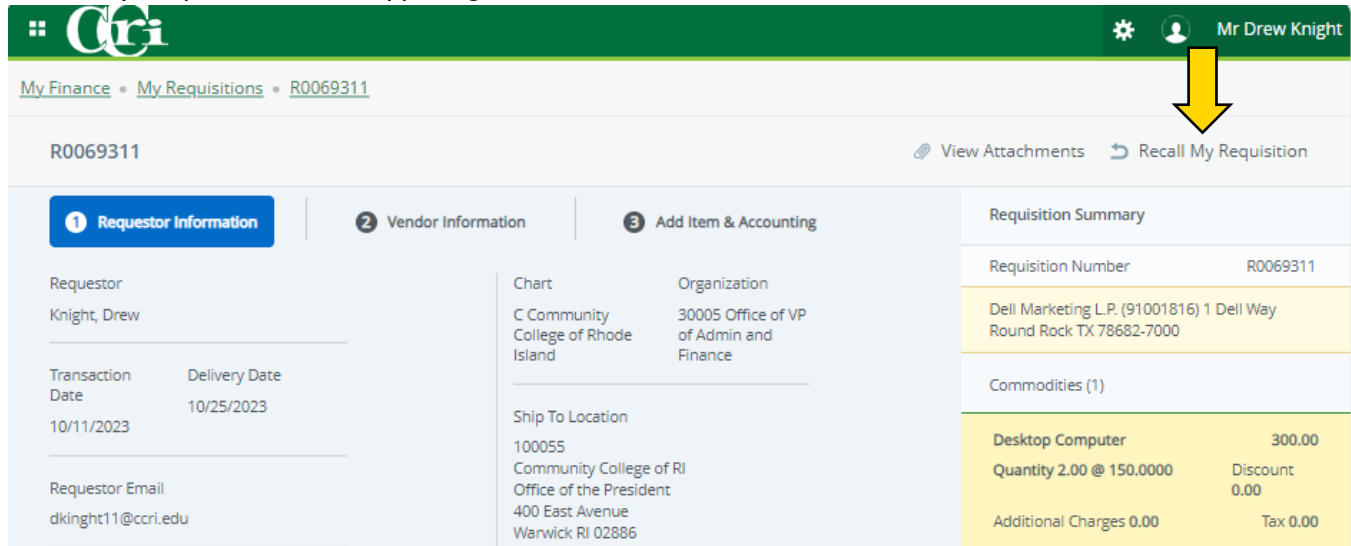
A screenshot of a web application showing a table of pending requisitions. The table has columns for Requisition Number, Date, Vendor Name, Amount, and Status. One requisition is listed with ID R0069311, dated 10/11/2023, from Dell Marketing L.P., for \$300.00, with a status of 'In Approval'. A circled '1' is next to the 'Pending Requisitions' header, and another circled '1' is next to the 'In Approval' status.

Requisition Number	Date	Vendor Name	Amount	Status
R0069311	10/11/2023	Dell Marketing L.P.	\$300.00	In Approval

You can check the approval queue by clicking the information icon next to the requisition status.

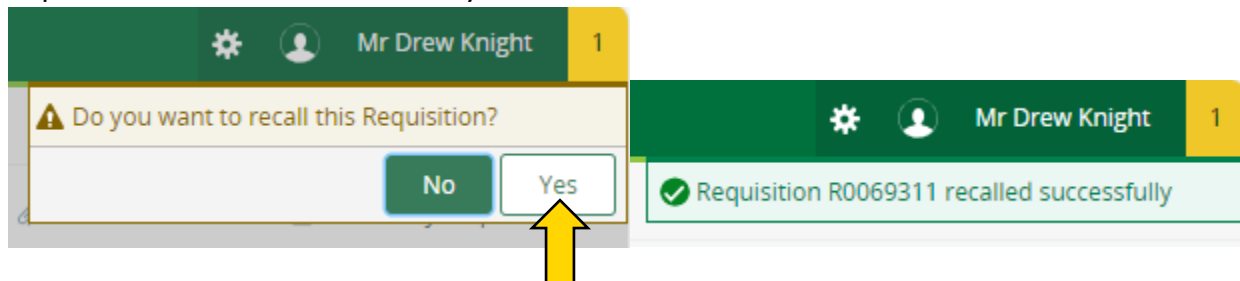


If you need to make changes or corrections, click on the pending requisition under “My Requisitions” and select “Recall My Requisition” in the upper right-hand corner.



A screenshot of the 'My Requisitions' page for requisition R0069311. The page header shows 'Mr Drew Knight' with a settings gear and a notification '1'. A yellow arrow points to the 'Recall My Requisition' button in the top right. The main content area is divided into sections: 'Requestor Information' (Knight, Drew), 'Vendor Information' (C Community College of Rhode Island), 'Add Item & Accounting' (30005 Office of VP of Admin and Finance), and 'Requisition Summary' (Dell Marketing L.P., Desktop Computer, 300.00).

A notification will appear confirming your selection. Press “Yes” and you’ll get a notification confirming that the requisition has been recalled successfully.



A screenshot showing a confirmation dialog box with the text 'Do you want to recall this Requisition?' and 'No' and 'Yes' buttons. A yellow arrow points to the 'Yes' button. To the right, a green success message reads 'Requisition R0069311 recalled successfully'.

The requisition will now again appear in your “Draft Requisitions” where you can make changes and resubmit.

**Note:** If the requisition needs to be edited or corrected and was previously completed and approved by your department, contact the Purchasing Department to ask that it be disapproved at their level, which will then enable you to make any necessary corrections. Also, if the Purchasing Department has already approved a requisition, the document cannot be disapproved. It will need to be canceled by Purchasing and a new requisition will need to be entered by the department.

If you cannot recall the requisition and/or need to disapprove a requisition, go to “Approve Documents” on the My Finance home screen.

My Finance

Hello Drew,  
Create, edit and approve transactions and view financial information for department / organization.

- My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.
- Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.
- View Document**  
View draft, pending and completed documents with related information and approval history.

Your User ID will autopopulate. Enter the Requisition number in the “Document Number” text field. After, press “Submit” and you will be brought to a new screen showing all matching documents.

My Finance > Approve Documents

### Approve Documents

*i* The radio buttons related to next approver apply when a User ID is present.

User ID: DKNIGHT      Document Number: R0069311      Submit

User ID is next approver     All documents User may approve

Press the “Disapprove” button on the right. You will not be able to press “Approve” unless you are next in the approval queue.

Approve Documents List 1

*i* Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT	300.00	-	Yes	DOC	-		Disapprove	Approve

A new box will appear where you can enter a reason for the disapproval in the “Comment” text field. Lastly, press “Disapprove” to disapprove the requisition.

Disapprove Document ×

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Document Number	Document Type
R0069311	REQ
Change Sequence	Submission
-	-

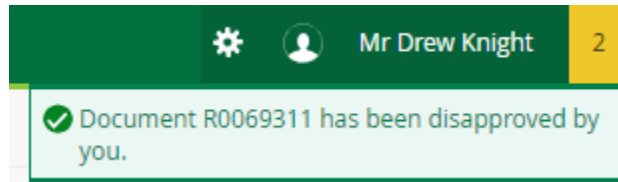
Amount  
300.00

Comment \*

Approval has been denied!

CancelDisapprove

A notification will appear in the upper right-hand corner confirming the document has been disapproved.



The disapproval will be shown in the “Approval History” of the requisition. You can view the approval history by going to “View Document” on the My Finance home screen.

☰ C ri ⚙️ 👤 Mr Drew Knight

## My Finance

Hello Drew,

Create, edit and approve transactions and view financial information for department / organization.

**My Requisitions**

Create and view draft, pending and completed requisitions and supporting documentation.

**Approve Documents**

View list of documents pending approval. Approve, disapprove, or deny.

**View Document**

View draft, pending and completed documents with related information and approval history.

A yellow arrow pointing to the right, highlighting the 'View Document' option in the My Finance menu.

Rev. 11/10/2023

[www.ccri.edu/purchasing](http://www.ccri.edu/purchasing)

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First, choose “Requisition” for the document type, “Choose Document Number” for the method of document search, and then enter the recorded requisition number in the last text field.

My Finance • View Document

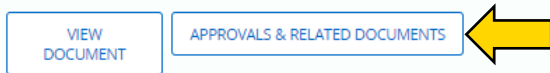
### View Document

Document Type  
Requisition x v

Document Search  
Choose Document Number x v

Document Number \*  
R0069311

Next, press “Approvals & Related Documents” to search. Selecting “View Document” will only bring up the requisition itself.



Lastly, you will be brought to this screen where you can check attachments, approval history, and any approvals that are required.

My Finance • View Document • Approval & Related Documents - Requisition

### Approval & Related Documents - Requisition

**Related Documents**  
No Related Documents information available for R0069311

**Attachments**  
No Attachments for R0069311

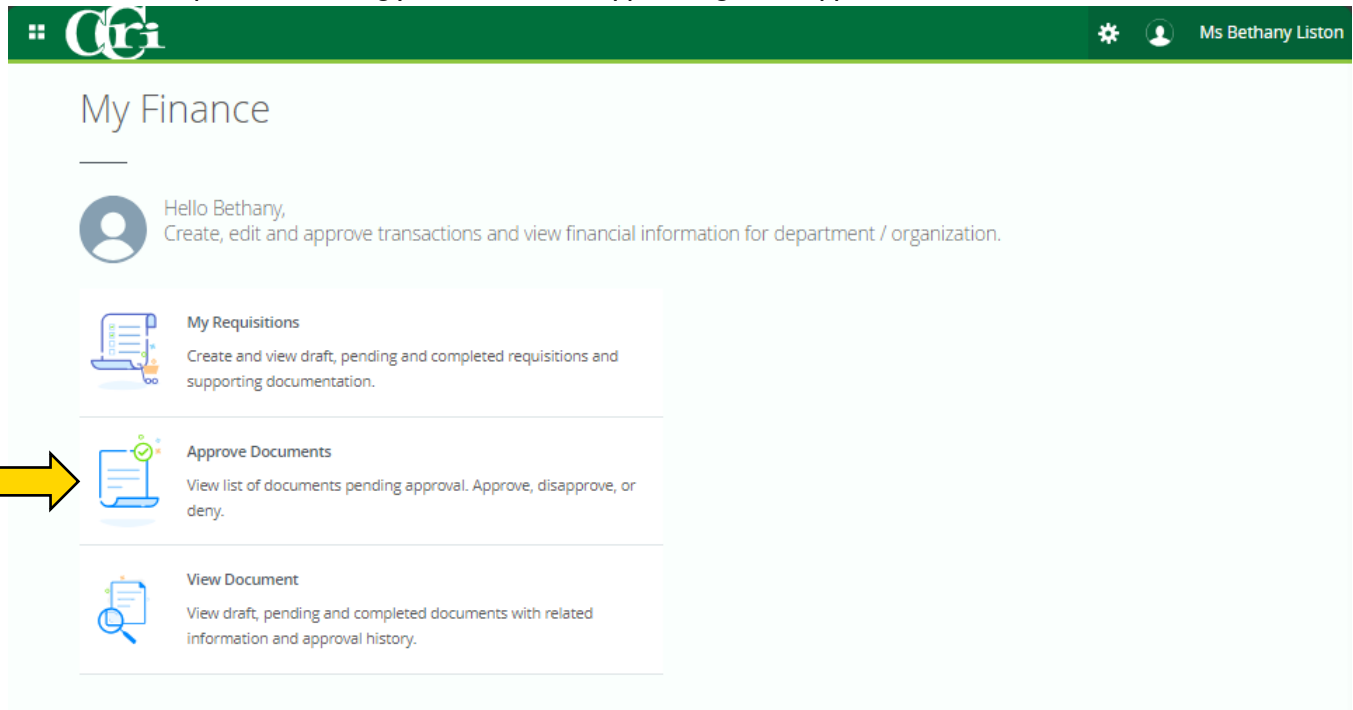
**Approval History**  
(DENY) (0)  
Knight, Drew | 10/16/2023  
(DENY) (0)  
Knight, Drew | 10/16/2023

**Approvals Required**  
Purchasing (P001) (1)  
Liston, Bethany  
Flanagan, Carl

BACK TO VIEW DOCUMENT

## Approving, Disapproving, and Reviewing Requisitions

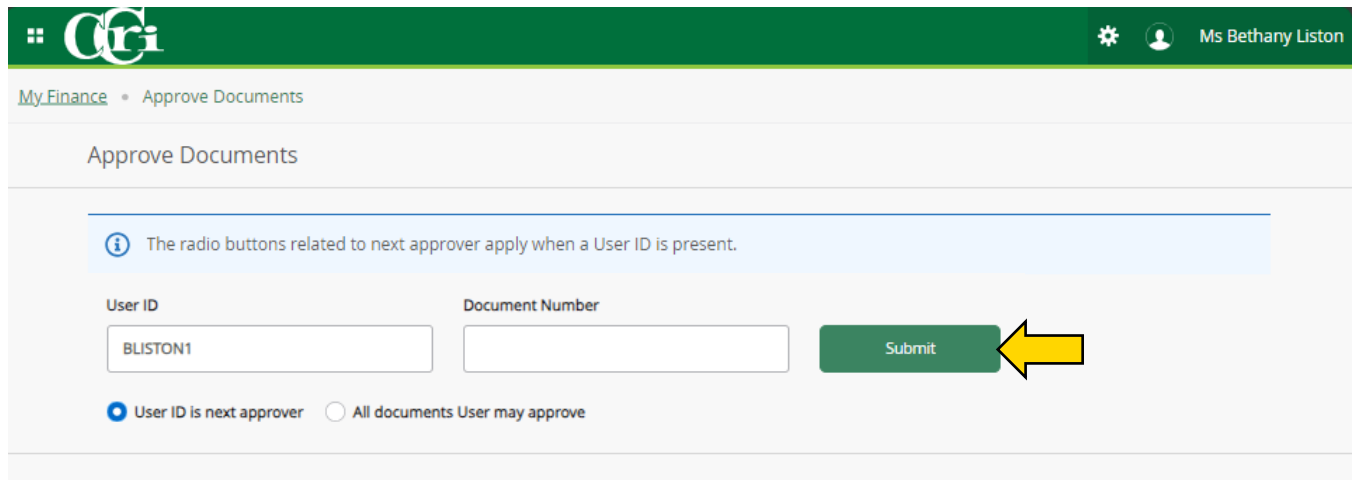
To review a requisition awaiting your review and approval, go to “Approve Documents.”



The screenshot shows the 'My Finance' dashboard. At the top, there is a green header with the CCI logo and the user's name, Ms Bethany Liston. Below the header, the page title 'My Finance' is displayed. A greeting 'Hello Bethany,' is followed by a description: 'Create, edit and approve transactions and view financial information for department / organization.' Three main navigation cards are visible: 'My Requisitions' (Create and view draft, pending and completed requisitions and supporting documentation), 'Approve Documents' (View list of documents pending approval. Approve, disapprove, or deny), and 'View Document' (View draft, pending and completed documents with related information and approval history). A yellow arrow points to the 'Approve Documents' card.

Your username will automatically populate in the “User ID” text field. You can press “Submit” to show all documents awaiting your approval.

To search for a specific requisition, enter the requisition number in the “Document Number” text field and then press “Submit.”



The screenshot shows the 'Approve Documents' form. At the top, there is a green header with the CCI logo and the user's name, Ms Bethany Liston. Below the header, the breadcrumb 'My Finance > Approve Documents' is visible. The page title 'Approve Documents' is displayed. A blue information box contains the text: 'The radio buttons related to next approver apply when a User ID is present.' Below this, there are two text input fields: 'User ID' (containing 'BLISTON1') and 'Document Number' (empty). To the right of these fields is a green 'Submit' button, which is highlighted by a yellow arrow. Below the input fields, there are two radio buttons: 'User ID is next approver' (selected) and 'All documents User may approve'.



A list of documents will appear that you are eligible to approve.

MyFinance • Approve Documents

Approve Documents

Queried Parameters

Another Query

Approve Documents List 1

Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

To review the requisition, click on the requisition number in the “Document” column.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

To review any attachments, press the paperclip icon under “Attachments.”

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

After you have reviewed the requisition, press either “Disapprove” or “Approve” on the righthand side of the document list.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0069311	REQ	-	-	DKNIGHT1	300.00	-	Yes	DOC			Disapprove	Approve

A new box will appear where you can add a comment in the text field provided if necessary. Then, press “Approve” to approve the requisition.

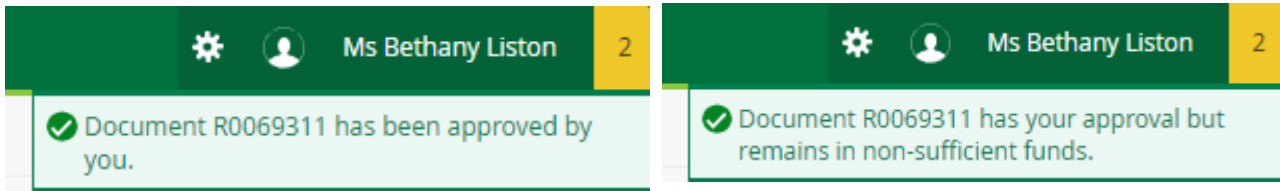
Approve Document

Document Number: R0069311  
Document Type: REQ  
Change Sequence: -  
Submission: -  
Amount: 300.00

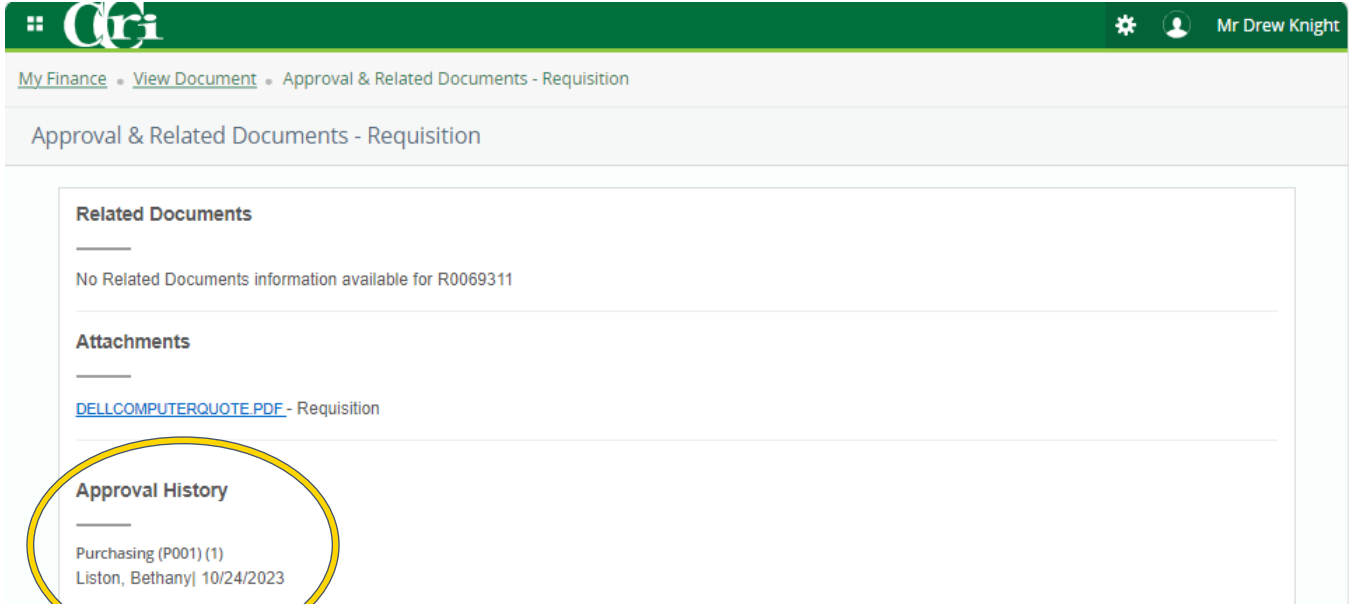
Comment: This document has been approved.

Cancel Approve

A notification will appear in the upper right-hand corner of the screen. Depending on where you are in the approval process, you will see one of two notifications:



Your approval will now be recorded in the “Approval History” of the requisition.



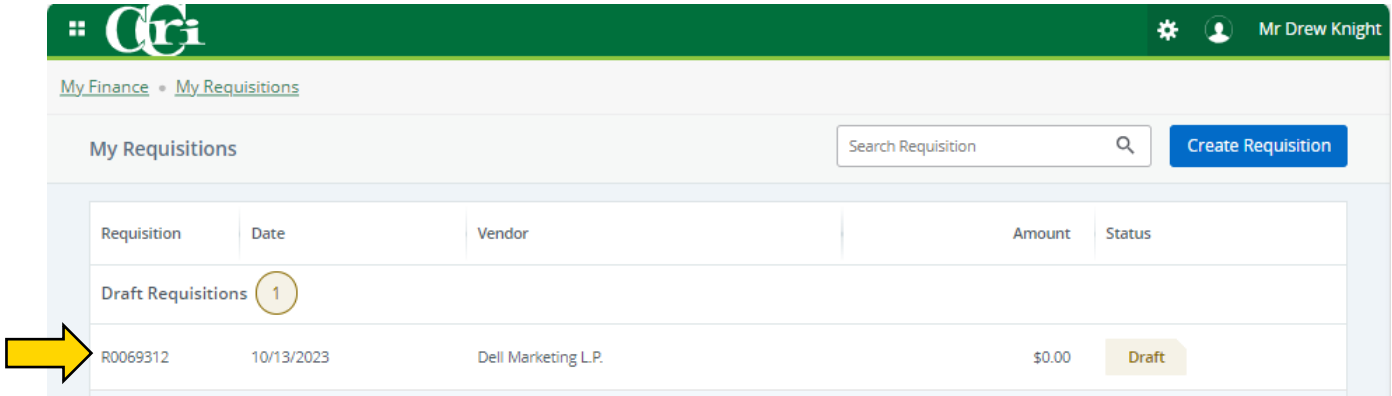
## Deleting a Purchase Requisition

Occasionally, there are situations where a requisition is not needed and should be deleted from Banner. A requisition can be deleted if it is not completed or approved.

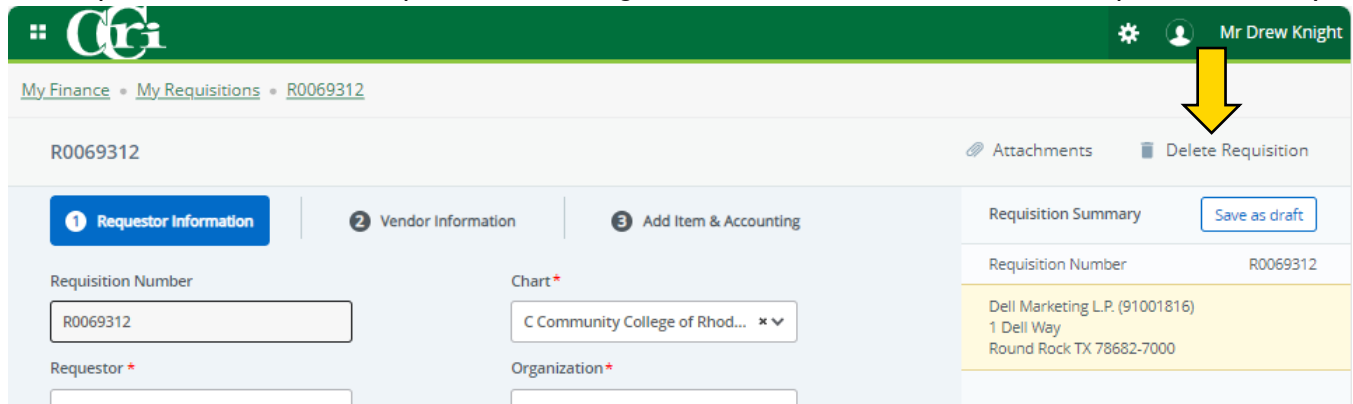
If the requisition has been completed and is awaiting approval, you can recall/disapprove the requisition where it will be accessible again in your drafts.

If the requisition has been approved by Purchasing, contact the [Purchasing Department](#) so the requisition can be canceled. At this point, it can no longer be deleted from the system.

To delete a draft requisition, go to “My Requisitions” on the My Finance home screen and select the draft requisition you wish to delete.



Once opened, select “Delete Requisition” on the right-hand side of the screen above the Requisition Summary.



A notification in the upper right-hand corner will appear confirming your selection. Press “Yes,” and you’ll get another notification confirming that the draft requisition has been deleted successfully.

