



BANNER 7 FINANCE - Requisitioning and Receiving

FPO201

v1.0

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Classroom Rules

- Please turn off your cell phones
- Only log on to email during break
- No surfing the net

Help Center

- help@email.uncc.edu
- Extension 7-3100

Course Objectives

- Introduction to Purchasing concepts
- Purchasing Points to Remember
- Complete the Basic Requisition
- Enter Receiving on a Purchase Order
- Explore various Requisition, Purchase Order and Receiving Inquiry forms

Purchasing - Introduction

- The purchasing process involves the joint effort of the Purchasing Office, user departments, and suppliers.
- The user department determines its needs and initiates the request for purchase by completing the on-line Purchase Requisition.

Purchasing - Introduction

- All off-campus purchases, which do not come within the guidelines of the Direct Pay, are to be initiated with a properly completed on-line purchase requisition.
- Contact the Purchasing Department if you have any questions about these guidelines.

Purchasing - Introduction

- Purchase requisitions should be completed in enough detail to enable the Purchasing Department and suppliers to understand the request.
- They should be submitted far enough in advance to allow Purchasing time to meet your requested delivery date.

Purchasing - Introduction

- Purchasing will review various aspects of each electronic requisition such as the recommended vendor, order type, the description and prices of the items involved, the unit of measure, the delivery address, etc.
- Changes or corrections may be made as necessary.

Purchasing - Introduction

- Do not include commodities which would be purchased from different vendors on the same on-line Requisition. Separate purchase Requisitions should be prepared for each individual vendor.

Purchasing – Points to Remember

- Separate requisitions containing similar items that are being ordered from the same vendor will be combined onto one purchase order, as determined by the Purchasing Department.

Purchasing – Points to Remember

- A purchase order needs to be issued by an authorizing purchasing agent before a vendor can be contacted to provide the commodities being requested.
- It is not acceptable to submit a requisition with an accompanying invoice "after-the-fact", unless the purpose is one of an actual after hour's emergency situation. In this case, the Purchasing Department requires notification of the emergency order on the next available business day.

Purchasing – Points to Remember

- Delivery of products or services without first obtaining a valid UNC Charlotte purchase order is in violation of the purchasing process. Therefore, "confirming orders" are not acceptable, and may be subject to personal liability.
- The purchase order number must be provided to the vendor. This process will help ensure that the PO number appears on the vendor's invoice. This process is necessary to facilitate the appropriate and timely payment of the invoice.

Create a Banner Requisition

- FPAREQN



Enter Receiving Against a Purchase Order

- FPARCVD



Requisition, Purchase Order, & Receiving Inquiry Forms

- FOIDOCH – Document History (Review)
- FPIREQN – Requisition Inquiry
- FPIPURR – Purchase/Change Order Inquiry
- FPIRCVD – Receiving Goods Inquiry
- FPIORQF – Open Requisitions by FOAPAL
- FPIOPOF – Open Purchase Orders by FOAPAL
- FPIOPOV – Purchase Orders by Vendor
- FPIREQS – Requisition Suspense List

Questions.....

