
Viewing PO / Requisition Information in Banner

Effective July 1, 2007, all Purchase Orders (PO's) will be paperless and entered into the new Banner system. To view purchase orders and requisitions online, you must (1) obtain access to the Banner system, (2) complete Banner Navigation training and (3) set up the Banner channel in myCuesta.

Obtaining access to Banner

1. Locate the Computer Access Sheet:
<http://www.cuesta.edu/deptinfo/compserv/ComputerAccessSheet.pdf>.
2. Complete the Computer Access Sheet online.
Make sure to mark the "Need" section for Banner INB.

<ul style="list-style-type: none">• Banner INB List the security classes needed for INB access, or you can list a person's name to mirror another users INB security classes.• Questions on this section? Contact the appropriate department (i.e. Fiscal Services, etc.)	Need <input checked="" type="checkbox"/> User to copy or list security classes: <input type="text" value="Jane Q. Public"/>
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3. Enter the Banner INB security classes or the name of a person to mirror.
(Contact the appropriate department [i.e. Fiscal Services, Admissions and Records, etc.]
4. Print out the completed form.
5. Sign the access sheet (employee and supervisor).
6. Send the complete form to Computer Services.

Acquiring Banner navigation training (online)

- Go to http://www.cuesta.edu/deptinfo/elic/banner_nav_training.htm and follow the written instructions, completing the eight (8) short modules.

Setting up the My Banner channel in myCuesta

- Refer to the document, "Using the My Banner Channel", located at http://www.cuesta.edu/deptinfo/elic/training_materials/Using_the_My_Banner_Channel.pdf.


Viewing information in Banner

To view requisition information:

1. Log into myCuesta and, from the My Banner channel, select **General Menu**.
The Banner General Menu will appear.

2. Enter form code: **FPIRQST** in the Go To field and press **[Enter]**.

The Requisition Validation form will appear.

3. Click the **Enter Query** icon  (or press **[F7]**) to clear the form.

4. Enter a valid number in the **Request Number** field and click the **Execute Query** icon

 (or press **[F8]**).

The requisition data will appear.

5. When finished, exit Banner.

- a. Press the **Exit X** button.

The General Menu will appear.

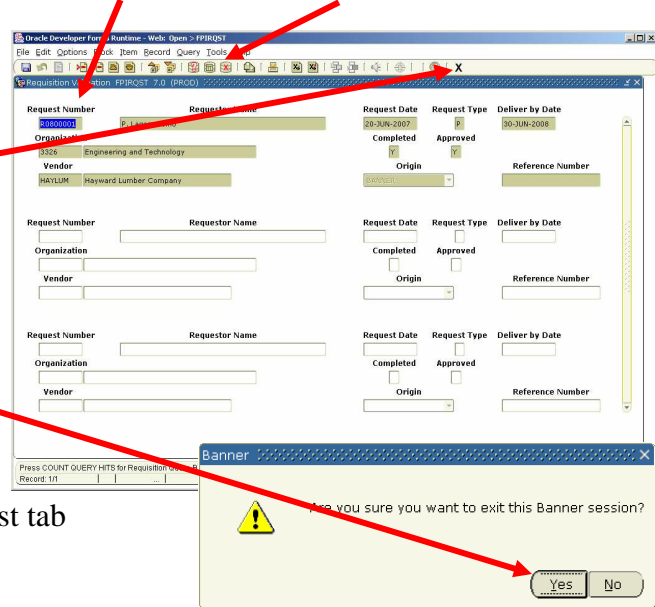
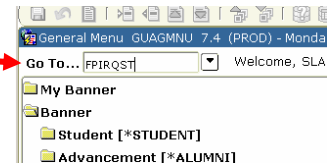
- b. Press the **Exit X** button again.

A confirmation screen will appear.

- c. Click the **Yes** button.

The myCuesta screen will appear.

- d. Click the “back to...” link in the upper left corner to return to the last tab viewed in myCuesta.



To view detailed purchase order information:

1. Log into myCuesta and, from the My Banner channel, select **General Menu**.

The Banner General Menu will appear.



2. Enter form code: **FPIPURR** in the Go To field and press **[Enter]**.

The Purchase/Blanket/Change Order Query form will appear.

3. Enter the purchase order number in the PO field.

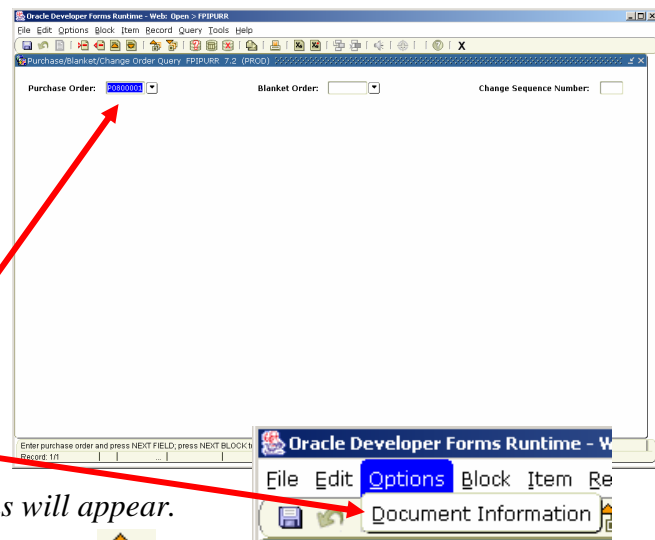
4. Select **Options > Document Information** from the menu bar.

The first of five (5) detailed PO screens will appear.


5. Press the **Next Block**  or **Previous Block**  buttons to scroll through the five (5) detailed PO screens.

6. When finished, exit Banner.

(See step #5 in “To view requisition information” for details.)



To view all order information:

1. Log into myCuesta and, from the My Banner channel, select **General Menu**.
The Banner General Menu will appear.
2. Enter form code: **FOIDOCH** in the Go To field and press **[Enter]**.
The Document History form will appear.
3. Click the **Search** icon  by the Document Type field.
The Document Type List will appear.
4. Select the desired document type (i.e. PO) and then click the **OK** button.

NOTE: You may also type the code (i.e. PO) in the Document Type field and press **[Enter]**.

Document Type	Document Description	Last Ac
PAK	Packing Slips for Receiving	25-MAF
PCD	Purchase Card	31-JAN
PMS	Payment Management System code	22-MAF
PO	Purchase Order	01-JUN
PRJ	Project	20-APR
PCD	Proposal Code	01-JUN
PRP	Proposal	04-OC
PTY	Appreciable Property	25-MAF

The code will appear in the Document Type field and the insertion point will be in the Document Code field.

5. Type the document number in the Document Code field.

6. Click the **Next Block** icon  (or press **[Ctrl]-[Page Down]**).

The document's information will appear in the appropriate field(s).

7. When finished, exit Banner.
(See step #5 in "To view requisition information" for details.)