


Purchase Requisition Procedures for Banner 9



(We recommend you to use Google Chrome as your browser)

Login to MyGateway: <https://mg.nocccd.edu>

Enter your 8-digit Banner ID number and your MyGateway Password. Click the LOGIN button to continue.

← → ↻ https://login.nocccd.edu/_layouts/PG/login.aspx?ReturnUrl=%2Fso%2Fdefault.aspx Not syncing

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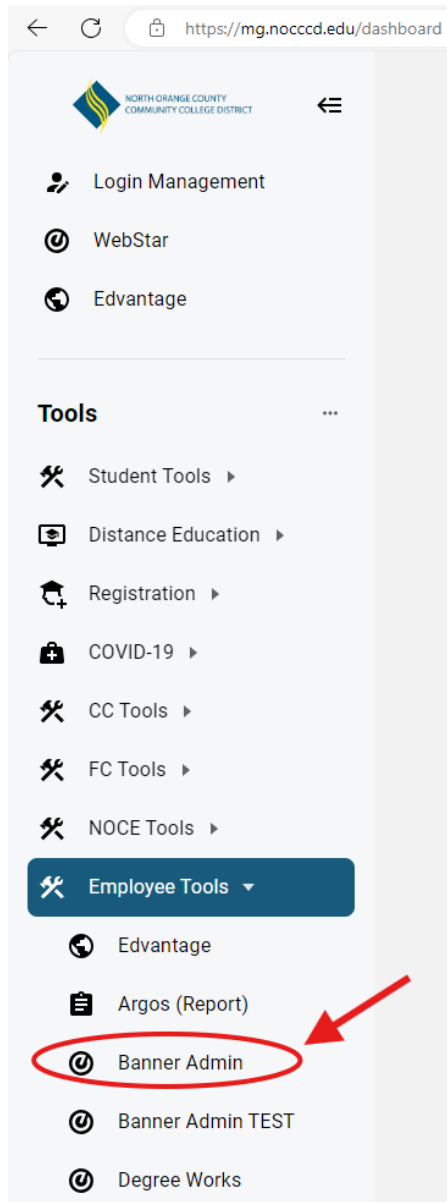
[FAQs](#)
Frequently Asked Questions

[Technical Support](#)
Contact your campus' tech support for help

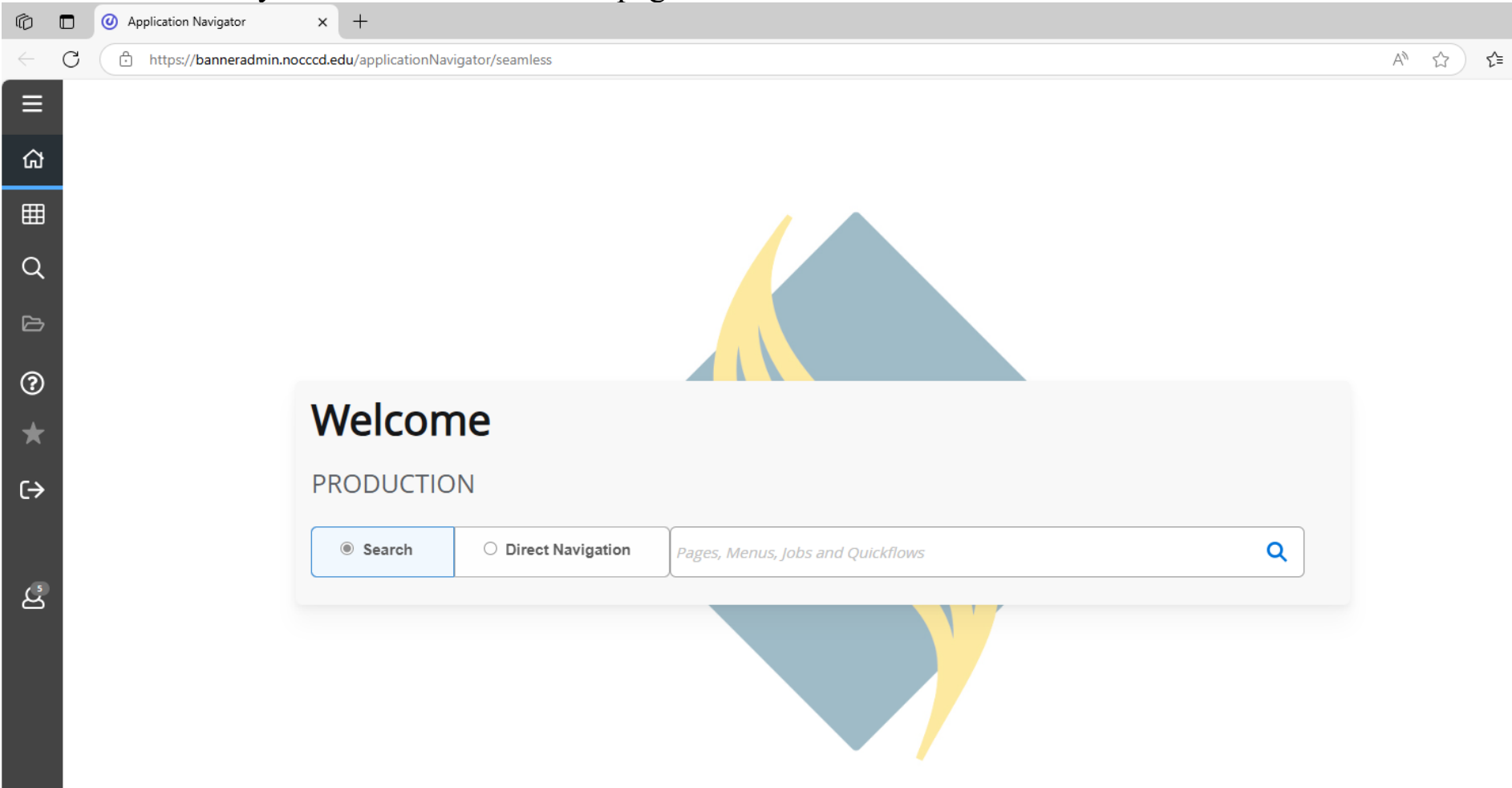
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Click on **Banner Admin** on the left hand side under Employee Tools.

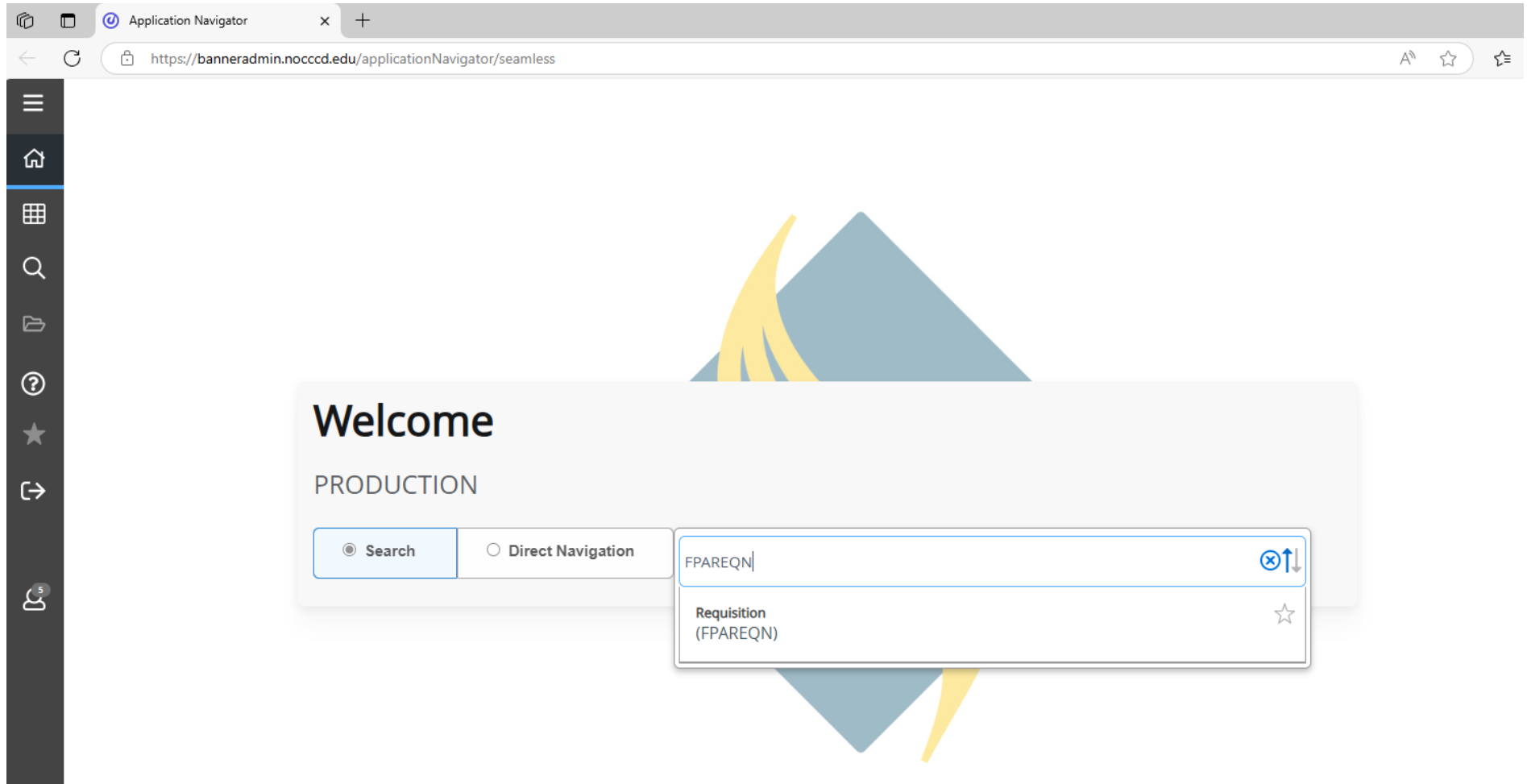


This link will lead you to the Banner 9 home page.



FPAREQN: Requisition

Type **FPAREQN** (Requisition) and press **enter** to create a new Requisition.



Leave the Requisition field blank and click the “Go” button at the top-right of the Banner window.

ellucian Requisition FPAREQN 9.3.15 (PROD) ADD RETRIEVE RELATED TOOLS

Requisition: Copy Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

EDIT Record: 1/1 KEY_BLOCK.DISPLAY_RQST_CODE [1] ©2000 - 2019 Ellucian. All rights reserved. ellucian.

Requestor/Delivery Information

You will be led to the “**Requestor/Delivery Information**” tab of the Requisition page.

Begin by selecting a valid “**Delivery Date**” at the top left. Please use Today’s Date, the date you are entering the requisition, for the Order Date, Transaction Date, and Delivery Date. Press the Enter key at every command. It will allow Banner to post the information.

When purchasing single line items over \$10,000, **Document Level Accounting** must be unchecked. This requires the requestor to enter a FOAPAL for each individual line item.

Enter your **Email**, your **Phone Area Code** and **Phone Number** in the appropriate fields.

In the “**Ship To**” field, select one of the following codes:

- BO – for Blanket Orders
- COMP – for Completed Invoices
- SBLO – for Professional Services, Non-Physical Products such as Electronic Deliverables
- STWK – for Site Work such as construction services/repairs/installation
- FC – for Fullerton College delivery address
- CC – for Cypress College delivery address
- ANA – for Anaheim Campus delivery address
- MAIN – for Maintenance Agreements

In the “**Attention To**” field on the right, enter your **Name** so you can be contacted if questions arise. Please include **Building Number** and **Room Number** for the delivery companies.

At this point, a new Requisition Number will be generated. Be sure to record this number for your reference!

All required fields are circled in **RED** and must be completed before proceeding to the next step.

Requisition: NEXT

Start Over

Insert Delete Copy Filter

Requisition: NEXT

Order Date * 09/25/2024

Transaction Date * 09/25/2024

Delivery Date *

Comments

Commodity Total 0.00

Accounting Total 0.00

☒ Document Level Accounting

☐ In Suspense

☐ Document Text

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

Requestor/Delivery Information

Requestor * Crystal Nguyen

Organization * 1387 *** Purchasing

COA * 1 *** North Orange County CCD

Email

Phone Area Code

Phone Number

Phone Extension

Fax Area Code

Fax Number

Fax Extension

Ship To * ANA ***

Street Line 1 Anaheim Campus

Street Line 2 1830 West Romneya

Street Line 3

Contact

Attention To *

Building

Floor

City Anaheim

State or Province CA

Zip or Postal Code 92801

Nation

Area Code

Phone Number

Extension

SAVE

Once you have completed the Requestor/Delivery tab, click on the “**Vendor Information**” tab to proceed to the next screen.

Vendor Information

Enter the Vendor ID directly “@0XXXXXXX” or click the three-dot box next to the Vendor field to search for the vendor. In the dialogue box that appears, select the “**Entity Name/ID (FTIIDEN) Search**” to lookup a vendor.

This screenshot shows the 'Vendor Information' tab in a software application. The 'Vendor' field is highlighted with a red arrow and a red circle around its three-dot dropdown menu. The form includes various input fields for vendor details:

- Vendor Information:** Vendor (with dropdown), Vendor Hold checkbox, Address Type, Sequence, Street Line 1, Street Line 2, Street Line 3, City, State or Province, Zip or Postal Code, Nation.
- Contact Information:** Contact, Email, Phone Area Code, Phone Number, Phone Extension, Fax Area Code, Fax Number, Fax Extension.
- Financials:** Discount, Tax Group (set to 'TAX' with 'California & Orange County Tax' selected), Currency.

This screenshot shows the same 'Vendor Information' form, but with the 'Option List' dialog box open. The dialog box contains two options: 'Entity Name/ID Search (FTIIDEN)' and 'Vendor Maintenance (FTMVEND)'. The first option is circled in red, indicating it is the correct choice for searching for a vendor by ID. The 'Cancel' button is at the bottom of the dialog.

Option List

- [Entity Name/ID Search \(FTIIDEN\)](#)
- [Vendor Maintenance \(FTMVEND\)](#)

Cancel

To search for a vendor, use the “**Last Name**” field and enter the company name with percent signs (%) before and after (for example, %Vendor Name%). This improves search accuracy. Avoid using special characters like periods or hyphens, as the system is sensitive to them. Then, select “Go” to search.

For individuals, use both the “**Last Name**” and “**First Name**” fields.

The screenshot shows the 'Entity Name/ID Search' interface. The 'Last Name' field is highlighted with a red box and contains the text '%Cal Pro Specialties%'. The 'Go' button is also visible.

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
@01377410	Cal Pro Specialties			Corporation		Yes	No	No	No	No	

Once the search results appear, locate and select the correct vendor or employee name, then click the “**Select**” button in the bottom right corner to select the vendor.

The screenshot shows the search results page. The 'SELECT' button is highlighted with a red circle.

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
@01377410	Cal Pro Specialties			Corporation		Yes	No	No	No	No	

After returning to the Vendor Information tab, complete any remaining required fields.

If the **Address Type** or **Sequence Number** fields are blank or appear outdated, click the **three-dot button** next to the Sequence field to view available address options.

From the list, select the address that matches the vendor's quote or W-9 to ensure accuracy in processing and delivery.

The screenshot shows the 'Vendor Information' tab of a software application. The 'Vendor' field contains '@0137741 ***' and 'Cal Pro Specialties'. The 'Address Type' is 'BU ***'. The 'Sequence' field is '1 ***', with a red circle around the three-dot menu icon and a red arrow pointing to it. The 'Street Line 1' is '8621 Elmer Ln'. The 'City' is 'Garden Grove'. The 'State or Province' is 'CA'. The 'Zip or Postal Code' is '92841-1045'. The 'Nation' is blank. The 'Contact' field is blank. The 'Email' field is blank. The 'Phone Area Code' is '714'. The 'Phone Number' is '2732942'. The 'Phone Extension' is blank. The 'Fax Area Code' is blank. The 'Fax Number' is blank. The 'Fax Extension' is blank. The 'Discount' field is blank with a three-dot menu icon. The 'Tax Group' is 'TAX ***' with the text 'California & Orange County Tax'. The 'Currency' field is blank with a three-dot menu icon.

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
▼ VENDOR INFORMATION			
Vendor		Contact	
@0137741 *** Cal Pro Specialties			
<input type="checkbox"/> Vendor Hold		Email	
Address Type			
BU ***			
Sequence		Phone Area Code	
1 ***		714	
Street Line 1		Phone Number	
8621 Elmer Ln		2732942	
Street Line 2		Phone Extension	
Street Line 3		Fax Area Code	
City		Fax Number	
Garden Grove			
State or Province		Fax Extension	
CA			
Zip or Postal Code		Discount	
92841-1045		***	
Nation		Tax Group	
		TAX *** California & Orange County Tax	
		Currency	

Once you have completed the Vendor Information tab, click on the **“Commodity/Accounting”** tab to proceed to the next screen.

New Vendor

If the vendor does not currently exist in Banner:

- Email a signed copy of the vendor's **W-9** to your assigned Buyer (Reference **RQ #** in the subject line)
- Buyer will enter the new vendor information before the Purchase Order can be processed
- In the **Vendor ID** field, leave it blank
- In the **Name** field, type "**NEW VENDOR**" to indicate a new vendor request

Requestor/Delivery Information	Vendor Information	Commodity/Accounting	Balancing/Completion
▼ VENDOR INFORMATION			
Vendor	<input type="text"/>	<input type="text" value="NEW VENDOR"/>	
<input type="checkbox"/> Vendor Hold			
Address Type	<input type="text"/>		
Sequence	<input type="text"/>		
Street Line 1			
Street Line 2	<input type="text"/>		
Street Line 3	<input type="text"/>		
City	<input type="text"/>		
State or Province			
Zip or Postal Code			
Nation			

Once you have completed the Vendor Information tab, click on the "**Commodity/Accounting**" tab to proceed to the next screen.

Commodity/Accounting

Begin by entering the appropriate **commodity code** in the “**Commodity**” field:

- 3TR – for Travel
- MG – for District buyer Michael Grove
- PS – for District buyer Pamela Spence
- CN – for District buyer Crystal Nguyen
- MH – for Maintenance RQs and Fund 4, Mireille Hernandez

Modify the “**Description**” field as necessary to match the vendor’s quote for each item.

Enter the appropriate **Unit of Measure**, **Tax Group**, **Quantity**, and **Unit Price** to reflect the quoted amounts.

In the **Tax Group** field, select the Tax Code “**TAX**” for “**California & Orange County Tax**” to apply the correct tax rate of **7.75%**. This ensures accurate tax calculation on the requisition.

Tax Group List						X
Criteria						<input type="text"/>
Code	Tax Group Description	Tax Rate	COA	Eff Date	Term Date	
TAX	California & Orange County Tax	8	1	01/01/2013		
TAX	California Sales & Use Tax	7.5	1	07/02/2001		

For items such as electronic deliverables, professional services, construction services, software, and blanket orders select the Tax Code “**NT**” for “**No Tax**”.

Enter your commodities descriptions and values as necessary.

Requestor/Delivery Information		Vendor Information		Commodity/Accounting		Balancing/Completion			
<div> <div>COMMODITY</div> <div> <div>Settings</div> <div>Insert</div> <div>Delete</div> <div>Copy</div> <div>Filter</div> </div> </div>									
Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1	CN	Microsoft Surface Laptop 6 - 13"	EA	TAX	1.00	1,479.4000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	CN	Jabra Evolve 65 SE UC Stereo - headset	EA	TAX	1.00	175.4000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<div> <div>1 of 1</div> <div>10 Per Page</div> <div>Record 1 of 2</div> </div>									
Extended Amount		1,479.40		Tax		114.66		<input checked="" type="checkbox"/> Distribute	
Discount		<input type="text" value="0.00"/>		Commodity Total		1,594.06			
Additional		<input type="text" value="0.00"/>							

ACCOUNTING												
<div> <div>Settings</div> <div>Insert</div> <div>Delete</div> <div>Copy</div> <div>Filter</div> </div>												
Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSF Override	NSF Suspend
1	1	26		11100	1387	64310	6770		407003		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<div> <div>1 of 1</div> <div>10 Per Page</div> <div>Record 1 of 1</div> </div>												
<div> <div>%</div> <div>USD</div> </div>												
Extended Amount	<input type="checkbox"/>			<input type="text" value="1,479.40"/>								
Discount	<input type="checkbox"/>			<input type="text" value="0.00"/>								
Additional	<input type="checkbox"/>			<input type="text" value="0.00"/>								
Tax	<input type="checkbox"/>			<input type="text" value="114.66"/>								
FOAPAL Total				<input type="text" value="1,594.06"/>								
Commodity Total				<input type="text" value="1,594.06"/>								
Remaining				<input type="text" value="0.00"/>								
Commodity Amount				<input type="text" value="0.00"/>								

Item Text

To access the **Item Text** or **Document Text** Options, press the “**RELATED**” tab at the top right of the window. Then, select “**Item Text [FOAPOXT]**”.

elucian

Requisition FPAREQN 9.3.24 (PROD)

ADD

RETRIEVE

RELATED

TOOLS

Requisition: R0195088

REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: R0195088

Order Date: 08/05/2025

Transaction Date: 08/05/2025

Delivery Date: 08/05/2025

Comments

Commodity Total: 1,783.06

Accounting Total: 1,783.06

☐ Document Level Accounting

☒ In Suspense

☒ Document Text

Requestor/Delivery Information

Vendor Information

Commodity/Accounting

Balancing/Completion

COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
1	CN	Microsoft Surface Laptop 6 - 13"	EA	TAX	1.00	1,479.4000	<input type="checkbox"/>	
2	CN	Jabra Evolve 65 SE UC Stereo - headset	EA	TAX	1.00	175.4000	<input type="checkbox"/>	

Extended Amount: 1,479.40

Discount: 0.00

Additional: 0.00

Tax: 114.66

Commodity Total: 1,594.06

☒ Distribute

ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Activ	Locn	Proj
1	1	26		11100	1387	64310	6770		407003	

%

USD

Extended Amount

Discount

Additional

Tax

FOAPAL Total

Commodity Total

Remaining

Commodity Amount

1,479.40

0.00

0.00

114.66

1,594.06

1,594.06

0.00

Search

Review Commodity Information [FOICOMM]

Item Text [FOAPOXT]

Document Text [FOAPOXT]

Commodity Text [FOATEXT]

The Item Text should closely reflect the vendor’s quote. Be sure to include the part number or product code, along with any additional relevant details.

The commodity description does NOT need to be duplicated in item text.

In this section, provide detailed information related to the commodity. This may include:

- SKU number or Product Code
- Scope of Work or Description of Services

The **LAST** commodity item should include the following information in the Item Text:

- Contract Number (if applicable and referenced on the quote)
 - For example, FCCC CollegeBuys, CMAS, NASPO
- Board Approval Date (if required)
- Authorized Signature

ellucian Procurement Text Entry FOAPOXT 9.3.6 (PROD)

Text Type: REQ Code: R0195088 Change Sequence: Item Number: 2 Vendor: @00008143 CDW Government Inc Commodity Description: Jabra Evolve 65 SE UC Stereo - headset Modify Clause: Copy Commodity Text: ☐ Default Increment: 10 [Start Over](#)

PROCUREMENT TEXT ENTRY

Text	Clause Number	Print *	Line
CDW #: 7805517		<input checked="" type="checkbox"/>	10
		<input checked="" type="checkbox"/>	20
Contract: CigBuys- CSU Master Agreement #0000442		<input checked="" type="checkbox"/>	30
Catalog (00004442)		<input checked="" type="checkbox"/>	40
		<input checked="" type="checkbox"/>	50
Board Approved: April 27, 2021		<input checked="" type="checkbox"/>	60
		<input checked="" type="checkbox"/>	70
Authorized Signature for Payment:		<input checked="" type="checkbox"/>	80
Mireille Hernandez		<input checked="" type="checkbox"/>	90

10 Per Page Record 9 of 9

Blanket Orders

Blanket Orders must include the following information:

- 1) State the Department Name
- 2) Commodity or Service
- 3) An Effective Period
- 4) Not to Exceed Amount
- 5) Persons Authorized for Purchase and/or Payment

** No single item/good exceeding: \$450.00

** BPOs Limit amount: \$5,000.00

- Prior approval of Purchasing Director is needed for BPOs more than \$5,000.00

Modify the “**Description**” field as follows: “**Blanket Order for Campus & Department**”

Requestor/Delivery Information		Vendor Information		Commodity/Accounting		Balancing/Completion		
COMMODITY						Settings Insert		
Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
	CN	Blanket Order for CC Department ***	LOT	NT	1.00	500.0000	<input type="checkbox"/>	<input type="checkbox"/>
Extended Amount		500.00		Tax		<input type="checkbox"/> Distribute		
Discount		0.00		Commodity Total		500.00		
Additional		0.00		Document Total				

In Item Text, select the **Modify Clause** template “**BLANKET**” for “**Blanket Purchase Order**”. Then, fill in the required information.

✕ @ ellucian Procurement Text Entry FOAPOXT 9.3.6 (PROD)

ADD

RETRIEVE

RELATED

TOOLS

Go

Text Type: REQ

Code: R0203244

Change Sequence:

Item Number: 1

Vendor:

Commodity: Blanket Order for CC Departm

Modify Clause: BLANKET

Description

Default Increment: 10

Copy Commodity: ☐ Text

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

✕ @ ellucian Procurement Text Entry FOAPOXT 9.3.6 (PROD)

ADD

RETRIEVE

RELATED

TOOLS

Start Over

Text Type: REQ Code: R0203244 Change Sequence: Item Number: 1 Vendor: Commodity Description: Blanket Order for CC Department Modify Clause: Copy Commodity Text: ☐ Default Increment: 10

▼ PROCUREMENT TEXT ENTRY

Settings Insert Delete Copy Filter

Text	Clause Number	Print *	Line
Blanket Order for (Campus/Department)		<input checked="" type="checkbox"/>	10
for (supplies/services)		<input checked="" type="checkbox"/>	20
for the period beginning (Month-Day-Year)		<input checked="" type="checkbox"/>	30
and ending (Month-Day-Year)		<input checked="" type="checkbox"/>	40
Enter one of the following Ending Date(s):		<input checked="" type="checkbox"/>	50
Regular BPOs: June 30, 2026		<input checked="" type="checkbox"/>	60
Amazon & Office Solutions: June 12, 2026		<input checked="" type="checkbox"/>	70
.		<input checked="" type="checkbox"/>	80
Not to exceed: \$		<input checked="" type="checkbox"/>	90
.		<input checked="" type="checkbox"/>	100
Employee identification shall be provided		<input checked="" type="checkbox"/>	110
prior to completion of any sale/service:		<input checked="" type="checkbox"/>	120
.		<input checked="" type="checkbox"/>	130
Authorized Signatures for Purchase:		<input checked="" type="checkbox"/>	140
.		<input checked="" type="checkbox"/>	150
Authorized Signatures for Payment:		<input checked="" type="checkbox"/>	160
.		<input checked="" type="checkbox"/>	170
** NO SINGLE ITEM THAT COSTS \$450 OR MORE		<input checked="" type="checkbox"/>	180
ALLOWED TO BE PURCHASED ON THIS PO **		<input checked="" type="checkbox"/>	190

1 of 1

20 Per Page

Record 1 of 19

Accounting

Enter your FOAPAL budget string in this section.

- To add a budget line, press the “**+Insert**” button at the top-right of the Accounting section.
- To remove a budget line, press the “**-Delete**” button at the top-right of the Accounting section.
- **Note:** If you are unsure of the Location Code, please contact your Budget Officer or the Accounting Department. Purchasing does not assign room or building numbers.

Requestor/Delivery Information		Vendor Information		Commodity/Accounting		Balancing/Completion			
▼ COMMODITY									
Settings Insert Delete Copy Filter									
Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
1	CN	Microsoft Surface Laptop 6 - 13"	EA	TAX	1.00	1,479.4000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	CN	Jabra Evolve 65 SE UC Stereo - headset	EA	TAX	1.00	175.4000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Record 1 of 2									
Extended Amount		1,479.40		Tax		114.66		<input checked="" type="checkbox"/> Distribute	
Discount		0.00		Commodity Total		1,594.06			
Additional		0.00							
▼ ACCOUNTING									
Settings Insert Delete Copy Filter									
Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn
1	1	26		11100	1387	64320	6770		407003
Record 1 of 1									
%									
USD									
Extended Amount		<input type="checkbox"/>		1,479.40					
Discount		<input type="checkbox"/>		0.00					
Additional		<input type="checkbox"/>		0.00					
Tax		<input type="checkbox"/>		114.66					
FOAPAL Total				1,594.06					
Commodity Total				1,594.06					
Remaining				0.00					
Commodity Amount									

Tip: You can press “**SAVE**” at the bottom-right of your screen at any time. The system will notify you if any errors occur, allowing you to correct them before proceeding.

Once you have completed the Commodity/Accounting tab, click on the “**Balancing/Completion**” tab to proceed to the next screen.

Balancing/Completion

On the final screen, enter the **Document Text**, which should include:

- Sales representative contact information
- Reason for purchase
- Statement of Purpose for grants (if applicable)
- New Vendor Information (if applicable)
- Notes to A/P (if applicable)

Document Text

To access the **Item Text** or **Document Text** Options, press the “**RELATED**” tab at the top right of the window. Then, select “**Document Text [FOAPOXT]**”.

The screenshot displays the 'Requisition FPAREQN 9.3.24 (PROD)' window. The top navigation bar includes tabs for ADD, RETRIEVE, RELATED (highlighted with a red circle), and TOOLS. The main content area is divided into several sections: REQUISITION ENTRY: REQUESTOR/DELIVERY, COMMODITY, and ACCOUNTING. The COMMODITY section lists items such as 'Microsoft Surface Laptop 6 - 13"' and 'Jabra Evolve 65 SE UC Stereo - headset'. The ACCOUNTING section shows a table with columns for Sequence, COA, Year, Index, Fund, Orgn, Acct, Prog, Actv, Locn, and Proj. On the right side, a sidebar contains a search bar and a list of options: Review Commodity Information [FOICOMM], Item Text [FOAPOXT], Document Text [FOAPOXT], and Commodity Text [FOATEXT]. Red arrows point from the 'Document Text' checkbox in the main area to the 'Document Text [FOAPOXT]' option in the sidebar.

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text
1	CN	Microsoft Surface Laptop 6 - 13"	EA	TAX	1.00	1,479.4000	<input type="checkbox"/>	
2	CN	Jabra Evolve 65 SE UC Stereo - headset	EA	TAX	1.00	175.4000	<input type="checkbox"/>	

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj
1	1	26		11100	1387	64310	6770		407003	

	%	USD
Extended Amount	<input type="checkbox"/>	1,479.40
Discount	<input type="checkbox"/>	0.00
Additional	<input type="checkbox"/>	0.00
Tax	<input type="checkbox"/>	114.66
FOAPAL Total		1,594.06
Commodity Total		1,594.06
Remaining Commodity Amount		0.00

If applicable, select your **Modify Clause** template in the **Document Text** field by clicking the **three dots (...)** next to the field. Use the appropriate code based on the requisition type:

- REG – Supplies or Non-Public Works Requisition
- DIR – CUPCCAA / Public Works Requisition
- FC TRVL – Travel Requisition

Set your preferred line increment for line text entry (default is 10), then select **“Go”** in the top-right corner to continue.

Procurement Text Entry FOAPOXT 9.3.6 (PROD)

Text Type: REQ Code: R0195088

Change Sequence: Item Number:

Vendor: @00008143 CDW Government Inc. Commodity: Description

Modify Clause: REG *** Copy Commodity: ☐ Text

Default Increment: 10

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Clause List FOICLAU 9.0 (PROD)

Clause	Description
BLANKET	Blanket Purchase Order
BOND	Invoice for payment
CHANGE	Change Order
CMAS	Network Refresh Project
DIR	SB854
FC BLKT	Blanket Order
FC TRVL	Travel
LEASE	Minolta/Oce Lease Purchase Agmts
MA	Maintenance Agreement
OFFICE	Office Supplies
PW	Public Works
QUOTE	Quote
REG	Reg PO (non-public works)
SPEAKER	Performer/Guest Speaker/Referee
TRAVEL	Travel
VENDOR	New Vendor

1 of 1 20 Per Page

After selecting a Modify Clause, Banner will populate the text fields with a preformatted template. Fill in all **required information** directly in the provided fields.

- Quote # and Date
- Sales Representative Name
- Sales Representative Phone
- Sales Representative Email
- New Vendor Information (if applicable)
- Reason for Purchase
- Statement of Purpose for Grants (if applicable)

If needed, adjust the number of visible text lines by changing the “**Per Page**” setting at the bottom of the window.

Procurement Text Entry FOAPOXT 9.3.6 (PROD)

Text Type: REQ Code: R0195088 Change Sequence: Item Number: Vendor: @00008143 CDW Government Inc Commodity Description: Modify Clause: REG Copy Commodity Text: ☐ Default Increment: 10

Start Over

PROCUREMENT TEXT ENTRY

Text	Clause Number	Print *	Line
Quote #: Dated:		<input checked="" type="checkbox"/>	10
Contact Name:		<input checked="" type="checkbox"/>	20
Phone:		<input checked="" type="checkbox"/>	30
Email:		<input checked="" type="checkbox"/>	40
**		<input checked="" type="checkbox"/>	50
The Purchase Order Terms & Conditions are the		<input checked="" type="checkbox"/>	60
contract between the Vendor and the District.		<input checked="" type="checkbox"/>	70
These conditions are available on the District's		<input checked="" type="checkbox"/>	80
website at		<input checked="" type="checkbox"/>	90
https://www.nocccd.edu/documents/general-terms-and		<input checked="" type="checkbox"/>	100
-conditions		<input checked="" type="checkbox"/>	110

1 of 1

20 Per Page

Record 1 of 11

Once you have completed the **Document Text**, click **Save** in the bottom-right corner. Then, close the window to return to the **Balancing/Completion** screen.

Final Review and Submission

On the **Balancing/Completion** screen:

1. **Verify Amounts** – Ensure commodity amounts and accounting amounts are correct and the status displays **“Balanced.”**
2. **Confirm Tax** – Check that tax amounts are accurate and reflect the correct rate.
3. **Conduct a Final Review** – Review all entries for accuracy and completeness.
4. **Submit or Save for Later**
 - Submit the Requisition – Select **“Complete”** to submit. The approval process will begin immediately upon submission.
 - Save for Later – Select **“In Process”** if you are not ready to submit. This allows you to return and complete the requisition at a later time.

Requestor/Delivery Information		Vendor Information		Commodity/Accounting		Balancing/Completion	
BALANCING/COMPLETION							
Vendor	@0000814:	CDW Government Inc		Currency			
	<input type="checkbox"/> Vendor Hold			Exchange Rate			
COA	1	North Orange County CCD		Commodity Record	2		
				Count			
Requestor	Crystal Nguyen			Input Amount	1,783.06		
Organization	1387	Purchasing		Converted Amount			
AMOUNTS							
	Input	Commodity		Accounting		Status	
Approved Amount	1,654.80	1,654.80		1,654.80		BALANCED	
Discount Amount	0.00	0.00		0.00		BALANCED	
Additional Amount	0.00	0.00		0.00		BALANCED	
Tax Amount	128.26	128.26		128.26		BALANCED	
<input type="button" value="Complete"/> <input type="button" value="In Process"/>							

Email Backup Documentation

After submitting your requisition, you must **email your assigned Buyer** all required backup documents related to your requisition:

- Quote, Proposal, or Order Form
- Signed Invoice
- Contract
- Vendor W-9
- Certificate of Insurance

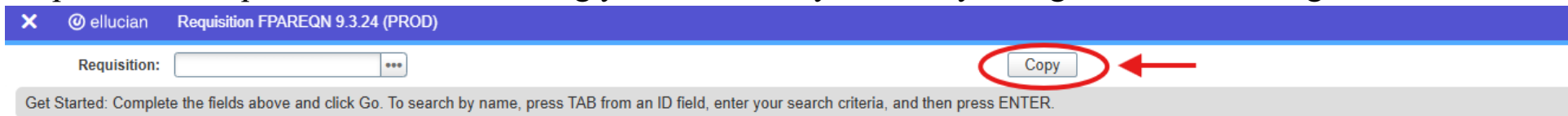
Be sure to include the Requisition Number (RQ#) in the email subject line.

Buyers cannot process the Purchase Order without the required backup documents. Failure to provide them promptly will cause delays in your requisition processing.

Creating a New Requisition using the Copy Feature

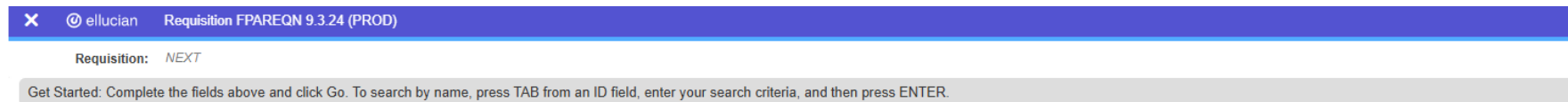
Copy a previously submitted requisition to save time when creating a new similar requisition if you know its requisition number.

On the **FPAREQN** screen, select the “**Copy**” button and enter the existing requisition number. This will duplicate the requisition details, allowing you to make any necessary changes without starting from scratch.

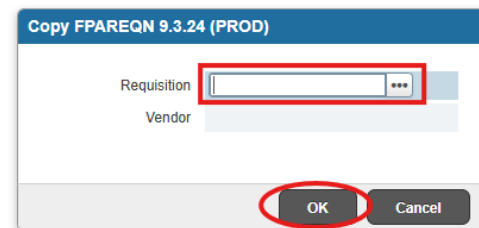


The screenshot shows the top of the FPAREQN 9.3.24 (PROD) application window. The title bar includes a close button, the ellucian logo, and the text 'Requisition FPAREQN 9.3.24 (PROD)'. Below the title bar, there is a 'Requisition:' label followed by an empty text input field with a dropdown arrow. To the right of the input field is a 'Copy' button, which is circled in red. A red arrow points from the right towards the 'Copy' button. Below the input field and button is a grey instruction bar that reads: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

Enter the existing **Requisition Number** to be copied and press the “**OK**” button



This screenshot shows the same FPAREQN 9.3.24 (PROD) application window. The 'Requisition:' label is followed by the text 'NEXT' in the input field. The 'Copy' button is no longer visible. The grey instruction bar at the bottom remains the same: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'



The screenshot shows a modal dialog box titled 'Copy FPAREQN 9.3.24 (PROD)'. Inside the dialog, there are two input fields: 'Requisition' and 'Vendor'. The 'Requisition' field is highlighted with a red rectangular box. Below the input fields are two buttons: 'OK' and 'Cancel'. The 'OK' button is circled in red.

The new requisition will open, displaying the “**Requestor/Delivery Information**” tab on the Requisition page.

To continue this Requisition, please reference the instructions above in this guide to complete the requisition.

Review all information carefully by scrolling through the page and customize the fields as needed.

At this stage, a new **Requisition Number** will be generated. Be sure to record this number for your reference.

Requisition FPAREQN 9.3.24 (PROD)

Requisition: R0195088

ADD RETRIEVE RELATED TOOLS

Start Over

REQUISITION ENTRY: REQUESTOR/DELIVERY

Insert Delete Copy Filter

Requisition R0195088

Order Date * 07/01/2025

Transaction Date * 07/01/2025

Delivery Date * 07/01/2025

Comments

Commodity Total 1,783.06

Accounting Total 1,783.06

☐ Document Level Accounting

☒ In Suspense

☒ Document Text

Requestor/Delivery Information Vendor Information Commodity/Accounting Balancing/Completion

REQUESTOR/DELIVERY INFORMATION

Insert Delete Copy Filter

Requestor * Crystal Nguyen

Organization * 1387 *** Purchasing

COA * 1 *** North Orange County CCD

Email cnguyen1@nocccd.edu

Phone Area Code

Phone Number

Phone Extension

Fax Area Code

Fax Number

Fax Extension

Ship To * ANA ***

Street Line 1 Anaheim Campus

Street Line 2 1830 West Romneya

Street Line 3

Contact Anaheim Campus

Attention To * Crystal Nguyen 8th Floor

Building

Floor

City Anaheim

State or Province CA

Zip or Postal Code 92801

Nation

Area Code

Phone Number

Extension