

Requisition Helpful Hints

- The requisition process can take up to five business days in order for the appropriate department head, Vice-President, Executive Vice-President, and the Purchasing Director to all grant approval and a purchase order be issued. It is your responsibility to make sure you submit your requisition in a timely manner, allowing for adequate processing time.
- Timely submission is especially important when it comes to renewals or yearly contracts. A requisition should be submitted and a new purchase order should be issued **BEFORE** the next contract period begins, not after services have been initiated or performed. This ensures that we are not violating purchasing law by authorizing for goods or services prior to the issuance of a valid purchase order.
- If you wish to call in your order after the purchase order is completed instead of the order going directly to the vendor, please email the Purchasing Department at the time you submit your requisition to avoid a double shipment.
- Make sure you include any freight or shipping charges on your initial requisition. If in doubt, contact the vendor. This will prevent delays in processing orders, as the vendor must call to get verbal approval or resubmittal of a purchase order prior to shipping.
- Before entering a requisition, please verify that your vendor of choice does accept purchase orders as a form of payment, as well as Holmes Community College's Net 30 Payment Terms.
- Once the purchase order is issued, the requestor should receive a computer-generated copy of the purchase order.
- Rush orders near the end of a budget fiscal year period are discouraged. It is important that requisitions be submitted with sufficient time to purchase goods and/or services and assure delivery and/or completion of orders before the end of the fiscal year, particularly if the item is required to be added to inventory.
- It is strongly recommended that all yearly agreements and contracts follow the academic yearly calendar of July 1st thru June 30th.
- Once you have submitted a requisition, please forward any quotes, registration forms, or other documentation pertinent to your requisition to the Purchasing Department. **If you reference a quote or estimate on your requisition, please forward a copy to the Purchasing Department for filing purposes.**
- Verify the information on your requisition before submitting. Make sure the shipping address and vendor's address sequence match your intended selection. Make sure the vendor ID is not blank and that all **necessary details** are included in the Public Comment boxes. Vague requisitions with Item Numbers and no descriptions or incomplete descriptions such as "Supplies" will not be processed, but will be disapproved.

Banner Requisition Process (Staff Only)

To eliminate the possibility of error and to ensure that you receive the correct items, requisitions must contain all complete and vital information. Clear and concise information will expedite the ordering, receiving, and invoicing processes.

1. Access the Holmes Community College website www.holmescc.edu, Click on the MyHolmes link.
2. Scroll down to Employee Essentials, then select the Financial Portal (Requisitions) link.
3. Select the My Requisition link under the My Finance options.
4. Click on the blue Create Requisition box.
5. The Requestor Name, Email, Transaction Date, and Organization should automatically populate. Enter a Delivery Date, which can be any date later than the transaction date.
6. Verify that the “Ship to Location” field is correct for your campus.
7. If you are responsible for ordering goods for other campuses, remember to make any necessary changes to the “Attention To” and “Ship To Location” fields.
8. The Public Comment box can be used to add important information such as dates of special events/meetings, quote numbers, program-related data, check requests, or any information you want your approvers to know. **(NOTE: For auditing purposes, requisitions for items for special events, meetings, etc. must include the date and name of the function and a detailed list of the items for purchase. Snacks or supplies will not suffice as a commodity description.)**
9. Any information entered in the Private Comment box will not print or carryover. Use this box for your notes only.
10. After verifying entries, click on the blue Next button at the bottom of the screen.
11. Click in the Choose Vendor box and type the name of your vendor. Once your vendor selection appears in blue, click on it and it will be populated on your requisition form. If a vendor has multiple addresses, make sure you select the right one. Note: Banner is specific, you will need to know whether you are looking for MS, Mississippi, Miss, etc., in a vendor’s name. Then, select the blue Next button at the bottom of the screen.
12. If your vendor does not appear or you need a new vendor to be added, have the vendor send a W9 to Nancy Langford in the Business Office. She will add them to the system and they will be assigned a Holmes ID vendor number. **(NOTE: The Vendor ID MUST be present on your requisition. Incomplete requisitions may be disapproved.)**
13. To enter the first commodity, click Choose Item and type your description. You will have to click the blue description field in order to add the item to your requisition. Do not put anything in the “Tax Group” field. **(NOTE: Descriptions should include an identification number and a reasonable description, ex. Item #12345 or Equipment Package are not sufficient data entries. Requisitions with Item Numbers only or insufficient product descriptions will not be processed, but will be disapproved.)**
14. Click on the dropdown list under U/M and select the appropriate unit of measure.
15. Type in the Quantity and Unit Price.
16. Follow the same procedure for each commodity item.
17. The Public Comment box can be used if you need more space for the commodity description.

18. Click the blue Save button at the bottom and repeat the same process to add additional commodities. Once all commodity items have been entered, click the blue Add Accounting button at the bottom.
19. Most fields will populate automatically. If you order for multiple Organizations, you will need to adjust as necessary. Select the appropriate Account Code for your items. (**Note:** General Checking ledger numbers cannot be used for purchase orders. Account numbers normally start with a “7” or “8” for most requisitions.)
20. Once you click Save, you should see a green 100% to the right. If you need to use multiple accounts on your requisition, select Split Accounting and enter the distributions necessary.
21. Your requisition number should appear at the top right, for reference purposes. Once funding equals 100%, click the blue Submit Requisition button.