ENTERING A BANNER CALL NUMBER

A call number can be obtained for any vendor that has an Unfunded Blanket Purchase Order issued. New lists are issued at the beginning of each fiscal year. Naming convention is: B - Blanket purchase order
J - Juneau Campus
04 - Fiscal year 2004 (this changes each year)
002 - Blanket purchase order number
Example: BJ04002 This is the Blanket Order Number (not the call number)

1. At the Banner main menu screen type in FPA2PUR - ENTER to continue.
2. At the **Purchase Order** box do **CONTROL+PAGE DOWN** to continue.
3. The next screen will open with your cursor in the **Blanket Order** box. Here you will enter the appropriate Unfunded Blanket Order Number. See the list for this information. (BJ01003) Once the number is entered **TAB** to **Order Date**. This date is going to be the date the Unfunded blanket purchase order was created in the Business Office, change this date to the current date. **TAB** to **Trans Date**, the current date will appear, **TAB** to **Delivery Date**. Enter estimated delivery date. If there is no specific delivery date use the last day of the month. **Buyer Code** is the Purchasing Office staff member that created the Unfunded blanket order - do not change. This is all that needs to be entered on this screen. **CONTROL+PAGE DOWN** to continue.

**Order** date & **Trans** date should be the same – it should be the date you get your call number.
4. When the next screen opens the cursor will be on the Requestor field. Your name should default into that field. TAB to Organization and enter the Org code for your department. Example - 76100 for Admin, this field must be entered. Enter your Extension number. Other fields such as E-Mail, fax, etc can be TABBED through or completed if you think the information is important. Enter your departments Ship To code, click flashlight enter “J” and find your dept. TAB through to Attention To. This field must be entered and can either be yourself or whomever the call number is being pulled for. CONTROL+PAGE DOWN to continue.

Ship To codes: Each department has a code and they begin with a “J” for Juneau. Click the flashlight, hit J then use the arrow keys to scroll thru the choices.

examples: JSBUS - Business Office
JSSTGV - Student Government
5. This screen shows the vendor you have selected and the address. Verify that you have selected the right vendor before you go on. If it is the wrong vendor go back to the first page, delete this call number and start over with the correct vendor. **DO NOT** change the vendor ID. There should be **No entries to this page**. **CONTROL+PAGE DOWN** to continue.

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TIP:
You want to get in the habit of writing down the call number as soon as banner gives it to you in case you don’t finish the call number right away. It is easy to get side tracked by interruptions and lose track of where you are. This way you know what it is if you need to get back in. It is difficult to find the number if you need it and you haven’t written it down.
6. This is where you will enter the dollar amount of your call number. The screen will open with your cursor in the **Comm** field. **Desc** field will automatically be filled in. **TAB** three times - you should now be in the **Quantity** field. Enter the **TOTAL DOLLAR AMOUNT** of your call number, regardless of how many things you are buying there will only be **ONE** entry and **ONE** amount. Although the **TAB** will take you to the **Unit Price** you cannot change it, the default has been set to “1”.

**BO Balance** shows the amount of money left on the unfunded blanket purchase order you are in. Pay attention to this figure to make sure there is enough money to cover your call #. If it is short call Mary X-6493 or Mark X-6371 to have it increased. (See #7 for message)

**CONTROL+PAGE DOWN** to access the accounting section of the screen.

Your cursor will be highlighted on the field that has a B in it. This is the **Chart of Accounts** and should always have a “B” in it. If it somehow is missing you will need to put it in before you can continue. **TAB** four times. Your org number will be automatically dropped in from entering it in the first screen. If you need to change the account or fund numbers you need to do it now, otherwise the only number you should have to type in is the **Acct** field. These numbers are in the Statewide Accounting Manual account code section and should be 4xxx number. 4010=office supplies, etc. Type in the correct number & **TAB** through the rest of the screen. Here is where you need to do the **PRINT SCREEN** of your call number. Using your mouse, click on **Review Accounting Information** under **Options Bar** on the left.
7. This screen shows all the information concerning the Call Number in one area: Call # (Document #), vendor name, account info, etc. To screen print simply click the Printer Icon on your menu bar. Make sure your printer is selected and hit Print. You can also enter **CTRL+SHIFT+P** to print. To exit this screen and return to the previous page choose the **EXIT** door on your menu bar or **CTRL+Q**. When at previous screen – **CONTROL+PAGE DOWN**. You are now on the final page of your document.

**IMPORTANT:** Keep this print screen – get authorized signature & hold onto it till you get the invoice or delivery slip for your purchase. When you have received the entire order staple all invoices to the call number & forward to accounts payable.

Call numbers **DO NOT** get received in banner.

Send following Call #’s immediately to the Business Office, the invoice’s will come from the vendor to us, you will not get a copy.

*Printing Trade - Alaska Litho - DHL - Fed Ex - Xerox - Juneau Empire*
8. See message in lower left corner. You need to call Mary or Mark to increase the money in the blanket purchase order.
9. Once in the final screen you will need to complete the Call Number. Using your mouse **CLICK** on the **Complete Button**. Your call number will be processed and a new screen for another call number will appear. CTRL Q.

If you do not click the green button you will have an **INCOMPLETE DOCUMENT**.

Be sure to read the message in the lower left corner. It will tell you whether your document is complete or if there is a problem with it. This is an important step to get in the habit of doing with any banner document.

There are two money problems that can occur at this step:

1. Your department org (7xxxx) is NSF and you cannot complete this document. Either use a different org or your department needs to do a budget revision to correct this problem. Purchasing cannot help you here. Do not go shopping till you have money and your call number has been completed. **DO NOT LEAVE CALL NUMBERS OPEN WAITING FOR A BUDGET REVISION!** Delete them and do it again later. (See #10 for message)

2. The blanket purchase order needs to be increased. See step #7.
10. The message in the lower left corner will appear when your department budget doesn’t have enough money to cover your purchase. Need a budget revision to fix this.

HIGHLIGHTS:

Call numbers **do not** get received in banner.

Dollar limit for a call number is **$2500.00**.

Do not enter multiple line items.

Attach all invoices to print screen of call number and send to A/P when order is complete. There are the noted exceptions to this.

Be sure to read the messages at the bottom left side of your screen.