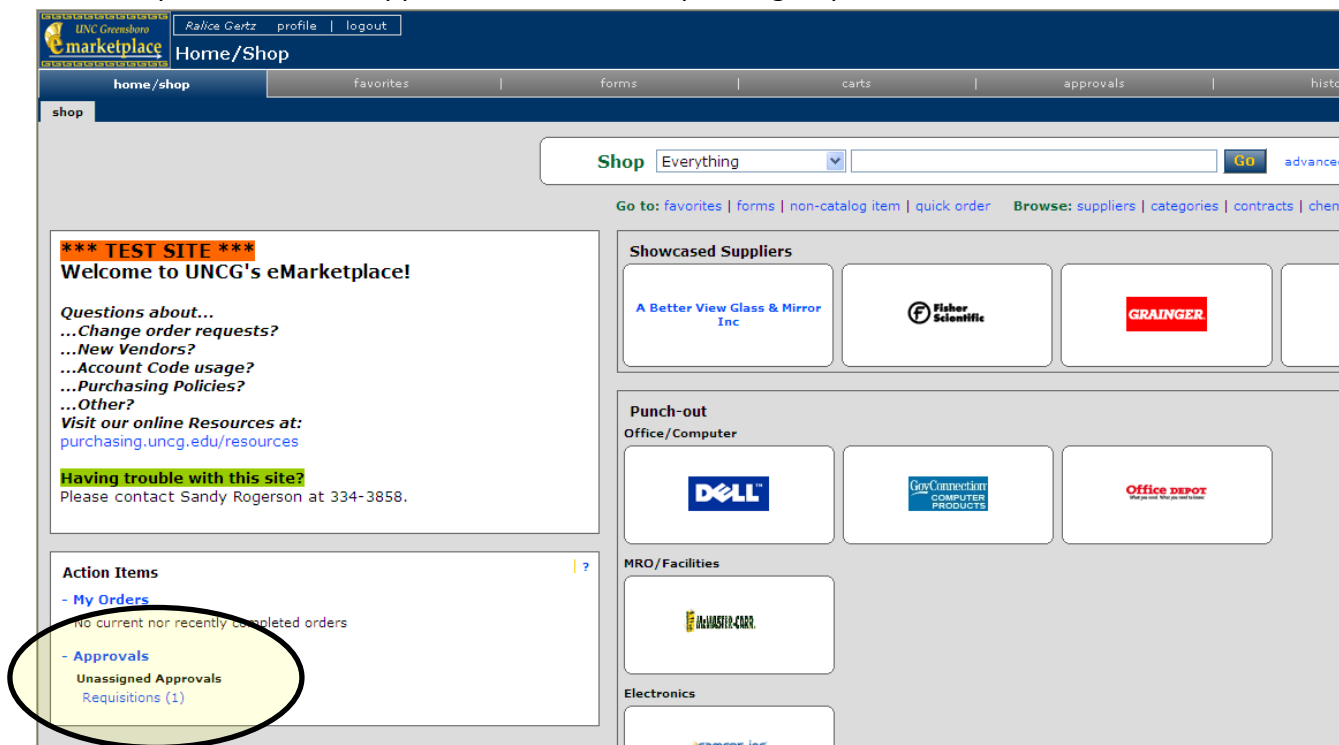
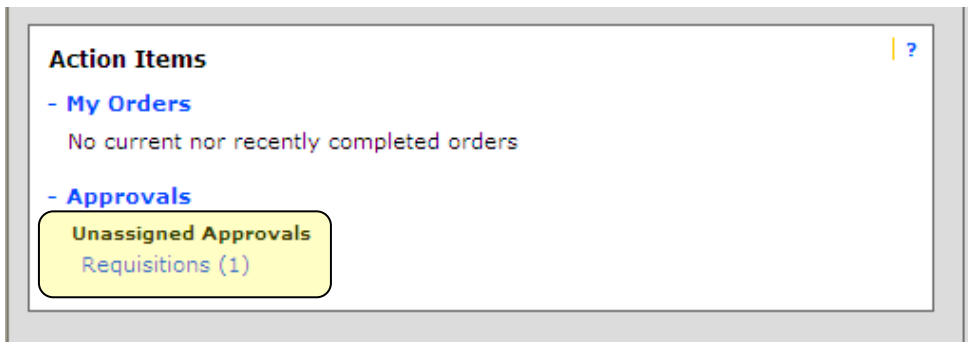


# New Supplier Workflow Steps for Accounting

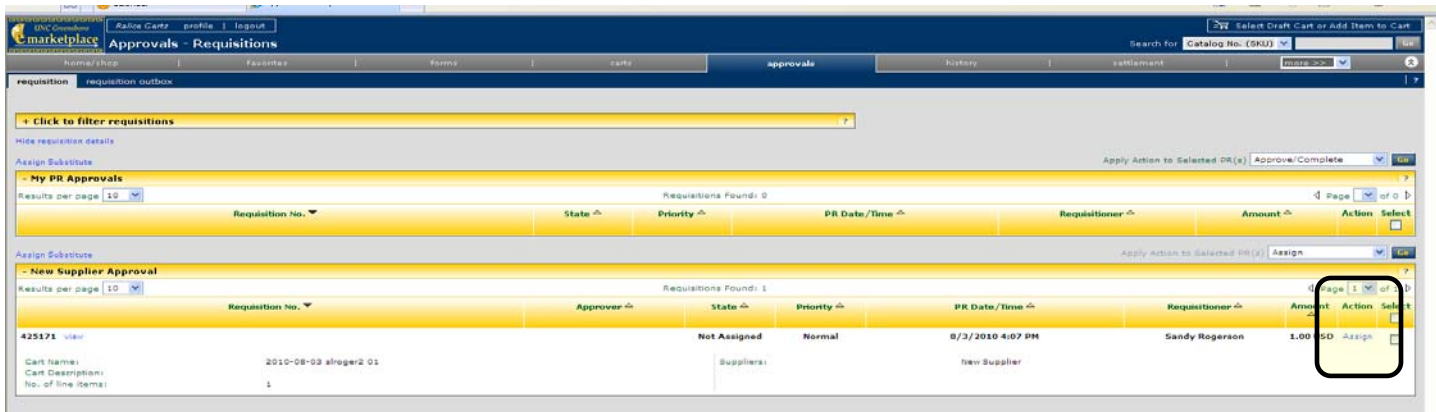
1. Expand the "View Approvals" link to show pending requisitions



2. Click on the Requisitions link under Unassigned Approvals



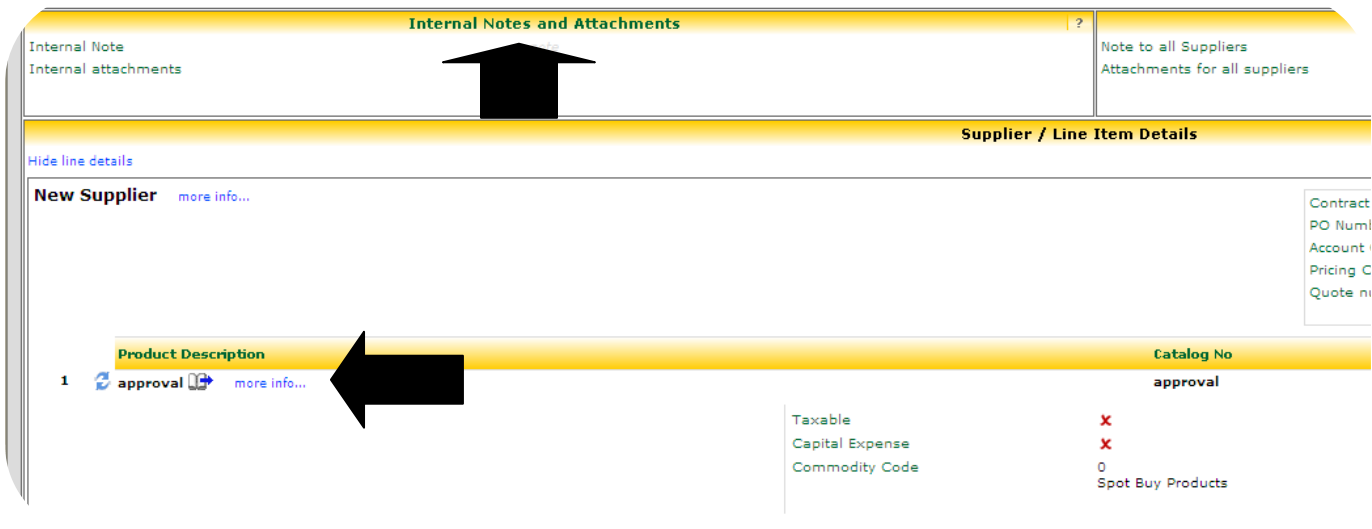
3. Assign to yourself



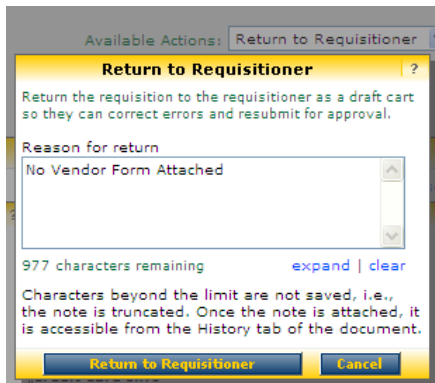
4. Click the Requisition number or view link to open the requisition

5. Locate the Vendor form in one of the following areas:

- Internal Notes and Attachments
- On the form (if a form was used)
  - Note: You can access the form by clicking the form icon under product description

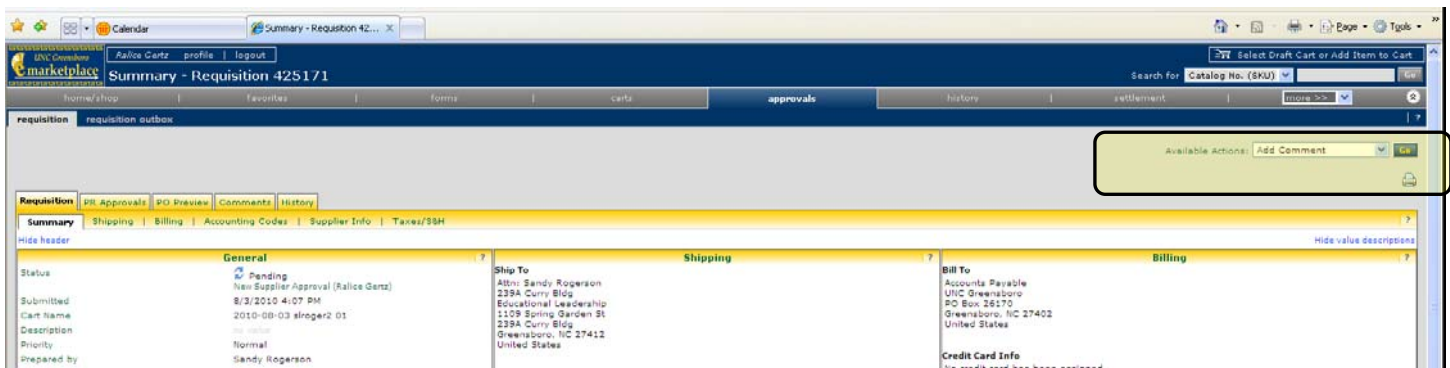


- If the vendor form is not attached, Return the requisition to the Requestor:
  - Under “Available Actions” select “Return to Requisitioner” then click Go. Enter the reason for return (ie. no vendor form attached) in the space provided, then click Return to Requisitioner.



6. Once the vendor has been entered into Banner, do the following:

- If the vendor is a minority or HUB Vendor
  - Choose Add Comment from the Available Actions box at the top right of the screen then click Go



- The add comment box appears. Select Gay McDonald or Sandy Rogerson as an email recipient, enter the HUB information in the box, and click Add Comment to send.

The screenshot shows a web-based interface with a search bar at the top containing 'Catalog No. (SKU)' and a 'Go' button. Below the search bar, the word 'settlement' is visible. A dropdown menu shows 'more >>'. The main content area is titled 'Available Actions: Add Comment' with a 'Go' button. A yellow-bordered dialog box titled 'Add Comment' is open. Inside the dialog, there is a paragraph of text: 'This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.' Below this is the 'Email notification(s):' section with two checkboxes: one checked for 'Sandy Rogerson (Prepared by) <slroger2@uncg.edu>' and one unchecked for 'Ralice Gertz (Approver) <rogertz@uncg.edu>'. A link 'add email recipient...' is present. A text area contains the comment: 'New Supplier "Trent Industries" is a HUB vendor - Asian American.' Below the text area, it says '934 characters remaining' and has 'expand | clear' links. The 'Attach file to this document (optional):' section includes an 'Attachment Type' dropdown set to 'File', a 'File Name' input field, and a 'File' input field with a 'Browse...' button. At the bottom of the dialog are 'Add Comment' and 'Cancel' buttons.

- If the vendor is not a HUB vendor, but has been entered, select “Approve/Complete Step” from the drop-down list and click Go. This will send the order on to Purchasing who will assign the vendor to the PO.

Note, if the Vendor Name is not apparent on the form or the order, please make sure to send a comment (like above) to one of the Purchasing Agents as well.