Creating Requisitions

Things to Note

- Ellucian has not completed the transformation of Banner 8 Finance Self-Service functionality to Banner 9 Finance Self-Service. Therefore, ACCS will use SSB8 and SSB9.
- You will enter requisitions through Finance Self-Service (SSB9).
- It is recommended to use the Google Chrome Web browser to access Finance Self-Service.

Use SSB9 to create requisitions and review status of requisitions.
Banner 9 Finance Self-Service

To log into Finance Self-Service:

1. Enter the URL address for Banner Self-Service 9 (list prov).

2. Enter your User ID and password in the corresponding fields, and click Sign In.

Sign in to your account

Enter your User ID and password to sign in.

Sign In
3. From SSB9 Landing Page select **My Requisitions**.
Create a requisition

To begin the purchase process, use the **My Requisitions** dashboard page to create a purchase requisition.

1. On the **My Requisitions** dashboard page, click **Create Requisition**.
2. On the **Requestor Information** page, specify who is requesting the purchase using the available fields if you are not the default requester for the account.

3. Tab and complete the **Transaction Date** and **Delivery Date**.

4. Tab to **Attention To** and input appropriate person (the Purchasing Agent or purchaser).

5. Click **Next** to continue to the next page.
6. On the **Vendor Information** page, select the vendor for the requisition.

![Vendor Information Page](image)

- **Vendor Email**: Not Required
- **Discount**: Not Applicable
7. On the **Add Item & Accounting** page, add an item using the **Add Item(s)** field. After an item is entered, the page updates with required fields for the selected item.

**Please Note:** The page refreshes with the item you added listed below the **Add Item(s)** field in the **Commodities** list.

**Add Item(s):** **MUST** list Item # and Brand Name of Product only

You must *Tab* to add as new item and proceed.
8. Click **Save**. If you click on a Commodity to review, it will delete the contents of the Public Comments box and it will have to be retyped. Best practice is to “View as PDF” to review your entry.
9. Click **Add Accounting**. Your departmental Fund, Organization, Account and Program (FOAP) will be required.

Once all items have been entered, Click **Add Accounting**
10. Click **Save**. The Requisition Summary updates.
11. Select **View as PDF**. Review the output (example below).
12. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requistion** to deploy the requisition for approval.

Click in the Funding bar to edit FOAP (example on next page)
Click on the FOAP to edit
Once the requisition has been submitted, the information page (below) will display. This provides you with the specific status for each requisition in your queue.