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Creating Requisitions

Things to Note

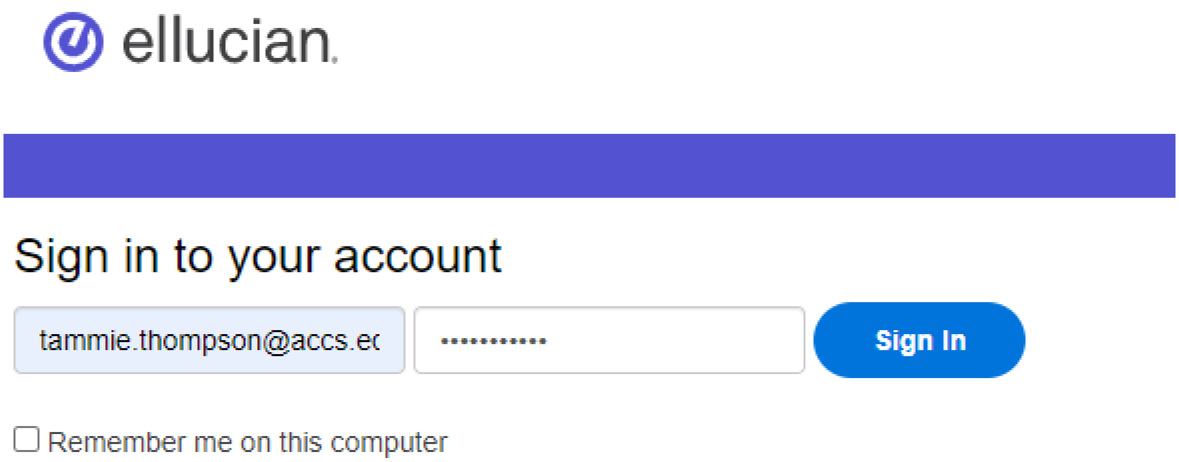
- Ellucian has not completed the transformation of Banner 8 Finance Self-Service functionality to Banner 9 Finance Self-Service. Therefore, ACCS will use SSB8 and SSB9.
- You will enter requisitions through Finance Self-Service (SSB9).
- It is recommended to use the Google Chrome Web browser to access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

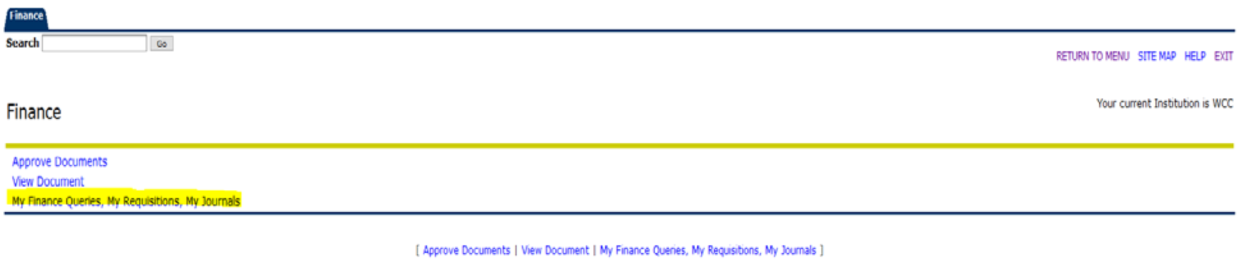
Use SSB9 to create requisitions and review status of requisitions.

Banner 9 Finance Self-Service

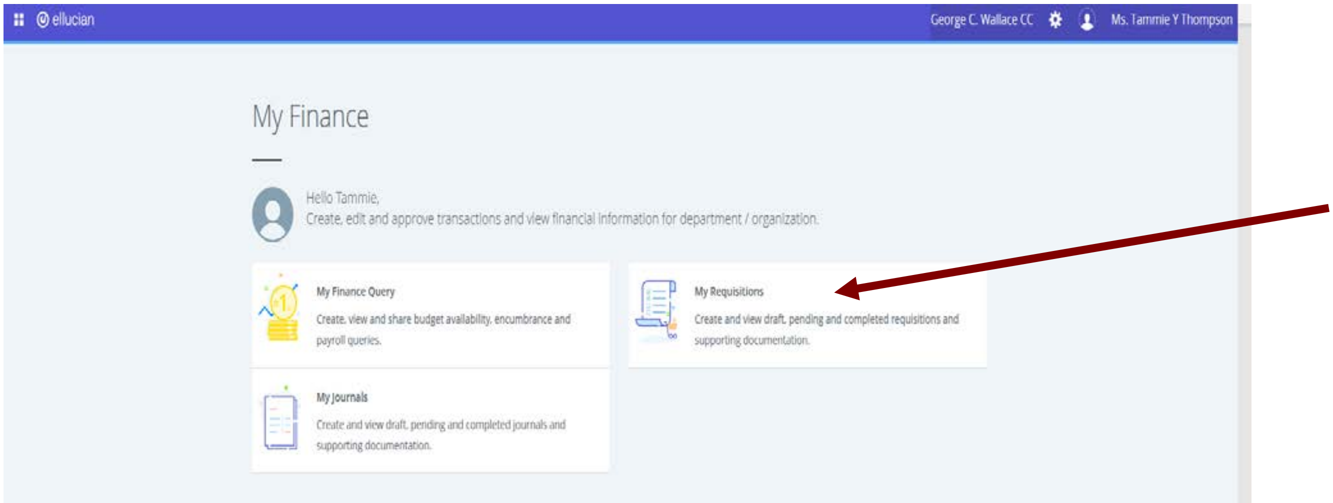
To log into Finance Self-Service:

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**.





3. From SSB9 Landing Page select **My Requisitions**.

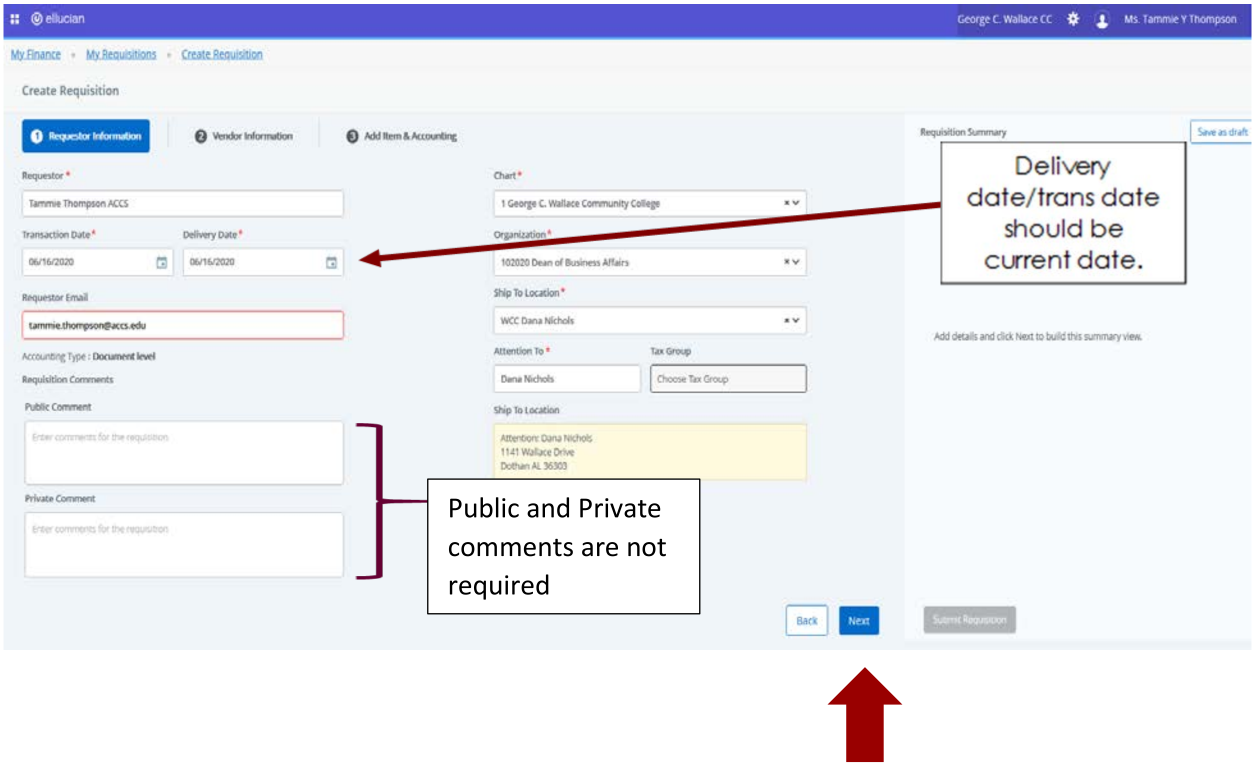


Create a requisition

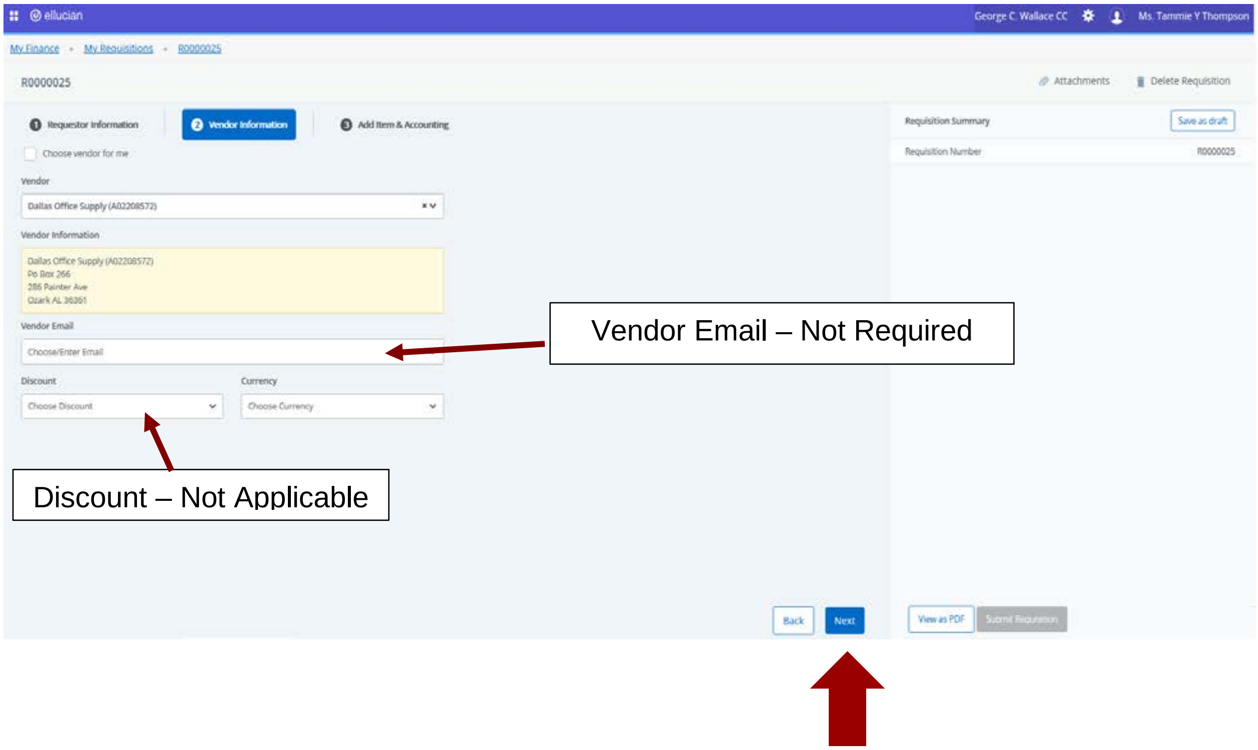
To begin the purchase process, use the **My Requisitions** dashboard page to create a purchase requisition.

1. On the **My Requisitions** dashboard page, click **Create Requisition**.

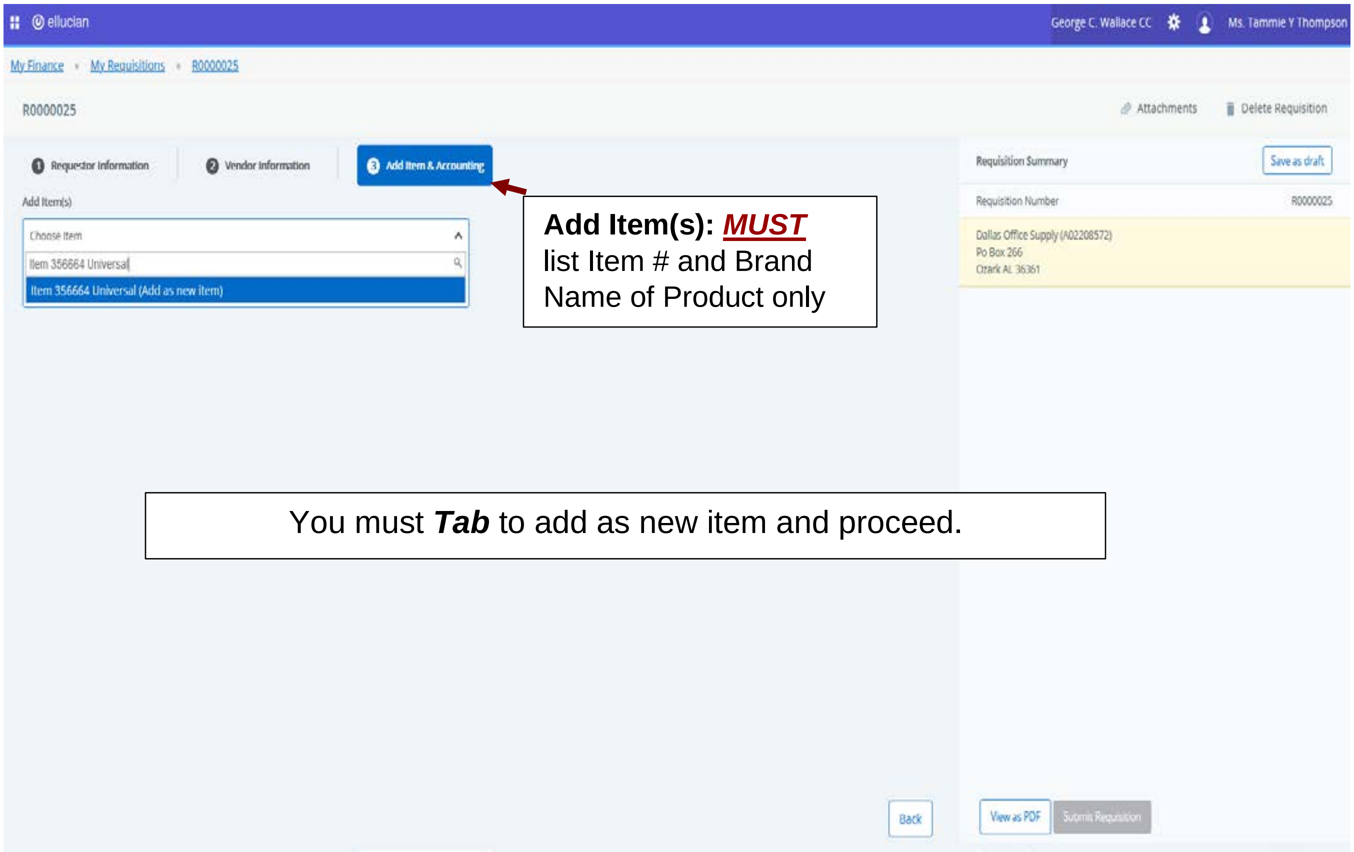
2. On the **Requestor Information** page, specify who is requesting the purchase using the available fields if you are not the default requester for the account.
3. Tab and complete the **Transaction Date** and **Delivery Date**.
4. Tab to **Attention To** and input appropriate person (the Purchasing Agent or purchaser).
5. Click **Next** to continue to the next page.



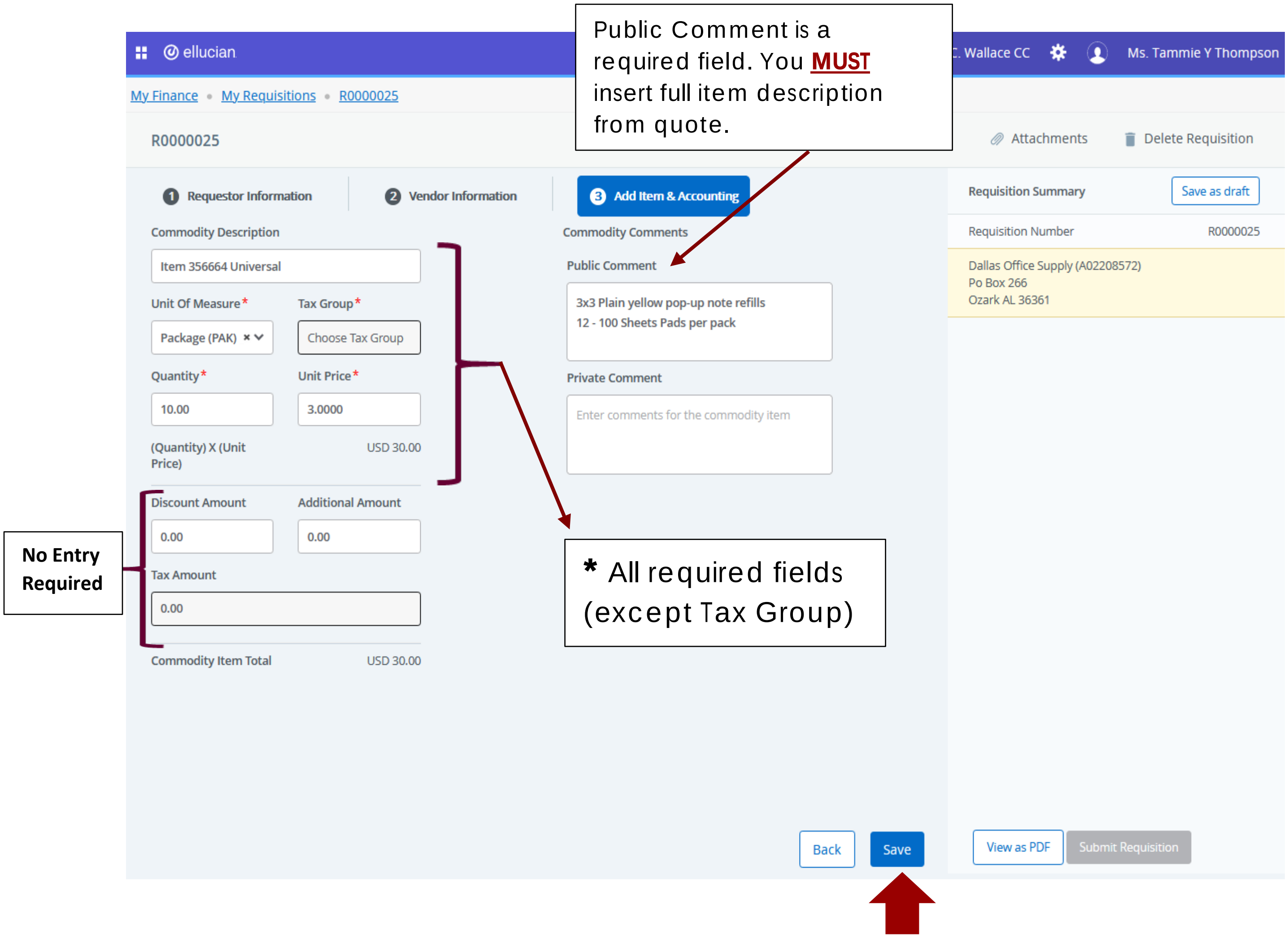
6. On the **Vendor Information** page, select the vendor for the requisition.



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.



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.

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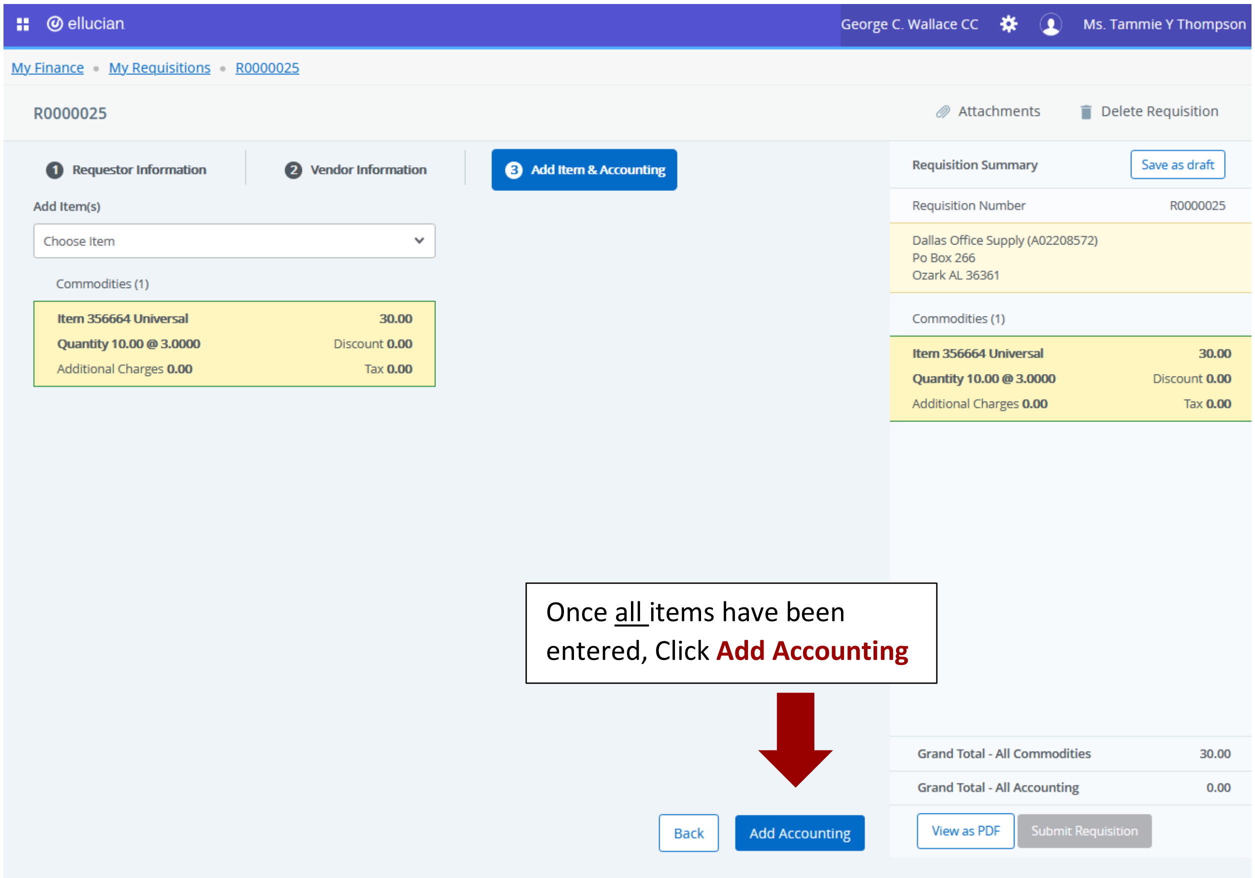
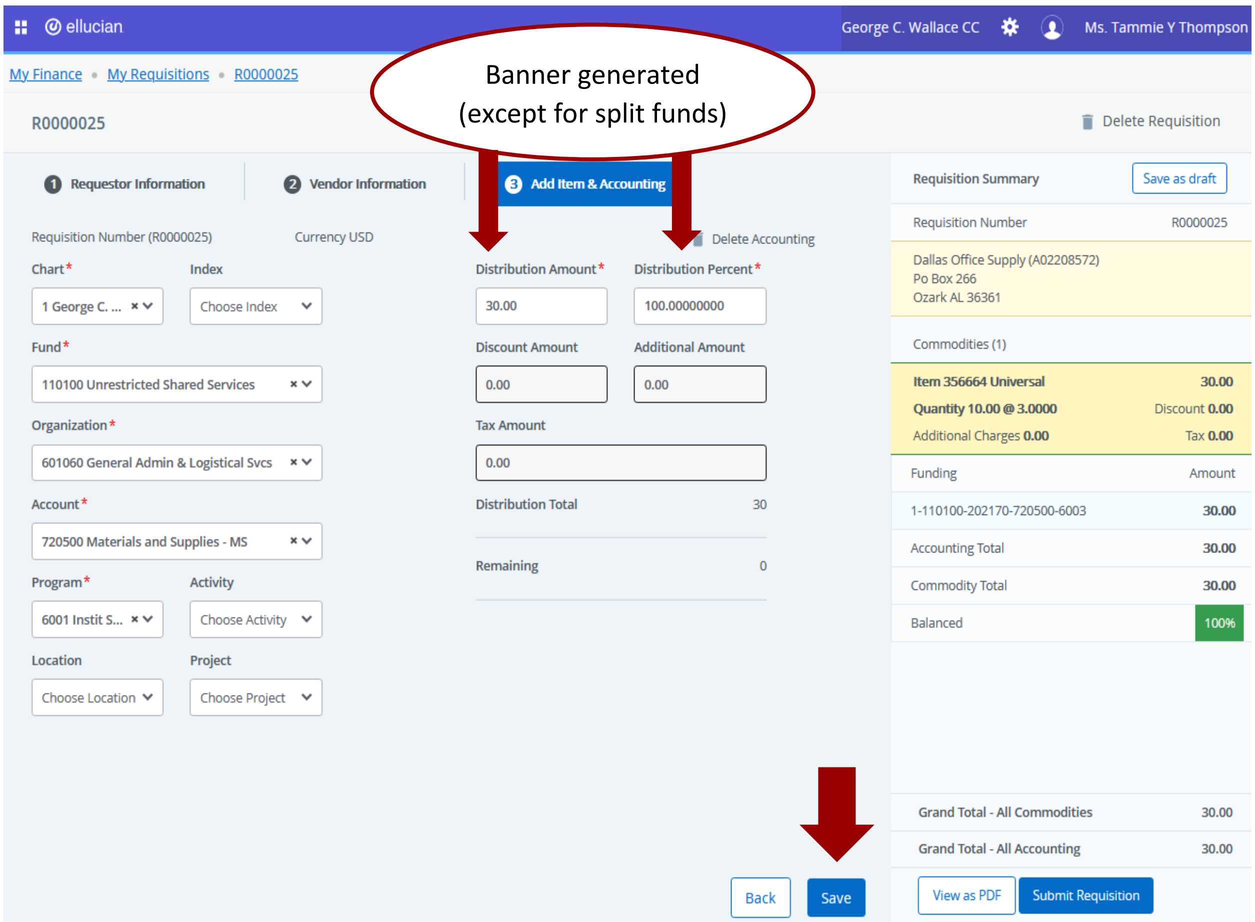
9. Click **Add Accounting**. ***Your departmental Fund, Organization, Account and Program (FOAP) will be required.***



10. Click **Save**. The Requisition Summary updates.



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11. Select **View as PDF**. Review the output (*example below*).

PURCHASE REQUISITION
(Non-negotiable; not a valid Purchase Order)

Requestor	Tammie Thompson ACCS	**Requisition #**	R0000025
Phone	- Ext	**Transaction Date**	06/16/2020
Email	tammie.thompson@accs.edu	**Delivery Date**	06/16/2020
Organization	Dean of Business Affairs (102020)	**Status**	Draft
Accounting Type	Document Level	**Currency**	USD

Ship To	WCC	**Vendor**	Dallas Office Supply (A02208572)
Address	1141 Wallace Drive Dothan AL 36303	**Address**	Po Box 266 286 Painter Ave Ozark AL 36361
Attention To	Dana Nichols 334- 5562256 Ext	**Phone**	- Fax -
		Email	

Requisition Comments	

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Total
1	Item 356664 Universal Item Text: 3x3 Plain yellow pop-up note refills 12- 100 Sheet Pads per pack	PAK	10.00	3.0000	0.00	30.00

Grand Total - All Commodities	30.00

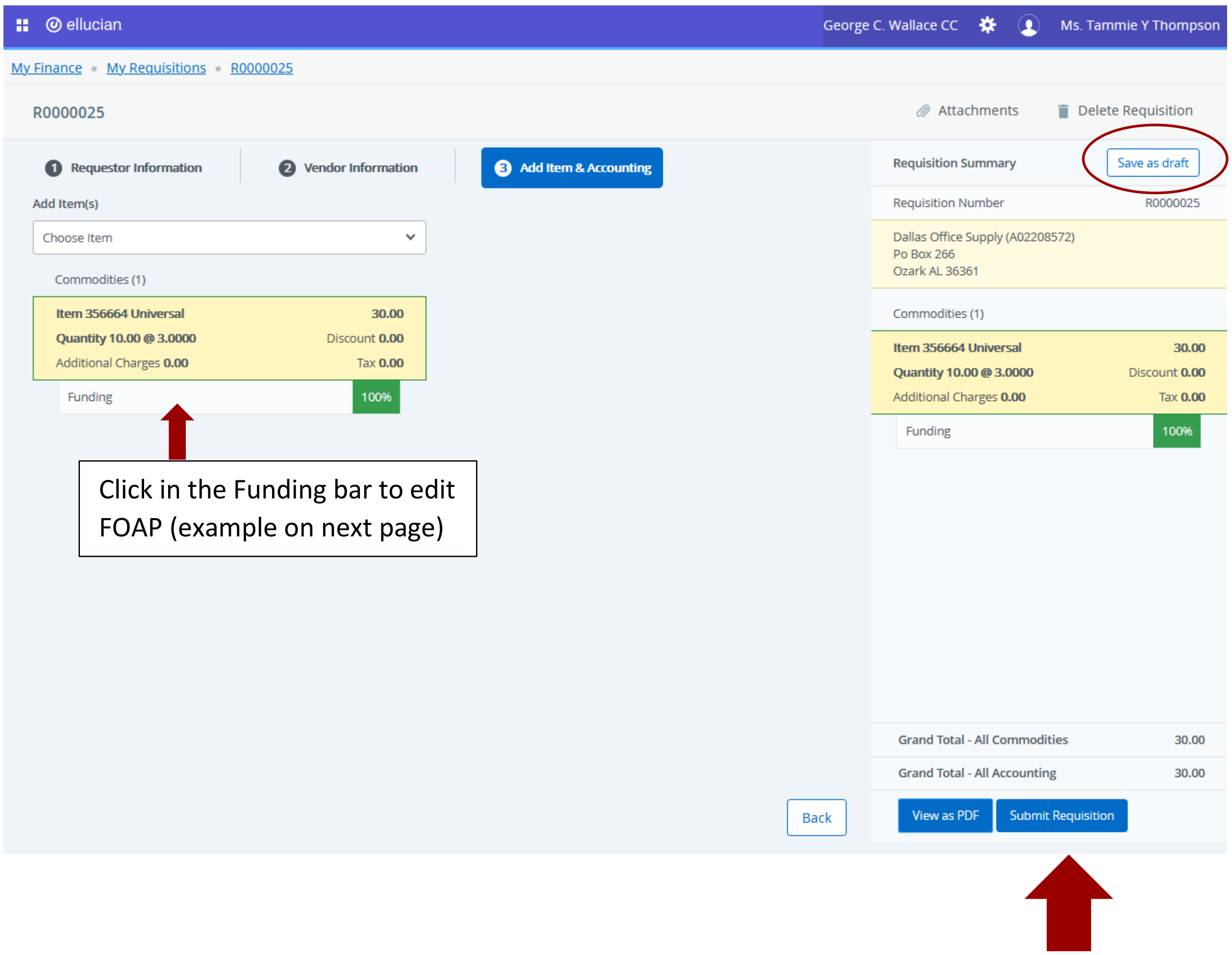
Accounting Distributions

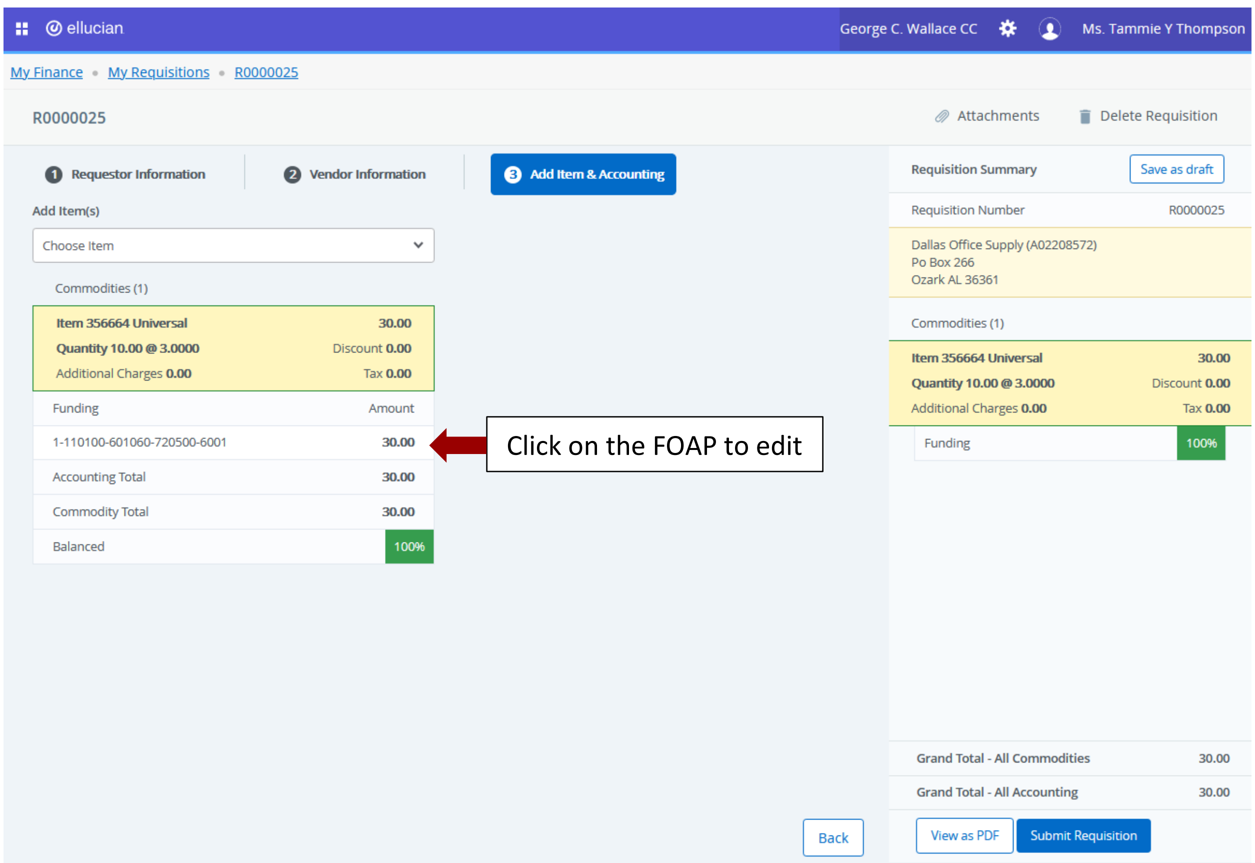
SEQ#	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Distribution Total
1	1- - 110100- 601060- 720500- 6001- - -	Yes	No	No	100.0000	30.00

Grand Total - All Accounting	30.00

DISCLAIMER - A Purchase Requisition does not represent a valid Purchase Order to provide to a vendor or supplier. As such, this PDF of the Purchase Requisition is restricted to internal use only.

12. Click **Save as draft** if you want to return to the requistion before submitting or **Submit Requistion** to deploy the requistion for approval.




ellucian
George C. Wallace CC
Ms. Tammie Y Thompson
My Finance • My Requisitions • R0000025
R0000025
Attachments
Delete Requisition
1 Requestor Information
2 Vendor Information
3 Add Item & Accounting
Add Item(s)
Choose Item
Commodities (1)
Item 356664 Universal 30.00
Quantity 10.00 @ 3.0000 Discount 0.00
Additional Charges 0.00 Tax 0.00
Funding Amount
1-110100-601060-720500-6001 30.00
Accounting Total 30.00
Commodity Total 30.00
Balanced 100%
Click on the FOAP to edit
Requisition Summary
Save as draft
Requisition Number R0000025
Dallas Office Supply (A02208572)
Po Box 266
Ozark AL 36361
Commodities (1)
Item 356664 Universal 30.00
Quantity 10.00 @ 3.0000 Discount 0.00
Additional Charges 0.00 Tax 0.00
Funding 100%
Grand Total - All Commodities 30.00
Grand Total - All Accounting 30.00
Back
View as PDF
Submit Requisition

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.