


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

 Remember me on this computer

Finance

Search

[ACCESSIBILITY](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Main Menu

Your current Institution is WCC

Finance

Create or review financial documents, budget information, approvals.

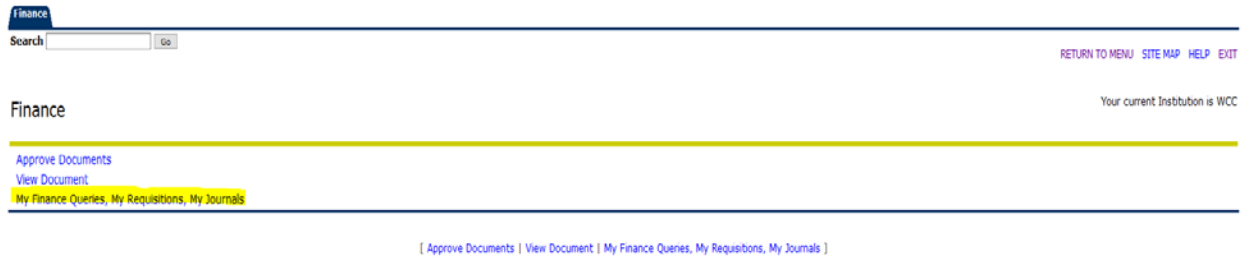
[Events](#)

[Banner 9 Events](#)

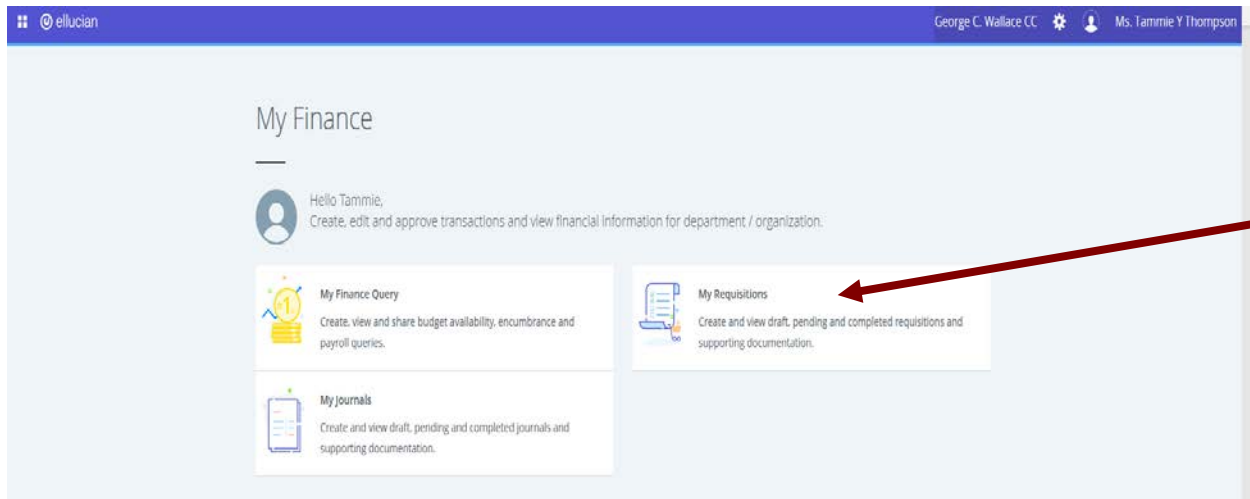
[My Action Items](#)

[Action Items Processing](#)

RELEASE: 0.9.1



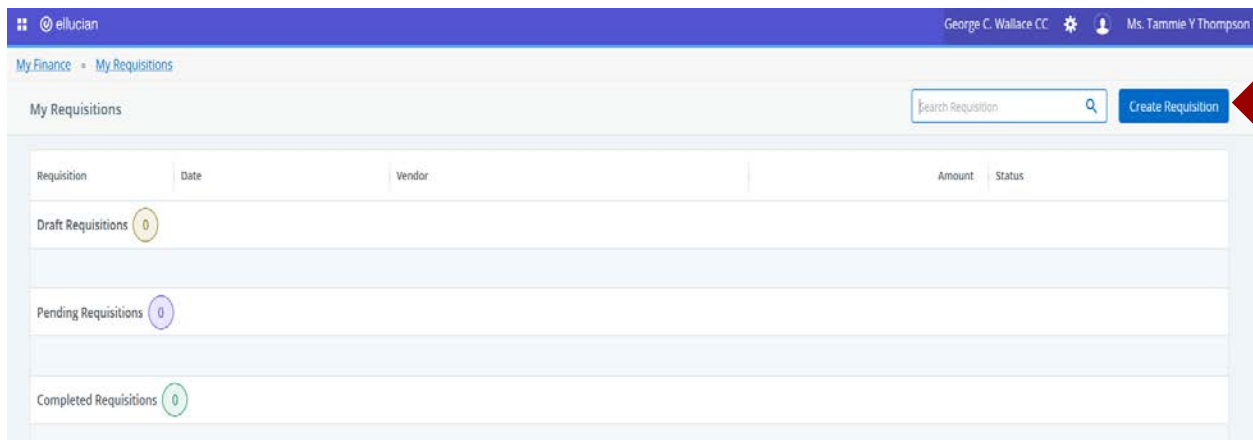
3. From SSB9 Landing Page select **My Requisitions**.



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**.



The screenshot displays the 'My Requisitions' dashboard in the OneACCS system. At the top, there is a navigation bar with the user's name 'George C. Wallace CC' and 'Ms. Tammie Y Thompson'. Below the navigation bar, the page title 'My Requisitions' is visible. A search bar labeled 'Search Requisition' is located on the right side of the dashboard. To the right of the search bar is a blue button labeled 'Create Requisition', which is highlighted with a red arrow. Below the search bar and button is a table with the following columns: Requisition, Date, Vendor, Amount, and Status. The table is currently empty. Below the table, there are three summary rows: 'Draft Requisitions' with a count of 0, 'Pending Requisitions' with a count of 0, and 'Completed Requisitions' with a count of 0.

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.

George C. Wallace CC Ms. Tammie Y Thompson

My Finance > My Requisitions > Create Requisition

Create Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requestor *
Tammie Thompson ACCS

Transaction Date * 06/16/2020 Delivery Date * 06/16/2020

Requestor Email
tammie.thompson@accs.edu

Accounting Type : Document level

Requisition Comments

Public Comment
Enter comments for the requisition

Private Comment
Enter comments for the requisition

Chart *
George C. Wallace Community College

Organization *
102020 Dean of Business Affairs

Ship To Location *
WCC Dana Nichols

Attention To *
Dana Nichols

Tax Group
Choose Tax Group

Ship To Location
Attention: Dana Nichols
1141 Wallace Drive
Dothan AL 36303

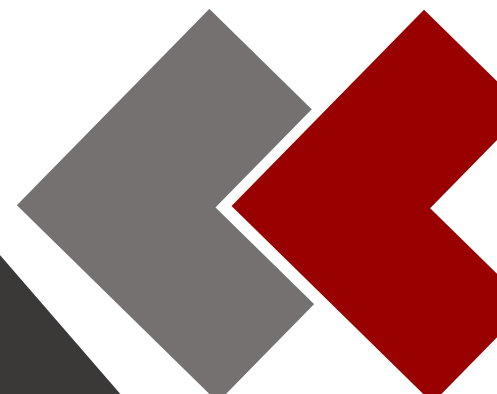
Requisition Summary
Delivery date/trans date should be current date.

Add details and click Next to build this summary view.

Save as draft

Back Next Submit Requisition

Public and Private comments are not required



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

My Finance > My Requisitions > R0000025

R0000025

Requestor Information | **Vendor Information** | Add Item & Accounting

Choose vendor for me

Vendor: Dallas Office Supply (A02208572)

Vendor Information: Dallas Office Supply (A02208572)
Po Box 266
266 Painter Ave
Clark AL 36021

Vendor Email: Choose/Enter Email

Discount: Choose Discount | Currency: Choose Currency

Requisition Summary: Requisition Number: R0000025

Buttons: Back, Next, View as PDF, Submit Requisition

Callouts: 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.

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

Item 356664 Universal

Item 356664 Universal (Add as new item)

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

Requisition Summary Save as draft

Requisition Number R0000025

Dallas Office Supply (A02208572)

Po Box 266

Orank AL 36361

Back View as PDF Submit Requisition

You must **Tab** to add as new item and proceed.

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

The screenshot shows the 'Add Item & Accounting' step of a requisition process. The form is divided into three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. The 'Add Item & Accounting' tab is active and contains several input fields. Annotations include:

- A box at the top center: "Public Comment is a required field. You **MUST** insert full item description from quote." with an arrow pointing to the 'Public Comment' text area.
- A box on the left: "No Entry Required" with a bracket pointing to the 'Discount Amount', 'Additional Amount', and 'Tax Amount' fields.
- A box at the bottom center: "* All required fields (except Tax Group)" with an arrow pointing to the 'Unit Price' and 'Quantity' fields.
- A red arrow at the bottom points to the 'Save' button.

The form fields include:

- Commodity Description: Item 35664 Universal
- Unit Of Measure*: Package (PAK) * v
- Tax Group*: Choose Tax Group
- Quantity*: 10.00
- Unit Price*: 3.0000
- (Quantity) X (Unit Price): USD 30.00
- Discount Amount: 0.00
- Additional Amount: 0.00
- Tax Amount: 0.00
- Commodity Item Total: USD 30.00

Commodity Comments:

- Public Comment: 3x3 Plain yellow pop-up note refills 12 - 100 Sheets Pads per pack
- Private Comment: Enter comments for the commodity item

Buttons: Back, Save, View as PDF, Submit Requisition

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.

The screenshot shows the OneACCS interface for requisition R0000025. The user is logged in as George C. Wallace CC and Ms. Tammie Y Thompson. The breadcrumb trail is My Finance > My Requisitions > R0000025. The main content area has three tabs: 1 Requestor Information, 2 Vendor Information, and 3 Add Item & Accounting (which is active). Under 'Add Item(s)', there is a 'Choose Item' dropdown and a table of commodities. The table shows one commodity: 'Item 356664 Universal' with a quantity of 10.00, a unit price of 3.0000, a total of 30.00, a discount of 0.00, and additional charges and tax of 0.00. On the right, there is a 'Requisition Summary' section with a 'Save as draft' button. Below the summary, there is a table with the same commodity information as the main table. At the bottom, there are buttons for 'Back', 'Add Accounting', 'View as PDF', and 'Submit Requisition'. A red arrow points from a text box to the 'Add Accounting' button.

Once all items have been entered, Click **Add Accounting**

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

The screenshot shows the OneACCS interface for requisition R0000025. A red oval highlights the text "Banner generated (except for split funds)" above the "Add Item & Accounting" button. Red arrows point from this oval to the "Add Item & Accounting" button and to the "Save" button at the bottom. The "Add Item & Accounting" section shows a distribution amount of 30.00 and a distribution percent of 100.00000000. The "Requisition Summary" table on the right shows a total amount of 30.00 and a balanced status of 100%.

ellucian George C. Wallace CC Ms. Tammie Y Thompson

My Finance • My Requisitions • R0000025

R0000025 Delete Requisition

1 Requestor Information **2** Vendor Information **3** Add Item & Accounting

Requisition Number (R0000025) Currency USD

Chart* Index
1 George C. ... Choose Index

Fund*
110100 Unrestricted Shared Services

Organization*
601060 General Admin & Logistical Svcs

Account*
720500 Materials and Supplies - MS

Program* Activity
6001 Instit S... Choose Activity

Location Project
Choose Location Choose Project

Distribution Amount* 30.00 Distribution Percent* 100.00000000

Discount Amount 0.00 Additional Amount 0.00

Tax Amount 0.00

Distribution Total 30

Remaining 0

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	Amount
1-110100-202170-720500-6003	30.00
Accounting Total	30.00
Commodity Total	30.00
Balanced	100%

Grand Total - All Commodities 30.00

Grand Total - All Accounting 30.00

Back Save View as PDF Submit Requisition

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	Address	Po Box 266 286 Painter Ave Dothan AL 36303
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 requisition before submitting or **Submit Requisition** to deploy the requisition for approval.

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 100%

Click in the Funding bar to edit FOAP (example on next page)

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



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.

The screenshot shows the 'My Requisitions' page in the OneACCS system. The page header includes the user's name 'ellucian', the institution 'George C. Wallace CC', and the user 'Ms. Tammie Y Thompson'. Below the header, there are navigation links for 'My Finance' and 'My Requisitions', a search bar for 'Search Requisition', and a 'Create Requisition' button. The main content area displays a table with the following data:

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 0				
Pending Requisitions 1				
R0000025	06/16/2020	Dallas Office Supply	\$30.00	In Approval ⓘ
Completed Requisitions 0				