
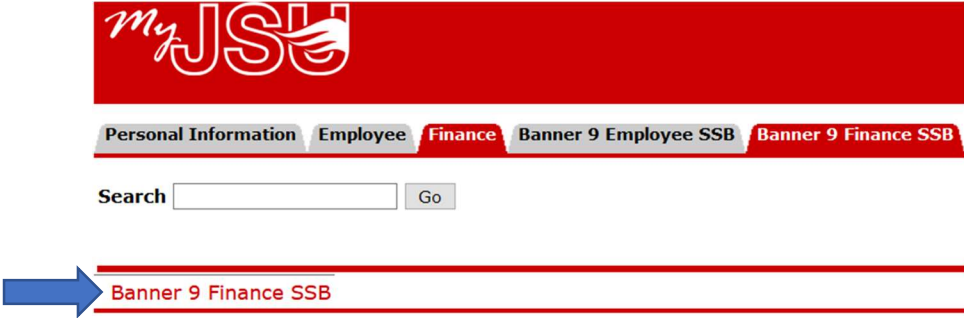
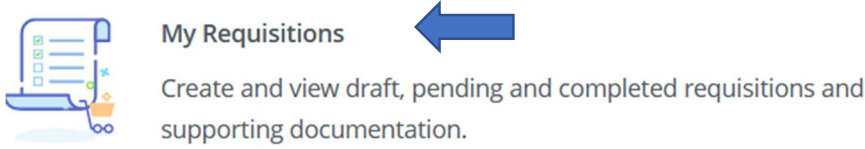
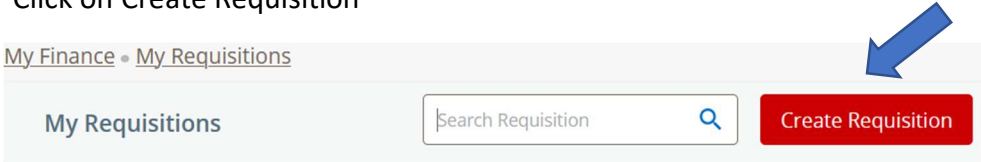


SOP Name	New Requisitions
Department	Controller's Office
Owner	Anastasia Rodriguez
SOP Description	Entering Requisitions in Banner 9 Finance SSB
Procedure	<p>1) In Self-Service click on the Banner 9 Finance SSB tab.</p>  <p>2) Click on the Banner 9 Finance SSB link</p>  <p>3) Click on My Requisitions</p>  <p>4) Click on Create Requisition</p>  <p>The next screen is the input screen for the requisition. It is comprised of 3 separate sections: Requestor Information, Vendor Information and Add Item & Accounting.</p>

Requestor Information

Create Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requestor *

Michele Hughes

Transaction Date *

03/16/2021

Delivery Date *

04/16/2021

Requestor Email

Enter Requestor Email

Choose Accounting Type

- ☒ Document Level Accounting
☐ Commodity Level Accounting

Requisition Comments

Public Comment

Enter comments for the requisition

Private Comment

Enter comments for the requisition

Chart *

Jacksonville State University

Organization *

61001 Controller

Ship To Location *

CONT Anastasia Rodriguez

Attention To *

Anastasia Rodriguez

Tax Group

Choose Tax Group

Ship To Location

Attention: Anastasia Rodriguez
 Controller's Office
 700 Pelham Road N
 Room 249
 Jacksonville AL 36265

The **Requestor** autofills with the User Name as does the **Transaction Date**

5) Enter **Delivery Date** as one month after the transaction date regardless of expected delivery

6) Enter **Requestor Email** address

Accounting Type defaults to Document Level Account

7) Enter description in **Public Comments** of the purpose of the requestion, don't leave this field blank. Approvers and auditor need this field completed

8) **Private Comments** can be left blank

9) Select **Organization** from the drop-down menu

10) Select **Ship to Location** from the drop-down menu and verify **Attention To** and **Ship To Location**

11) Click **Next** from the lower portion of the screen

Back

Next



Vendor Information

12) Choose **Vendor** by entering the Vendor ID number or the Vendor name from the drop-down list **Procurement must be provided with a vendor's signed W-9

13) Input **Vendor Email** if applicable

14) Select **Currency** from the drop-down list

15) Click **Next** from the lower portion of the screen

Add Item & Accounting

16) **Add Item(s)** by selecting from the drop-down list or typing the item description. If it is a long list of items, select 'See attached list of supplies' from the drop-down list for each account order will be charged. Example: Supplies for both Office and Expendable are purchased on the same requisition. Create two items.

17) Enter **Unit of Measure** from the drop-down list

18) Enter the **Quantity**

19) Enter **Unit Price**

Only enter **Discount Amount** and **Additional Amount** if applicable

20) Enter appropriate description of the item in **Public Comments, Private Comments** can be left blank

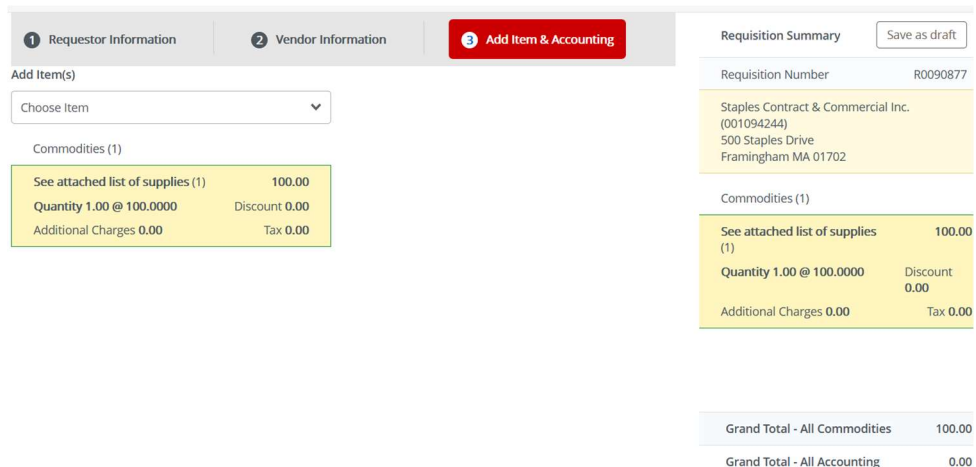
21) Click **Save** in the lower portion of the screen

Back

Save



Repeat as necessary to input all items. As each item is added they will show on the Add Item & Accounting Page



1 Requisition Information		2 Vendor Information		3 Add Item & Accounting	
Add Item(s)					
Choose Item					
Commodities (1)					
See attached list of supplies (1)		100.00			
Quantity 1.00 @ 100.0000	Discount 0.00				
Additional Charges 0.00	Tax 0.00				
Requisition Summary					
Requisition Number		R0090877			
Staples Contract & Commercial Inc. (001094244) 500 Staples Drive Framingham MA 01702					
Commodities (1)					
See attached list of supplies (1)		100.00			
Quantity 1.00 @ 100.0000	Discount 0.00				
Additional Charges 0.00	Tax 0.00				
Grand Total - All Commodities 100.00					
Grand Total - All Accounting 0.00					

22) When all items have been added click **Add Accounting** from the lower portion of the screen

Back

Add Accounting



Once all the items have been added, the accounting information is added to each item one at a time

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number (R0090876)
Currency USD

Chart*

Index

Distribution Amount*

Distribution Percent*

Jacksonville State Uni...

Choose Index

76.96

100.00000000

Fund*

Discount Amount

Additional Amount

10000 Current Unrestricted

0.00

0.00

Organization*

Tax Amount

61001

0.00

Account*

Distribution Total

72019 COVID-19

76.96

Program*

Activity

70 Institutional Support

Choose Activity

Location

Project

Choose Location

Choose Project

Remaining

0.00

Information will automatically populate from the first page

23) If not correct, select **Fund** from the drop-down menu

24) If not correct, select **Fund and Organization** from the drop-down menu

25) Select **Account** and **Program** from the drop-down list

26) Select **Program** from the drop-down list

27) Enter **Distribution Amount**

28) Enter **Distribution Percent** (if only for one line item, the default amounts should match what was entered previously)

29) Click **Save** in the lower portion of the screen



Continue this process until accounting has been added to each item and the Grand Totals equal the items in the requisition

Grand Total - All Commodities	30.00
Grand Total - All Accounting	30.00

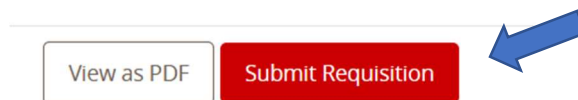
View as PDF

Submit Requisition

Support documentation should be scanned and attach to the requisition by clicking on the attachment paper clip located at the top left portion of the screen under the users name. This includes a copy of the quote, Disclosure Statement (if over \$5,000), and/or contract.



30) Click **Submit Request**



The status of the Requisition can be seen in Self-Service Banner v.9

My Requisitions				
Search Requisition <input type="text"/>				Create Requisition
Requisition	Date	Vendor	Amount	Status
Draft Requisitions 1				
R0090877	04/16/2021	Staples Contract & Commercial Inc.	\$100.00	Draft
Pending Requisitions 0				
Completed Requisitions 0				

Documentation

Effective Date: 3/16/2021