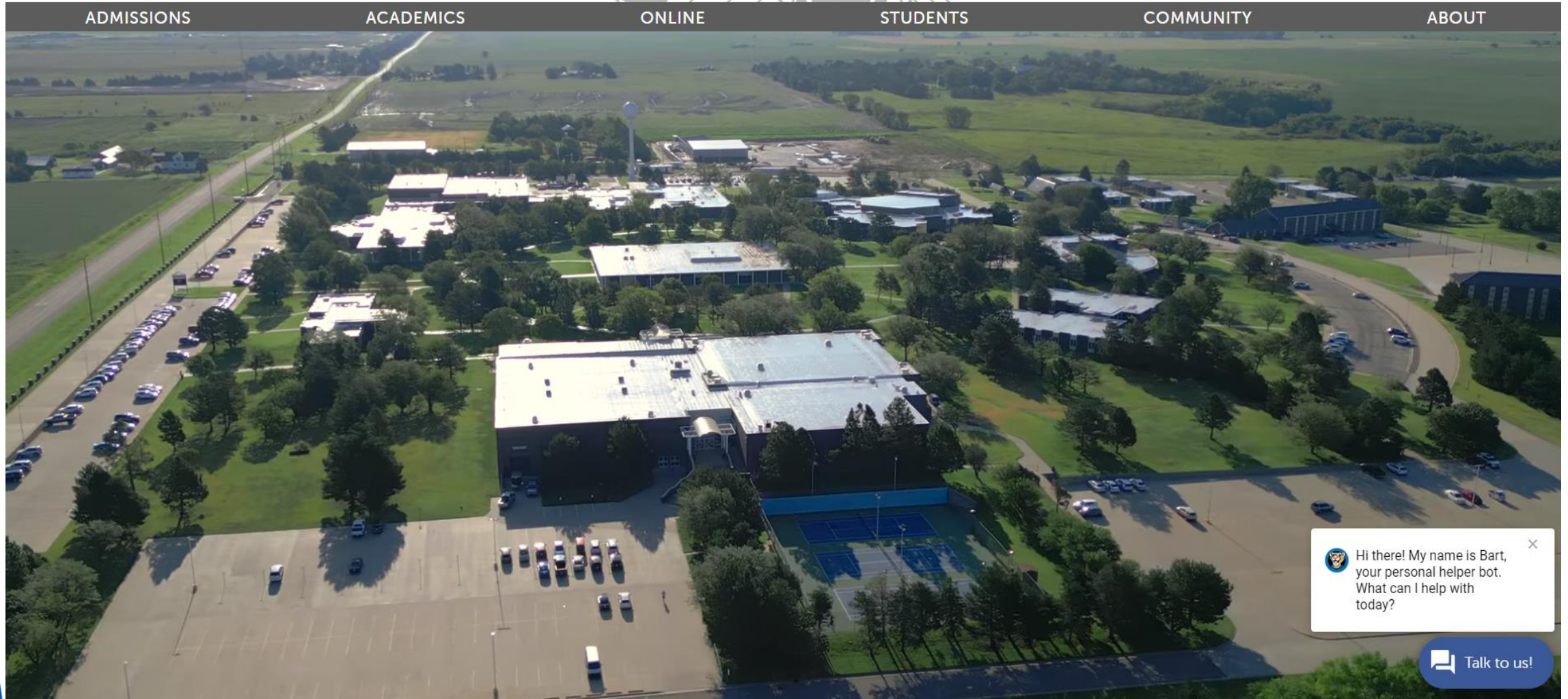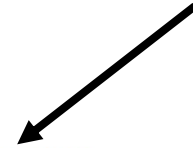# Finance SSB9 2023

Approving Documents, Creating Queries, Creating Requisitions, Requisition Approval Status, Copying a Requisition, Looking up a Requisition, and Tips.

BARTON
COMMUNITY COLLEGE

1. Go to the Barton Website: www.bartonccc.edu
2. Head to MyBarton Portal.

1. Go to MyBarton Portal.
2. Login with your Username and Password.

When in the Portal, navigate to Employee Self-Service Card. Once there click on Finance Self Service
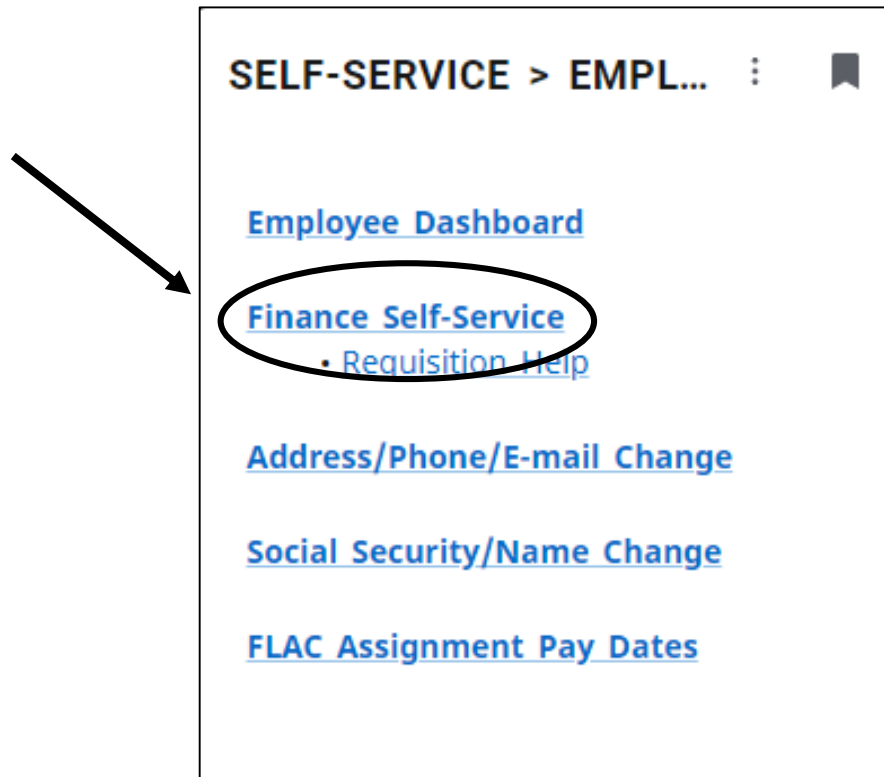
Table of Contents

(ctrl + click on any of the bullets to go directly to that topic)

BARTON
COMMUNITY COLLEGE

Approving Documents

BARTON
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The approver will go to Approve Documents in SSB9.

User ID will autopopulate with lastname first init. and you'll want to leave it as that. Leave the document number blank then click Submit.

Here you can see all of the Requisitions pending your approval. Click on the document you'd like to take a closer look at.

You can look at the PDF file to review the details.
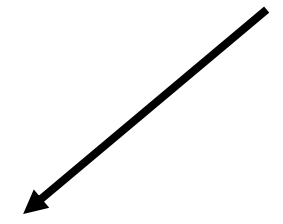
Approve Documents List (1)

ℹ️ Click the document number link to view a document as a PDF in a new tab. Clic[k] attachments if more than one, otherwise a new tab is opened to view a single a[ttachment]

Document	Document Type	Change Sequence	Submission	Originating User
R0143394	REQ	-	-	BANNERC

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

Requestor	Put Your Name Here	Requisition Number	R0143394
Phone	- Ext	Transaction Date	09/22/2023
Email	Bannertest@bartonccc.edu	Delivery Date	09/22/2023
Organization	TECHNOLOGY DEPARTMENT (6400)	Status	In Approval
Accounting Type	Document Level	Currency	USD

Ship To	BCCC	Vendor	OPI - Office Products Incorporated (11284)
Address	245 NE 30 RD	Address	Attn: Connie
			1204 Main Street
	Great Bend KS 67530		Great Bend KS 67530
Attention To	Barton Community College - Ext	Phone	- Fax -
		Email	

Requisition Comments	Office Chair - $2,000.00 This is where the Doc Text is located now that was in SSB 8 (Paws).

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	Office Chair	EA	1.00	2,000.0000	0.00	2,000.00

Total Commodities	2,000.00

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	8- - 1111- 6400- 701001- 600- - -	No	No	No	50.0000	1,000.00
2	8- - 1111- 6400- 850110- 600- - -	No	No	No	50.0000	1,000.00

Total Accounting Distributions	2,000.00

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.

Let's go approve this Requisition. "This document has been approved" will always be the default comment, however, you can change this, if needed. Then click Approve.

history, and any related documents. Click the Attachments icon to display a list of ⌄

Attachments ⇕   History   Disapprove   Approve

↺   Disapprove   Approve

Approve Document   ✕

Document Number   **Document Type**
R0143394   REQ

Change Sequence   **Submission**
-                                       -

Amount
2,000.00

Comment

This document has been approved.

Cancel   Approve

Let's disapprove this Requisition. Then click Disapprove.

<div style="text-align: center;">

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

</div>

Requestor	Put Your Name Here	Requisition Number	R0143394
Phone	- Ext	Transaction Date	09/22/2023
Email	Bannertest@bartonccc.edu	Delivery Date	09/22/2023
Organization	TECHNOLOGY DEPARTMENT (6400)	Status	Disapproved
Accounting Type	Document Level	Currency	USD

Ship To	BCCC	Vendor	OPI - Office Products Incorporated (11284)
Address	245 NE 30 RD	Address	Attn: Connie
			1204 Main Street
	Great Bend KS 67530		Great Bend KS 67530
Attention To	Barton Community College - Ext	Phone	- Fax -
		Email	

Requisition Comments	Office Chair - $2,000.00 This is where the Doc Text is located now that was in SSB 8 (Paws).

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	Office Chair	EA	1.00	1,000.0000	0.00	1,000.00

	Total Commodities	1,000.00

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	8- - 1111- 6400- 701001- 600- - -	No	No	No	50.0000	500.00

Creating Queries

You can create and look up budget queries in SSB9. Navigate to My Finance Query.

Click on the "New Query" button to create a new budget query.
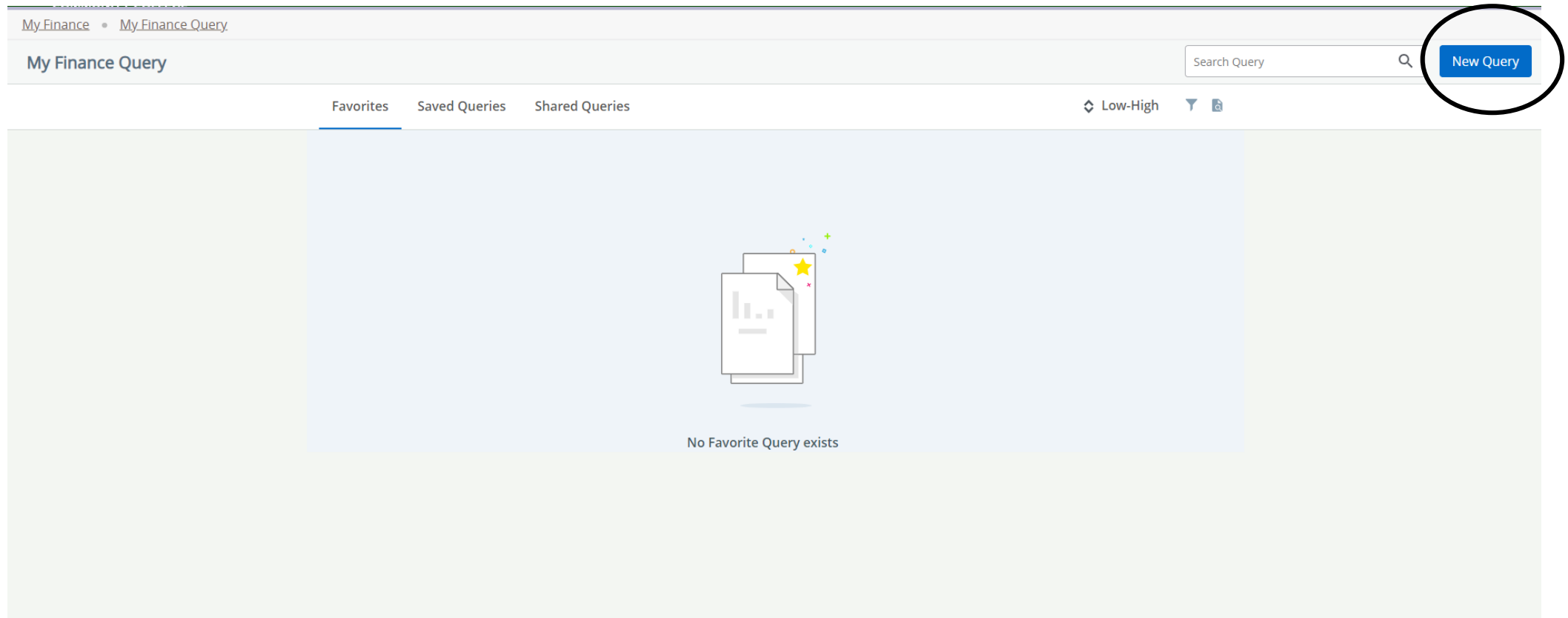
- When creating a new query click on "Budget Status by Account" for Query Type.
- **Tip**: You can type either the number or the name and you will get the same results.
- **Chart**: Enter chart 8.
- **Fund**: Type the fund number.
- **Organization**: Type the organization number or name.
- **Account**: Type the account number.
- **Program**: Type the program
- Then scroll down to next section.

Create New Query

Select Query Type

Budget Status by Account ▲

🔍

Budget Status by Account

Budget Quick Query

Chart *

8 BARTON COUNTY COMMUNITY COLLEGE × ∨

Index

Choose Index ∨

Fund

1111 GENERAL FUND × ∨

Organization *

6400 TECHNOLOGY DEPARTMENT × ∨

Account

701001 OFFICE SUPPLIES × ∨

Program

600 INSTITUTIONAL SUPPORT × ∨

Activity

Choose Activity ∨

Location

Choose Location ∨

- **Fiscal Year**: Choose the Fiscal year you want
- **Fiscal Period**: Choose the Fiscal Period you want
  - Tip: We are in Fiscal Period 14
- **Operating Ledger:** There are a lot of options to choose, but most Queries, you will choose: Accounted Budget, Year to Date, Reservations, and Available Balance.
- **Comparison Fiscal Year & Period**: These are both optional
- After you have all of the information filled out, click *Submit*.

Fiscal Year *   2024 × ∨

Fiscal Period *   14 × ∨

Comparison Fiscal Year   None ∨

Comparison Fiscal Period   None ∨

Operating Ledger

☐ Adopted Budget ⓘ   ☑ Year to Date ⓘ

☐ Budget Adjustment ⓘ   ☐ Encumbrance ⓘ

☐ Adjusted Budget ⓘ   ☑ Reservation ⓘ

☐ Temporary Budget ⓘ   ☐ Commitments ⓘ

☑ Accounted Budget ⓘ   ☑ Available Balance ⓘ

SUBMIT

Example: When you click on FY24/PD14 Year to Date link, it brings up the information for that query.

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account

New Query

< TECHNOLOGY DEPARTMENT - 6400

Query Results

Account	Account Title	FY24/PD14 Adopted Budget	FY24/PD14 Year to Date	FY24/PD14 Encumbrances	FY24/PD14 Commitments	FY24/PD14 Available Balance
701001	OFFICE SUPPLIES	$1,300.00	$78.61	$0.00	$0.00	$1,221.39
Report Total (of all records)		$1,300.00	$78.61	$0.00	$0.00	$1,221.39

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account

New Query

< TECHNOLOGY DEPARTMENT - 6400

Query Results

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
08/18/2023	08/18/2023	I0254247	Amazon Capital Services Inc	$78.61	INNI
Report Total (of all records)				$78.61	

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Creating a Requisition

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Click on My Requisitions to start a new requisition.

Click on Create Requisition.

My Requisitions

Search Requisition 🔍   **Create Requisition**

Requisition	Date	Vendor	Amount	Status
Draft Requisitions (1)				
R0143395	09/22/2023	Visa Card Center	$0.00	Draft
Pending Requisitions (1)				
R0143394	09/22/2023	OPI - Office Products Incorporated	$2,000.00	In Approval ⓘ
Completed Requisitions (0)				

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Requisition Form:
- **Requestor**: This will be your First name and Last name.
- **Transaction & Delivery Date**: Typically todays date.
- **Requestor Email:** Your email.
- **Public Comment:** Previously doc text in SSB8.
- **Private Comment**: It won't be on the requisition, so you will want to put it in the Public comment.

Create Requisition

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

Requestor *

BannerC ARM

Transaction Date*   Delivery Date*

10/09/2023   MM/dd/yyyy

Requestor Email

Enter Requestor Email

Accounting Type : **Document level**

Requisition Comments

Public Comment

Enter comments for the requisition

Private Comment

Enter comments for the requisition

Chart*

8 BARTON COUNTY COMMUNITY COLLEGE   ✕ ⌄

Organization*

6400 TECHNOLOGY DEPARTMENT   ✕ ⌄

Ship To Location*

BCCC   ✕ ⌄

Attention To *   Tax Group

Enter Name   Choose Tax Group

Ship To Location

Attention:
245 NE 30 RD
Great Bend KS 67530

Back   Next

Requisition Form:

- **Tips:** Remember that you can do both number or text and it would still bring up the same thing.
  - **Example:** For Chart, you can search up either the number 8 or just type Barton Community College.
- **Chart**: This is where the start of the FOAPS. Enter chart 8.
- **Organization**: Type the organization.
- **Ship To Location:** Typically you don't change this and keep BCCC.
- **Attention To**: Your Department or Barton Community College. Then Click *Next*.

Example of a Requisition:

- **Vendor**: You can search by name, or the vendor number.
  - Note the difference in addresses from SSB8.
- **Vendor Discount and Currency**: Leave Blank.
- Click *Next* when finished.

Example of the Vendor Information:

On the "Add Item & Accounting" tab, you will add the Commodity description in the Choose Item dropdown.

Example of the Add Item & Account: Part 1

- Type in the item description, example of an "Office Chair," click Add as new item.

Example of the Add Item & Account: Part 2

- **Commodity Description**: This is the Item that you added to the requisition.
- **Unit Of Measure:** Most of the time it's EACH (EA).
- **Quantity:** How many do you have of each item?
- **Unit Price:** What is the price of each item?
- **The Discount, Additional, and Tax Amount:** Leave as is.
- Click *Save*.

Example of the Add Item & Account: Part 3

- Click "Add Accounting"
- You can multiple commodity items if needed by clicking on the down arrow to add another record.

Example of the Add Item & Account: Part 4 (Only one account type)

- This is where you would want to use the FOAP.
- **Chart**: Enter chart 8.
- **Fund**: Insert the Fund number.
- **Organization**: Insert the department number.
- **Account**: Insert the Account number.
- **Program**: Insert the program number.
- **Distribution Amount**: If the dollar amount does not need to be split between different accounts; leave as is.
- **Distribution Percent**: If the dollar percentage does not need to be split between different accounts; leave alone.
- Click *Save*.

Example of the Add Item & Account: Part 4 (Multiple account types)

- This is where you would want to use the *FOAP*.
- **Chart**: Enter Chart 8.
- **Fund**: Insert the Fund number.
- **Organization**: Insert the department number.
- **Account**: Insert the Account number.
- **Program**: Insert the program number.
- **Distribution Amount**: If the dollar amount needs to be split between accounts, you can adjust the dollar amount while the distribution percent will automatically change.
- **Distribution Percent**: Allows you to adjust the percentage amount as needed.
- Click *Save*.
- **Tip:** The number of commodity items does not need to match the number of accounting distribution lines.

Example of the Add Item & Account: Part 4 (Multiple account types)

R0143394

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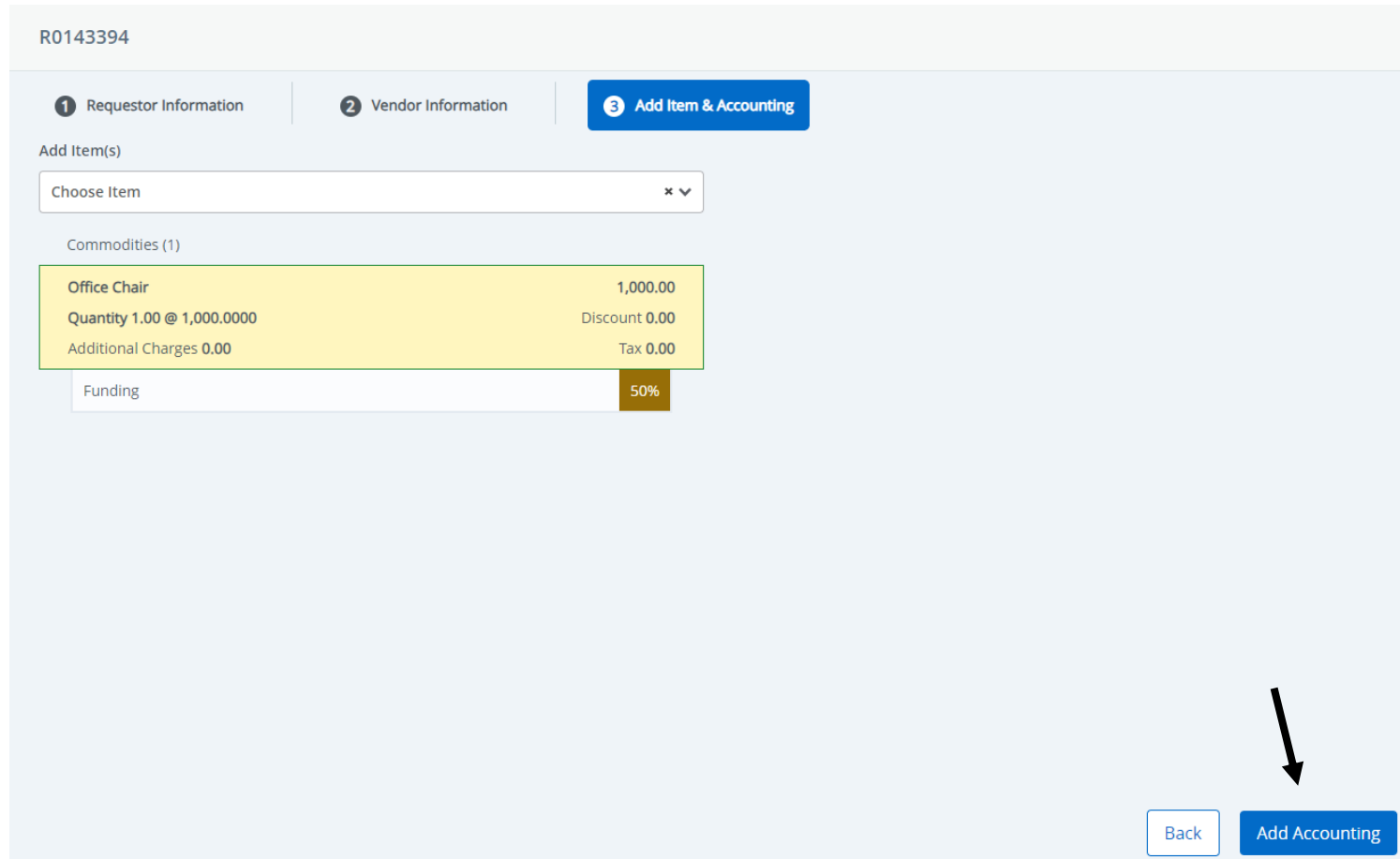2. Vendor Information
3. **Add Item & Accounting**

Add Item(s)

Choose Item

Commodities (1)

Office Chair	1,000.00
Quantity 1.00 @ 1,000.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 50%

Back   **Add Accounting**

- Click "Add Accounting" at the bottom.

Example of the Add Item & Account: Part 4 (Multiple account types)

My Finance • My Requisitions • R0143394

R0143394

① Requestor Information   ② Vendor Information   ③ Add Item & Accounting

Requisition Number (R0143394)   Currency USD

Chart *
8 BARTON COUNTY CO... ×∨

Index
Choose Index ×∨

Fund *
1111 GENERAL FUND ×∨

Organization *
6400 TECHNOLOGY DEPARTMENT ×∨

Account *
850110 COMPUTER EQUIPMENT ×∨

Program *
600 INSTITUTIONAL SU... ×∨

Activity
Choose Activity ×∨

Location
Choose Location ×∨

Project
Choose Project ×∨

Distribution Amount *
500.00

Distribution Percent *
50.00000000

Discount Amount
0.00

Additional Amount
0.00

Tax Amount
0.00

Distribution Total   500.00

Remaining   0.00

Back   Save

- This is where you would want to use the *FOAP*.
- **Chart:** Enter chart 8.
- **Fund**: Insert Fund number.
- **Organization**: Insert department number.
- **Account**: Insert Account number.
- **Program**: Insert program number.
- **Distribution Amount**: Adjust the dollar amount for the next account type as needed.
  - Tip: If only have two account types, leave this alone.
- **Distribution Percent**: You can adjust the percentage amount as needed.
- Click *Save*.

Example of the Add Item & Account: Part 5

- When you click on the PDF button, it brings up a PDF about what the Requisition will look like.
- You can also click on the funding and it will do a drop down of the FOAP.
- If you wanted to save a requisition without submitting, press "Save as draft".
- Once you see that everything looks good click "Submit Requisition".

Requisition Summary	Save as draft
Requisition Number	R0143394
OPI - Office Products Incorporated (11284) Attn: Connie Great Bend KS 67530	
Commodities (1)	
Office Chair	1,000.00
Quantity 1.00 @ 1,000.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	Amount
8-1111-6400-701001-600	1,000.00
Accounting Total	1,000.00
Commodity Total	1,000.00
Balanced	100%
Grand Total - All Commodities	1,000.00
Grand Total - All Accounting	1,000.00

View as PDF | Submit Requisition

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

Requestor	Banner Test	Requisition Number	R0143391
Phone	- Ext	Transaction Date	09/22/2023
Email	Bannerc@bartonccc.edu	Delivery Date	09/22/2023
Organization	TECHNOLOGY DEPARTMENT (6400)	Status	Assigned to Buyer
Accounting Type	Document Level	Currency	USD

Ship To	BCCC	Vendor	OPI - Office Products Incorporated (11284)
Address	245 NE 30 RD	Address	Attn: Connie
			1204 Main Street
	Great Bend KS 67530		Great Bend KS 67530
Attention To	Barton Community College - Ext	Phone	- Fax -
		Email	

Requisition Comments	This is a Test

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	Desk	EA	1.00	1,000.0000	0.00	1,000.00
	Total Commodities					1,000.00

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	8- - 1111- 6400- 850110- 600- - -	No	No	No	100.0000	1,000.00
	Total Accounting Distributions					1,000.00

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.

Requisition Approval Status

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When checking on requisition approval status, click on view document.

- Document Number: Type in your requisition number.
- Click on view document.

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

Requestor	Banner Test	**Requisition Number**	R0143391
Phone	- Ext	**Transaction Date**	09/22/2023
Email	Bannerc@bartonccc.edu	**Delivery Date**	09/22/2023
Organization	TECHNOLOGY DEPARTMENT (6400)	**Status**	Assigned to Buyer
Accounting Type	Document Level	**Currency**	USD

Ship To	BCCC	**Vendor**	OPI - Office Products Incorporated (11284)
Address	245 NE 30 RD	**Address**	Attn: Connie
			1204 Main Street
	Great Bend KS 67530		Great Bend KS 67530
Attention To	Barton Community College - Ext	**Phone**	- Fax -
		Email	

Requisition Comments	This is a Test

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total
1	Desk	EA	1.00	1,000.0000	0.00	1,000.00

Total Commodities	1,000.00

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount
1	8- - 1111- 6400- 850110- 600- - -	No	No	No	100.0000	1,000.00

Total Accounting Distributions	1,000.00

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.

- If a requisition has been approved, it will say Assigned to Buyer in the status section.

Copying a Requisition

(Alternative to a requisition template)

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- If you want to copy a requisition, click on "My Requisitions"

- Go to "Completed Requisitions" and select the requisition that you want to copy.

- Once you locate the requisition that you want to copy, click on "Copy Requisition"

- Click on Yes to copy the requisition.

- Once you copy the requisition, it will give you a notification in the top right letting you know that you did it successfully and it will create a new requisition number.

Looking up a Requisition

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COMMUNITY COLLEGE

When checking on requisition approval status, click on view document.

- Click on the Magnifying Glass to lookup the requisition, if you are unsure of what it is.

- Enter known information.
- Click execute query
- **Tips**:
  - Activity date ranges – **From & To fields**: Put in a date range that includes the date you believe you put in the requisition.
  - **User ID**: The User ID will automatically populate as your Banner ID so leave as is.

- Below is a screenshot example of the Requisition – Lookup Results page.
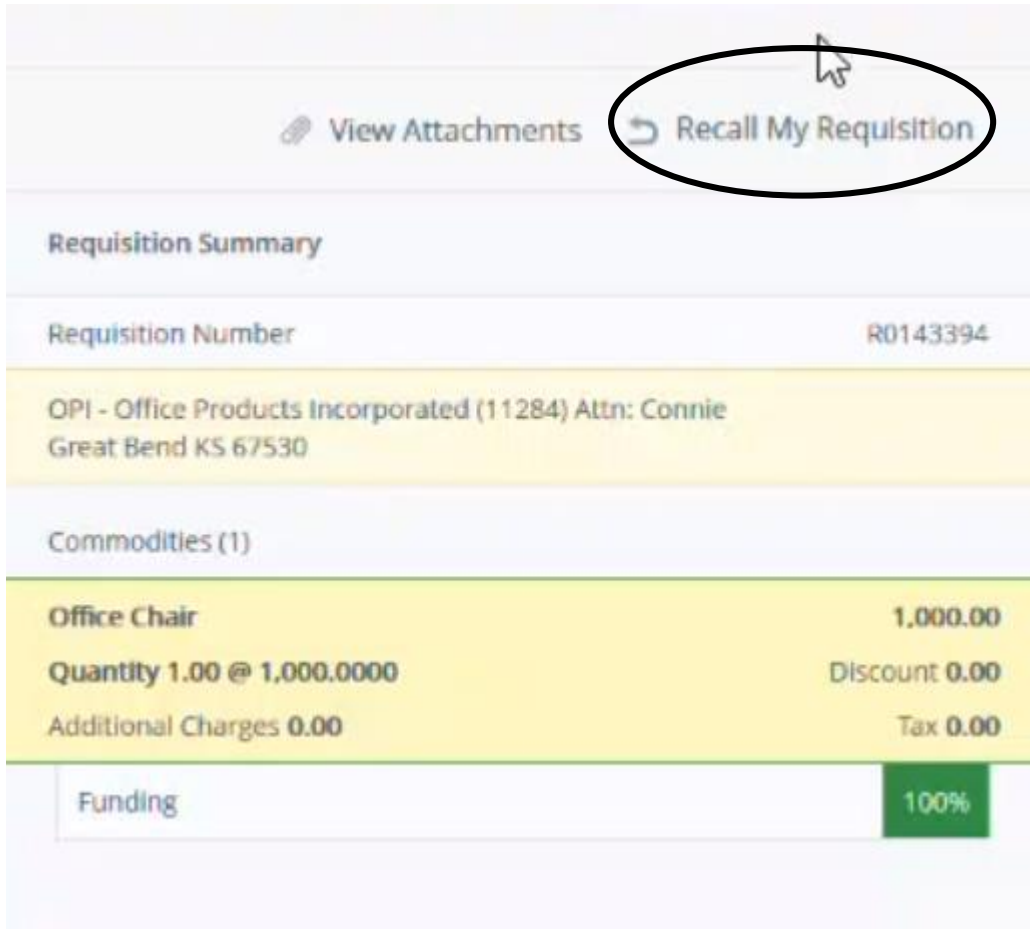
Lookup Results

Requisition - Lookup Results (2)

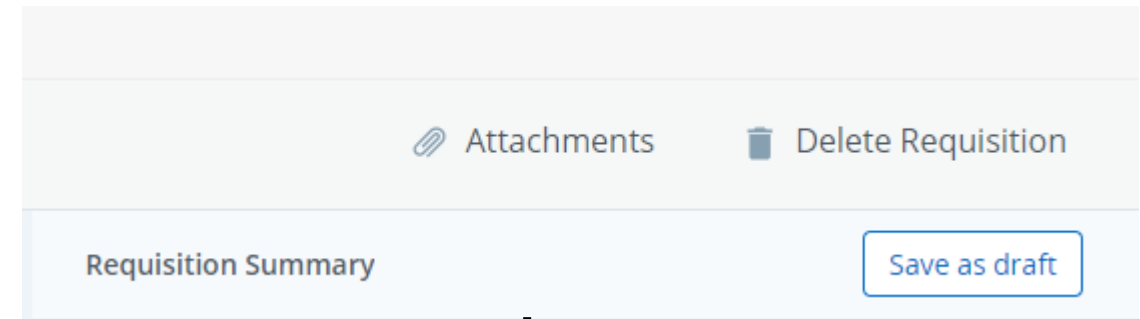| Document Number	User ID	Activity Date	Transaction Date	Vendor ID	Requestor	Approved	Completed	Reference Number
R0143394	BANNERC	10/10/2023	09/22/2023	11284	Put Your Name Here	No	Yes	-
R0143398	BANNERC	10/11/2023	10/11/2023	15576	BannerC ARM	No	Yes	-

BACK TO VIEW DOCUMENT   ANOTHER QUERY

Tips

- **Tip**: If you made any mistake after submitting, there should be a button on the top right that says " Recall My Requisition" and you can modify and submit it again.

- **Tip**: If you make a mistake, you can click Delete Requisition and create a new one.

Questions:

- If you have any questions about the requisition process in SSB9, call Terry Barrow at extension 318.

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