

# Finance SSB9 2023

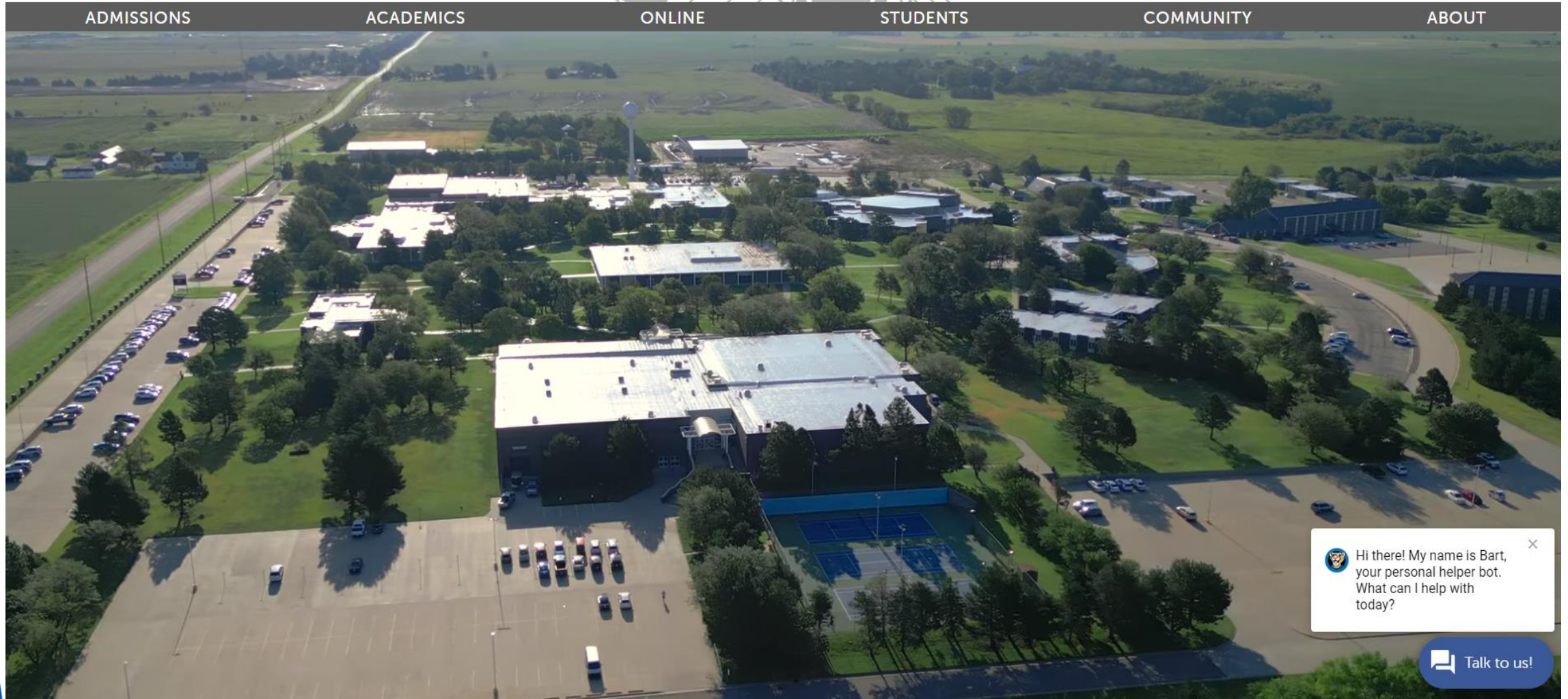
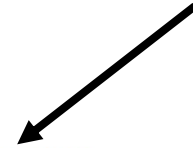
Approving Documents, Creating Queries, Creating Requisitions, Requisition Approval Status, Copying a Requisition, Looking up a Requisition, and Tips.

1. Go to the Barton Website: [www.bartonccc.edu](http://www.bartonccc.edu)
2. Head to MyBarton Portal.

**BARTON**  
COMMUNITY COLLEGE



- MyBarton Portal
- Transparency
- Search



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



## Welcome to the MyBarton Portal

Search, Email, Home icons

- Admissions >
- Academics >
- Barton Online >
- Students >
- Community >
- About >

Facebook, Twitter, YouTube, Messenger, Instagram, Snapchat, TikTok icons

### Announcements

- **NOTE - Everyone will be prompted to use OKTA Multi-Factor Authentication to access the MyBarton Portal.**
  - Read the information about [OKTA Multi-Factor Authentication](#) in detail to avoid access issues.
  - You can use OKTA to reset your password going forward by looking for the MFA OKTA Security Card in the MyBarton Portal.
  - You can also use the "Need Help Signing in Link" at the bottom of the OKTA sign in page.
  - If you have issues logging in to MyBarton Portal, please complete a [Cougar Tech Support Form](#) for password assistance.
- Please be aware that all Business Office, Advisor, Financial Aid, and Enrollment Services communications will be through your Office 365 (O365) Barton student email account. To access your O365 account please login to your MyBarton Portal and locate the O365 card. Please note that this email account is not tied to your Canvas account.

### How to log in to the portal

Students	+
Employees	+
Still having problems?	+

### Need Help?

+ Chat with our chatbot, Bart the Cougar, on any Barton webpage

MYBARTON PORTAL LOGIN

### Use MyBarton to Access:

- + Banner
- + Courses via Canvas
- + Student Financial Center
- + Barton Email
- + Transcript Requests
- + Concourse
- + Financial Aid
- + Student Housing Application
- + Apply for Graduation
- + Barton Bookstore
- + Degree Progress

FINANCIAL AID

SUPPORT SERVICES

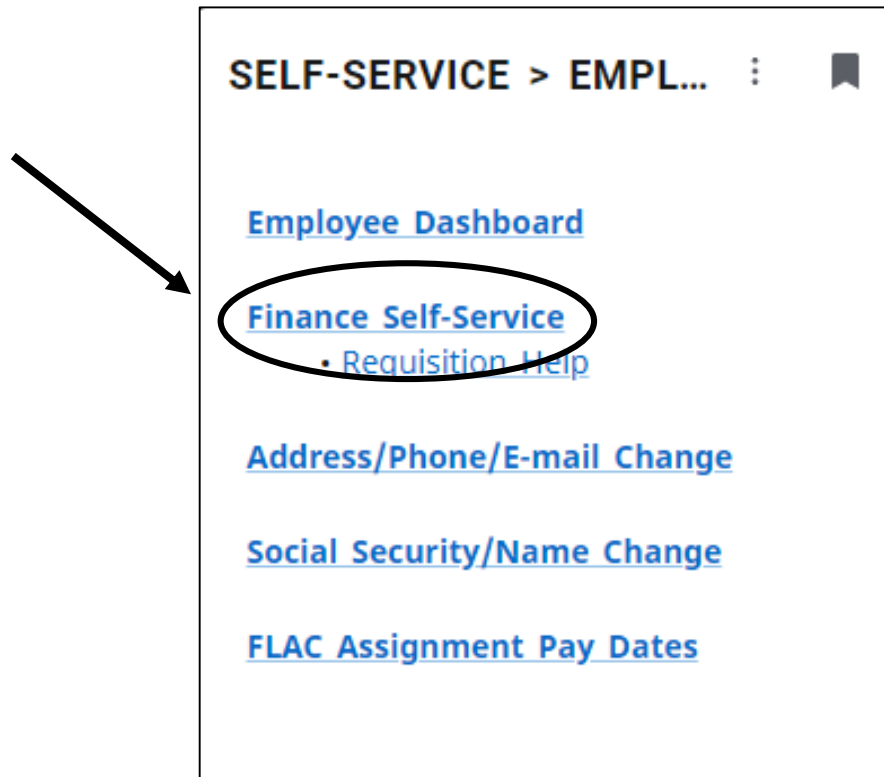
COURSE SE

BILLING & PAYMENT

Hi there! My name is Bart, your personal helper bot. What can I help with today?

Talk to us!

When in the Portal, navigate to Employee Self-Service Card.  
Once there click on [Finance Self Service](#)



# Table of Contents

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- [Tips](#)



# Approving Documents

# The approver will go to Approve Documents in SSB9.

## My Finance



Hello Cloud,  
Create, edit and approve transactions and view financial information for department / organization.



### My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.



### Approve Documents

View list of documents pending approval. Approve, disapprove, or deny.



### Delete Finance Template

Delete templates for Finance Queries, Budget Development, and Purchase Orders.



### My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



### View Document

View draft, pending and completed documents with related information and approval history.

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.

**BARTON**  
COMMUNITY COLLEGE

[My Finance](#) • Approve Documents

### Approve Documents

**i** The radio buttons related to next approver apply when a User ID is present.

User ID:  Document Number:

User ID is next approver  All documents User may approve



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

**BARTON**  
COMMUNITY COLLEGE

My Finance • Approve Documents

Approve Documents

Queried Parameters

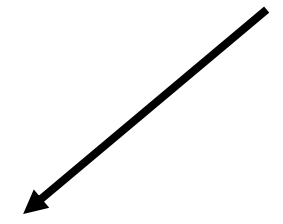
Another Query

Approve Documents List 1


Click the document number link to view a document as a PDF in a new tab. Click the History option to display pending approvals, approval history, and any related documents. Click the Attachments icon to display a list of attachments if more than one, otherwise a new tab is opened to view a single attachment...

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
R0143394	REQ	-	-	BANNERC	2,000.00	Yes	-	DOC	-		Disapprove	Approve

You can look at the PDF file to review the details.



## Approve Documents List 1

 Click the document number link to view a document as a PDF in a new tab. Click attachments if more than one, otherwise a new tab is opened to view a single attachment.

Document	Document Type	Change Sequence	Submission	Originating User
<a href="#">R0143394</a>	REQ	-	-	BANNERC

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

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

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

**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
<b>Total Commodities</b>						2,000.00


Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Loen-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
<b>Total Accounting Distributions</b>						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

R0143394

Document Type

REQ

Change Sequence

-

Submission

-

Amount

2,000.00


Comment

This document has been approved.

Cancel

Approve

# Let's disapprove this Requisition. Then click Disapprove.

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

Attachments  History Disapprove Approve



Disapprove

Approve

## Disapprove Document

Document Number  
R0143394

Document Type  
REQ

Change Sequence  
-


Submission  
-

Amount  
1,000.00


Comment \*

Approval has been denied.

Cancel

Disapprove 

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

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

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

**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

<b>Total Commodities</b>						1,000.00
--------------------------	--	--	--	--	--	----------

Accounting Distributions

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

You can look at the PDF file to review the details. The status will say Disapproved.



# Creating Queries

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

## My Finance



Hello Cloud,  
Create, edit and approve transactions and view financial information for department / organization.



### My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.



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Delete templates for Finance Queries, Budget Development, and Purchase Orders.



### My Requisitions

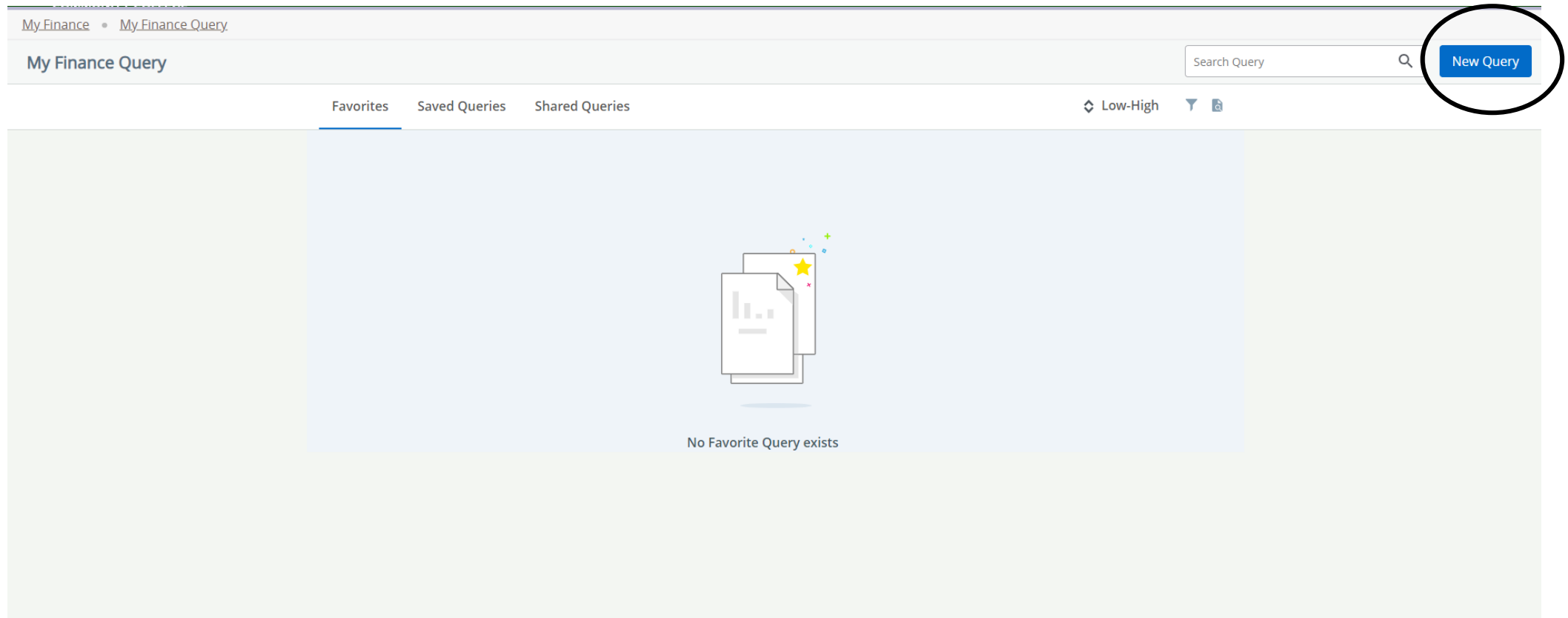
Create and view draft, pending and completed requisitions and supporting documentation.



### View Document

View draft, pending and completed documents with related information and approval history.

# 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

Fund

1111 GENERAL FUND

Account

701001 OFFICE SUPPLIES

Activity

Choose Activity

Index

Choose Index

Organization\*

6400 TECHNOLOGY DEPARTMENT

Program

600 INSTITUTIONAL SUPPORT

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 x v	Fiscal Period*	14 x v
Comparison Fiscal Year	None v	Comparison Fiscal Period	None v

---

Operating Ledger

<input type="checkbox"/> Adopted Budget ⓘ	<input checked="" type="checkbox"/> Year to Date ⓘ
<input type="checkbox"/> Budget Adjustment ⓘ	<input type="checkbox"/> Encumbrance ⓘ
<input type="checkbox"/> Adjusted Budget ⓘ	<input checked="" type="checkbox"/> Reservation ⓘ
<input type="checkbox"/> Temporary Budget ⓘ	<input type="checkbox"/> Commitments ⓘ
<input checked="" type="checkbox"/> Accounted Budget ⓘ	<input checked="" type="checkbox"/> 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

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

TECHNOLOGY DEPARTMENT - 6400

Query Results

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
08/18/2023	08/18/2023	10254247	Amazon Capital Services Inc	\$78.61	INNI
Report Total (of all records)				\$78.61	



# Creating a Requisition

# Click on My Requisitions to start a new requisition.

## My Finance



Hello Cloud,  
Create, edit and approve transactions and view financial information for department / organization.



### My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.



### My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



### Approve Documents

View list of documents pending approval. Approve, disapprove, or deny.



### Delete Finance Template

Delete templates for Finance Queries, Budget Development, and Purchase Orders.



### View Document

View draft, pending and completed documents with related information and approval history.

# Click on Create Requisition.

My\_Finance • My\_Requisitions

My Requisitions  [Create Requisition](#)

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

## Requisition Form:



- **Requestor:** This will be your First name and Last name.
- **Transaction & Delivery Date:** Typically today's 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.

My Finance • My Requisitions • Create Requisition

### Create Requisition

1 Requestor Information    2 Vendor Information    3 Add Item & Accounting

**Requestor \***  
BannerC ARM

**Transaction Date \*** 10/09/2023     **Delivery Date \*** 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 x v

**Organization \***  
6400 TECHNOLOGY DEPARTMENT x v

**Ship To Location \***  
BCCC x v

**Attention To \*** Enter Name    **Tax Group** 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*.

My Finance • My Requisitions • Create Requisition

### Create Requisition

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

Requestor \*  
BannerC ARM

Transaction Date \* 10/09/2023 | Delivery Date \* 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 \*  
Enter Name

Tax Group  
Choose Tax Group

Ship To Location  
Attention:  
245 NE 30 RD  
Great Bend KS 67530

Back Next



# Example of a Requisition:

My Finance » My Requisitions » Create Requisition

## Create Requisition

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

**Requestor \***

**Transaction Date \***  **Delivery Date \***

**Requestor Email**

**Accounting Type :** Document level

**Requisition Comments**

**Public Comment**

**Private Comment**

**Chart \***

**Organization \***

**Ship To Location \***

**Attention To \***     **Tax Group**

**Ship To Location**

- **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.

My Finance • My Requisitions • R0143397

R0143397

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

Choose vendor for me

Vendor

Choose Vendor x v

Discount Currency

Choose Discount x v Choose Currency x v

Back Next

# Example of the Vendor Information:

My Finance » My Requisitions » R0143394

R0143394

1 Requestor Information    2 Vendor Information    3 Add Item & Accounting

Choose vendor for me

Vendor

OPI - Office Products Incorporated (11284) x v

Vendor information

OPI - Office Products Incorporated (11284)  
Attn: Connie  
1204 Main Street  
Great Bend KS 67530

Vendor Email

Choose/Enter Email x v

Discount    Currency

Choose Discount x v    Choose Currency x v

Back    Next

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

My.Finance • My.Requisitions • R0143397

R0143397

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

Add Item(s)

Choose Item x v

# Example of the Add Item & Account: Part 1

My Finance • My Requisitions • R0143394

R0143394

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

Add Item(s)

Choose Item

Office Chair

Office Chair (Add as new item)

- 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*.

My Finance • My Requisitions • R0143394

R0143394

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

Commodity Description

Office Chair

Unit Of Measure\*    Tax Group\*

EACH (EA)    Choose Tax Group

Quantity\*    Unit Price\*

1.00    1000.00

(Quantity) X (Unit Price)    USD 1,000.00

Discount Amount    Additional Amount

0.00    0.00

Tax Amount

0.00

Commodity Item Total    USD 1,000.00

Commodity Comments

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

Back    **Save**

# Example of the Add Item & Account: Part 3

My Finance • My Requisitions • R0143394

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

Back Add Accounting

- 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)

My Finance • My Requisitions • R0143394

R0143394

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

Requisition Number (R0143394)    Currency USD

Chart *	Index	Distribution Amount *	Distribution Percent *
8 BARTON COUNTY CO... * v	Choose Index * v	1,000.00	100.00000000
Fund *		Discount Amount	Additional Amount
1111 GENERAL FUND * v		0.00	0.00
Organization *		Tax Amount	
6400 TECHNOLOGY DEPARTMENT * v		0.00	
Account *		Distribution Total	1,000.00
701001 OFFICE SUPPLIES * v			
Program *	Activity	Remaining	0.00
600 INSTITUTIONAL SU... * v	Choose Activity * v		
Location	Project		
Choose Location * v	Choose Project * v		

Back    Save

- 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)

My\_Finance • My\_Requisitions • R0143394

R0143394

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

Requisition Number (R0143394)    Currency USD

Chart\*    Index

8 BARTON COUNTY CO... x v    Choose Index x v

Fund\*

1111 GENERAL FUND x v

Organization\*

6400 TECHNOLOGY DEPARTMENT x v

Account\*

701001 OFFICE SUPPLIES x v

Program\*    Activity

600 INSTITUTIONAL SU... x v    Choose Activity x v

Location    Project

Choose Location x v    Choose Project x v

Distribution Amount\*    Distribution Percent\*    Delete Accounting

500.00    50.00000000

Discount Amount    Additional Amount

0.00    0.00

Tax Amount

0.00

Distribution Total    500

Remaining    500

Split Accounting →

Back    Save

- 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)

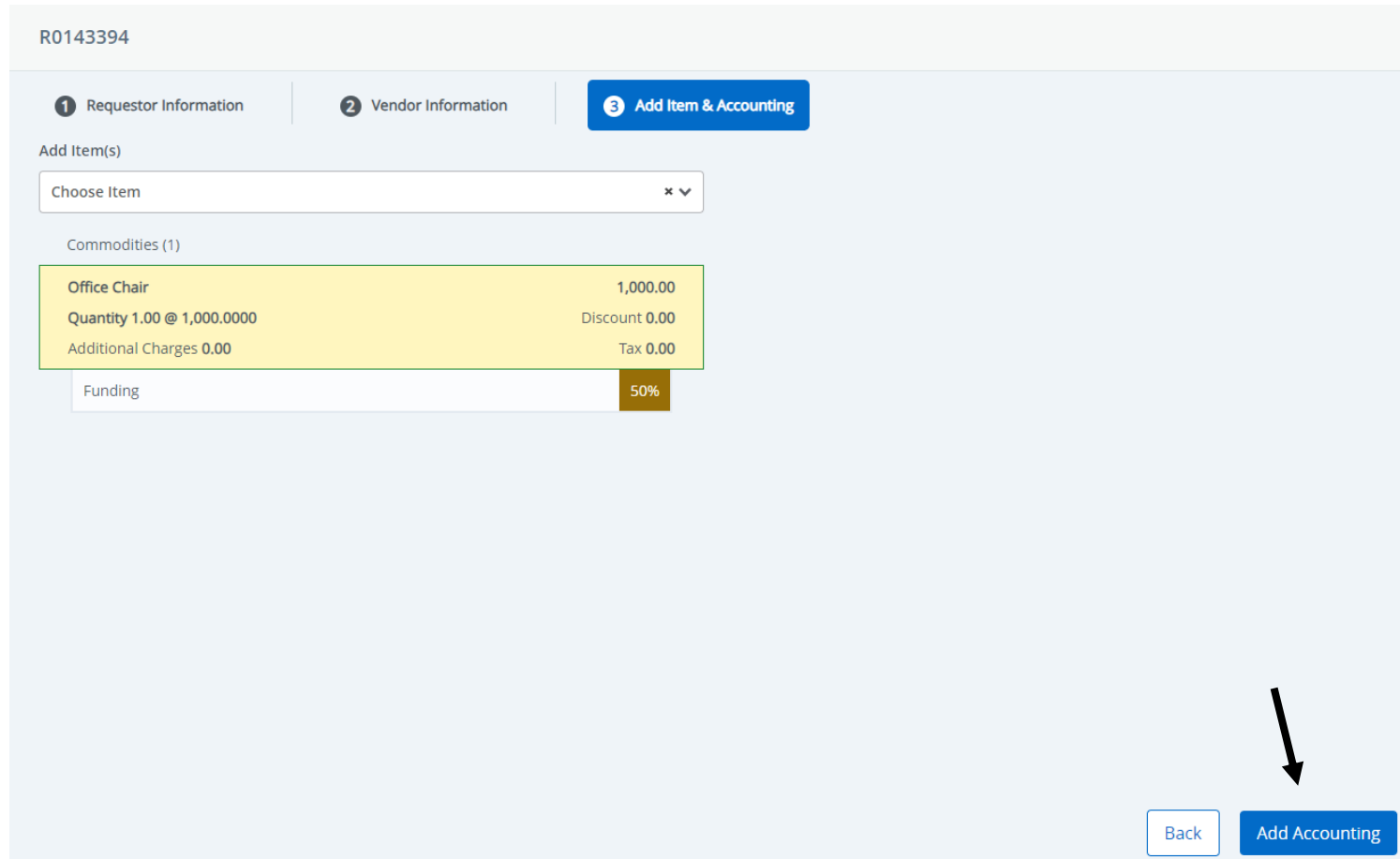
Choose Item x v

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\* Index Distribution Amount\* Distribution Percent\*  
8 BARTON COUNTY CO... x v Choose Index x v 500.00 50.00000000

Fund\* Discount Amount Additional Amount  
1111 GENERAL FUND x v 0.00 0.00

Organization\* Tax Amount  
6400 TECHNOLOGY DEPARTMENT x v 0.00

Account\* Distribution Total 500.00  
850110 COMPUTER EQUIPMENT x v

Program\* Activity Remaining 0.00  
600 INSTITUTIONAL SU... x v Choose Activity x v

Location Project  
Choose Location x v Choose Project x v

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

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

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

Buttons: 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  
Address: 245 NE 30 RD  
Great Bend KS 67530

Vendor: OPI - Office Products Incorporated (11284)  
Address: Attn: Connie  
1204 Main Street  
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
<b>Total Commodities</b>						1,000.00

Accounting Distributions

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

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

## My Finance



Hello Cloud,  
Create, edit and approve transactions and view financial information for department / organization.



### My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.



### My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



### Approve Documents

View list of documents pending approval. Approve, disapprove, or deny.



### Delete Finance Template

Delete templates for Finance Queries, Budget Development, and Purchase Orders.



### View Document

View draft, pending and completed documents with related information and approval history.

My Finance • View Document

## View Document

Document Type

Requisition



Document Search

Choose Document Number



Document Number \*

R0143394

VIEW DOCUMENT

APPROVALS & RELATED DOCUMENTS

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

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

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



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

**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
<b>Total Commodities</b>						1,000.00

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Loctn-Proj	NSF Suspend	NSF Override	Suspend	Distribution Percent	Net Amount
1	8 - 1111- 6400- 850110- 600- - -	No	No	No	100.0000	1,000.00
<b>Total Accounting Distributions</b>						1,000.00

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

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.







# Copying a Requisition

(Alternative to a requisition template)

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

## My Finance



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Create, view and share budget availability, encumbrance and payroll queries.



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### My Requisitions

Create and view draft, pending and completed requisitions and supporting documentation.



### View Document

View draft, pending and completed documents with related information and approval history.

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

My Finance • My Requisitions

My Requisitions  [Create Requisition](#)

Requisition	Date	Vendor	Amount	Status
Draft Requisitions <span>2</span>				
R0143399	10/12/2023	OPI - Office Products Incorporated	\$1,000.00	Draft
R0143396	09/22/2023	Visa Card Center	\$50.00	Draft
Pending Requisitions <span>0</span>				
Completed Requisitions <span>293</span>				
R0143391	09/22/2023	OPI - Office Products Incorporated	\$1,000.00	Assigned to Buyer ⓘ

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

R0143391 [View Attachments](#) [Copy Requisition](#)

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

Requestor Banner Test	Chart 8 BARTON COUNTY COMMUNITY COLLEGE	Organization 6400 TECHNOLOGY DEPARTMENT
Transaction Date 09/22/2023	Delivery Date 09/22/2023	Ship To Location BCCC 245 NE 30 RD Great Bend KS 67530
Requestor Email Bannerc@bartonccc.edu	Attention To Barton Community College	Tax Group --
Accounting Type Document level		

Comments

Public Comment  
This is a Test

Private Comment  
No private comments

Requestor Information

Requestor Summary

Requestor Number: R0143391

OPI - Office Products Incorporated (11284) Attn: Connie  
Great Bend KS 67530

Commodities (1)

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

Funding: 100%

Grand Total - All Commodities: 1,000.00

Grand Total - All Accounting: 1,000.00

[Back](#) [Next](#) [View as PDF](#)

- Click on Yes to copy the requisition.

My\_Finance • My\_Requisitions • R0143391

R0143391

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

**Requestor Information**

Requestor  
Banner Test

Transaction Date    Delivery Date  
09/22/2023    09/22/2023

Requestor Email  
Bannerc@bartonccc.edu

Accounting Type  
Document level

Comments

Public Comment  
This is a Test

Private Comment  
No private comments

**Vendor Information**

Chart    Organization  
8 BARTON COUNTY COMMUNITY COLLEGE    6400 TECHNOLOGY DEPARTMENT

Ship To Location  
BCCC  
245 NE 30 RD  
Great Bend KS 67530

Attention To    Tax Group  
Barton Community College    --

**Requisition Summary**

Requisition Number    R0143391

OPI - Office Products Incorporated (11284) Attn: Connie  
Great Bend KS 67530

Commodities (1)

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

Funding    100%

Grand Total - All Commodities    1,000.00

Grand Total - All Accounting    1,000.00

Back    Next    View as PDF

**Do you want to copy this requisition?**

No    Yes

- 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.

My\_Finance • My\_Requisitions • R0143399

✔ Requisition R0143391 copied successfully

R0143399

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number: R0143399

Requestor: Banner Test

Transaction Date: 10/12/2023 Delivery Date: MM/dd/yyyy

Requestor Email: Bannerc@bartonccc.edu

Accounting Type: Document level

Requisition Comments

Public Comment: This is a Test

Private Comment: Enter comments for the requisition

Chart: 8 BARTON COUNTY COMMUNITY COLLEGE

Organization: 6400 TECHNOLOGY DEPARTMENT

Ship To Location: BCCC

Attention To: Barton Community College Tax Group: Choose Tax Group

Ship To Location: Attention: Barton Community College  
245 NE 30 RD  
Great Bend KS 67530

Requisition Summary Save as draft

Requisition Number: R0143399

OPI - Office Products Incorporated (11284)  
Attn: Connie  
Great Bend KS 67530

Commodities (1)

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

Funding 100%

Grand Total - All Commodities 1,000.00

Grand Total - All Accounting 1,000.00



# Looking up a Requisition

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

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### View Document

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## View Document

Document Type

Requisition



Document Search

Choose Document Number



Document Number \*

Please Enter Document Number



VIEW DOCUMENT

APPROVALS & RELATED DOCUMENTS

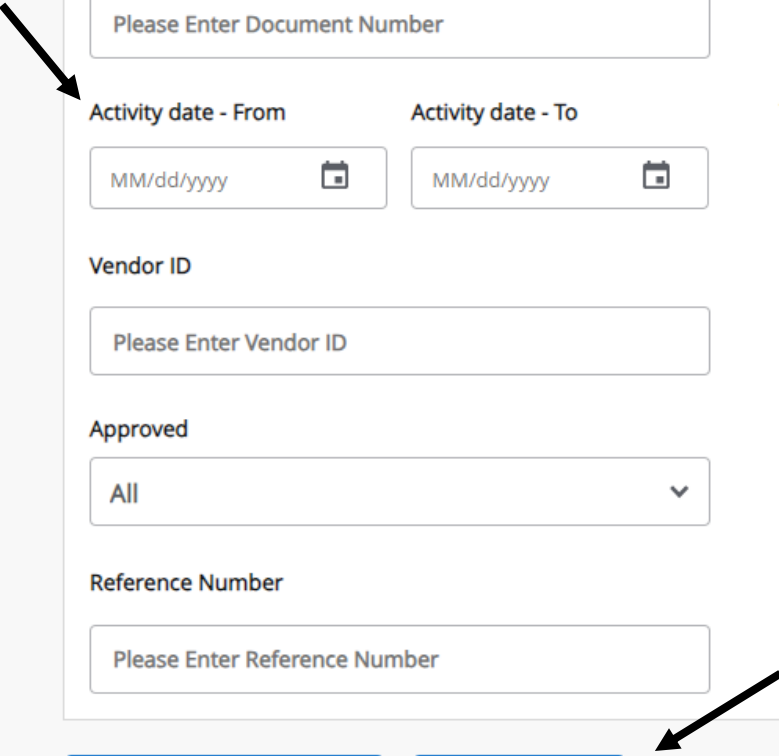
- Click on the Magnifying Glass to lookup the requisition, if you are unsure of what it is.

- 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.

My Finance • View Document • Look Up - Requisition

### Look Up - Requisition

Document Number	User ID		
<input type="text" value="Please Enter Document Number"/>	<input type="text" value="BANNERC"/>		
Activity date - From	Activity date - To	Transaction Date - Year	Transaction Date - Month
<input type="text" value="MM/dd/yyyy"/>	<input type="text" value="MM/dd/yyyy"/>	<input type="text" value="All"/>	<input type="text" value="All"/>
Vendor ID	Requestor		
<input type="text" value="Please Enter Vendor ID"/>	<input type="text" value="Please Enter Requestor"/>		
Approved	Completed		
<input type="text" value="All"/>	<input type="text" value="All"/>		
Reference Number			
<input type="text" value="Please Enter Reference Number"/>			



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

Lookup Results

Requisition - Lookup Results 2

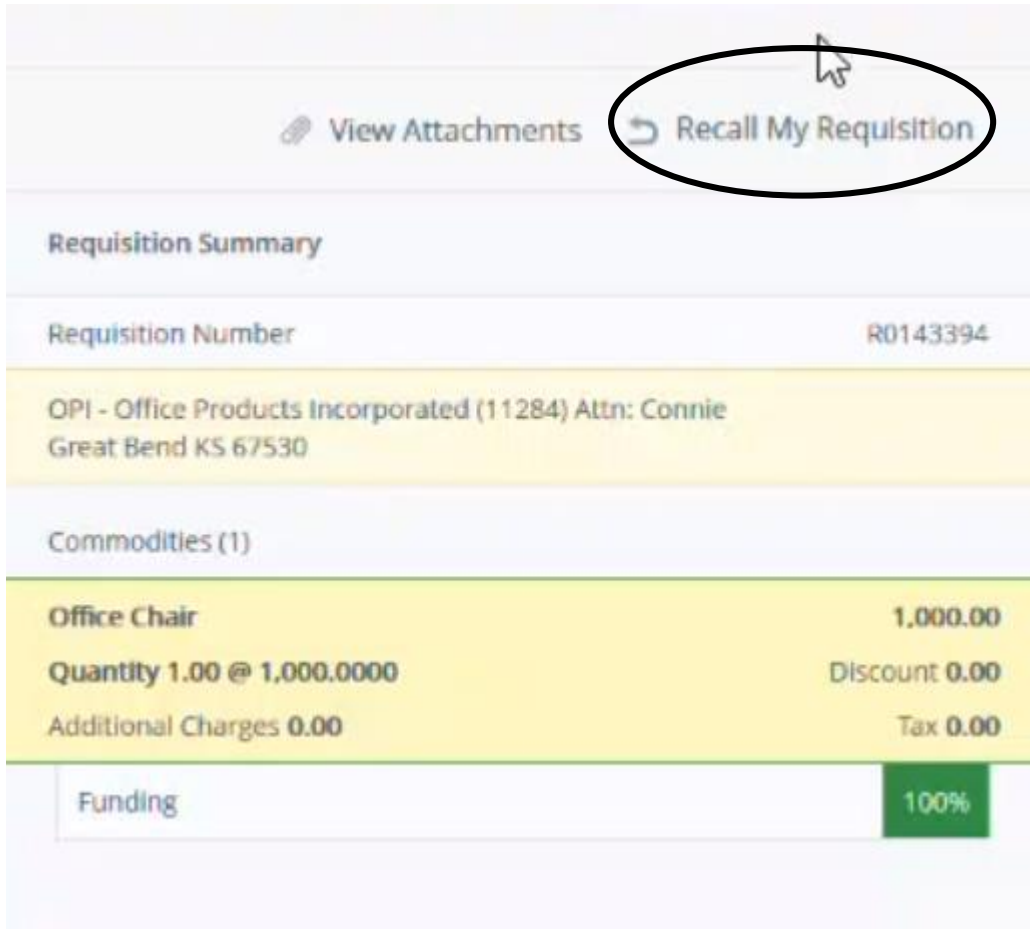
Document Number	User ID	Activity Date	Transaction Date	Vendor ID	Requestor	Approved	Completed	Reference Number
R0143394	BANNERC	10/10/2023	09/22/2023	11284	Put Your Name Here	No	Yes	-
R0143398	BANNERC	10/11/2023	10/11/2023	15576	BannerC ARM	No	Yes	-

[BACK TO VIEW DOCUMENT](#) [ANOTHER QUERY](#)

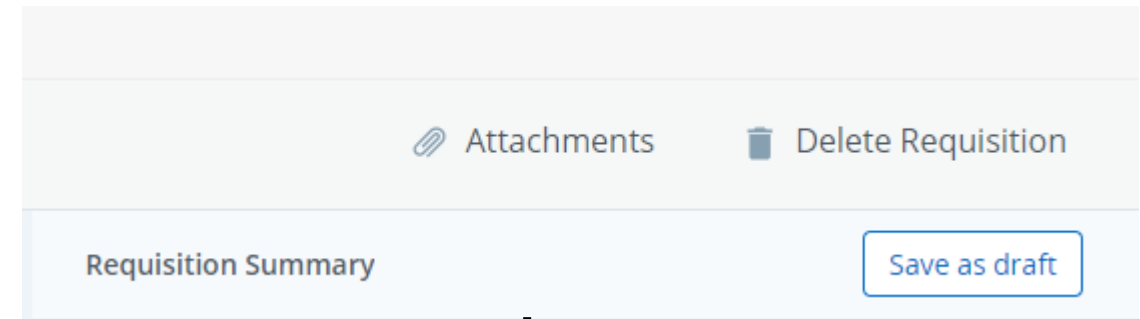


# Tips

- **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.



A screenshot of a web application interface for requisitions. At the top right, there are two buttons: "View Attachments" and "Recall My Requisition". The "Recall My Requisition" button is circled in black, and a mouse cursor is hovering over it. Below the buttons is a "Requisition Summary" section. It includes the "Requisition Number" R0143394 and the vendor information "OPI - Office Products Incorporated (11284) Attn: Connie Great Bend KS 67530". Under "Commodities (1)", there is one item: "Office Chair" with a quantity of 1.00 at a price of 1,000.00. Below this, it shows "Additional Charges 0.00" and "Tax 0.00". At the bottom, there is a "Funding" section with a green bar indicating "100%".



A screenshot of a web application interface for requisitions. At the top right, there are two buttons: "Attachments" and "Delete Requisition". Below these is a "Requisition Summary" section with a "Save as draft" button.

- **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.