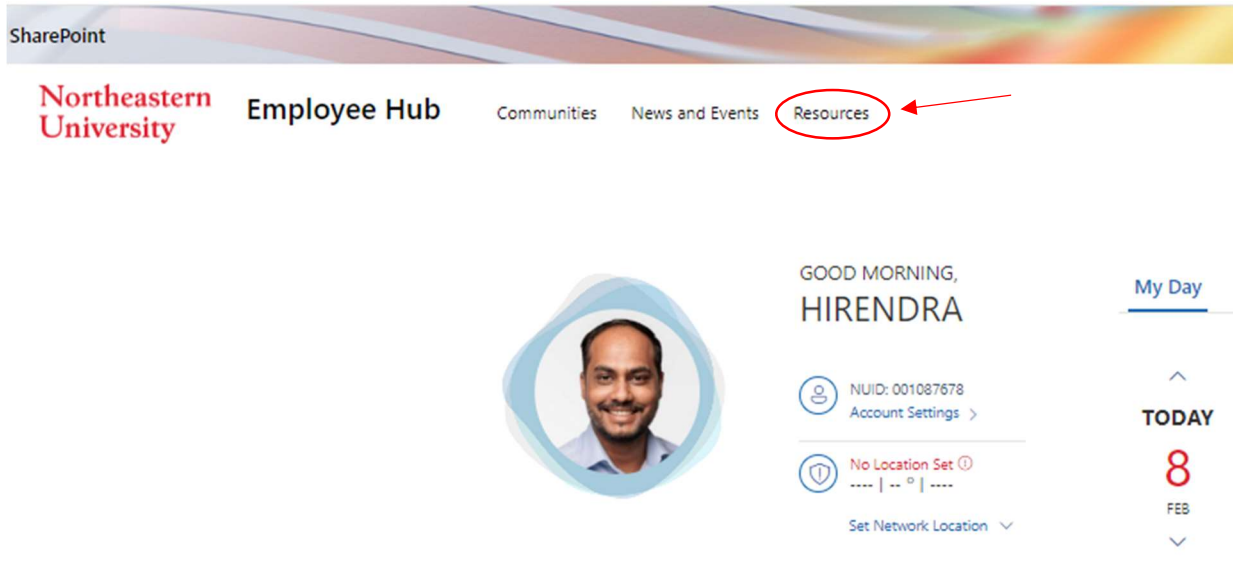


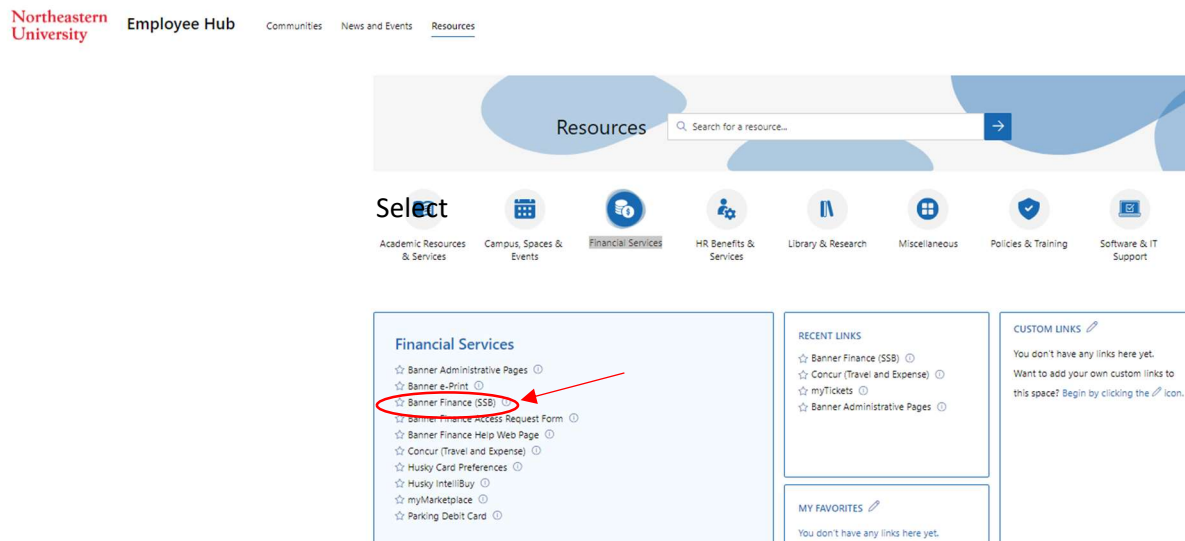
Requisition Creation in Banner

Actions:

- a) Open Employee Hub and click on **Resources**:



- b) Under Resources go to Financial Services and click on **Banner Finance (SSB)** option:



- c) It will open up the Homepage of Banner SSB Menu. Click on Finance. You can access **Banner Finance (SSB)** using following link as well: **[Banner Finance \(SSB\)](#)**

Main Menu

Select

[Employee and Students](#)
Time sheets, time off, benefits, leave or job data, paystubs, W2 and T4 forms, W4 data.

[Finance](#) ←

Create or review financial documents, budget information, approvals.

RELEASE: 8.9.1.3

© 2022 Ellucian Company L.P. and its affiliates.

d) Click on [Requisitions](#) link:

Finance

[Budget Queries](#)

[Encumbrance Query](#)

[Requisition](#) ← Select

[Purchase Order](#)

[Approve Documents](#)

[View Document](#)

[Budget Transfer](#)

[Multiple Line Budget Transfer](#)

RELEASE: 8.9.1.3

© 2022 Ellucian Company L.P. and its affiliates.

e) It will open REQUISITION Homepage. Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Use [Code lookup](#) feature (it is at bottom side of the current page) to find Vendor details:

Requisition

Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and se commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select the Item number link to add item text for a commodity.

Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for process completion.

Search In Process Requisitions

Use Template:

Transaction Date:

Delivery Date:

[Vendor ID](#)

Address Type: Address Sequence:

Seq#	Chart	Index	Fund	Orgn	Account	Pro
1						
2						
3						
4						
5						

Save as Template

Shared

Validate Complete Save

Code Lookup

Chart of Accounts Code

Type vendor

Code Criteria

Title Criteria

Maximum rows to return 10

Execute Query

f) Enter the name of Vendor in Title Criteria. Use % sign at the beginning and end of the vendor's name as shown below. Leave Code Criteria blank. After filling out the required info hit **Execute Query** option:

Code Lookup

Chart of Accounts Code N

Type vendor

Code Criteria

Title Criteria %Beacon hill staffing%

Maximum rows to return 10

Execute Query

[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#)]

g) After hitting the Execute Query, The Vendor results will be shown as following. Copy the **Vendor ID** from the results:

Locate the desired value from the code lookup results list and type that value into the applicable field.

Vendor ID

Hold	Vendor ID	Name
No	Z00089053	Beacon Hill Staffing Group LLC


Search In Process Requisitions

Use Template None


Retrieve

Note: If there are no records found for the Vendor name/Keyword you are looking for; please leave it blank and send a latest W9 copy with REQ number to procurement.

h) Paste the **Vendor ID** in the given field and hit **Vendor Validate** option. It will auto populate rest of the details. Please verify the Vendor details and make sure those are correct.

Transaction Date 26 ▾ SEP ▾ 2022 ▾
Delivery Date 26 ▾ SEP ▾ 2022 ▾
Vendor ID Z00089053 **Vendor Validate**  Click
Address Type PO **Address Sequence** 1
Vendor Contact **Vendor E-mail**
Vendor Name Beacon Hill Staffing Group LLC
Vendor Address 152 Bowdoin St
 Boston MA 02108
Fax Number

i) Submit your email address and verify the auto populated fields. Use code NU if you don't know the **ship code**.

Requestor Name Hirendra Tandekar
Requestor E-mail h.tandekar@northeastern.edu
Area Code **Phone Number** **Extension**
Requestor Phone
Requestor Fax
Chart of Accounts N **Organization** 158000
Currency Code USD ▾ **Discount Code** 09 ▾  Insert ship Code
Ship Code **Attention To** Hirendra Tandekar
Comments **Document Text**

j) For filling out the **Commodity Details**, leave commodity code blank and fill out rest of the details. For U/M section choose EA from the drop-down menu as following. After completing the table hit **commodity Validate**.

Item	Commodity Code	Commodity Description	U/M	Quantity	Unit Price	Additional Amount
1	<input type="text"/>	Supply Chain Management Member	EA ▾	1	12000	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	None ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	None ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	None ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	None ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>

Commodity Validate  Click

k) After clicking on commodity Validate option, the second Commodity table will be auto populated as following:

Calculated Commodity Amounts

Item	Extended Amount	Discount Amount	Additional Amount	Net Amount
1	12,000.00	0.00		12,000.00
2				
3				
4				
5				
Totals:	12,000.00	0.00	0.00	12,000.00

l) For filling out the accounting info use following **two step** process to complete it:

- Step 1:** fill out N in Chart field. Insert **Index number** in Index field. After filling out these two sections hit **validate**.

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	N	224020							
2									
3									
4									
5									

Save as Template

Shared

Validate Complete Save In Process

Click

- Step 2:** After validation, some fields will be auto populated. Fill out rest of the details like Account number and **accounting info**. Select Dollars instead of Percent.

Dollars Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	N		200000	158000	74210	5020			12000
2									
3									
4									
5									

m) After filling out all the required info, hit **complete** option:

Save as Template

Shared

Validate Complete Save In Process

Click

- Upon final submission, the **REQ number** will be shown in the popup message as following. Copy the REQ number for reference:

Search In Process Requisitions

- ✓ Document Validated with no errors
- ✓ Document R0086718 completed and forwarded to the Approval process

REQ Number

Another Requisition, Same Vendor

Another Requisition, New Vendor

Use Template

Retrieve

o) Once submitted, it will be sent out for **departmental approval**. You can check the approval status via the following link:

https://northeastern-my.sharepoint.com/:w:/g/personal/s_bangar_northeastern_edu/EaW9q1oCat9Cjade-MaICCBx0-u6mLkKBgc_tBzNaI9Ag?e=JS6Lyd

Document Identification

Document Number	R0086718	Type	Requisition
Originator:	N001087678	Hirendra Tandekar	

Approval Status

Approvals required

Queue	Description	Level	Approvers
1201	PROCUREMENT SERVICES	1000	
			Michael J. Mallon
1201	PROCUREMENT SERVICES	3000	
			Michael J. Mallon

✓ No approvals have been recorded for this document