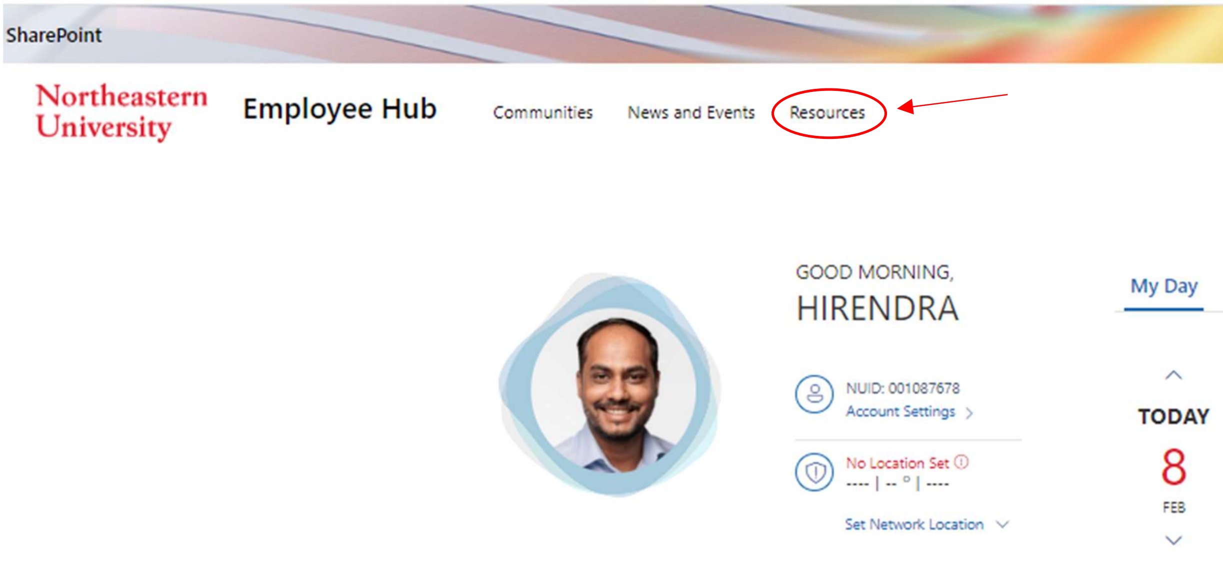
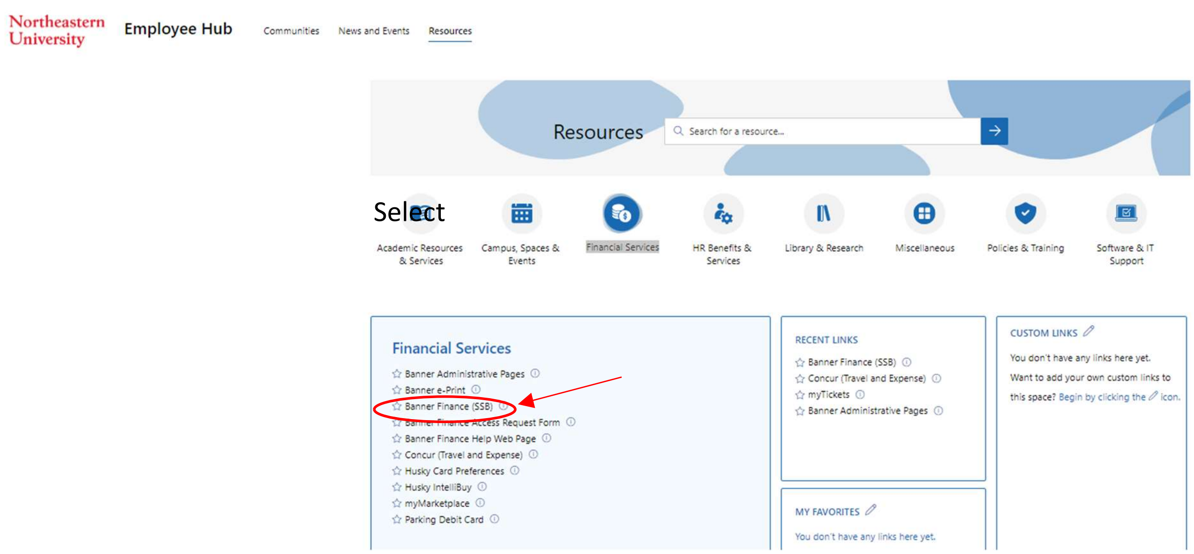
Requisition Creation in Banner

Actions:

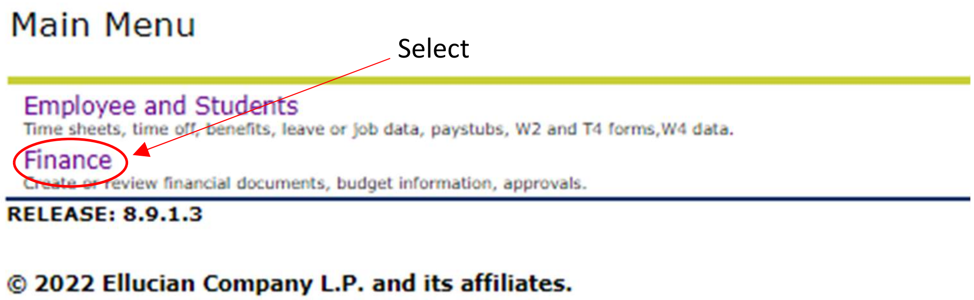
a) Open Employee Hub and click on **Resources**:



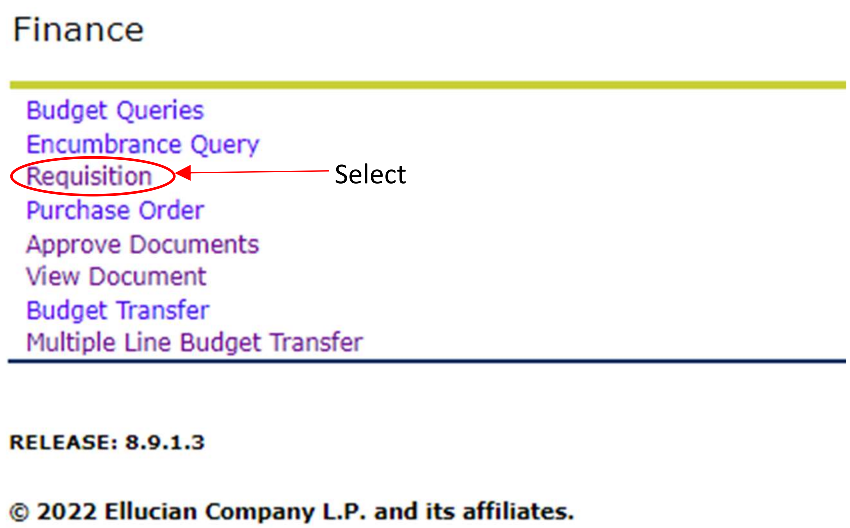
b) Under Resources go to Financial Services and click on **Banner Finance (SSB)** option:



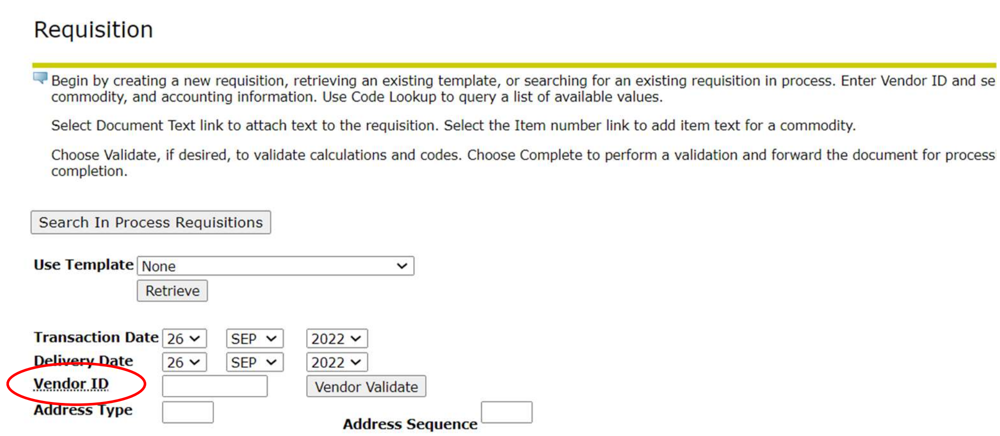
c) It will open up the Homepage of Banner SSB Menu. Click on Finance. You can access **Banner Finance (SSB)** using following link as well: **Banner Finance (SSB)**

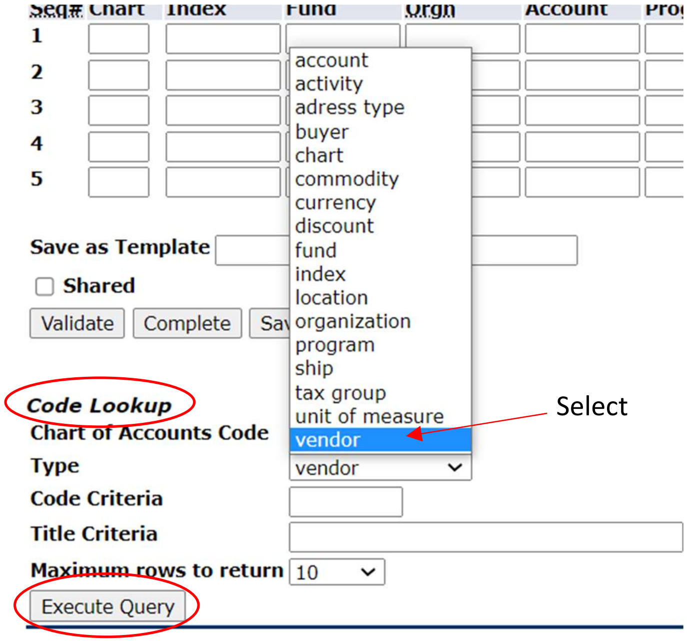


d) Click on **Requisitions** link:

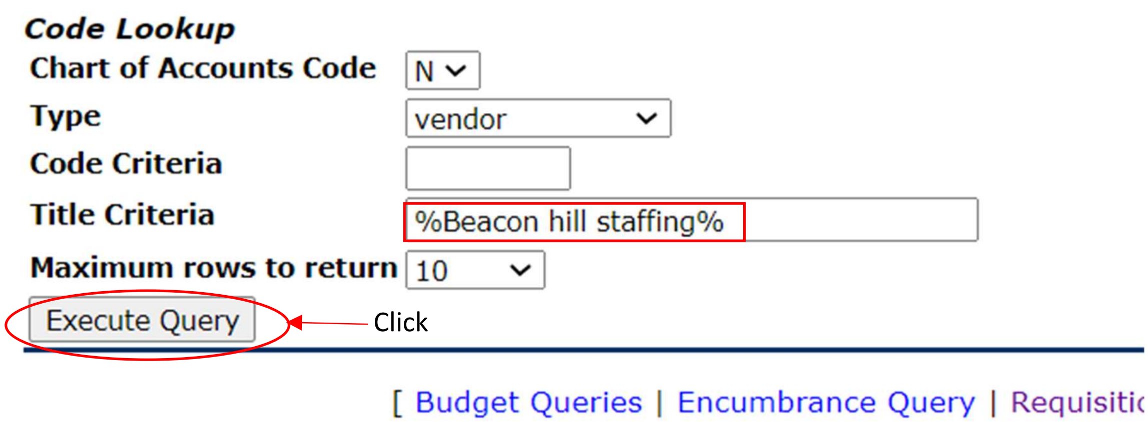


e) It will open REQUISITION Homepage. Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Use **Code lookup** feature (it is at bottom side of the current page) to find Vendor details:

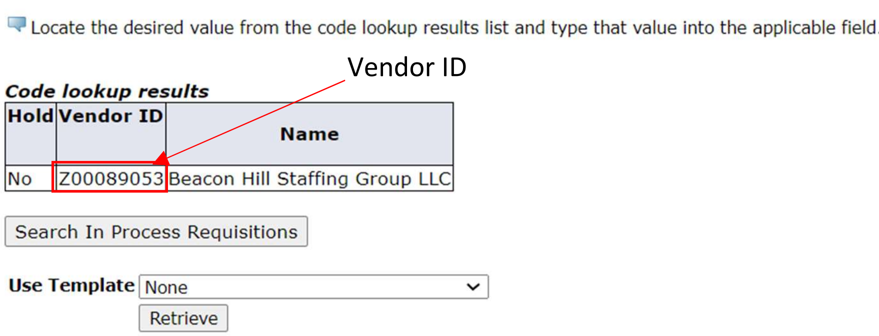




f) Enter the name of Vendor in Title Criteria. Use **% sign** at the beginning and end of the vendor's name as shown below. Leave Code Criteria blank. After filling out the required info hit **Execute Query** option:

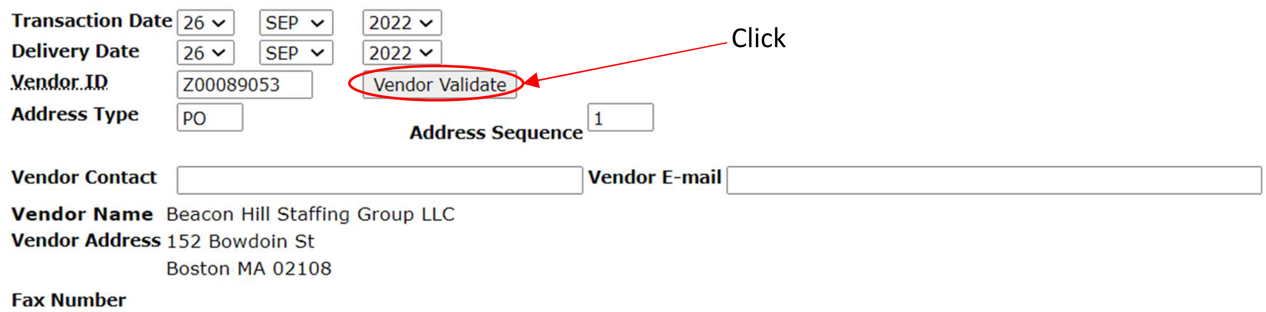


g) After hitting the Execute Query, The Vendor results will be shown as following. Copy the **Vendor ID** from the results:

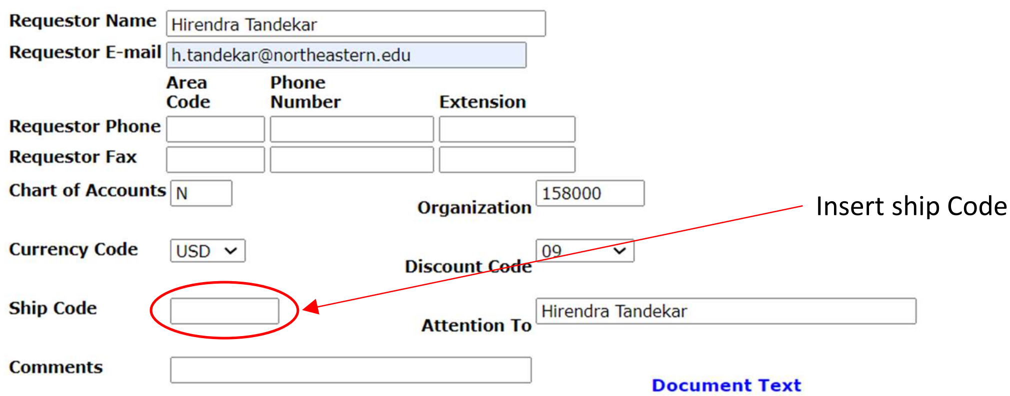


Note: If there are no records found for the Vendor name/Keyword you are looking for; please leave it blank and send a latest W9 copy with REQ number to procurement.

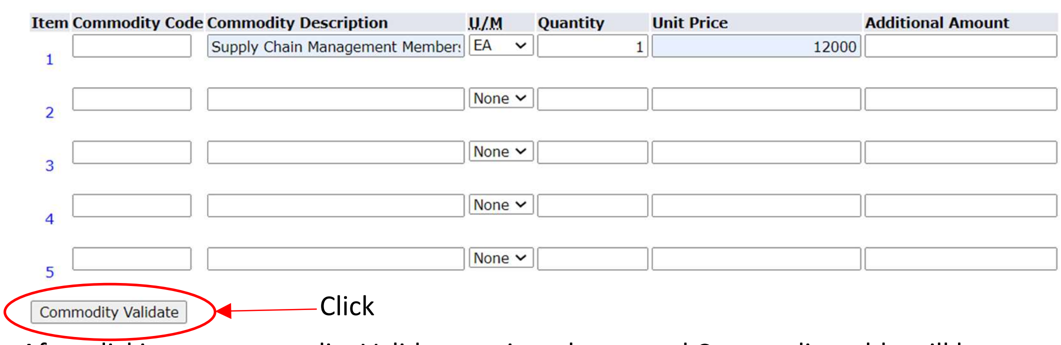
h) Paste the **Vendor ID** in the given field and hit **Vendor Validate** option. It will auto populate rest of the details. Please verify the Vendor details and make sure those are correct.



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



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**.



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:

1. **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

2. **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:

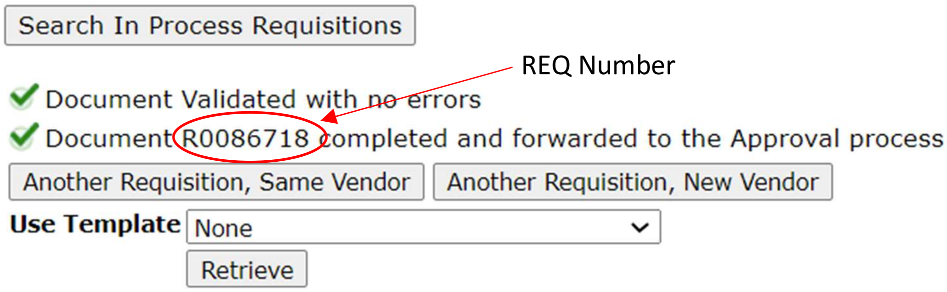
Save as Template

Shared

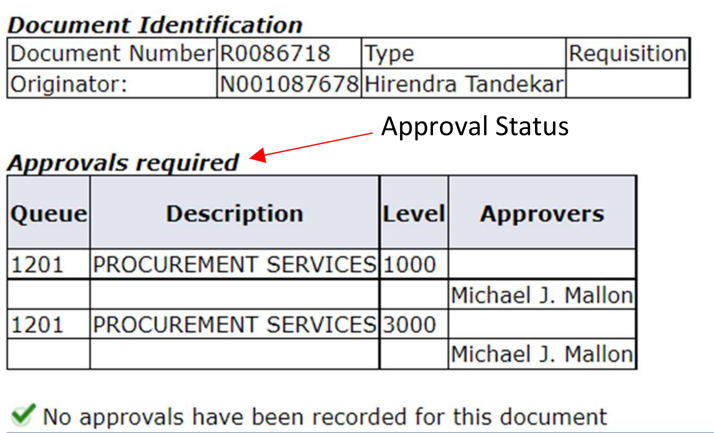
Validate Complete Save In Process

Click

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



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-MaICCMBx0-u6mLkKBgc_tBzNal9Ag?e=JS6Lyd



Document Identification

Document Number	R0086718	Type	Requisition
Originator:	N001087678	Hirendra Tandekar	

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