



Feather River College

Banner 9 Finance Self Service User Guide

03.21.2023

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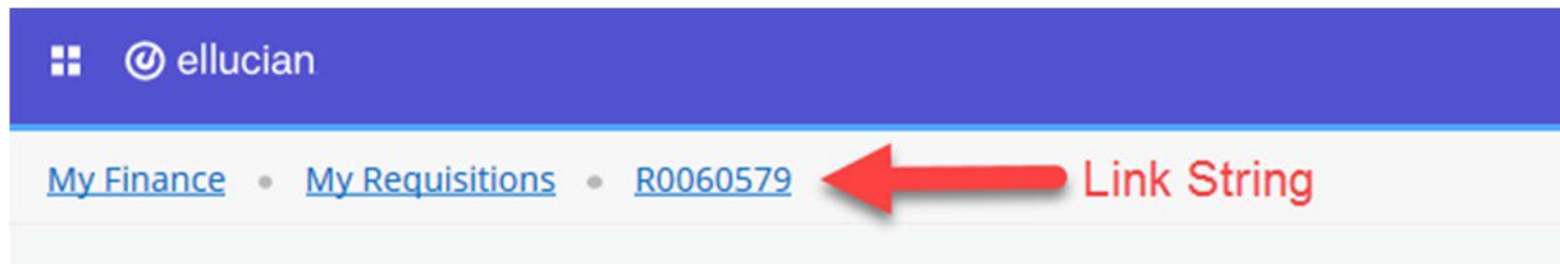
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Overview

- Banner 9 Self Service will allow Users to create and submit Requisitions in a more convenient and user-friendly environment.
- Users will be able to follow the status of Requisitions and view all related documents in Self Service. The idea is to create a unified “hub” that Users can access quickly.
- Banner 9 Self Service will also enable Users to create custom queries, which can then be saved and accessed again with one click.

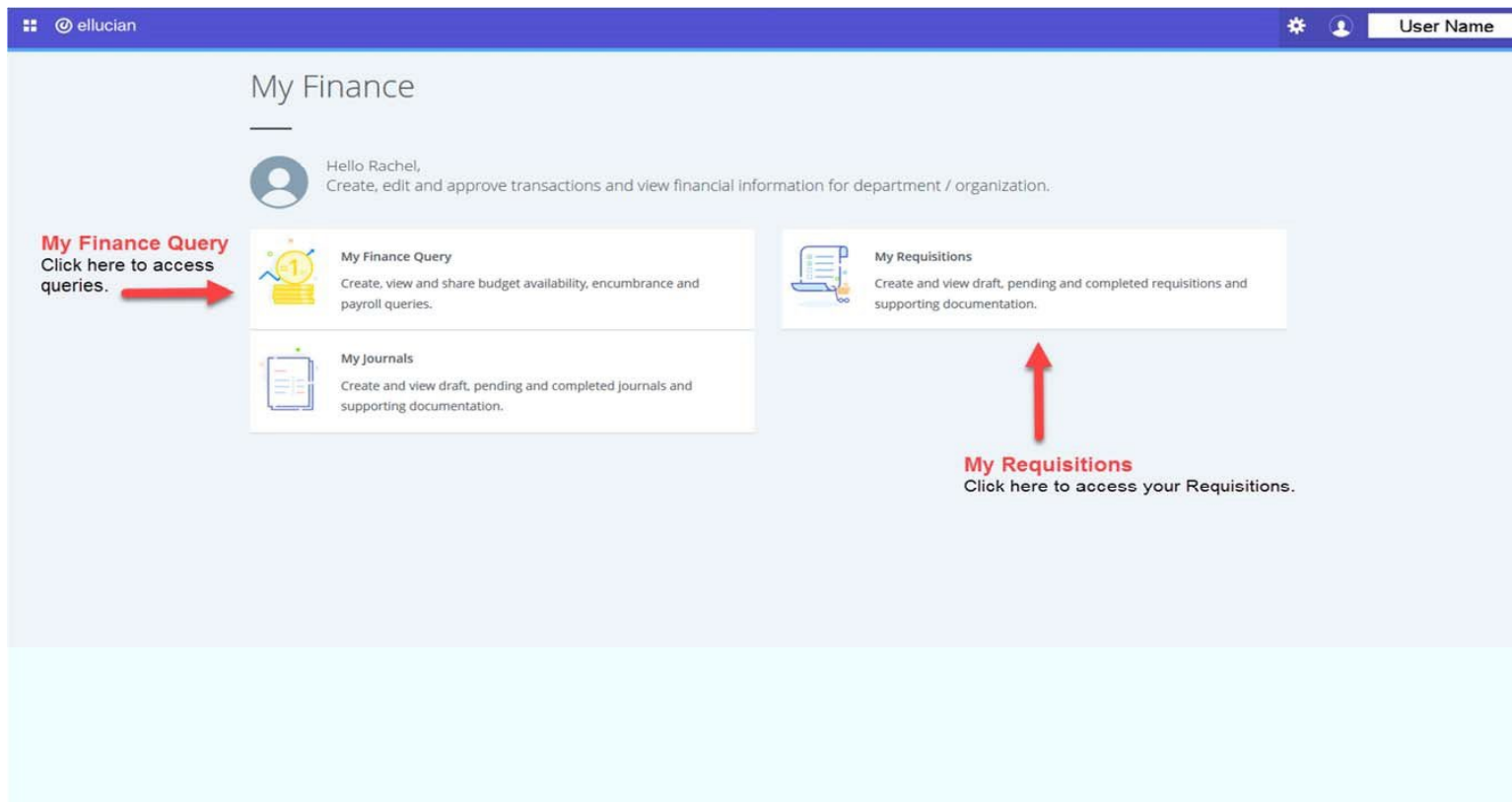
Navigation in Self Service

- Banner 9 Self Service is **mouse-heavy**. Users are strongly encouraged to abandon keystrokes in favor of **mouse clicks**. Users will not be able to “tab” through modifiable fields as they did in Banner 8 Self Service.
- When creating Requisitions, the **Next button** is the only way to move from screen to screen (**Requestor Information**, **Vendor Information**, and **Add Item & Accounting screens** are NOT clickable).
- The easiest way to navigate Banner 9 Self Service is to utilize the **Link String**, which is located just below the blue Ellucian bar (**see below**):



My Finance Dashboard

- This is the first screen the User will see once they are logged in.
- Click **My Finance Query** to access Queries.
- Click **My Requisitions** to access Requisitions.



My Requisitions Dashboard

- Requisitions will be sorted into **3 categories: Completed, Pending, and Draft**.
 - Click on the **View More link** to see the full list in each category.
- There is also a **Search bar** that allows Users to locate Requisitions. Type in the **Requisition Number** or the **Vendor Name** (not case sensitive) and press **Enter**.

My Requisitions

Search Bar →



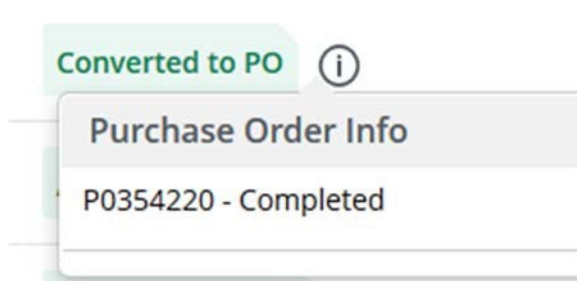
Create Requisition

Requisition	Date	Vendor	Amount	Status
Draft Requisitions (7)				
R0060937	05/18/2019	Office Depot Inc	\$100.00	Draft
R0060936	05/18/2019	Barnes & Noble College Booksellers LLC #8108	\$64,650.00	Draft
				View More → View More
Pending Requisitions (5)				
R0060929	05/15/2019	Grainger	\$5.39	In Approval ⓘ
R0060921	05/10/2019		\$26.94	In Approval ⓘ
				View More
Completed Requisitions (28)				
R0060471	03/01/2019	Club Colors	\$632.66	Assigned to Buyer ⓘ
R0060631	02/27/2019		\$126.36	Assigned to Buyer ⓘ
				View More

Types of Requisitions

Completed Requisitions are Requisitions that have been approved. The **Status** will as “Converted to PO.”

“Converted to PO”: The Requisition has been assigned to a Buyer and a PO has been completed. Click on the **Information icon** to obtain the PO Number.



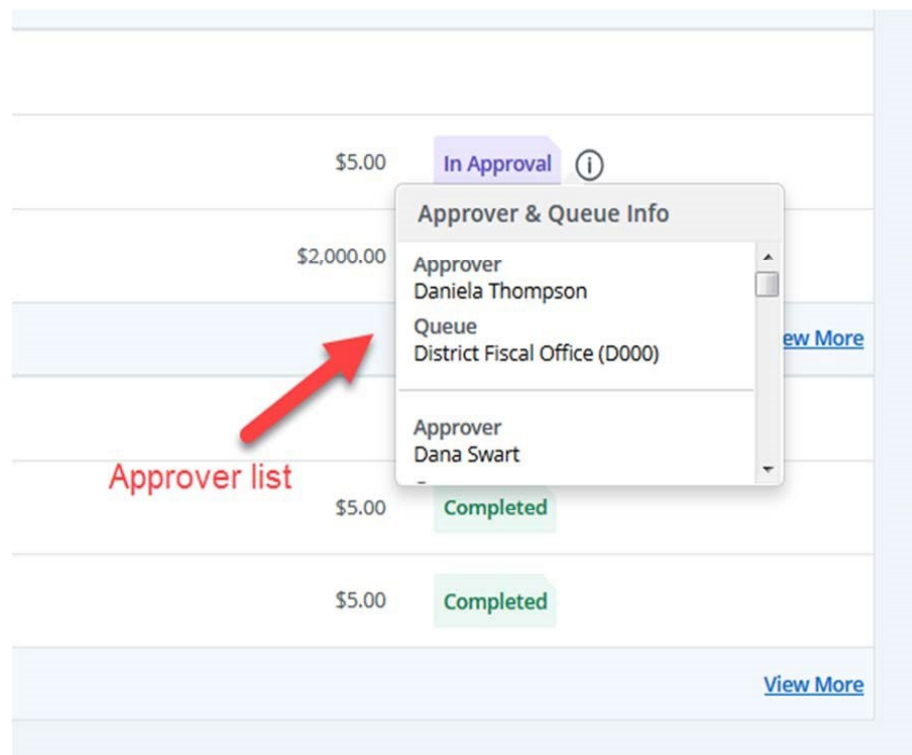
Pending Requisitions are Requisitions that have been completed and submitted for approval. The **Status** will show “In Approval.”

TIP: Click on the **View More** link to see all Pending Requisitions. From this screen, Pending Requisitions can be sorted by Requisition Number, Date, Vendor, Amount, or Status. The User can also use the **Search bar** to find a Requisition by typing in the **Requisition Number** or the **Vendor Name**.

Pending Requisitions					
				<input type="text" value="Search Requisition"/>	Create Requisition
Requisition	Date	Vendor	Amount	Status	
← Pending Requisitions 14					
R0060549	05/17/2019	24/7 Customer Canada Inc	\$5.00	In Approval	i
R0060563	05/21/2019	Art Supply Warehouse	\$5.00	In Approval	i
R0060566	05/21/2019	Graybar Electric	\$5.39	In Approval	i
R0060567	05/21/2019	Home Depot	\$2.00	In Approval	i
R0060564	05/21/2019	Lytle Screen Printing Inc	\$5.00	In Approval	i
R0060571	05/22/2019	Office Depot Inc	\$10,000.00	In Approval	i
R0060565	05/21/2019	Office Depot Inc	\$2.16	In Approval	i
R0060547	05/17/2019	Office Depot Inc	\$5.00	In Approval	i


To see the full list of approvers, click on the **Information icon**.

TIP: As the Requisition gets approved, the list will get shorter (each approver is removed from the list once they approve the Requisition).



Draft Requisitions are Requisitions that the User has started, but have not been completed or submitted for approval. **Clicking on the Requisition** will redirect the User to the **Requestor Information screen**. The Requisition can now be edited and submitted for approval.

TIP: Click on the **View More link** to see all Draft Requisitions. From this screen, Draft Requisitions can be sorted by Requisition Number, Date, Vendor, Amount, or Status. The User can also use the **Search bar** to find a Requisition quickly by typing in the **Requisition Number** or the **Vendor Name**.

Draft Requisitions					<input type="text" value="Search Requisition"/> 		Create Requisition
Requisition	Date	Vendor	Amount	Status			
← Draft Requisitions 8							
R0060570	05/22/2019	24/7 Customer Canada Inc	\$1.00	Draft			
R0060560	05/18/2019	Office Depot Inc	\$100.00	Draft			
R0060556	05/18/2019	Barnes & Noble College Booksellers LLC #8108	\$48.46	Draft			
R0060550	05/17/2019	Smart & Final Stores LLC	\$5.00	Draft			
R0060548	05/17/2019	Office Depot Inc	\$0.00	Draft			
R0060546	05/16/2019	Spicers Paper Inc	\$1,000.00	Draft			
R0060543	05/16/2019	24 Hour Fitness USA Inc	\$5.00	Draft			
R0060534	05/15/2019	Office Depot Inc	\$809.85	Draft			

Creating Requisitions

1. To create a new Requisition, click the **Create Requisition** button located in the **My Requisitions** dashboard.
2. On the **Requestor Information** screen, the User's information will be auto-filled.

My Finance • My Requisitions

My Requisitions

Search Requisition

Create Requisition

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 5				
R0060550	05/17/2019	Smart & Final Stores LLC	\$5.00	Draft
R0060548	05/17/2019	Office Depot Inc	\$0.00	Draft
View More				
Pending Requisitions 8				
R0060549	05/17/2019	24/7 Customer Canada Inc	\$5.00	In Approval ⓘ
R0060547	05/17/2019	Office Depot Inc	\$5.00	In Approval ⓘ
View More				
Completed Requisitions 26				
R0060417	02/11/2019	Honeybaked Ham Inc	\$2,593.44	Assigned to Buyer ⓘ
R0060081	01/15/2019	Something Better Corp	\$1,504.99	Assigned to Buyer ⓘ
View More				

3. NOTE: The Accounting Type in Banner 9 Self Service will default to Commodity Level Accounting. This is intentional (see Requisitioning Tips section for more information).
4. Enter the **Delivery Date** and **Attention To** information.
5. Use the **Public Comment** field to enter notes to Vendors (if needed).
6. Use the **Private Comment** field to enter internal notes to Purchasing (if needed).
7. Click **Next** to access the **Vendor Information** screen.

The screenshot displays the 'Requestor Information' tab of a Banner 9 Self Service requisitioning form. The form is for requisition number R0060556. Key fields include: Requisition Number (R0060556), Requestor (Rachel Duhamel), Transaction Date (05/18/2019), Delivery Date (06/30/2019), Requestor Email (RDUHAMEL@CCCD.EDU), and Accounting Type (Commodity Level Accounting). Dropdown menus are present for Chart (D CCCD New Chart D), Organization (425050 Purchasing), Ship To Location (DIS), and Attention To (Purchasing). A Tax Group dropdown is set to CALT California Tax Group. A yellow callout box provides the address for Purchasing: Coast Comm College District, 1370 Adams Ave, Costa Mesa CA 92626. Text areas for Public and Private comments are also visible. The 'Next' button is highlighted in blue, indicating the next step in the process.

8. The Requisition will now be assigned a **Requisition Number**, which can be seen in the top left corner on the **Vendor Information** screen.
9. To select a Vendor, click on the **Choose Vendor** box. The User can either scroll through the list and click on the Vendor OR type the Vendor Name and wait until the Vendor appears in the drop-down list.

My Finance • My Requisitions • R0060556

R0060556

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

☐ Choose vendor for me:

Vendor

Choose Vendor

Barnes

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com Costa Mesa CA 92626-5429

Barnes & Noble College Booksellers LLC #8109 (C02445686)
GWC Email: ttruong@gwc.cccd.edu Costa Mesa CA 92626-5429

Barnes & Noble College Booksellers LLC #8110 (C02445687)
dcisneros15@coastline.edu Costa Mesa CA 92626-5429

Barnes & Noble Inc (C02000194)

Requisition Summary

Requisition Number R0060556

Save as draft

Back Next View as PDF Submit Requisition

10. Once the Vendor has been selected, it will appear in a yellow box.
11. To change the Vendor, click on the small “X” in the **Choose Vendor box** and re-select a different Vendor.
12. Click **Next** to access the **Add Item & Accounting screen**.

My Finance • My Requisitions • R0060556

R0060556 [Attachments](#) [Delete Requisition](#)

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

☐ Choose vendor for me

Vendor

Barnes & Noble College Booksellers LLC #8108 (C02445593) x v

Vendor Information

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com
1370 Adams Ave
Costa Mesa CA 92626-5429

Vendor Email

SM8108@bncollege.com x v

Discount

30 Net 30 Days x v

Currency

USD United States Dollars x v

Requisition Summary [Save as draft](#)

Requisition Number R0060556

Back Next View as PDF Submit Requisition

✓ Vendor has been selected

Entering Line Item Requisitions

1. On the **Add Item & Accounting** screen, the **Choose Item box** will appear.
2. For **Line Item Orders**, click on the **Choose Item box** and type in the Item Information (up to 50 characters including spaces) **using the required format established by Purchasing.**
3. Once the Item has been entered, click **(Add as new item)** from the drop-down list.

My Finance > My Requisitions > R0060556

R0060556

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Book, "A Guide to US History, 3rd Edition," ISBN: |

Book, A Guide to US History, 3rd Edition, ISBN: (Add as new item)

Type in Item Information

Then click on (Add as new item)

Requisition Summary

Save as draft

Requisition Number: R0060556

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com
Costa Mesa CA 92626-5429

Back View as PDF Submit Requisition

4. If the User was unable to enter all of the Item Information on the previous screen, the rest of the Item Information must be entered in the **Public Comment field**.
5. Select the **Unit of Measure** from the drop-down list.
6. If applicable, enter Shipping/Freight charges in the **Additional Amount box**.
7. Click **Add Accounting**.

My Finance • My Requisitions • R0060556

R0060556 [Attachments](#) [Delete Requisition](#)

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

Commodity Description
Book, A Guide to US History, 3rd Edition,

Unit Of Measure* Tax Group*
Choose Unit Of Measure ▾ CALT California Tax Group ▾

Quantity* Unit Price*
0.00 0.0000

(Quantity) X (Unit Price) USD 0.00

Discount Amount Additional Amount
0.00 0.00

Tax Amount
0.00

Commodity Item Total USD 0.00

Commodity Comments
Public Comment
ISBN: 1234567890000, Item #ABCD

Private Comment
Enter comments for the commodity item

Requisition Summary [Save as draft](#)

Requisition Number R0060556

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com
Costa Mesa CA 92626-5429

Enter more Item Information here

Enter Shipping/Freight here

[Back](#) [Add Accounting](#) [View as PDF](#) [Submit Requisition](#)

8. Select the FOAPAL by using **each corresponding drop-down list (Activity, Location, and Project are not required fields and should only be selected when applicable).**
9. The User can either scroll through each list and click on the number, OR type the number and wait until the number appears in the drop-down list.
10. Once the FOAPAL has been selected, click **Save**.

My Finance • My Requisitions • R0060556 • Book, A Guide to US Histo...

Book, A Guide to US History, 3rd Edition, Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number (R0060556) Currency USD

Chart * Index

D CCCD New Chart D * Choose Index

Fund *

Choose Fund

Organization *

425050 Purchasing *

Account *

Choose Account

Program * Activity

Choose Program Choose Activity

Location Project

Choose Location Choose Project

Distribution Amount * 44.97 Distribution Percent * 100.00000000

Discount Amount 0.00 Additional Amount 0.00

Tax Amount 3.49

Distribution Total 48.46

Remaining 0.00

Requisition Summary Save as draft

Requisition Number R0060556

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com
Costa Mesa CA 92626-5429

Commodities (1)

Book, A Guide to US History, 3rd Edition,	48.46
Quantity 3.00 @ 14.9900	Discount 0.00
Additional Charges 0.00	Tax 3.49

Accounting Total 0.00

Commodity Total 48.46

Balanced 0%

Grand Total - All Commodities 48.46

Grand Total - All Accounting 0.00

Back Save View as PDF Submit Requisition

11. The **Add Item & Accounting** screen will now refresh and show the **Funding bar** and the **Requisition Summary**. The **Funding bar** indicates that all of the funds have been applied to the FOAPAL and that the Requisition is balanced.

12. To add another Item to the Requisition, **repeat Steps 2 through 11.**
13. The User may now choose to **Save as draft, View as PDF, or Submit Requisition.**

The screenshot shows a requisition form with three tabs: 1 Requestor Information, 2 Vendor Information, and 3 Add Item & Accounting. The 'Add Item & Accounting' tab is active. It contains a 'Choose Item' dropdown, a 'Commodities (1)' section with a table for 'Book, A Guide to US History, 3rd Edition', and a 'Funding' bar. A red arrow points to the 'Funding bar' label. To the right, a 'Running Summary' section is shown with a red arrow pointing from the text 'Running Summary' to the summary table. The summary table includes 'Requisition Summary' with a 'Save as draft' button, 'Requisition Number' R0060936, vendor information for Barnes & Noble College Booksellers LLC, and a 'Grand Total' of 48.46. At the bottom, there are buttons for 'Back', 'View as PDF', and 'Submit Requisition'.

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

Add Item(s)

Choose Item

Commodities (1)

Book, A Guide to US History, 3rd Edition,	48.46
Quantity 3.00 @ 14.9900	Discount 0.00
Additional Charges 0.00	Tax 3.49

Funding 100%

Running Summary →

Requisition Summary [Save as draft](#)

Requisition Number R0060936

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com
Costa Mesa CA 92626-5429

Commodities (1)

Book, A Guide to US History, 3rd Edition,	48.46
Quantity 3.00 @ 14.9900	Discount 0.00
Additional Charges 0.00	Tax 3.49

Funding 100%

Grand Total - All Commodities 48.46

Grand Total - All Accounting 48.46

[Back](#) [View as PDF](#) [Submit Requisition](#)

Submitting a Requisition

1. To submit a Requisition, click on the **Submit Requisition button** on the **Requisition Summary screen**.
2. If there are not enough funds in the chosen FOAPAL, **a warning message will appear**.
The User will be unable to submit a Requisition for approval if the FOAPAL status is NSF.
Instead, the Requisition will be **saved as a Draft**.

R0060936

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

Book, A Guide to US History, 3rd Edition,	48.46
Quantity 3.00 @ 14.9900	Discount 0.00
Additional Charges 0.00	Tax 3.49

Funding

100%

⚠ WARNING Budget is exceeded for item 1 sequence 1.
Do you want to submit the Requisition?

No

Yes

Requisition

Requisition Number

R0060936

Barnes & Noble College Booksellers LLC #8108 (C02445593)
OCC Email: SM8108@bncollege.com
Costa Mesa CA 92626-5429

Commodities (1)

Book, A Guide to US History, 3rd Edition,	48.46
Quantity 3.00 @ 14.9900	Discount 0.00
Additional Charges 0.00	Tax 3.49

Funding

100%

Grand Total - All Commodities

48.46

Grand Total - All Accounting

48.46

Back

View as PDF

Submit Requisition

Copying Requisitions

NOTE: Users will ONLY be able to copy Requisitions that have been created in Banner 9 Self Service. Requisitions created using Banner 8 cannot be copied in Banner 9 Self Service.

REMINDER: Copying Requisitions should only be done if the same Vendor is going to be used for the new Requisition.

1. To **copy** a Requisition, go to the **My Requisitions dashboard**.
2. Click on the **Completed Requisition** that needs to be copied (**Completed Requisitions** are the **only** Requisitions that can be copied – Users cannot copy Draft or Pending Requisitions).
3. Click on the **Copy Requisition button** located in the top-left corner, and then click **Yes** on the pop-up notification.

My Finance • My Requisitions • R0060633

R0060633

View Attachments **Copy Requisition**

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

Requestor
Rachel Duhamel

Transaction Date
05/30/2019

Delivery Date
06/30/2019

Requestor Email
RDUHAMEL@CCCD.EDU

Accounting Type
Commodity level

Comments
Public Comment
No public comments
Private Comment
No private comments

Chart
D CCCD New Chart D

Organization
425050 Purchasing

Ship To Location
DIS
Coast Comm College District
1370 Adams Ave
Costa Mesa CA 92626

Attention To
Purchasing

Tax Group
CALT California Tax Group

Requisition Summary

Requisition Number
R0060633

Prudential Overall Supply Co (C02002552) 16901 Aston
Irvine CA 92606-4829

Commodities (1)

Open Purchase Order for uniform cleaning
services (STANDING) 5.00

Quantity 1.00 @ 5.0000 Discount 0.00

Additional Charges 0.00 Tax 0.00

Funding 100%

4. Enter the **Delivery Date**.
5. If needed, revise the **Attention To** information (which will be pre-filled from the Requisition that was copied).
6. Click **Next** to access the **Vendor Information** screen.
7. Click **Next** to access the **Add Item & Accounting** screen.
8. Click on the **Commodity** to make any changes.

[My Finance](#) • [My Requisitions](#) • [R0060645](#)

R0060645

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

Add Item(s)

Choose Item

Commodities (1)

Open Purchase Order for uniform cleaning services (STANDING)	5.00
Quantity 1.00 @ 5.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 100%

[Back](#)

Click on the yellow box to make any changes

9. If needed, **edit the Public Comment field** to change the **Valid Dates, Authorized Purchasers**, and/or the **PO that is being replaced**.
10. Click **Save**.

R0060645

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Edit here

Delete Item

Item Code (STANDING)

Open Purchase Order for uniform cleaning services

Unit Of Measure *

LOT (LOT) x v

Tax Group *

EXMP Tax Exempt Group

Quantity *

1.00

Unit Price *

5.0000

(Quantity) X (Unit Price)

USD 5.00

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Commodity Item Total

USD 5.00

Commodity Comments

Public Comment

Valid Dates 05/01/19 through 06/30/19. The following may purchase against this order: John Eriksen, Joanna Perez, Rachel Duhamel. This order replaces PO #P0355000.

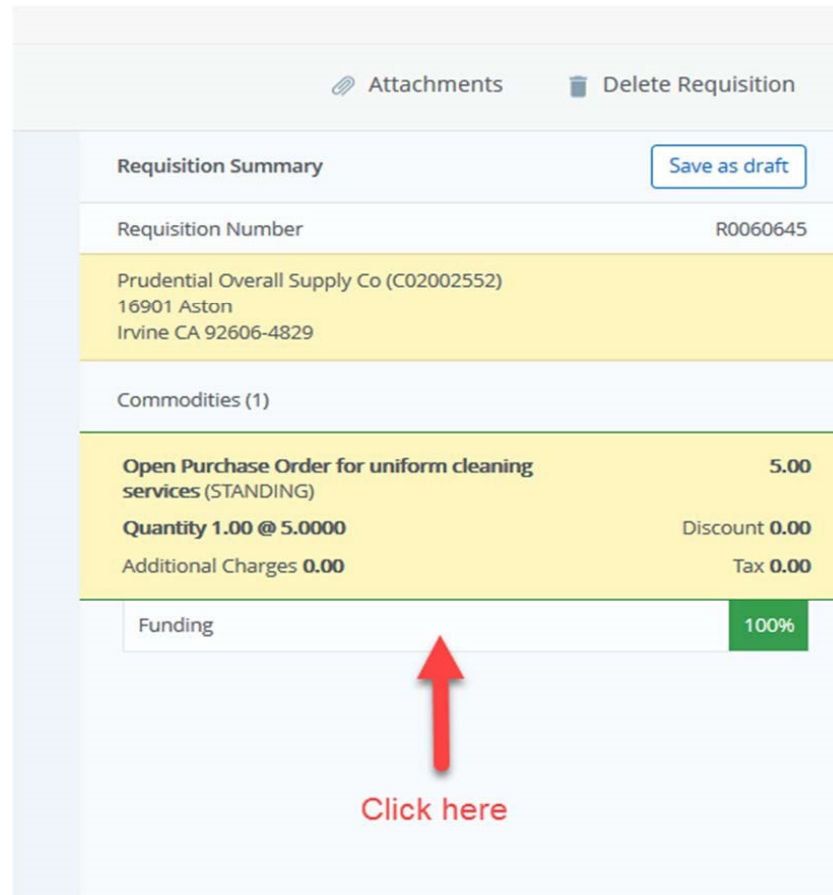
Private Comment

Enter comments for the commodity item

Back

Save

11. To edit the FOAPAL, click on the **Funding bar** located on the **Requisition Summary** on the right side of the screen.





The screenshot shows a web interface for a Requisition Summary. At the top, there are links for 'Attachments' and 'Delete Requisition'. Below this is a 'Requisition Summary' section with a 'Save as draft' button. The 'Requisition Number' is R0060645. The vendor information is 'Prudential Overall Supply Co (C02002552)', '16901 Aston', and 'Irvine CA 92606-4829'. Under 'Commodities (1)', there is a line item for 'Open Purchase Order for uniform cleaning services (STANDING)' with a quantity of 1.00 at a price of 5.0000. The total is 5.00. There are no discounts or taxes. At the bottom, the 'Funding' bar shows 'Funding' and '100%'. A red arrow points to the 'Funding' bar with the text 'Click here' below it.

Requisition Summary	
Requisition Number	R0060645
Prudential Overall Supply Co (C02002552) 16901 Aston Irvine CA 92606-4829	
Commodities (1)	
Open Purchase Order for uniform cleaning services (STANDING) Quantity 1.00 @ 5.0000 Additional Charges 0.00	5.00 Discount 0.00 Tax 0.00
Funding	100%

Click here

12. Click on the **FOAPAL** which will appear below the **Funding bar**.

 Attachments  Delete Requisition

Requisition Summary

Save as draft

Requisition Number

R0060645

Prudential Overall Supply Co (C02002552)
16901 Aston
Irvine CA 92606-4829

Commodities (1)

Open Purchase Order for uniform cleaning services (STANDING)

5.00

Quantity 1.00 @ 5.0000


Discount 0.00

Additional Charges 0.00

Tax 0.00

Funding	Amount
D-110001-425050-4110-672000	5.00
Accounting Total	5.00
Commodity Total	5.00
Balanced	100%

Click here



13. Select the new FOAPAL by using **each corresponding drop-down list** (**Activity**, **Location**, and **Project** are not required fields and should only be selected when applicable).
14. Once the new FOAPAL has been selected, click **Save**.

Open Purchase Order for uniform cleaning services

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number (R0060645)

Currency USD

 Delete Accounting

Chart *

D CCCD New Chart D x v

Index

Choose Index v

Fund *

110001 Unrestricted General Fund x v

Organization *

425050 Purchasing x v

Account *

4110 Instructional Supplies Materials x v

Program *

672000 Fiscal Operati... x v

Activity

Choose Activity v

Location

Choose Location v

Project

Choose Project v

Distribution Amount *

5.00

Distribution Percent *

100.00000000

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Distribution Total

5

Remaining

0

Back

Save

15. The **Add Item & Accounting screen** will now refresh and show the **Funding bar**. The **Funding bar** indicates that all of the funds have been applied to the new FOAPAL and that the Requisition is balanced.
16. The User will also see a notification in the **top-right** that reads, “Accounting updated in Requisition,” which confirms acceptance of the new FOAPAL.
17. The User may now choose to **Save as draft**, **View as PDF**, or **Submit Requisition**.

This notification indicates that the new FOAPAL has been accepted



Attachments

Delete Requisition

R0060645

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

Open Purchase Order for uniform cleaning services (STANDING)	5.00
Quantity 1.00 @ 5.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding	100%
---------	------

Requisition Summary

Save as draft

Requisition Number R0060645

Prudential Overall Supply Co (C02002552)
16901 Aston
Irvine CA 92606-4829

Commodities (1)

Open Purchase Order for uniform cleaning services (STANDING)	5.00
Quantity 1.00 @ 5.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding	100%
---------	------

Grand Total - All Commodities 5.00

Grand Total - All Accounting 5.00

Back

View as PDF

Submit Requisition

Requisitioning Tips

- In Banner 9 Self Service, the **Accounting Type** will default to **Commodity Level Accounting**. This change was made in order improve the way that **Fixed Assets** are tracked and reported. The **Accounting Type** should not be changed by the User**.

****NOTE: The ONLY exception to this rule is when multiple budget numbers are being applied to a Non-Receiveable Requisition.**

*(Example: An IC Agreement for \$12,000 that is split 3 ways **between each campus**)*

[My Finance](#) • [My Requisitions](#) • [R0060579](#)

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

Requisition Number

R0060579

Requestor *

Rachel Duhamel

Transaction Date * Delivery Date *

05/24/2019 06/28/2019

Requestor Email

RDUHAMEL@CCCD.EDU

Choose Accounting Type

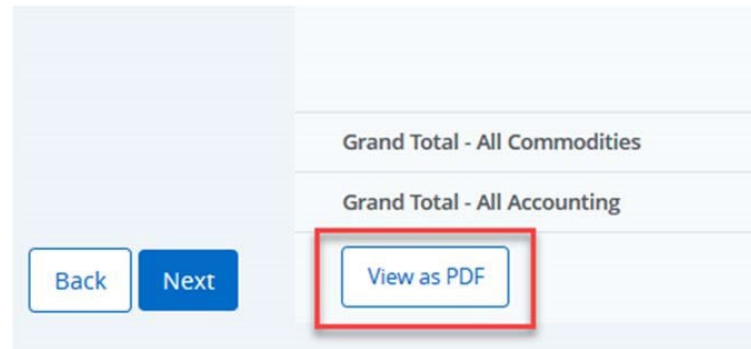
☐ Document Level Accounting

☒ **Commodity Level Accounting**

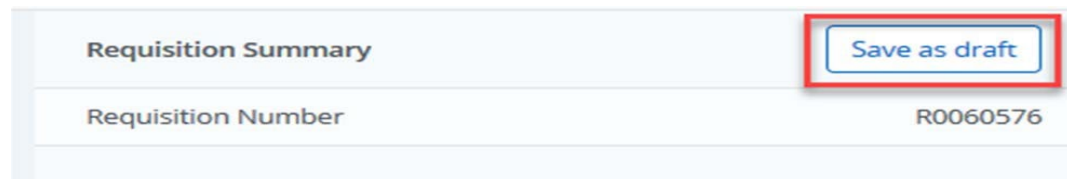
Commodity Level Accounting
is the default

Requisitioning Tips

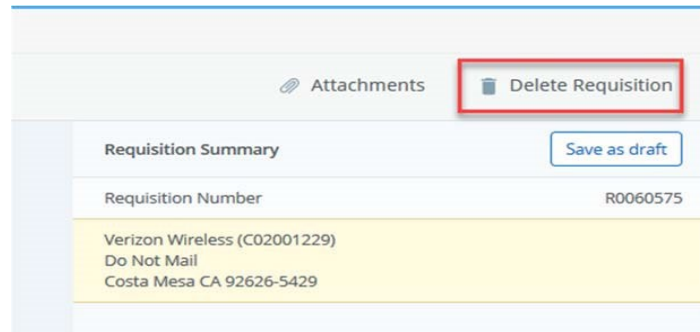
- Click on the **View as PDF button** and the Requisition will open in a new tab as a PDF file. The User can choose to download the PDF or print a hard copy. NOTE: Viewing a Requisition as a PDF does not mean that the Requisition has been submitted for approval.



- Requisitions are automatically saved as the User moves through each screen, but the Requisition can also be saved manually by clicking on the **Save as Draft button**.

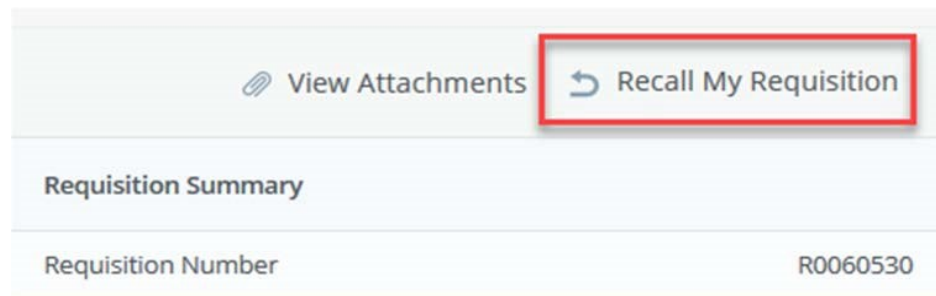


- To delete a **Draft Requisition**, access the **My Requisitions dashboard**, click on the Requisition, and then click on the **Delete Requisition button**.



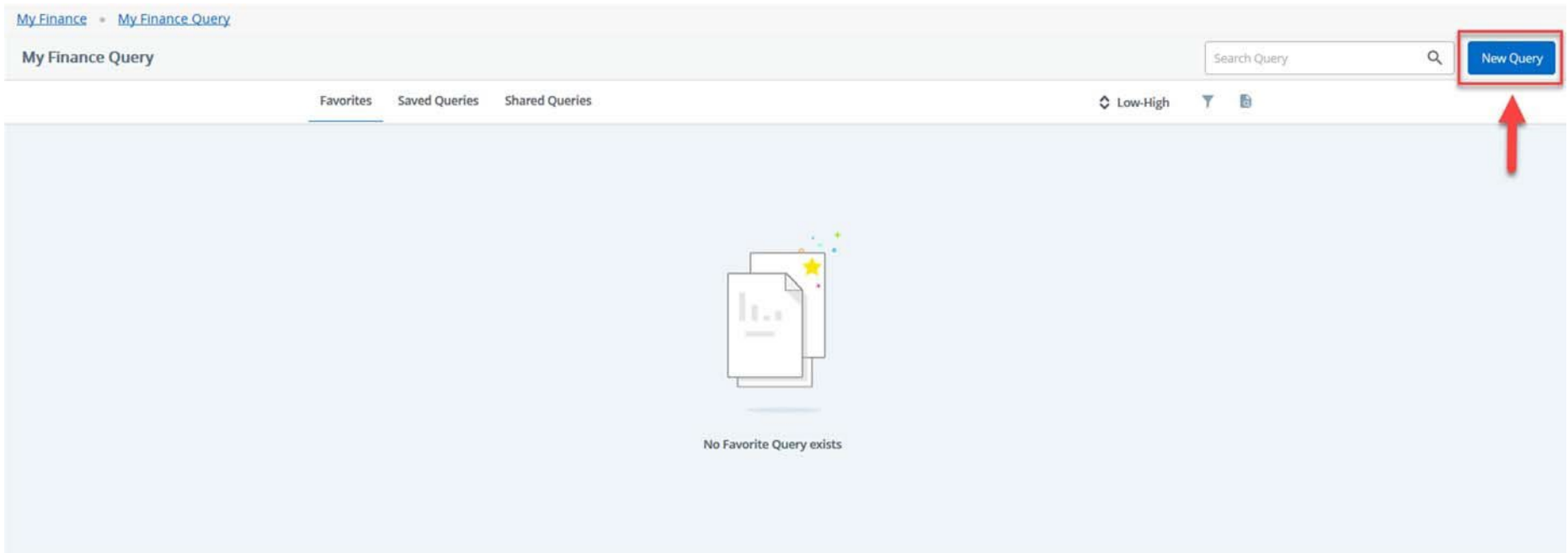
- To recall a **Pending Requisition**, access the **My Requisitions dashboard**, click on the Requisition, and then click on the **Recall My Requisition button**. Click **Yes** on the pop-up notification. The Requisition will be moved to **Draft Requisitions**.

NOTE: A Requisition can be recalled up until Final Approval. Users cannot recall a Requisition that has been fully approved by all approvers.



My Finance Query

1. To create a new Query, click on the **New Query** button.



2. Use the **Select Query Type** drop-down list to select the query type. For most queries you want to choose **Budget Status by Account**.

3. Select the **Fund, Organization, Account,** and **Program codes** by using the corresponding drop-down lists.
4. Scroll to the bottom of the window and click **Submit.**

My Finance • My Finance Query

My Finance Query

Search Query

Low-High

Favorites Saved Queries Shared Queries

Create New Query

Select Query Type

Budget Quick Query

Budget Status by Account

Budget Status by Organizational Hierarchy

Encumbrance Query

Multi Year Query

Budget Quick Query

Index

Choose Index

Fund

110001 Unrestricted General Fund

Organization*

425050 Purchasing

Account

4210 Noninstructional Supplies Materials

Program

672000 Fiscal Operations

Choose Activity

Choose Location

Commitment Type

All

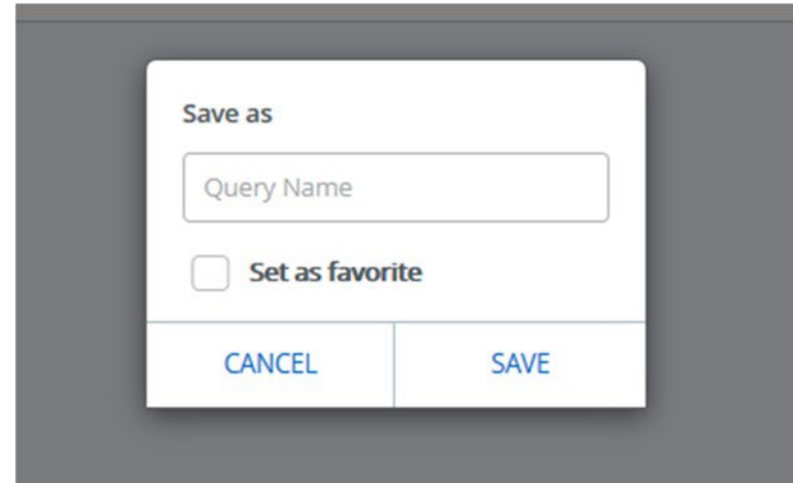
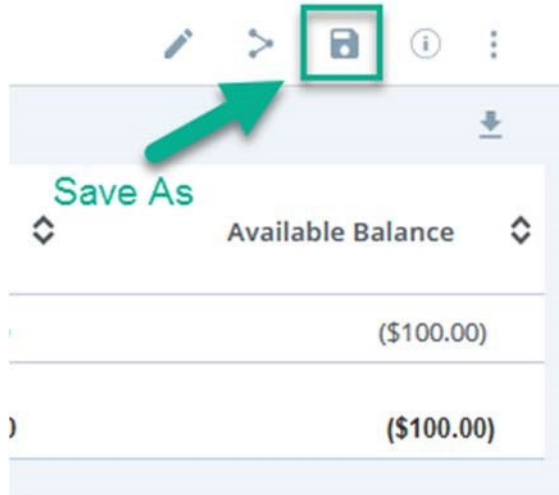
Include Revenue Accounts

Fiscal Year*

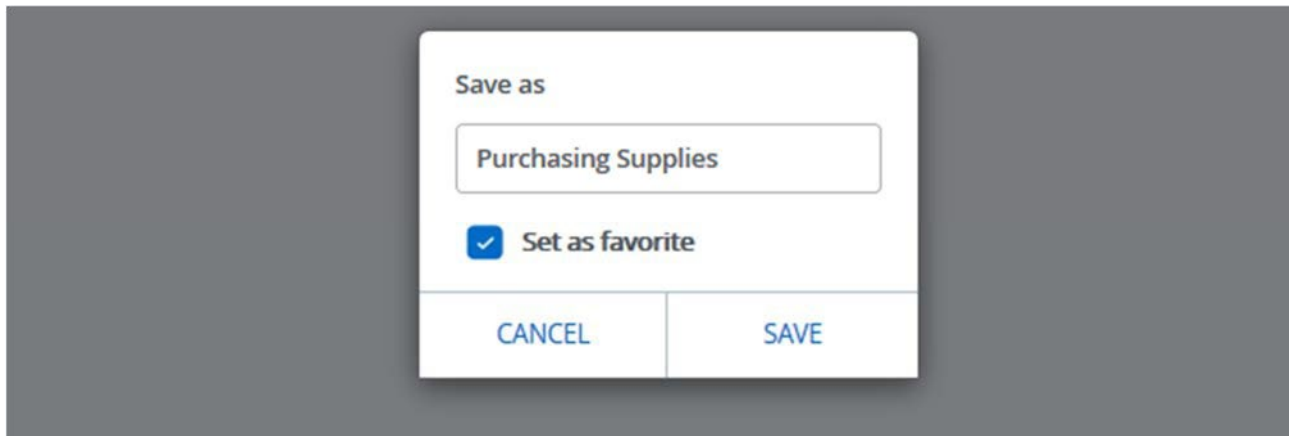
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5. The **Query Results screen** will appear with the query results.
6. From here, the User can choose what to do with the query results.
7. To save the query, click the **Save as icon**. The User can name the query and choose to **Save as favorite**.



8. Queries that are saved to **Favorites** will appear in the **Favorites section** and the **Saved Queries section** of the **My Finance Query Dashboard**.



9. The saved query will display a summary graphic.

