Self Service Banner 9

TRAINING MANUAL FOR REQUESTORS AND APPROVERS

Finance and Administration

UNIVERSITY OF TOLEDO | CREATED NOVEMBER 2025

November 2025 – Self Service Banner 8 is moving to Self Service Banner 9

New Features and Functionality

In addition to Banner's improved interface for easier navigation, Self-Service Banner 9 for Finance offers users new features to allow for quicker access to information and streamlined processes.

- **Mobile Functionality:** Complete a range of tasks from your tablet or mobile device with Self-Service Banner's new mobile functionality.
- **Enhanced Browser Support**: Access Self-Service Banner from your preferred browser. .
- **My Finance Query:** Budget managers and existing Self-Service Finance users will benefit from quick views of spend analysis. Users will be able to save favorite queries and share queries for collaboration.
- **My Journals:** Use this module to initiate budget transfers.
- **Approve Documents:** Access documents needing to be approved
- **View Documents:** View documents, and upload supporting documentation.
- **My Requisitions:** Create requsitions and view completed requisitions. Now able to select between Document Accounting and Line Accounting, and no limit of 5 line items.

The upgrade to Self-Service Banner 9 aligns with University of Toledo's commitment to increasing efficiency and delivering an enhanced experience for students, faculty and employees. Should you experience any technical issues or require assistance during the transition, please submit an IT Ticket https://ithelp.utoledo.edu/.

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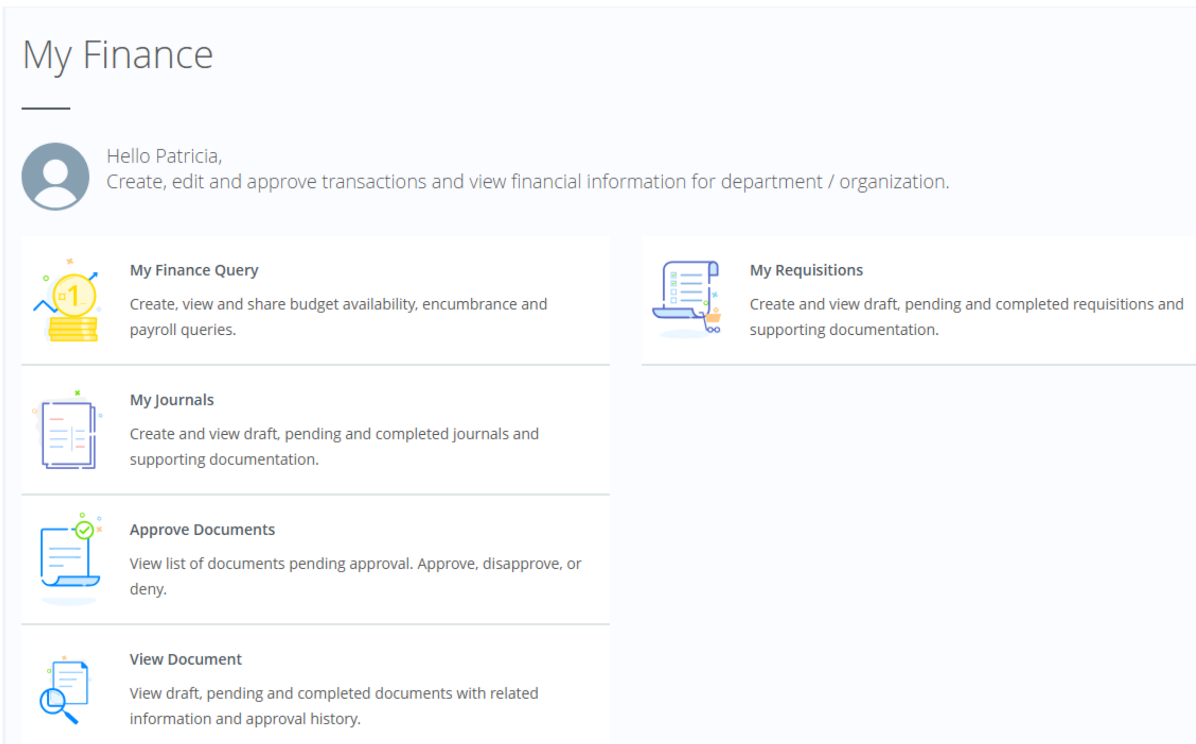
Signing on on to SSB

Complete the following steps to access Self Service Banner 9 (SSB9).

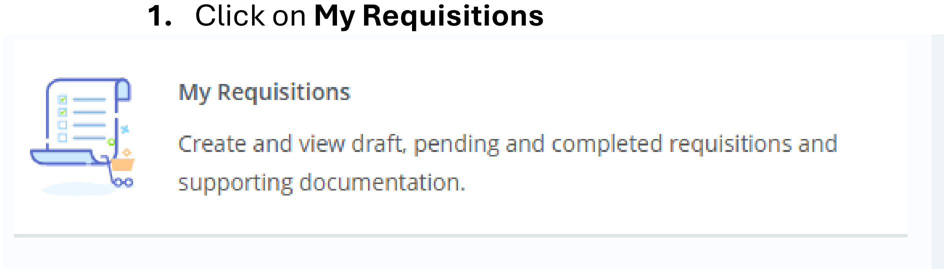
1. Click on an Internet Browser of your choice. (Chrome, Firefox)
2. From the University home screen, enter https://myut.utoledo.edu/
3. Click on the Login on MYUT with your UTAD username and password.
4. Under the Employee tab, go to the MY BANNER box and select Banner Finance SSB9

The My Finance Menu of Options will appear



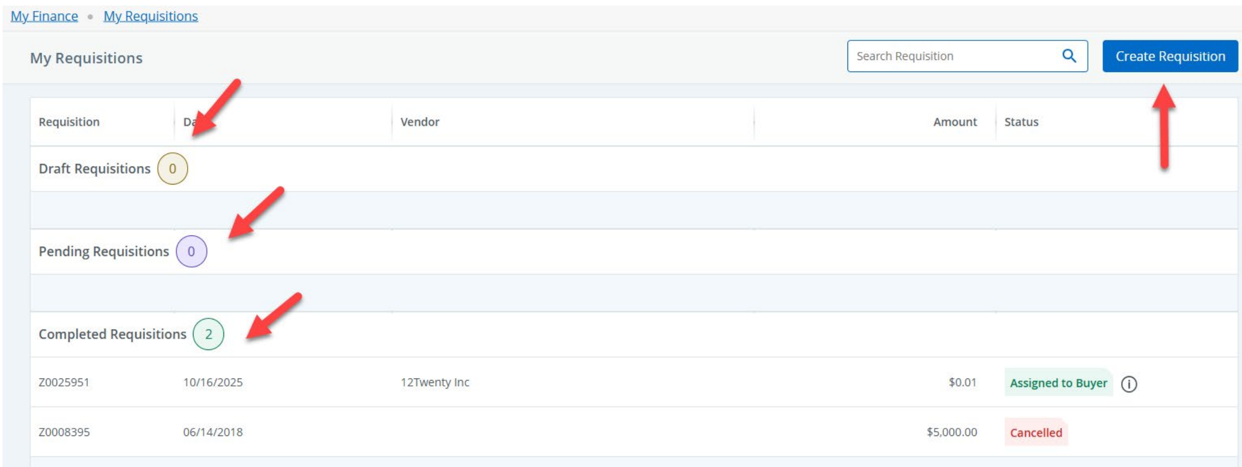
Creating a Requisition

1. Click on **My Requisitions**



A dashboard showing DRAFT, PENDING and COMPLETED Requisitions will appear. Use the SEARCH REQUISITION box to go to a results page where you can click on a specific requisition or click on any requisition from the My Requisition home page.

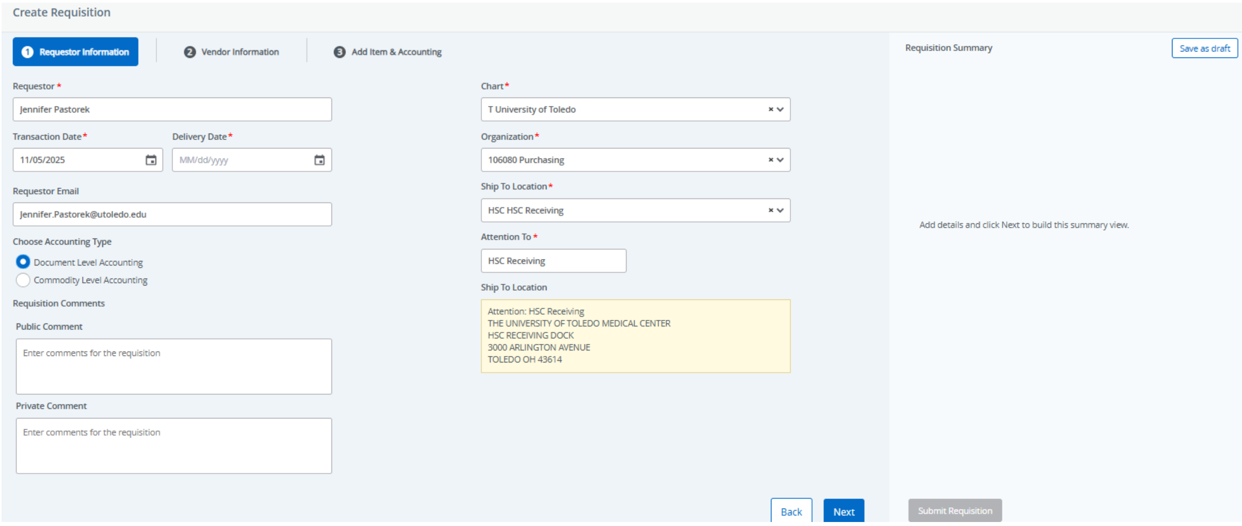
Draft Requisitions: Requisitions that have been started then saved as a draft for completion later.
Pending Requisitions: Requisitions that have been completed and are awaiting approval.
Completed Requisitions: Requisitions that are completed and have been assigned to a buyer for PO creation or the PO has already been created.



2. Click on the CREATE REQUISITION button top right of screen

There will be 3 TABS of information needed to complete a requisition (requestor, vendor, add items and accounting). Be complete in the filling of information.

1. REQUESTOR INFORMATION



Requestor name, email address, organization and ship to location will default from your profile. Today's date will auto-populate for the TRANSACTION date.

Choose the Delivery Date- the date in which you would like to receive the product.

NOTE: Red asterisks * are mandatory fields of entry.

Choose accounting type (document level or commodity level).

Document level Accounting: A way of processing requisitions and purchase orders in which the accounting distribution entered on the requsition applies to the whole requisition.

Commodity level Accounting: A way of processing requisitions and purchase orders in which each line of the requsition will have its own accounting distribution.

Enter Public comments – comments for the requisition for anyone to see/read.

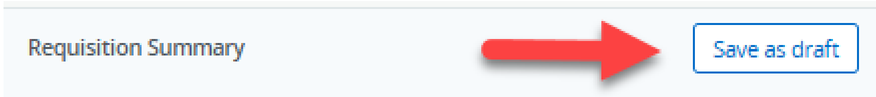
Enter Private comments – for the requisitioners eyes only – helpful internal reminders/notes.

CHART – defaults to T

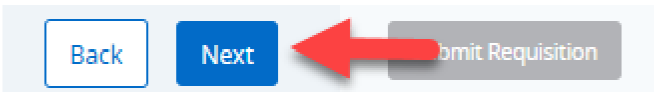
Select a different ORGANIZATION if the one listed is not the one being used.

Select a different SHIP to LOCATION if the one defaulted is not the one where product will be shipping to.

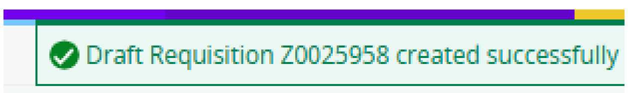
At this point you can save the requisition as a DRAFT by choosing the SAVE as DRAFT button in upper right hand corner.



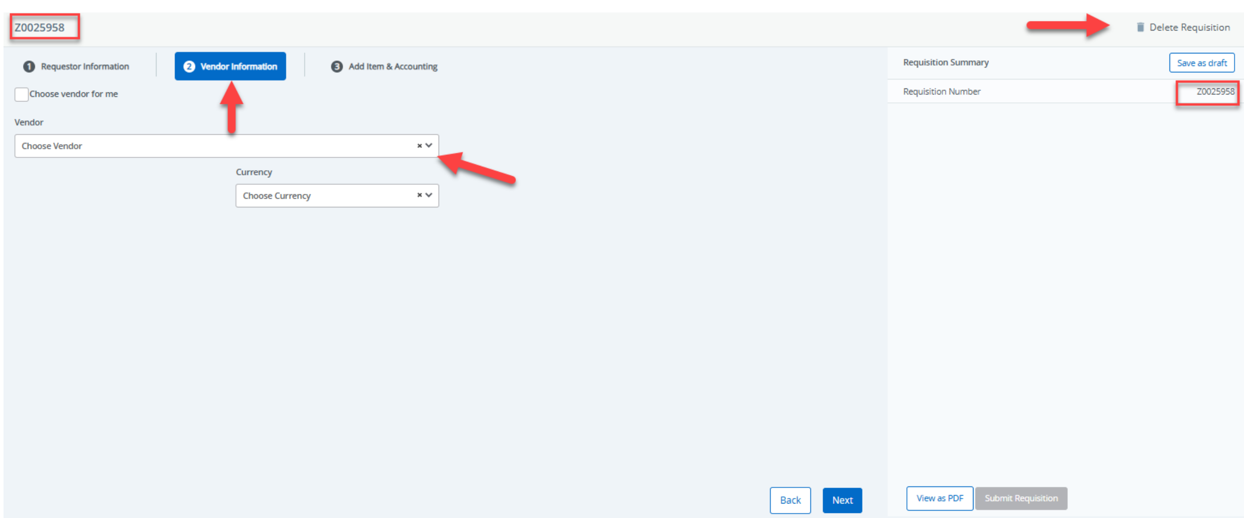
Click on the NEXT button at bottom of the page.



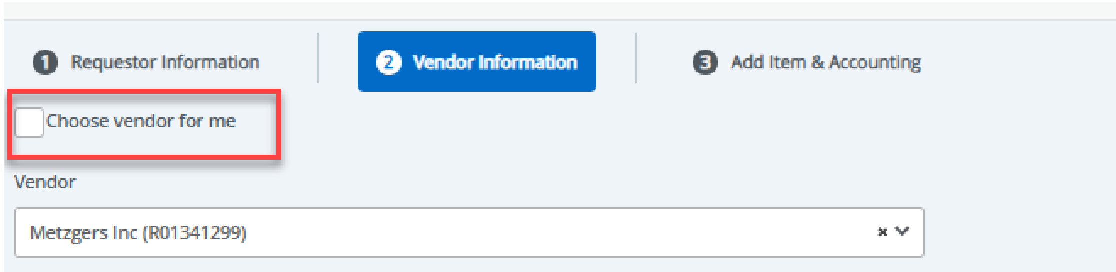
The screen will switch to second tab (VENDOR INFORMATION) and the DRAFT requisition number will be displayed in the upper right corner.



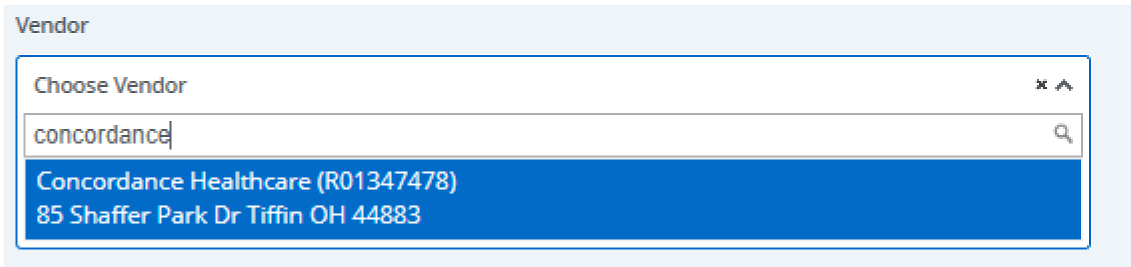
2. VENDOR INFORMATION



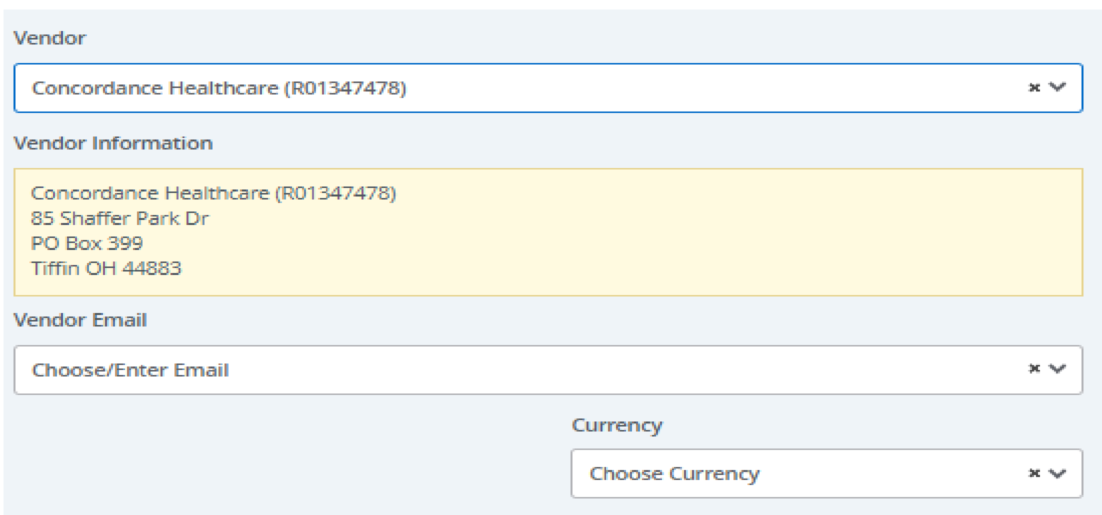
DO NOT check the box "Choose vendor for me". Skip over this. If you accidentally check the box, it will disable or lock out the vendor drop down field. Simply uncheck the box and continue with selection of a vendor.



In the Vendor Drop down box, begin typing the name of the vendor, when it displays in blue, you may select the vendor.



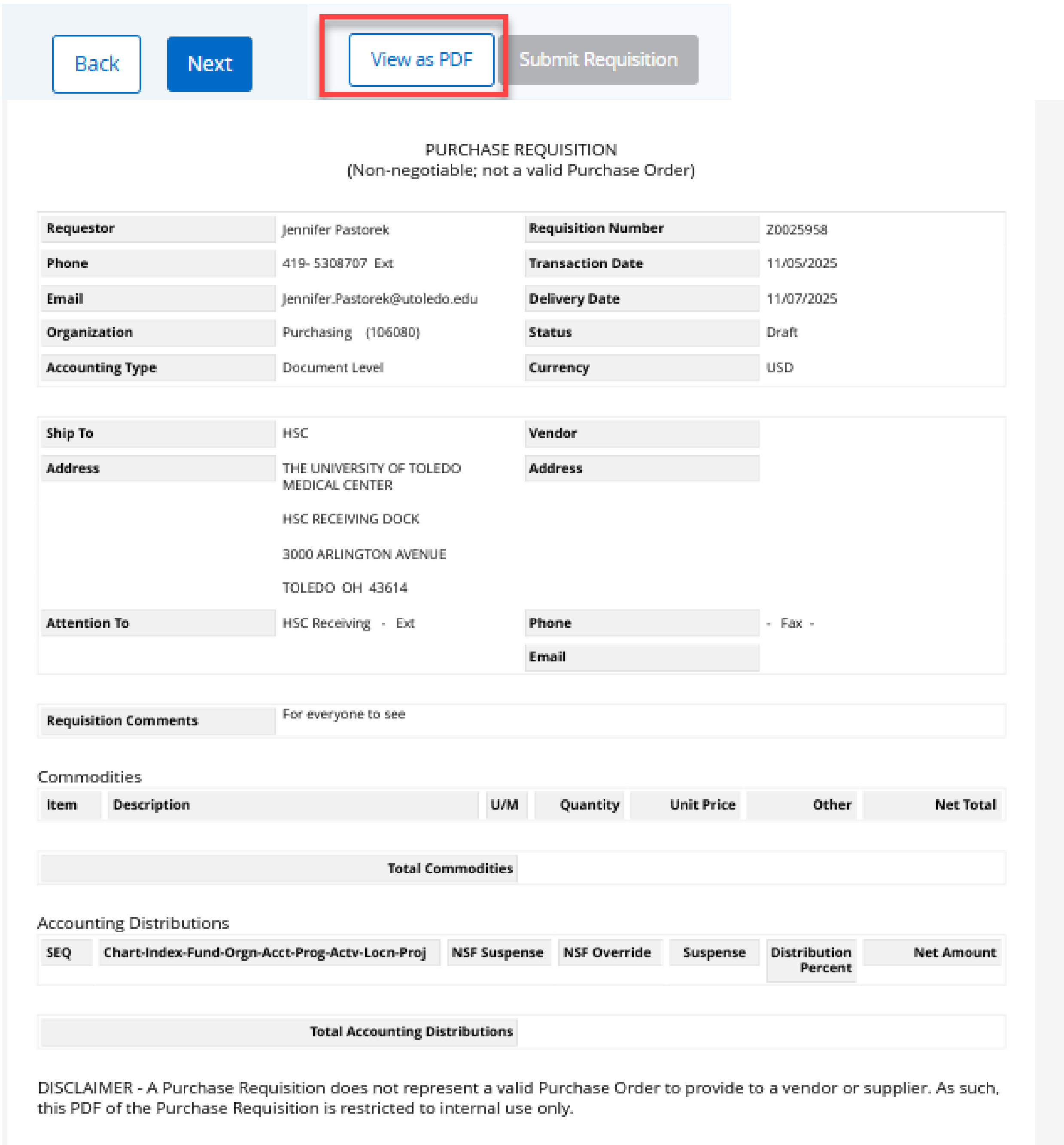
It will expand the screen to show you the complete address information and open up the ability to choose or enter a vendor email address.



At this point, you have additional functions displayed.

Delete Requisition – upper right hand corner. If you need to abandon the requisition you can do so at this step by clicking the garbage can delete requisition button.

View as PDF – located at bottom of page – view requisition



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

Requestor	Jennifer Pastorek	**Requisition Number**	Z0025958
Phone	419- 5308707 Ext	**Transaction Date**	11/05/2025
Email	Jennifer.Pastorek@utoledo.edu	**Delivery Date**	11/07/2025
Organization	Purchasing (106080)	**Status**	Draft
Accounting Type	Document Level	**Currency**	USD

Ship To	HSC	**Vendor**	
Address	THE UNIVERSITY OF TOLEDO MEDICAL CENTER HSC RECEIVING DOCK 3000 ARLINGTON AVENUE TOLEDO OH 43614	**Address**	
Attention To	HSC Receiving - Ext	**Phone**	- Fax -
		Email	

Requisition Comments	For everyone to see

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Net Total

Total Commodities	

Accounting Distributions

SEQ	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Locn-Proj	NSF Suspense	NSF Override	Suspense	Distribution Percent	Net Amount

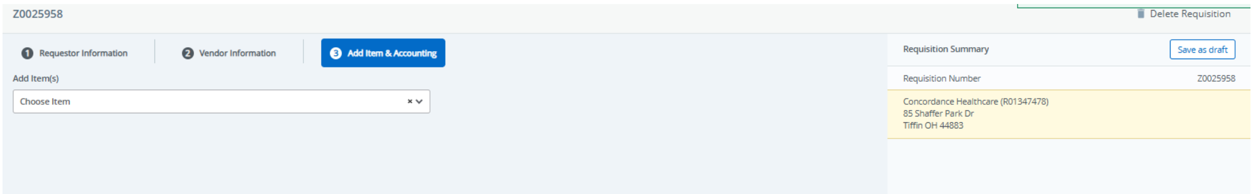
Total Accounting Distributions	

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.

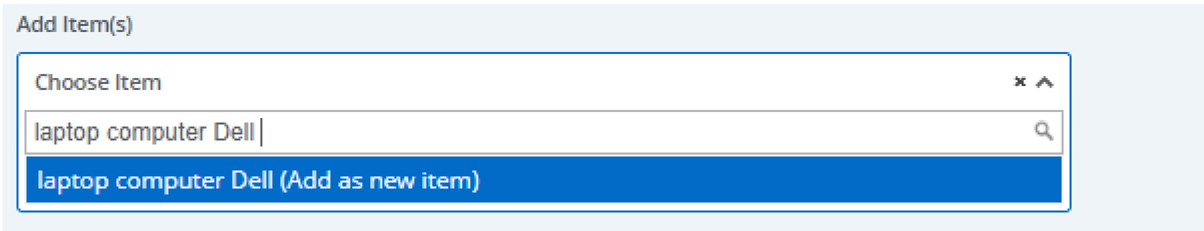
Click NEXT

The screen will transition to 3rd and final tab (ADD ITEMS & ACCOUNTING).

3. ADD ITEMS & ACCOUNTING

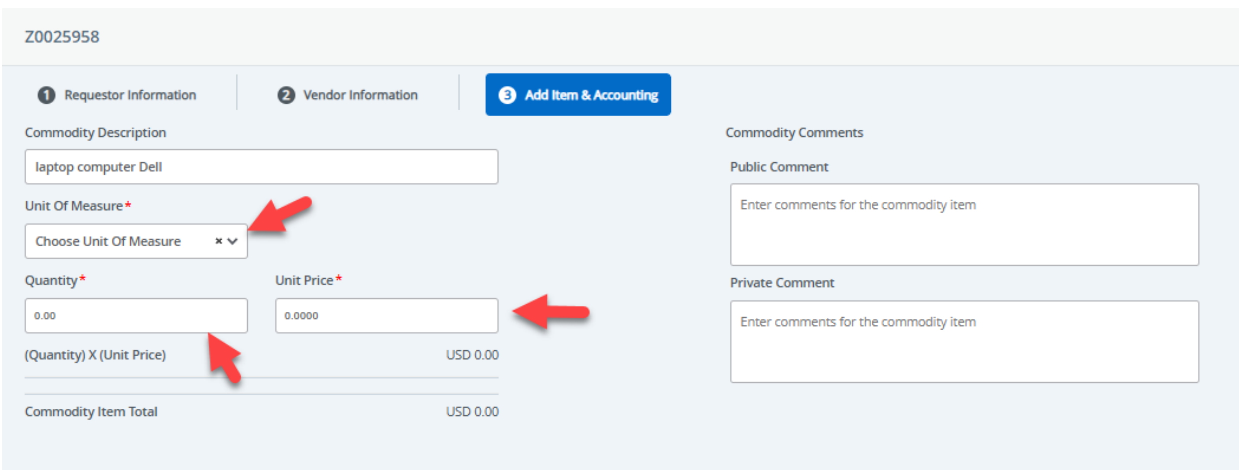


Type the item description (be clear and specific) and click on the blue (ADD AS NEW ITEM) to add to requisition and open additional attribute boxes to complete.



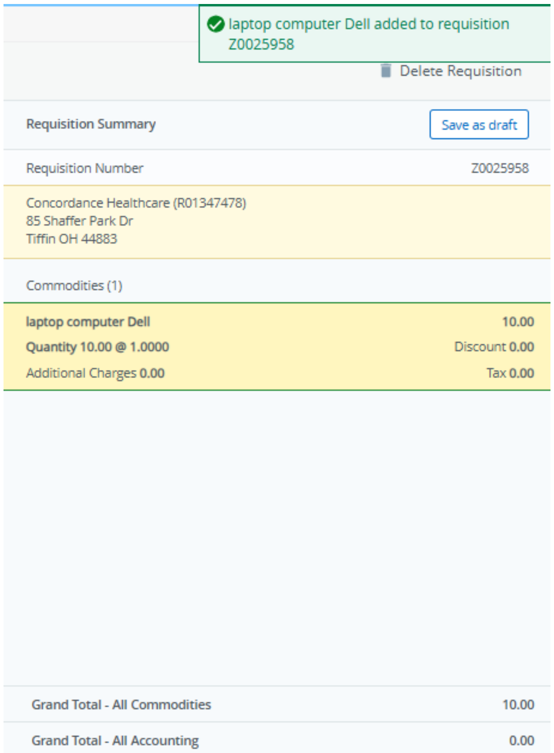
Select the Unit of Measure from the drop down. You can begin typing and the list will display options.

Enter Quantity and Unit Price and the system will do the math to display the totals.

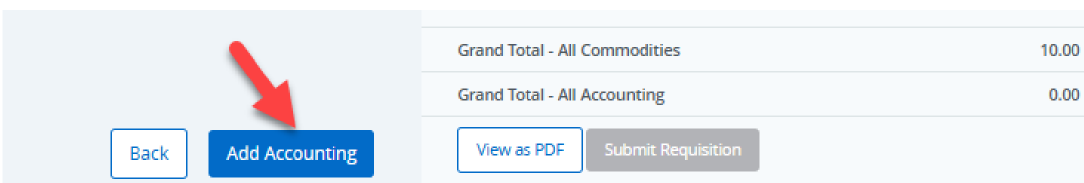


You can also enter PUBLIC and PRIVATE comments at the line-item level.

Click on the blue SAVE button (bottom of page) and the item will appear in the Requisition Summary (right side of page)



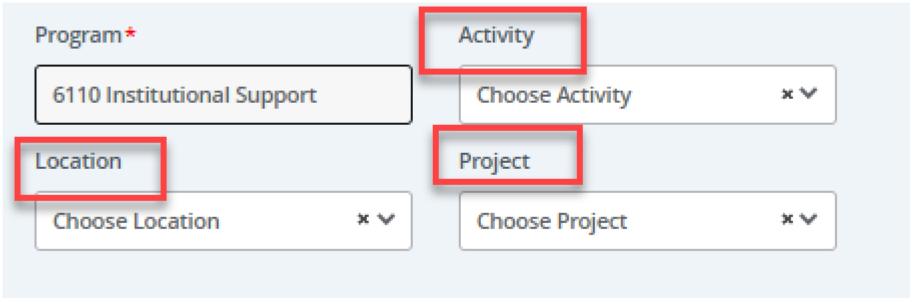
You can continue by repeating all the previous steps to add additional items or move the requisition forward by clicking on the blue ADD ACCOUTING button at bottom of the page.



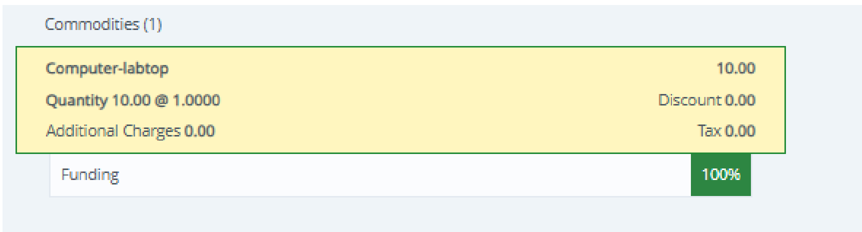
Select the INDEX from the drop-down menu. The fund and program associated with the index will auto-populate.

Select the ACCOUNT code from the drop-down menu. Ensure you are choosing the best option to classify the expense as this is what budgets are balanced against.

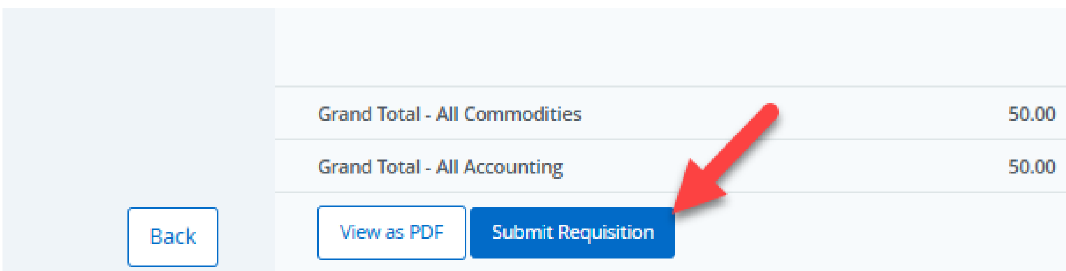
The fields of Activity, Location and Project are not needed nor mandatory to fill in. Simply skip over these fields.



Click on SAVE button.   Funding will display 100% in green

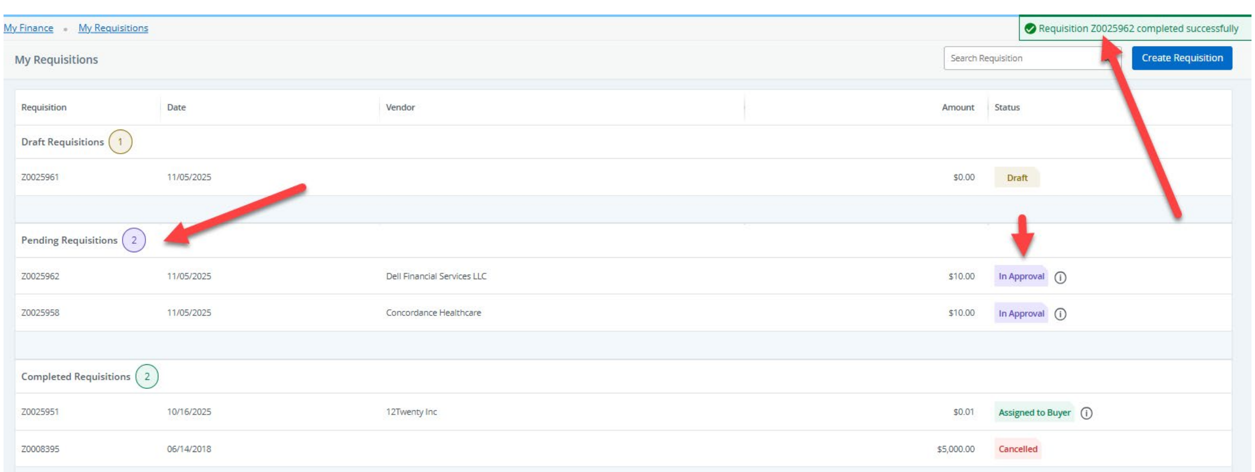


Click on SUBMIT REQUISITION button.

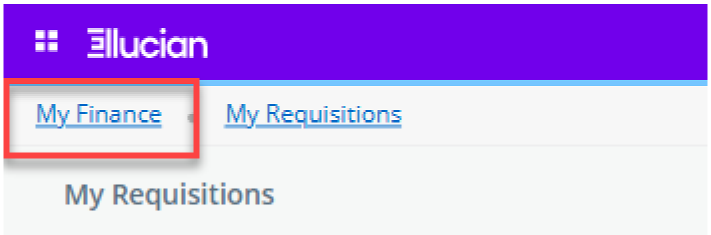


The Requisition completed successfully will display in upper right corner.

The requisition will show in the Pending Requisitions section of the dashboard (waiting for approval.



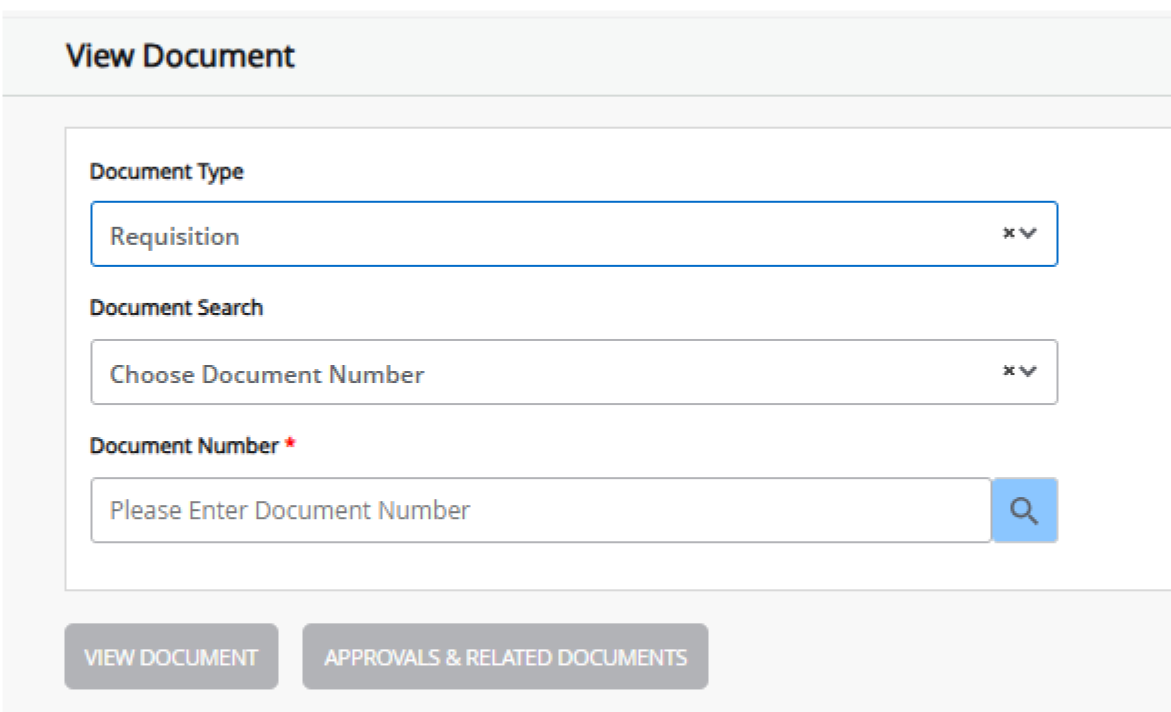
Click on My Finance link to go back to main menu



To View Documents

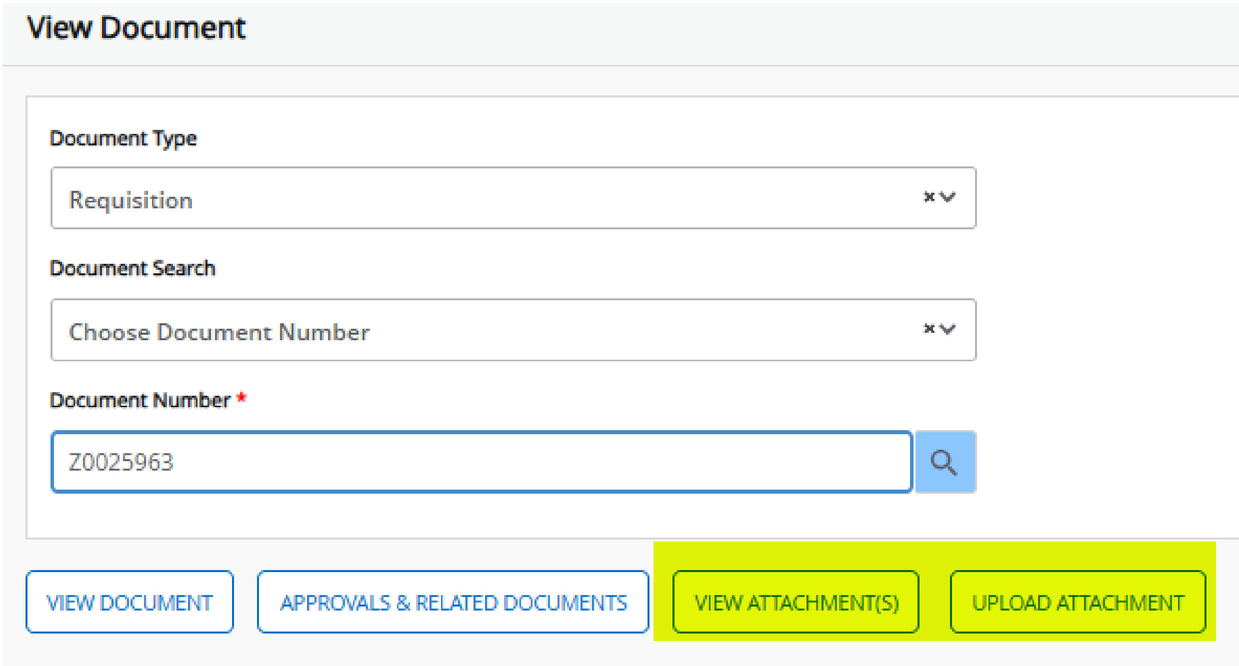
Click on VIEW DOCUMENT from My Finance dashboard.

You can choose document type, document number (either via a search or entered directly).



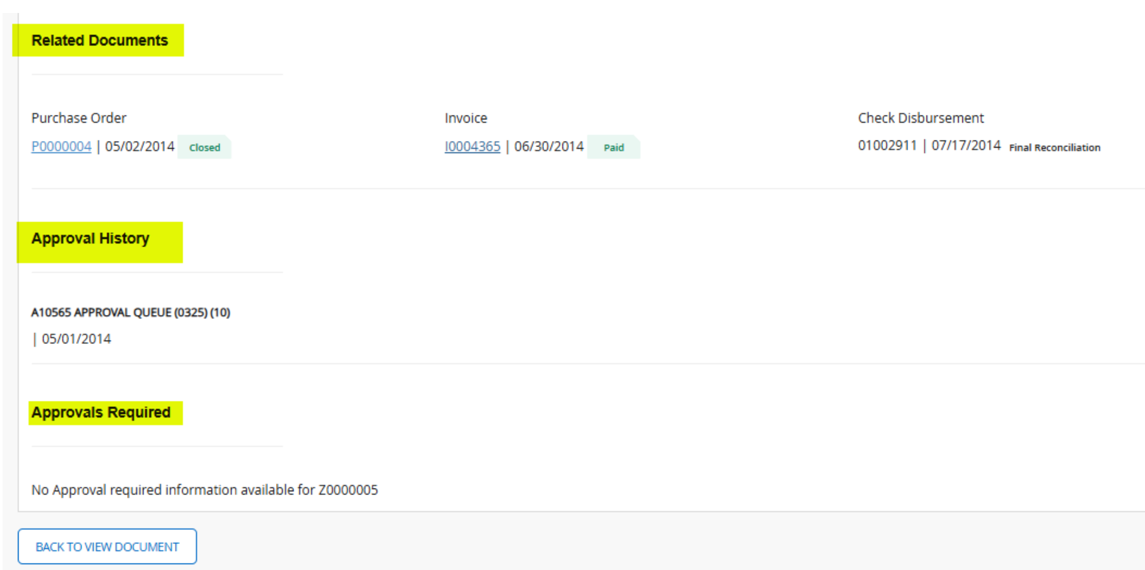
To view a specific requisition, ensure the document type is REQUISITION. Enter the specific requisition number in the Document Number field. Note this field is mandatory.

As you fill in a requisition number, the VIEW ATTACHMENTS and UPLOAD ATTACHMENT buttons will appear.   You can also add documents to requisitions if you forgot to do so during the requisition creation process.



Click on VIEW DOCUMENT and the PDF version of the requisition will display on screen (which you can then print or save if desired).

'X' out of the PDF and the screen returns to the previous view.   You can now also click on the APPROVALS & RELATED DOCUMENTS to see related documents such as the Purchase order (PO), invoices and check disbursement information or where in the approval flow the requisition may be.   Approval HISTORY and Approvals REQUIRED are displayed.



Click BACK TO VIEW DOCUMENT to return to prior page.

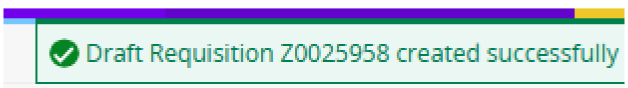
To ADD Documents to a Requisition (Document Imaging Function)

There are two ways in which to use the document imaging function.   Requestor can choose whichever way works best.

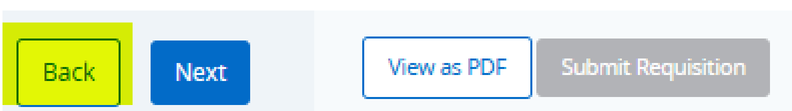
1. From inside the building of the requisition
2. Adding through the VIEW Document function after the requisition number has been submitted.

1. Add documents while building a requisition

When creating a requisition, after the first tab (Requestor Information) has been completed and the **NEXT** button clicked, the **REQUISITION** number will be displayed in the upper right hand corner.



At this point you can click the **BACK** button to go back to first screen.



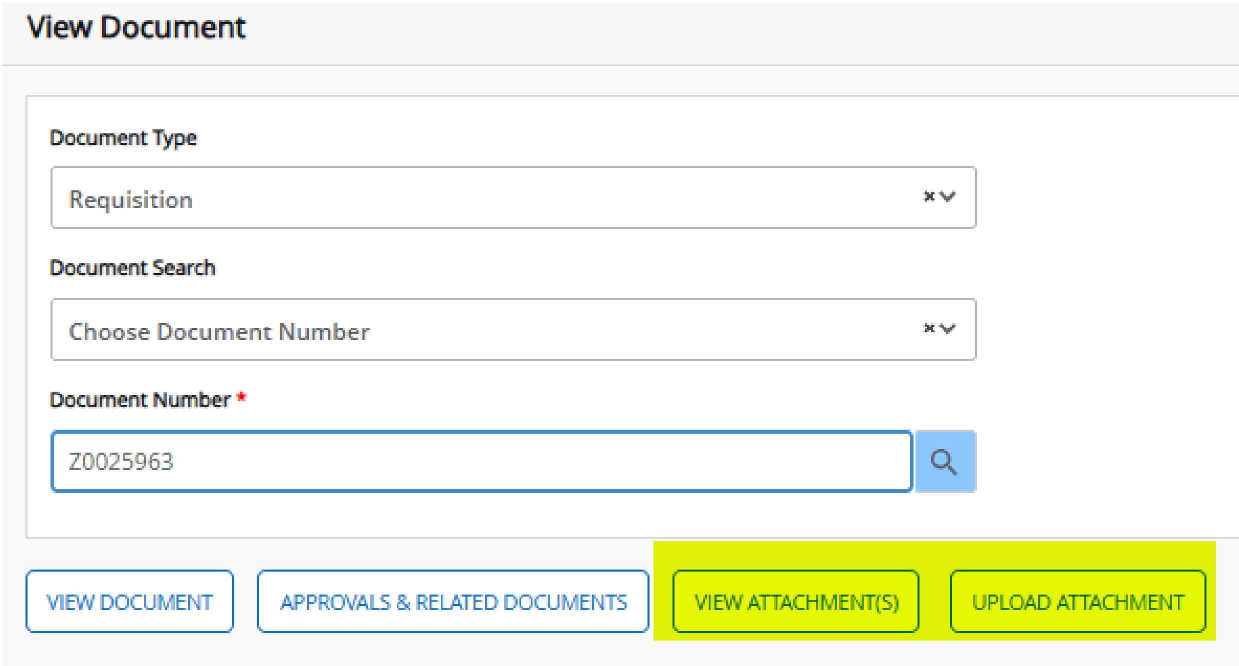
Now the **VIEW ATTACHMENTS** and **UPLOAD ATTACHMENT** Buttons will appear. Proceed to uploading documents as you do today with document imaging functionality.

You can also do this from any of the other tabs as your move throughout the building of the requisition.

2. Using the VIEW Document Function to add documentation.

You must know the requisition number in which to add documentation to when using this function.   You will be able to search if you did not record the requisition number upon submission.

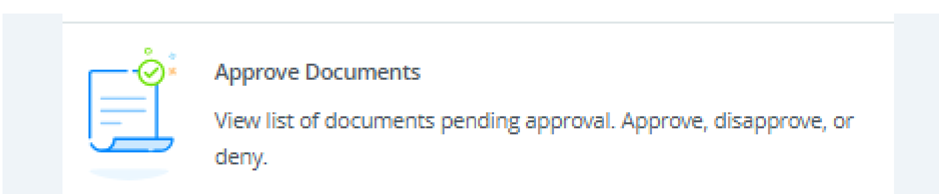
As you fill in a requisition number, the **VIEW ATTACHMENTS** and **UPLOAD ATTACHMENT** buttons will appear.

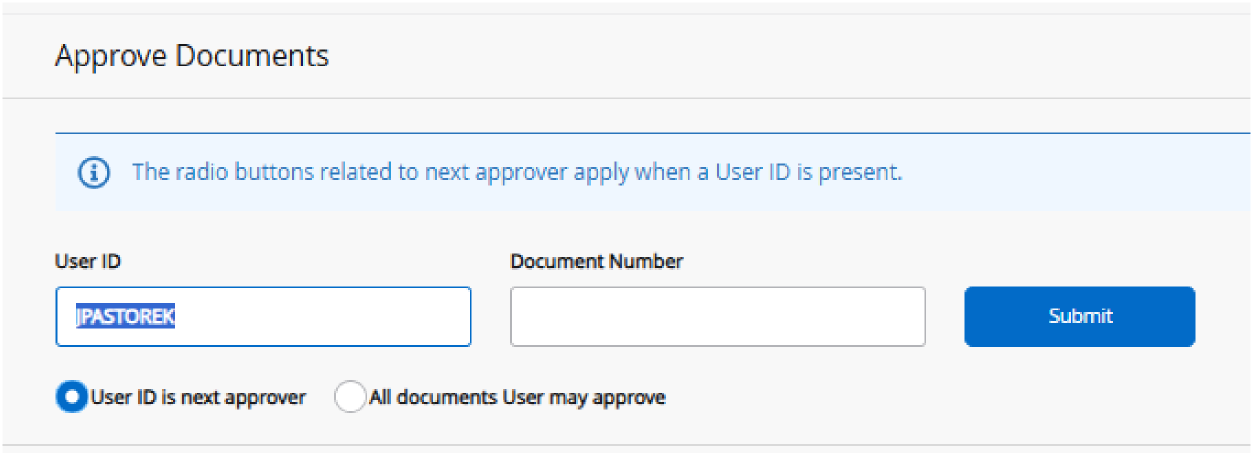


Proceed to uploading documents as you do today with document imaging functionality.

FOR APPROVERS ONLY

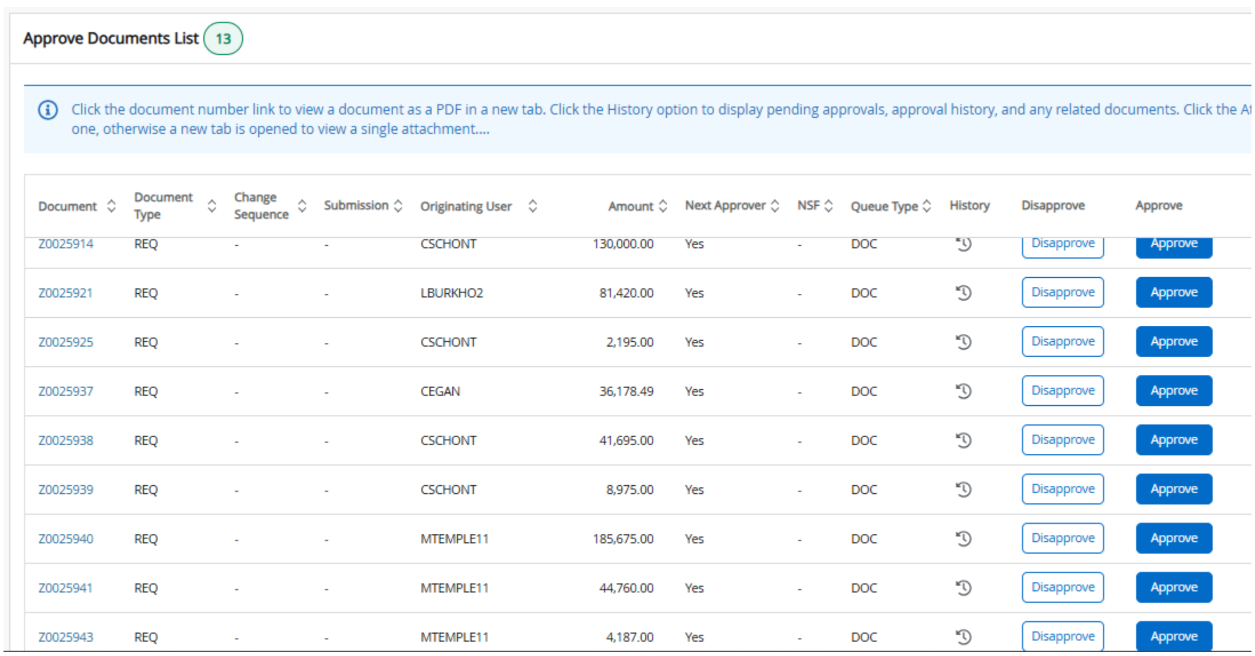
To approve requisitions, CLICK on the APPROVE DOCUMENTS Section of the main dashboard.





Click on the SUBMIT button.

A listing of requisitions will be displayed in which to take action on.



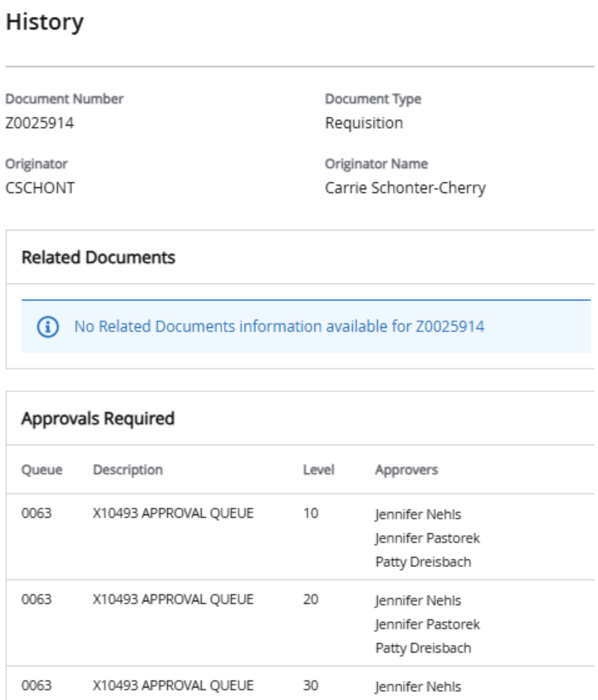
Approve Documents List 13

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 A 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	History	Disapprove	Approve
Z0025914	REQ	-	-	CSCHONT	130,000.00	Yes	-	DOC		Disapprove	Approve
Z0025921	REQ	-	-	LBURKHO2	81,420.00	Yes	-	DOC		Disapprove	Approve
Z0025925	REQ	-	-	CSCHONT	2,195.00	Yes	-	DOC		Disapprove	Approve
Z0025937	REQ	-	-	CEGAN	36,178.49	Yes	-	DOC		Disapprove	Approve
Z0025938	REQ	-	-	CSCHONT	41,695.00	Yes	-	DOC		Disapprove	Approve
Z0025939	REQ	-	-	CSCHONT	8,975.00	Yes	-	DOC		Disapprove	Approve
Z0025940	REQ	-	-	MTEMPLE11	185,675.00	Yes	-	DOC		Disapprove	Approve
Z0025941	REQ	-	-	MTEMPLE11	44,760.00	Yes	-	DOC		Disapprove	Approve
Z0025943	REQ	-	-	MTEMPLE11	4,187.00	Yes	-	DOC		Disapprove	Approve

Click on the REQUISITION number to understand what is being purchased. Opens up to the PDF version of the requisition. "X" out of the PDF to return to the previous page.

Click on the 'time clock' for the HISTORY of the approvals.



History

Document Number
Z0025914

Document Type
Requisition

Originator
CSCHONT

Originator Name
Carrie Schonter-Cherry

Related Documents

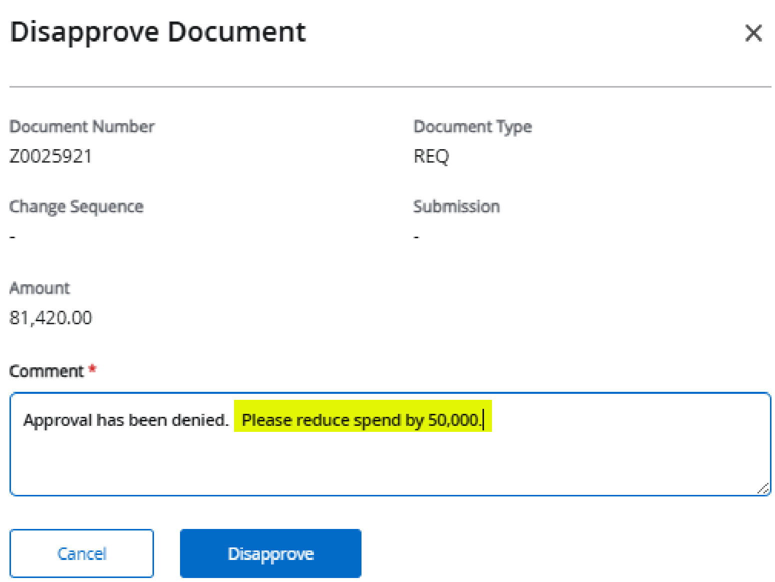
No Related Documents information available for Z0025914

Approvals Required

Queue	Description	Level	Approvers
0063	X10493 APPROVAL QUEUE	10	Jennifer Nehls Jennifer Pastorek Patty Dreisbach
0063	X10493 APPROVAL QUEUE	20	Jennifer Nehls Jennifer Pastorek Patty Dreisbach
0063	X10493 APPROVAL QUEUE	30	Jennifer Nehls

The approver has 2 actions:

DISAPPROVE – the approver can deny a request and send back to the requestor to either fix or completely cancel the request. Comments may be added for specific directions.



Disapprove Document

Document Number
Z0025921

Document Type
REQ

Change Sequence
-

Submission
-

Amount
81,420.00

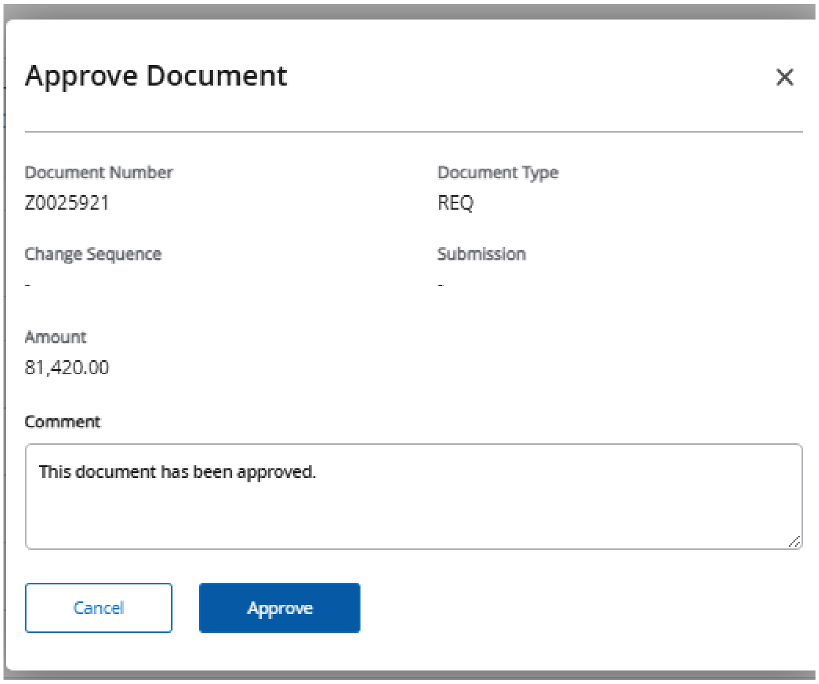
Comment *

Approval has been denied. Please reduce spend by 50,000.

Cancel

Disapprove

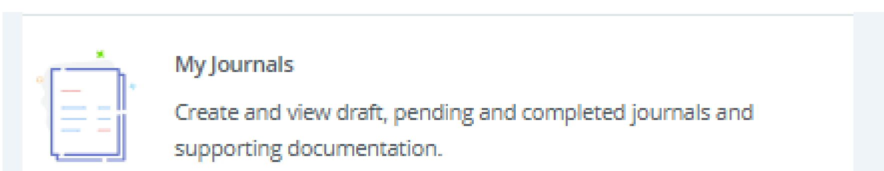
APPROVE – one reviewed and accepted, the approver will click on the APPROVE button to record the approval and the requisition will then be sent along to the purchasing buyer queue to be moved to a purchase order.



Click on the MY FINANCE link to return to the main dashboard.

MY JOURNALS

This module will primarily be used to initiate budget transfers. To begin, click on the MY JOURNALS button from the MY FINANCE main dashboard.



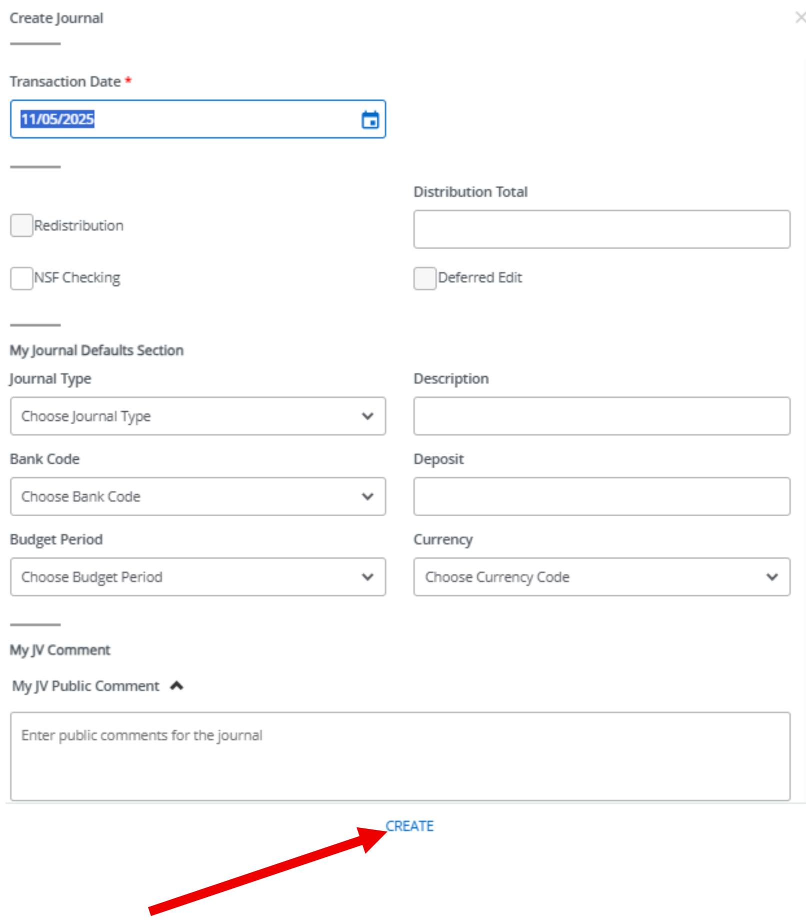
To create a journal entry, click on the CREATE JOURNAL button on the top right side of screen.

This will display the header page. The transaction date is the only mandatory field on this page. Generally, this would be today's date.

The default section can be used to populate items that will be the same for each line of the journal entry. For example, the journal type and budget period should be the same for each line.

<u>Please choose BD04 as the journal type for budget transfers</u> and select the appropriate budget period from the dropdown.

If the description is the same for every line of the entry it can be entered in the description field and it will populate every line.

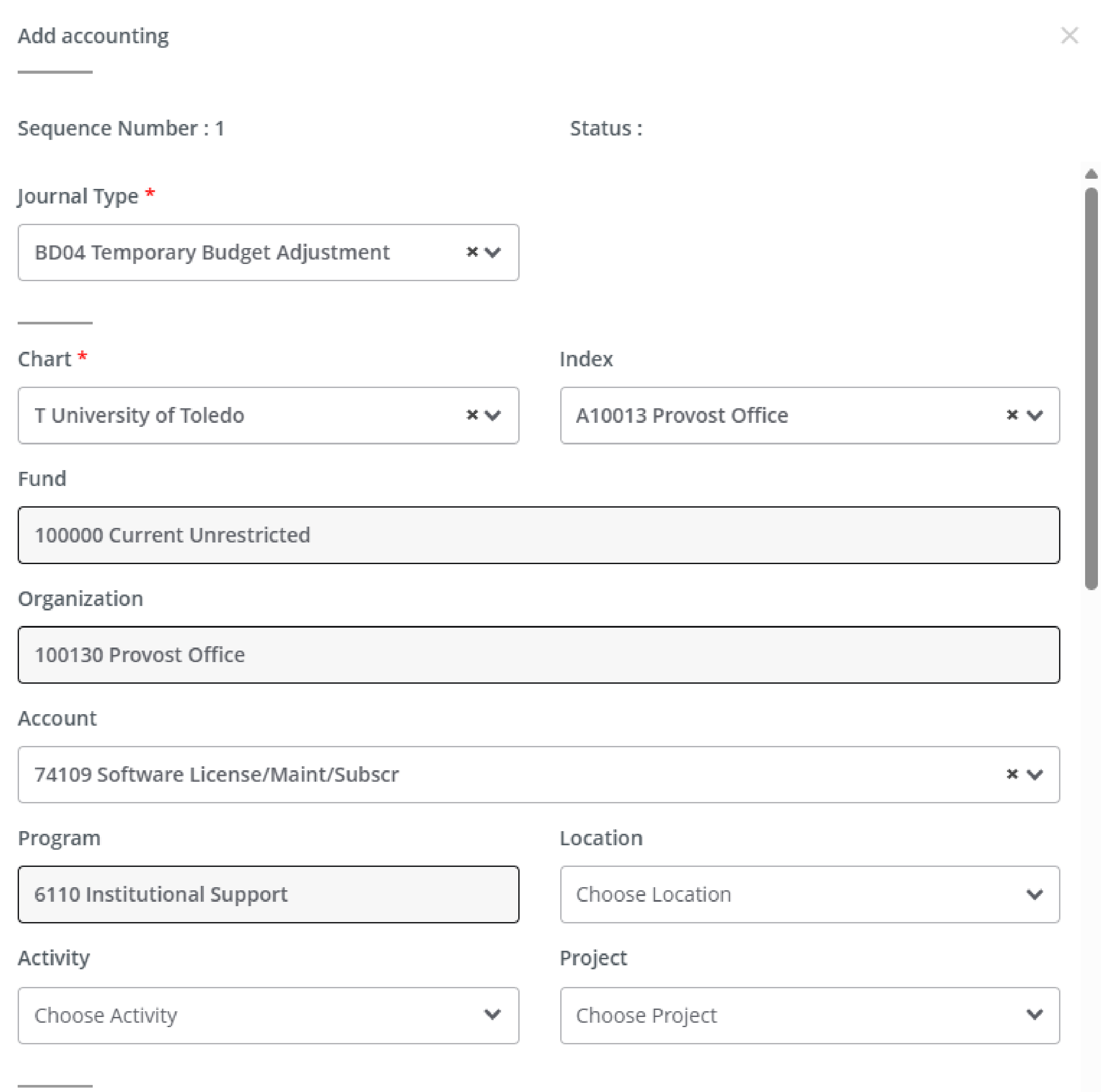


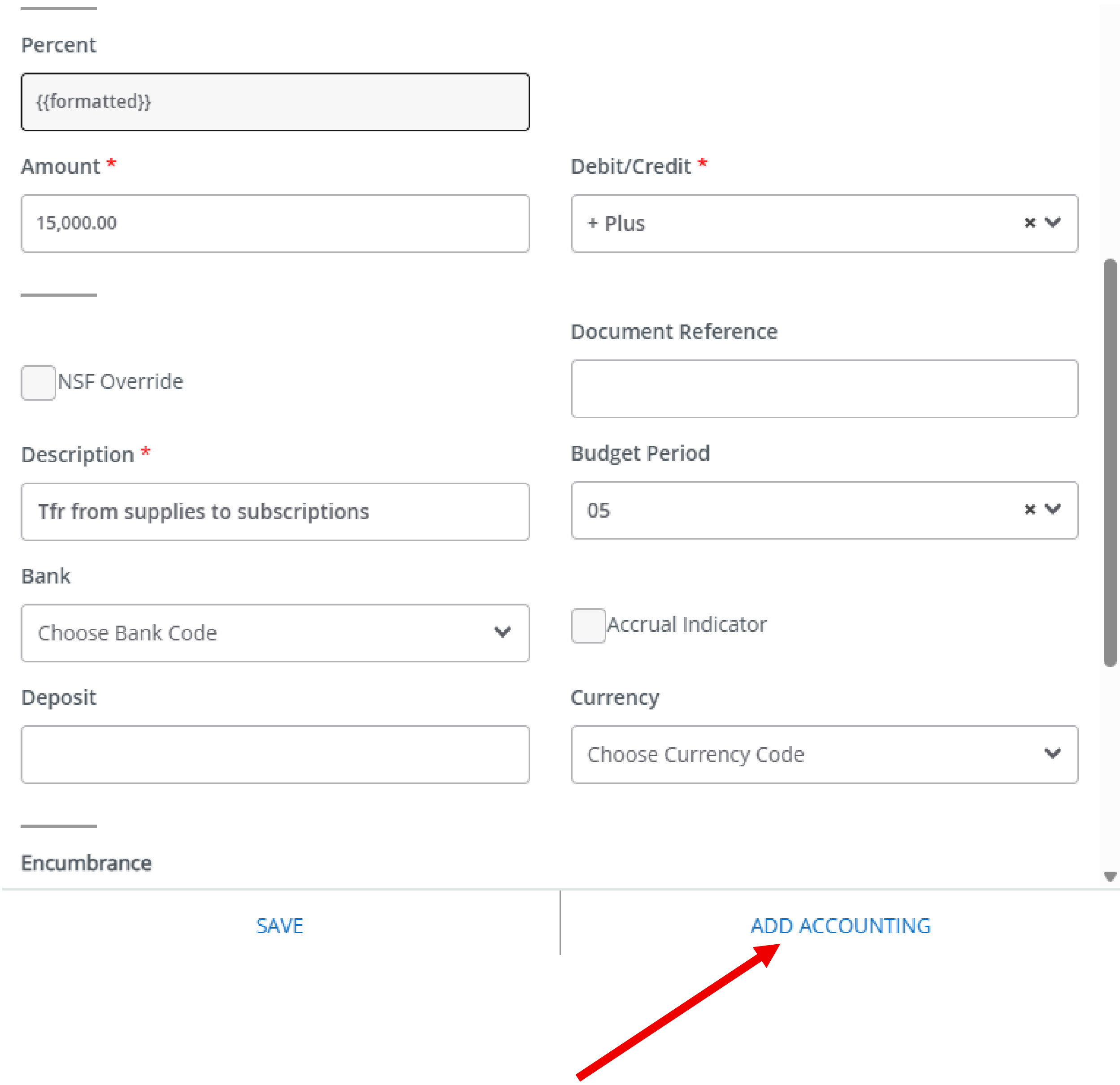
Click CREATE and you will be taken to the first line (sequence) of the journal entry.

If you select a journal type on the header page, it will automatically be displayed. If not, you will need to enter it here by selecting from the dropdown options. Again, **please choose BD04 for budget entries**.

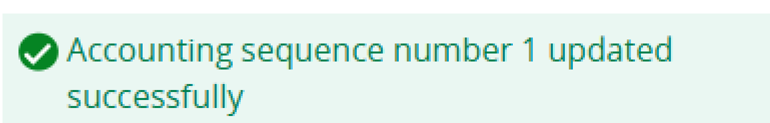
Next you will enter the index, account, amount, sign (Debit/Credit field), description and budget period.

As a reminder, for budget entries the sign should be "+" to increase the budget and "-"to decrease the budget.

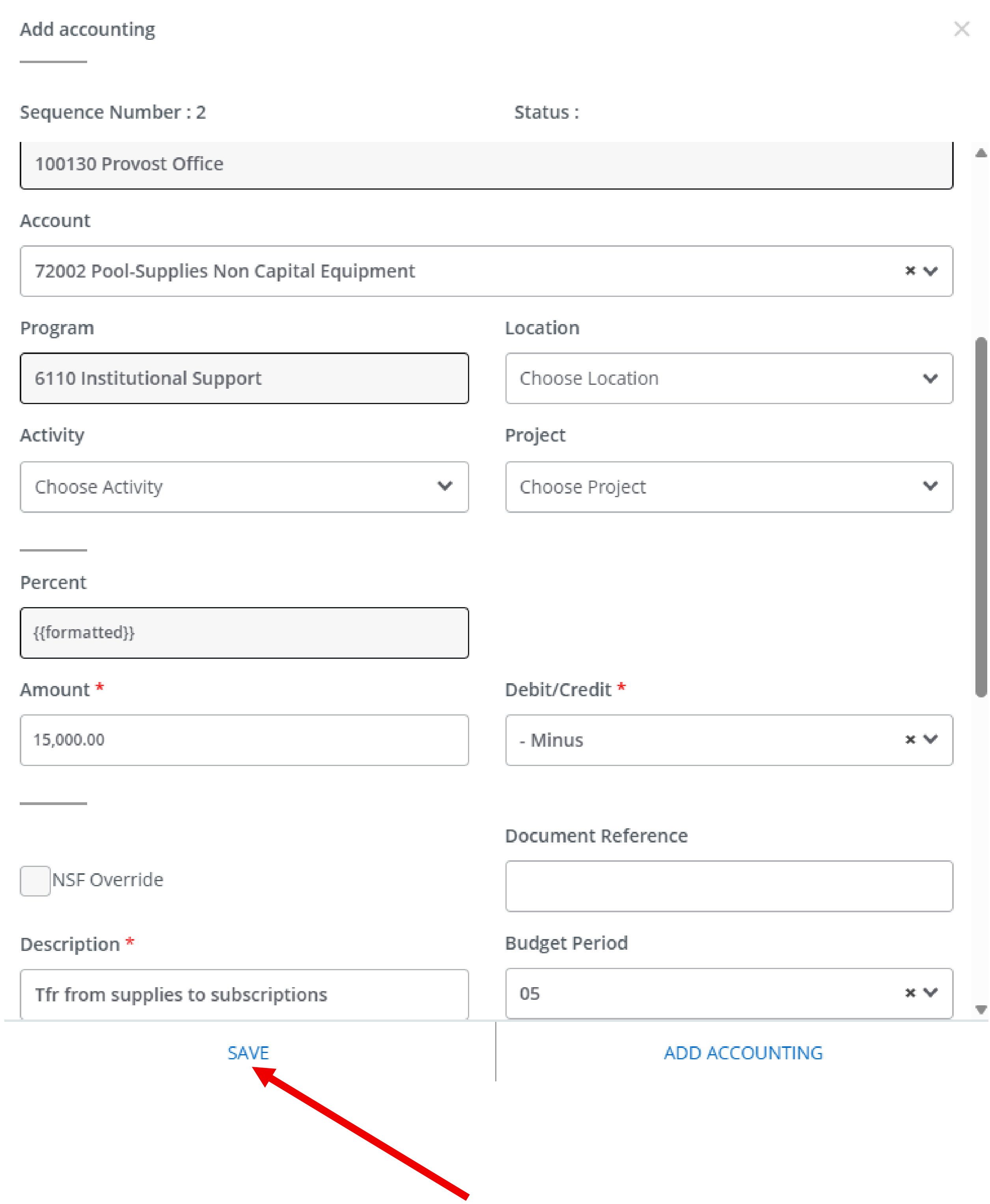

Add accounting
Sequence Number : 1
Status :
Journal Type *
BD04 Temporary Budget Adjustment
Chart *
T University of Toledo
Index
A10013 Provost Office
Fund
100000 Current Unrestricted
Organization
100130 Provost Office
Account
74109 Software License/Maint/Subscr
Program
6110 Institutional Support
Location
Choose Location
Activity
Choose Activity
Project
Choose Project



Once these items are entered click ADD ACCOUNTING. If there are no errors, you will receive a message that the sequence has been updated successfully.

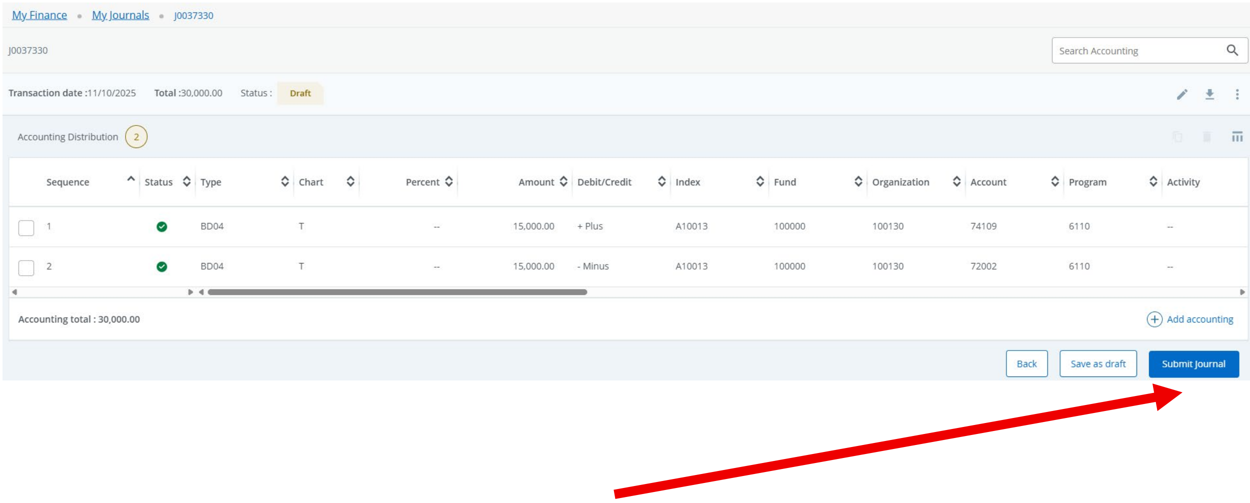


You will then be able to enter the next line of the journal following the same process as the first.



After all lines have been entered click the SAVE button.

The lines of the journal will be displayed for review.



If everything looks as expected click SUBMIT JOURNAL to send the journal through the approval process.

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