



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 requisitions 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

My Finance



Hello Patricia,
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 Journals
Create and view draft, pending and completed journals and supporting documentation.



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



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



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

Creating a Requisition

1. Click on **My Requisitions**



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

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.

My Finance • My Requisitions

My Requisitions

Search Requisition

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 0				
Pending Requisitions 0				
Completed Requisitions 2				
Z0025951	10/16/2025	12Twenty Inc	\$0.01	Assigned to Buyer ⓘ
Z0008395	06/14/2018		\$5,000.00	Cancelled

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

Search Requisition

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

Create Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requestor *
Jennifer Pastorek

Transaction Date * Delivery Date *
11/05/2025 MM/dd/yyyy

Requestor Email
Jennifer.Pastorek@utoledo.edu

Choose Accounting Type
☒ Document Level Accounting
☐ Commodity Level Accounting

Requisition Comments

Public Comment
Enter comments for the requisition

Private Comment
Enter comments for the requisition

Chart *
T University of Toledo

Organization *
106080 Purchasing

Ship To Location *
HSC HSC Receiving

Attention To *
HSC Receiving

Ship To Location
 Attention: HSC Receiving
 THE UNIVERSITY OF TOLEDO MEDICAL CENTER
 HSC RECEIVING DOCK
 3000 ARLINGTON AVENUE
 TOLEDO OH 43614

Requisition Summary Save as draft

Add details and click Next to build this summary view.

Back Next Submit Requisition

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 requisition applies to the whole requisition.

Commodity level Accounting: A way of processing requisitions and purchase orders in which each line of the requisition 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.

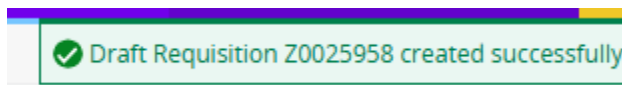
At this point you can save the requisition as a **DRAFT** by choosing the SAVE as DRAFT button in upper right hand corner.



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

A screenshot of the 'Vendor Information' tab in the requisition system. The top left shows the requisition number 'Z0025958' in a red box. The top right has a 'Delete Requisition' link with a red arrow pointing to it. The main area has three tabs: '1 Requestor Information', '2 Vendor Information' (active), and '3 Add Item & Accounting'. Under the 'Vendor Information' tab, there is a checkbox 'Choose vendor for me' and a 'Vendor' dropdown menu labeled 'Choose Vendor'. A red arrow points to the 'Vendor' dropdown. Below it is a 'Currency' dropdown menu labeled 'Choose Currency', with another red arrow pointing to it. On the right side, there is a 'Requisition Summary' section with a 'Requisition Number' field containing 'Z0025958' in a red box. At the bottom, there are buttons for 'Back', 'Next', 'View as PDF', and 'Submit Requisition'.

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.

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

☐ Choose vendor for me

Vendor

Metzgers Inc (R01341299) x v

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

Vendor

Choose Vendor x ^

concordance

Concordance Healthcare (R01347478)
85 Shaffer Park Dr Tiffin OH 44883

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.

Vendor

Concordance Healthcare (R01347478) x v

Vendor Information

Concordance Healthcare (R01347478)
85 Shaffer Park Dr
PO Box 399
Tiffin OH 44883

Vendor Email

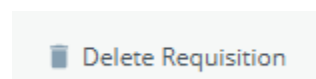
Choose/Enter Email x v

Currency

Choose Currency x v

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

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

Z0025958 Delete Requisition

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

Add Item(s)

Choose Item

Requisition Summary Save as draft

Requisition Number: Z0025958

Concordance Healthcare (R01347478)
85 Shaffer Park Dr
Tiffin OH 44883

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.

Add Item(s)

Choose Item

laptop computer Dell

laptop computer Dell (Add as new item)

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.

Z0025958

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

Commodity Description

laptop computer Dell

Unit Of Measure *

Choose Unit Of Measure

Quantity *

0.00

Unit Price *

0.0000

(Quantity) X (Unit Price) USD 0.00

Commodity Item Total USD 0.00

Commodity Comments

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

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)

✔ laptop computer Dell added to requisition Z0025958
 Delete Requisition

Requisition Summary
Save as draft

Requisition Number Z0025958

Concordance Healthcare (R01347478)
 85 Shaffer Park Dr
 Tiffin OH 44883

Commodities (1)

laptop computer Dell	10.00
Quantity 10.00 @ 1.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Grand Total - All Commodities	10.00
Grand Total - All Accounting	0.00

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

Back
Add Accounting

Grand Total - All Commodities	10.00
Grand Total - All Accounting	0.00

View as PDF
Submit Requisition

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.

Program* **6110 Institutional Support**

Activity **Choose Activity** x v

Location **Choose Location** x v

Project **Choose Project** x v

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

Commodities (1)

Computer-laptop	10.00
Quantity 10.00 @ 1.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

Click on **SUBMIT REQUISITION** button.

Back	View as PDF	Submit Requisition
Grand Total - All Commodities	50.00	
Grand Total - All Accounting	50.00	

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).

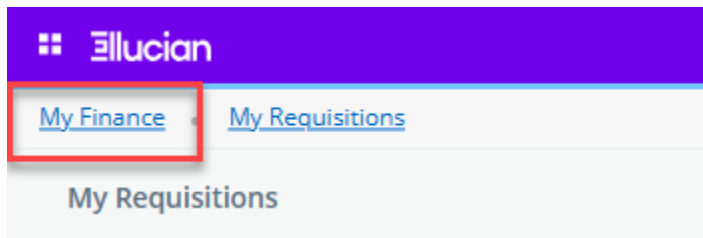
My Finance - My Requisitions

Requisition Z0025962 completed successfully

Search Requisition **Create Requisition**

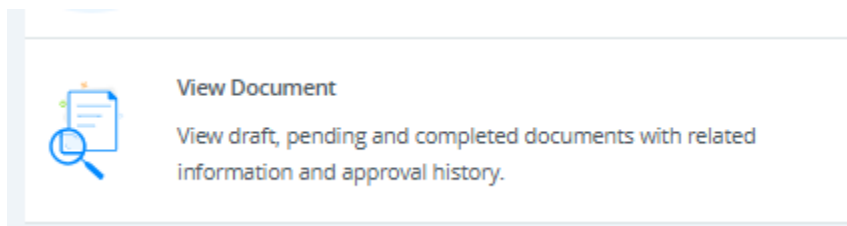
Requisition	Date	Vendor	Amount	Status
Draft Requisitions (1)				
Z0025961	11/05/2025		\$0.00	Draft
Pending Requisitions (2)				
Z0025962	11/05/2025	Dell Financial Services LLC	\$10.00	In Approval ①
Z0025958	11/05/2025	Concordance Healthcare	\$10.00	In Approval ①
Completed Requisitions (2)				
Z0025951	10/16/2025	12Twenty Inc.	\$0.01	Assigned to Buyer ①
Z0008395	06/14/2018		\$5,000.00	Cancelled

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).

A screenshot of the 'View Document' form. The form has a light gray header with the title 'View Document'. Below the header, there are three sections: 'Document Type' with a dropdown menu showing 'Requisition', 'Document Search' with a dropdown menu showing 'Choose Document Number', and 'Document Number' with a text input field containing 'Please Enter Document Number' and a search button. At the bottom of the form, there are two buttons: 'VIEW DOCUMENT' and 'APPROVALS & RELATED DOCUMENTS'.

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.

View Document

Document Type

Requisition

Document Search

Choose Document Number

Document Number *

Z0025963

VIEW DOCUMENT

APPROVALS & RELATED DOCUMENTS

VIEW ATTACHMENT(S)

UPLOAD ATTACHMENT

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.

Related Documents

Purchase Order

[P0000004](#) | 05/02/2014 | Closed

Invoice

[I0004365](#) | 06/30/2014 | Paid

Check Disbursement

01002911 | 07/17/2014 | Final Reconciliation

Approval History

A10565 APPROVAL QUEUE (0325) (10)

| 05/01/2014

Approvals Required

No Approval required information available for Z0000005

BACK TO VIEW DOCUMENT

Click **BACK TO VIEW DOCUMENT** to return to prior page.

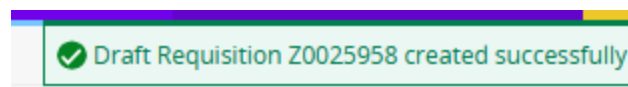
To ADD Documents to a Requisition (Document Imaging Function)

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

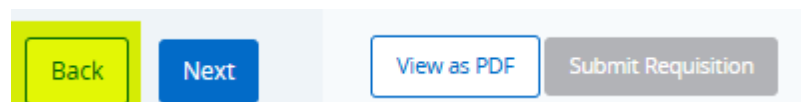
1. From inside the building of the requisition
2. Adding through the VIEW Document function after the requisition number has been submitted.

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.

View Document

Document Type

Requisition

Document Search

Choose Document Number

Document Number *

Z0025963

VIEW DOCUMENT

APPROVALS & RELATED DOCUMENTS

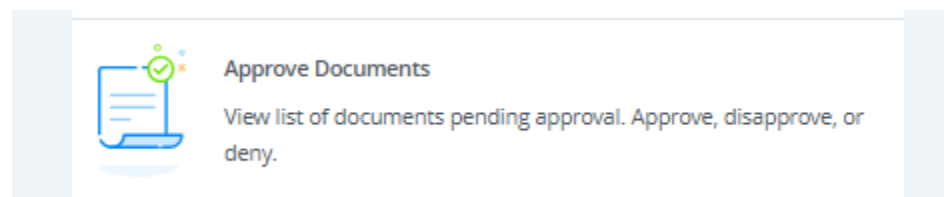
VIEW ATTACHMENT(S)

UPLOAD ATTACHMENT

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.



Approve Documents

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

User ID

PASTOREK

Document Number

Submit

☒ User ID is next approver ☐ All documents User may approve

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 AI 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	Document Type
Z0025914	Requisition
Originator	Originator Name
CSCHONT	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	Document Type
Z0025921	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.

Approve Document

Document Number

Z0025921

Document Type

REQ

Change Sequence

-

Submission

-

Amount

81,420.00

Comment

This document has been approved.

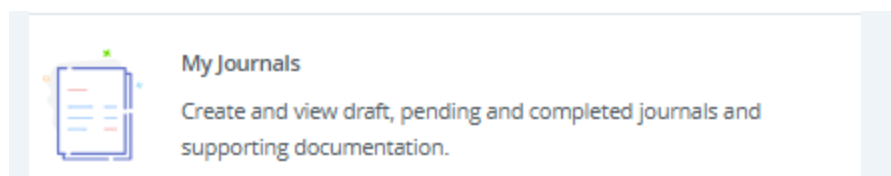
Cancel

Approve

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.

Search Journal

Create Journal

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.

Please choose BD04 as the journal type for budget transfers 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.

The screenshot shows the 'Create Journal' form. At the top, there's a 'Transaction Date' field with a calendar icon, showing '11/05/2025'. Below this are checkboxes for 'Redistribution', 'NSF Checking', and 'Deferred Edit'. A 'Distribution Total' field is also present. The 'My Journal Defaults Section' contains dropdowns for 'Journal Type' (set to 'Choose Journal Type'), 'Bank Code' (set to 'Choose Bank Code'), 'Budget Period' (set to 'Choose Budget Period'), 'Description' (empty), 'Deposit' (empty), and 'Currency' (set to 'Choose Currency Code'). At the bottom, there's a 'My JV Comment' section with a 'My JV Public Comment' field. A red arrow points from the bottom left towards the 'CREATE' button at the bottom right.

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 x v

Chart *

T University of Toledo x v

Index

A10013 Provost Office x v

Fund

100000 Current Unrestricted

Organization

100130 Provost Office

Account

74109 Software License/Maint/Subscr x v

Program

6110 Institutional Support

Location

Choose Location v

Activity

Choose Activity v

Project

Choose Project v

Percent

{{formatted}}

Amount *

15,000.00

Debit/Credit *

+ Plus x v

☐ NSF Override

Document Reference

Description *

Tfr from supplies to subscriptions

Budget Period

05 x v

Bank

Choose Bank Code v

☐ Accrual Indicator

Deposit

Currency

Choose Currency Code v

Encumbrance

SAVE

ADD ACCOUNTING

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.

✓ Accounting sequence number 1 updated successfully

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

Add accounting

Sequence Number : 2

Status :

100130 Provost Office

Account

72002 Pool-Supplies Non Capital Equipment

Program

6110 Institutional Support

Location

Choose Location

Activity

Choose Activity

Project

Choose Project

Percent

{{formatted}}

Amount *

15,000.00

Debit/Credit *

- Minus

☐ NSF Override

Document Reference

Description *

Tfr from supplies to subscriptions

Budget Period

05

SAVE

ADD ACCOUNTING

After all lines have been entered click the **SAVE** button.

The lines of the journal will be displayed for review.

My Finance > My Journals > J0037330

J0037330 Search Accounting

Transaction date: 11/10/2025 Total: 30,000.00 Status: Draft

Accounting Distribution 2

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index	Fund	Organization	Account	Program	Activity
☐ 1	✔	BD04	T	--	15,000.00	+ Plus	A10013	100000	100130	74109	6110	--
☐ 2	✔	BD04	T	--	15,000.00	- Minus	A10013	100000	100130	72002	6110	--

Accounting total: 30,000.00 + Add accounting

Back
Save as draft
Submit Journal

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

The journal will now be displayed in Pending Journals until approved.

My Journals Search Journal

Document	Date	Description	Total	Status
Draft Journals 0				
Pending Journals 2				
J0037330	11/10/2025	Tfr from supplies to subscriptions	30,000.00	In Approval ⓘ