


## OPTIONAL – Initiate Requisitions – SSB9

Step 1: Log into SSB from the Main menu and select the **Finance** tab. Then select **My Requisition**.

My Finance

Hello Gina,  
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.
- Delete Finance Template**  
Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.
- View Document**  
View draft, pending and completed documents with related information and approval history.

## Select Create Requisition

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

My Requisitions



Requisition	Date	Vendor	Amount	Status
Draft Requisitions <span>2</span>				
R0031865	09/12/2023		\$0.00	Draft
R0031863	09/07/2023	Cabrillo Community College	\$0.00	Draft

## Step 2: Requestor Information

Complete the following fields

- a. **Delivery Date**
- b. **Ship to Location**

The screenshot shows a multi-step requisition form. Step 1, 'Requestor Information', is active. It contains several fields: 'Requestor \*' (Gina Venn), 'Transaction Date \*' (09/12/2023), 'Delivery Date \*' (09/12/2023), 'Requestor Email' (gina.venn@wvm.edu), 'Choose Accounting Type' (Document Level Accounting selected), and two comment boxes. Step 2, 'Vendor Information', is partially visible, showing 'Chart \*' (D District Chart), 'Organization \*' (309600 Purchasing), 'Ship To Location \*' (01 Warehouse), 'Attention To \*' (Warehouse), and 'Tax Group' (CAD California Sales Tax). A yellow box displays the address for '01 Warehouse'. Red arrows point to the 'Delivery Date' and 'Ship To Location' fields. 'Back' and 'Next' buttons are at the bottom right.

If having multiple FOAP's you want to select **Commodity Level Accounting**

This close-up shows the 'Choose Accounting Type' section. It has two radio button options: 'Document Level Accounting' (unselected) and 'Commodity Level Accounting' (selected).

Select **Next**

Step 3: **Vendor Information**

- a. Choose a vendor (Contact Purchasing if unable to find vendor.)
- b. Enter email address for vendor if it doesn't populate
- c. Make note of requisition number

Select **Next**

R0031867 

1 Requestor Information2 Vendor Information3 Add Item & Accounting

Choose vendor for me

Vendor

Amazon Capital Services (G01449057)x v

Vendor Information

Amazon Capital Services (G01449057)  
Acct 60457 8781 006094 3  
PO Box 530958  
Atlanta GA 30353-0958

Vendor Email

ar-businessinvoicing@amazon.comx v

Discount

Currency

Choose Discountx v

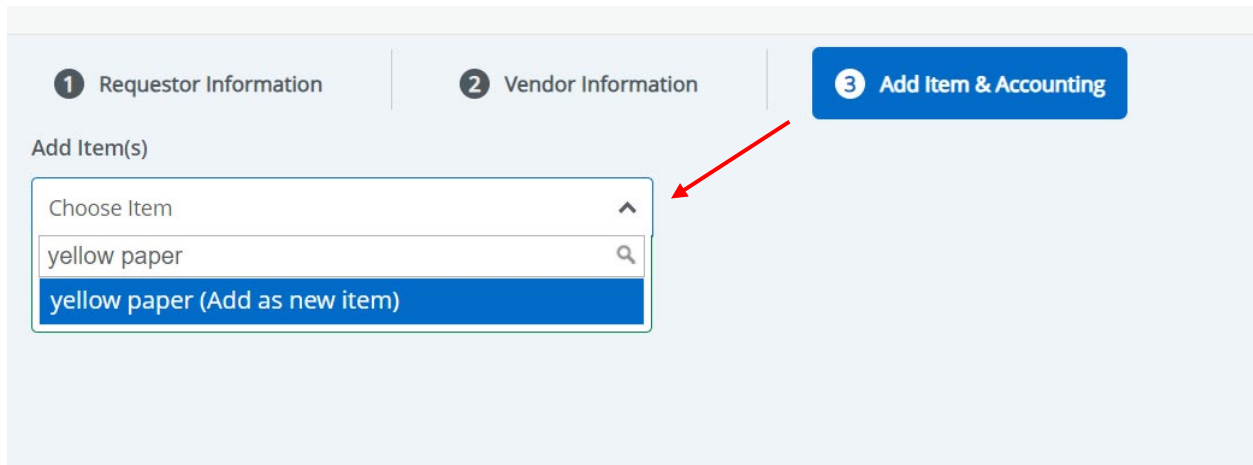
Choose Currencyx v

Step 4: **Add Item & Accounting**

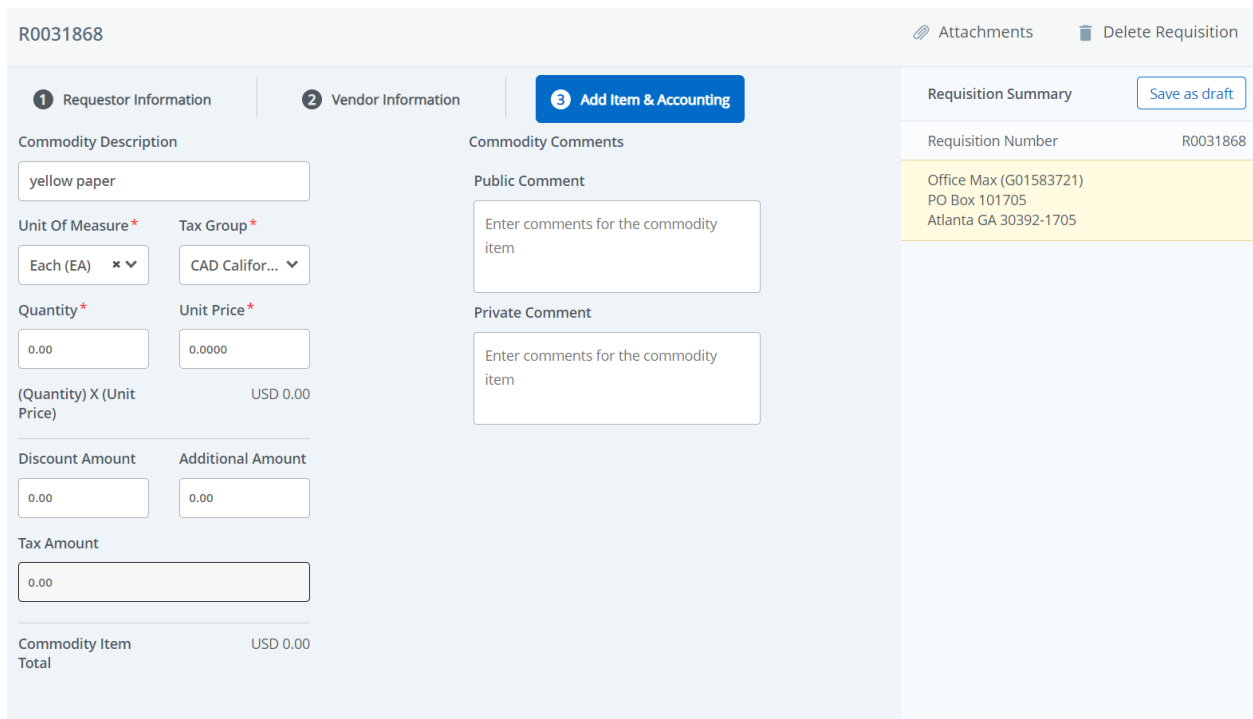
Complete the following fields:

**a. Choose item**

- i. Type item you would like to purchase. Hit “Enter” key on keyboard to move to the next screen.



**Next screen:**



**Complete the following:**

- a. Unit of Measure**
- b. Tax Group**

- i. CAD - California State Tax
- ii. D00 – District No Tax
- c. Quantity**
- d. Unit Price**

**Add comments if needed. SAVE.**

**Repeat for each line item to be added.**

After adding all needed line items, select **Add Accounting**.

R0031868 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x v

Commodities (1)

yellow paper	109.13
Quantity 1.00 @ 100.0000	Discount 0.00
Additional Charges 0.00	Tax 9.13

Requisition Summary Save as draft

Requisition Number R0031868

Office Max (G01583721)  
PO Box 101705  
Atlanta GA 30392-1705

Commodities (1)

yellow paper	109.13
Quantity 1.00 @ 100.0000	Discount 0.00
Additional Charges 0.00	Tax 9.13

### Step 5: Add Item & Accounting

Complete the following fields:

- a. Fund**
- b. Organization**
- c. Account**
- d. Program**

If using multiple account numbers you can change the **Distribution Amount** or **Distribution Percent**.

Select **Split Accounting**

Distribution Amount *	Distribution Percent *
15.00	50.00000000
Discount Amount	Additional Amount
0.00	0.00
Tax Amount	
1.37	
Distribution Total	16.37
<hr/>	
Remaining	16.37
<a href="#">Split Accounting →</a>	



Enter in additional FOAP

Step 6: **Select Save**

Step 7: **Add an attachment. Select “Attachments.”**

**a. Select “attach file”**

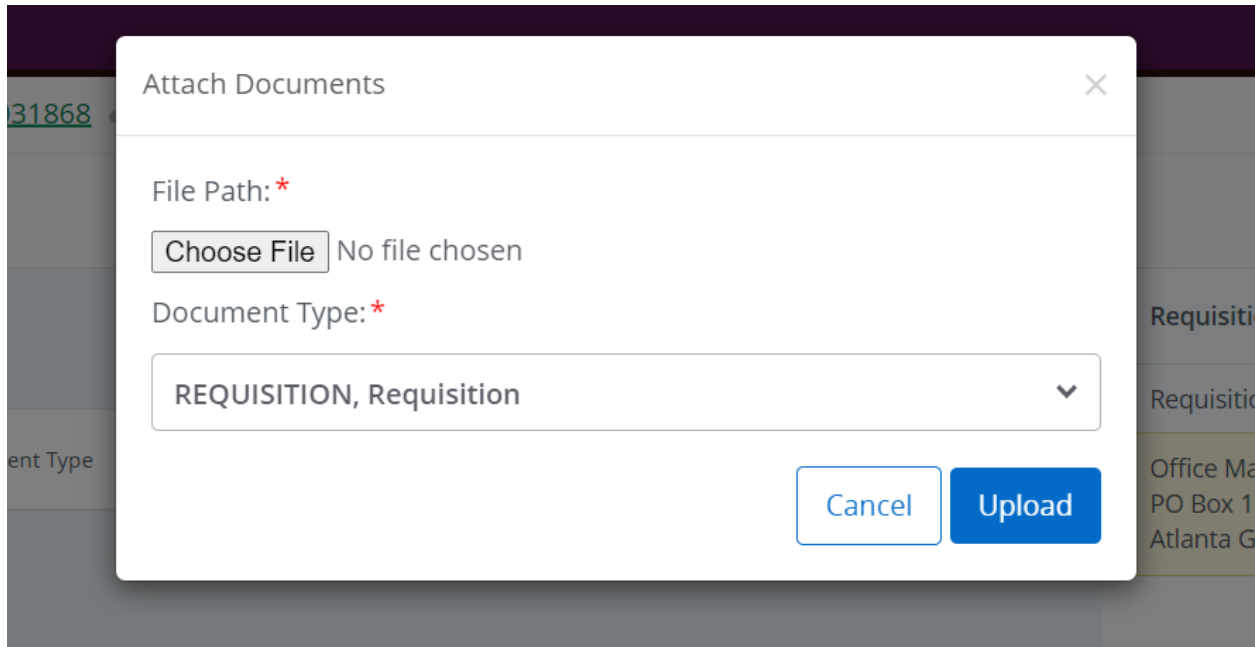
Requisition Number R0031868

← Attachments 
 Attach File
  Refresh Attachments

Document Name	Document Type	Owner Name	Date of Attachment

The following box will appear.

Select the appropriate document type from the drop-down menu. Choose file (must be PDF format). Select “upload.”



## Step 8: Submit Requisition