

How to find a PO in Banner SSB

General rules: If you see red text this means it is a link. You can click on these links for detail.

- View Document:** To use View Document you need to know a document number; requisition or invoice number (Banner generated invoice number)

From the menu click on View Document

- Choose the appropriate type whether it is Requisition or Invoice.
- Enter in the document Number in the Document Number field.
- Click View document

If a PO has been assigned it will display at the bottom of the screen under related documents

Related Documents				
Transaction Date	Document Type	Document Code	Status	Indicator
Aug 29, 2008	Invoice	I0011647	Approved	
Aug 27, 2008	Purchase Order	P0901247	Approved	

NOTE: Change Orders will increase/decrease the PO on View Document. However, the Change Order does not show up as a related document. If you need to view the Change Order do a View Document and Choose the type as PO and type in PO number in the Document Number field and the sequence number in the Change Seq # Field.

- Encumbrance Query:** To use the Encumbrance query you need an index or an organization number.

From the menu Click Encumbrance Query

- Enter in the index or organization in the appropriate fields. If using an index you will have to click submit query twice. Once will populate the Fund, Org and Program. Second time for query results.
NOTE: Use the Account to have a smaller query result.
- A list of PO's for that org or index will display.

Query Results									
Account Code	Document Code	Description	Original Commitments	Encumbrance Adjustments	Encumbrance Liquidations	Year to Date	Current Commitments	% Used	Cmt Type
72202	P821629		21.01	(21.01)	.00	.00	.00	.00	Uncommitted
73005	P0901385		1,824.55	.00	.00	.00	1,824.55	.00	Uncommitted
73066	P823527		1,562.62	.00	(685.34)	685.34	877.28	43.86	Uncommitted
73310	P0900228		15,000.00	(15,000.00)	.00	.00	.00	.00	Uncommitted
73310	P0900479		25,000.00	.00	.00	.00	25,000.00	.00	Uncommitted
73310	P0900639		137,500.00	.00	.00	.00	137,500.00	.00	Uncommitted
73310	P0901178		15,000.00	.00	.00	.00	15,000.00	.00	Uncommitted
73310	P821274		26,376.21	.00	.00	.00	26,376.21	.00	Uncommitted
73310	P821954		3,930.00	.00	(3,930.00)	4,022.50	.00	100.00	Uncommitted
73313	P0900142		30,000.00	.00	.00	.00	30,000.00	.00	Uncommitted
73313	P0900144		5,000.00	.00	.00	.00	5,000.00	.00	Uncommitted
73313	P0900152		1,500.00	.00	.00	.00	1,500.00	.00	Uncommitted
73313	P0900230		50,000.00	.00	(1,978.75)	1,978.75	48,021.25	3.96	Uncommitted
73313	P0900503		3,000.00	.00	(3,000.00)	3,734.00	.00	100.00	Uncommitted
73313	P0901111		19,100.00	.00	.00	.00	19,100.00	.00	Uncommitted
	Screen Total		334,814.39	(15,021.01)	(9,594.09)	10,420.59	310,199.29	3.00	
	Running Total		334,814.39	(15,021.01)	(9,594.09)	10,420.59	310,199.29	3.00	
	Report Total (of all records)		2,161,865.11	(432,701.01)	(670,755.89)	677,512.20	1,058,408.21	38.79	

Next 15 > [Click Here to see additional PO's on this Index or Organization.](#)

- Budget Status by Account:** To use the Budget Status by account you will need an index or an organization number.

From the main menu Click Budget Queries

- From the Drop down Click Budget Queries by Status by Account

- From the Columns make sure Encumbrances are checked and click Continue.

- Enter in the index or organization in the appropriate fields. If using an index you will have to click submit query twice. Once will populate the Fund, Org and Program. Second time for query results. NOTE: Use the Account to have a smaller query result.
- Click on the Dollar amount in the Encumbrance Column to drill down to a list of PO's that make up that dollar amount.

Query Results									
Account	Account Title	FY09/PD12 Adopted Budget	FY09/PD12 Adjustment	Budget Year to Date	FY09/PD12 Encumbrances	FY09/PD12 Reservations	FY09/PD12 Commitments	FY09/PD12 Avail	FY09/PD12 Avail
73035	Travel-ProCard ATM	0.00	0.00	403.00	0.00	0.00	0.00	0.00	0.00
73041	Telephone-Toll Charges	0.00	(1,399.00)	2.50	0.00	0.00	0.00	0.00	0.00
73042	Telephone-Instrument Charges	13,511.00	0.00	1,868.00	0.00	0.00	0.00	0.00	0.00
73044	Telephone-Cellular	10,000.00	0.00	243.83	0.00	0.00	0.00	0.00	0.00
73051	Postage	400.00	0.00	32.52	0.00	0.00	0.00	0.00	0.00
73066	Computer Software	1,562.62	0.00	685.34	877.28	0.00	0.00	877.28	0.00
73201	Subscriptions	200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
73301	Office Supplies	2,211.00	0.00	56.90	0.00	0.00	0.00	0.00	0.00
73303	Computer Supplies	300.00	0.00	583.30	0.00	0.00	0.00	0.00	0.00
73310	Lavatory Supplies	136,624.21	0.00	4,022.50	203,876.21	0.00	203,876.21	0.00	203,876.21

- A list of your PO's will display. Notice in this example there are invoices. These are invoices that have not been approved. Once they are approved they will disappear here and move to the Year to date column. At this point you can click on any red hyperlink to drill down on detail of the Document.

Document List							
Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code		
Jul 01, 2008	Jul 02, 2008	P821954	210910 73313Custom Chemical Co I	3,930.00	E100		
Jul 01, 2008	Jul 02, 2008	P821274	210910 73310Xpedx	26,376.21	E100		
Aug 25, 2008	Aug 25, 2008	P0901178	Xpedx	15,000.00	PORD		
Jul 24, 2008	Jul 24, 2008	P0900639	Perkins Paper	137,500.00	PORD		
Jul 17, 2008	Jul 31, 2008	P0900479	Custom Chemical Co Inc	25,000.00	PORD		
Aug 22, 2008	Aug 22, 2008	P0900228	Xpedx	(15,000.00)	PCRD		
Jul 09, 2008	Jul 09, 2008	P0900228	Xpedx	15,000.00	PORD		
Jul 16, 2008	Jul 16, 2008	I0002494	Xpedx	0.00	INEI		
Jul 16, 2008	Jul 16, 2008	I0002491	Xpedx	0.00	INEI		
Jul 16, 2008	Jul 16, 2008	I0002486	Xpedx	0.00	INEI		
Jul 16, 2008	Jul 17, 2008	I0002456	Xpedx	0.00	INEI		
Jul 14, 2008	Jul 15, 2008	I0001978	Custom Chemical Co Inc	(907.50)	INEI		
Jul 08, 2008	Jul 09, 2008	I0000954	Custom Chemical Co Inc	(1,237.50)	INEI		
Jul 08, 2008	Jul 09, 2008	I0000953	Custom Chemical Co Inc	(1,785.00)	INEI		
Report Total (of all records):				203,876.21			