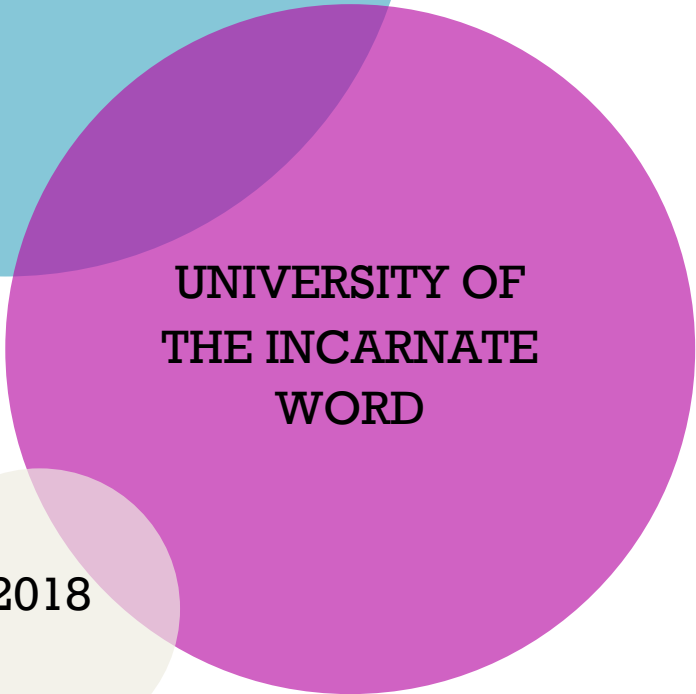
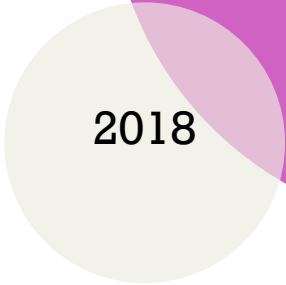




BANNER 9
My Requisition



**UNIVERSITY OF
THE INCARNATE
WORD**



2018

Welcome to Banner 9

My Requisition Self-Service

Purchase Requisition Overview


Purchase Requisition Overview Purchase Requisition allows you to create and submit a purchase requisition. You can create a purchase requisition using either document-level or commodity-level accounting. You can also use this application for the following:

- Save requisition as a draft (Draft status) • Edit a draft requisition and submit a draft requisition
- Delete a draft requisition
- View requisition status
- Copy a completed requisition
- Add comments (public and private)
- Add and delete attachments using Banner Document Management
- Recall your requisition from Banner Finance approvals
- View a requisition as a PDF

The following pages contain screenshots and instructions to walk you through the process of creating a requisition and submitting the requisition for approval.

If you need additional assistance with this process contact the Purchasing department.

Step 1 Login to the MyWord Portal



Sign In

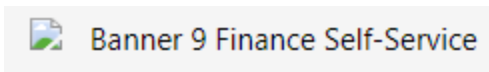
Username

Password

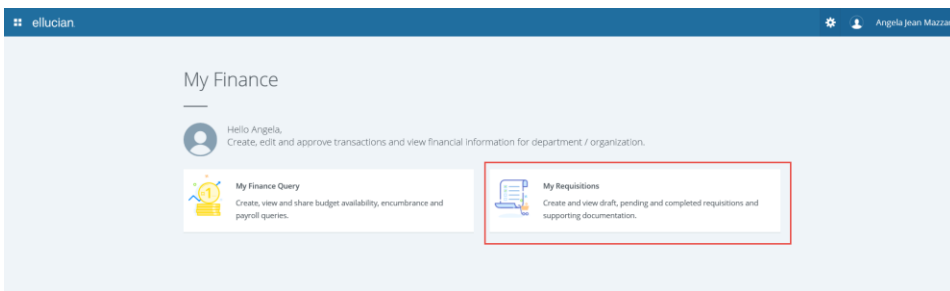
LOGIN

[Reset Password](#) | [Need Help?](#)

Step 2 From the Left side of the screen in your Launch Pad select the Banner 9 Finance Self-Service link.



Step 3 The My Finance dashboard will open once you have selected the link. If you do not receive this dashboard contact the Help Desk.



ellucian

Angela Joan Mazzaro

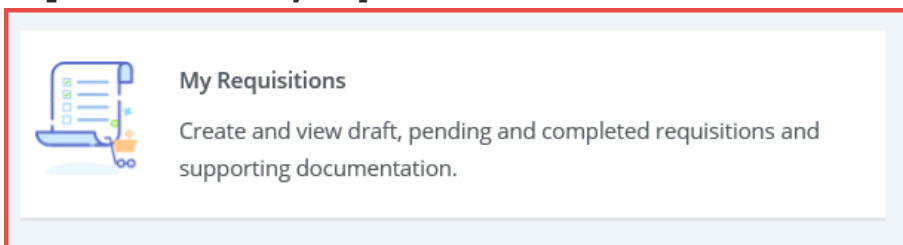
My Finance

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

Step 4 Click on the My Requisition button



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

Step 5 Your My Requisition Dashboard will open. The dashboard contains your Draft, Pending and Converted to PO requisitions. You can also click on the Create Requisition button to begin a new request.

Requisition	Date	Amount	Vendor	Status
Draft Requisitions (10)				
R004423	04/02/2018	\$32.00	Heighes Office Supply	Draft
R004424	04/02/2018	\$0.00		Draft
Pending Requisitions (13)				
R004421	04/09/2018	\$75.00	Heighes Office Supply	Pending
R004430	04/09/2018	\$8.00	Heighes Office Supply	Pending
Completed Requisitions (36)				
R0043141	11/03/2017	\$170.15	Heighes Office Supply	Converted to PO
R0042491	10/09/2017	\$559.96	Corporate Travel Planners	Converted to PO

Draft

A Draft is a requisition you have started but not completed.

Pending

A Pending requisition is a request you have completed and sent for approval.

Converted to PO

A Converted to PO is a requisition that is approved and the Purchasing department has converted to a Purchase Order.

Step 6 Click the Create Requisition button to begin a new request.

Create Requisition

Step 7 This is the Requestor/Delivery Page. You will complete the following steps on this page:

- Enter requested delivery date (must be at least 1 day ahead of the transactions date).
- Enter the Organization number
- Attention to
- Document Text (optional)

†Note: At this time only one requestor email may be entered.

My Finance » My Requisitions » Create Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requestor*
Angela Mazzara

Transaction Date* 04/30/2018 Delivery Date* 05/01/2018

Requestor Email
williams@uiwtx.edu

Accounting Type: Document level

Requisition Comments

Public Comment
Will be seen

Private Comment
Internal only

Chart*
1 Univ. of the Incarnate Word

Organization*
Choose Organization
6306
Enterprise Applications

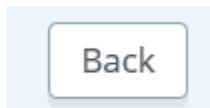
Attention To*
Sam Wages

Tax Group
Choose Tax Group

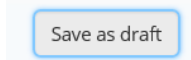
Ship To Location
Attention: Sam Wages
University of the Incarnate Word
4301 Broadway
San Antonio TX 78209

Back Next

Step 8 Click the Next button in the lower right of the screen to move to the next section of the request.

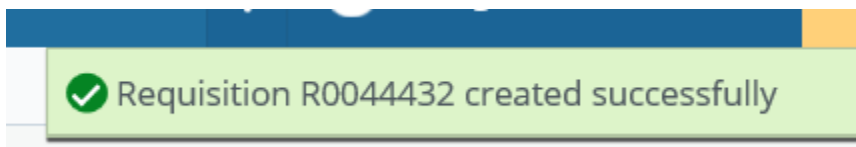


Back button will return you to the dashboard



Save as draft will save your requisition to the draft section of the My Requisition Dashboard.

Once you click Next you will receive confirmation that you have created a requisition and the number associated.



Step 9 You will be on the Vendor page. You can let purchasing select a vendor for your request or you can uncheck the box and select a vendor.



To select a vendor start typing the vendor's name. A dropdown will appear and you can scroll through to pick the correct vendor.

1 Requestor Information 2 Vendor Information 3 Add Item & A

Choose vendor for me

Vendor

Choose Vendor x ▲

Heights office x 🔍

Heights Office Supply (60462)
5204 Broadway St San Antonio TX 78209-5725

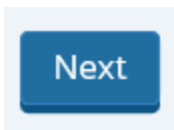
Heights Office Supply (60462)
9901 Broadway St Ste 114 San Antonio TX 78217-4916

Heights Office Supply (60462)
1103 Trail St Floresville TX 78114-1701

Heights Office Supply (60462)

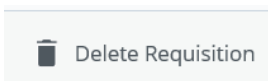
†Note: At this time only one vendor email may be entered.

Once you have your vendor selected click the Next button to move to the next section.

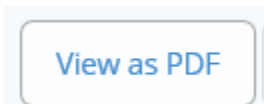


Requisition Summary	Save as draft
Requisition Number	R0044432

You can save your requisition at this point by pressing the Save as Draft button.

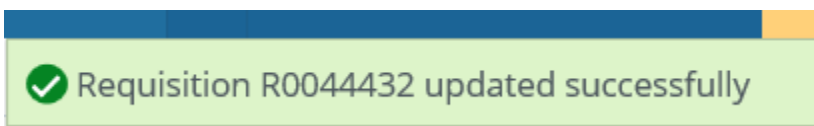


You can click the Delete Requisition button to cancel your request and start over.



You can click the View as PDF button to view your requisition as a PDF.

Once you click the Next button on the Vendor page you will receive a confirmation that the requisitions was updated.



Step 10 The Commodity page. Enter the following information:

- Description of the item or service to be ordered
- (U/M)Unit of Measure – always EA
- Quantity of items
- Price per item
- Private or Public Comments (optional)

R0044431

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

Commodity Description
 Unit of Measure is always EA

Unit Of Measure* Tax Group*

Quantity* Unit Price* Enter the price

(Quantity) X (Unit Price) USD 0.00

Discount Amount Additional Amount

Tax Amount

Commodity Item Total USD 0.00

Commodity Comments
 Public Comment

Private Comment

Enter the quantity ordered

Click the Save button. At this point, you can either enter another description for another item or click the Add Accounting button to add the account information associated with the purchase.

ellucian

My Finance > My Requisitions > R0044431

R0044431

Attachments Delete Requisition

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

Commodity Description

Unit Of Measure* Tax Group*

Quantity* Unit Price*

(Quantity) X (Unit Price) USD 25.00

Discount Amount Additional Amount

Tax Amount

Commodity Item Total USD 25.00

Commodity Comments
 Public Comment

Private Comment

Requisition Summary

Requisition Number R0044431

Heights Office Supply (60462)
 5204 Broadway St
 San Antonio TX 78209-5725

Back Save View as PDF Activate Windows
Go to Settings to activate Windows.
Submit Requisition

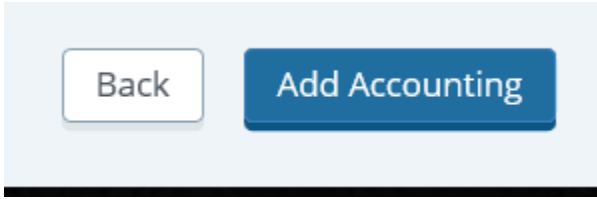
 Attachments

 Delete Requisition

Two buttons on this screen are optional.

- You can click the Delete Requisition button and completely cancel your requisition.
- You can click the Attachments button to add documentation to your request

Step 11 After all of your items or services are entered click the Add Accounting button.

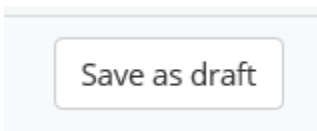


Step 12 Accounting Page you will enter the following:

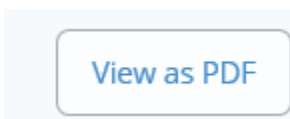
- Enter the Fund, ORG, ACCT, and Program codes. You can search on any of these fields if you don't remember the number you need to use

Note: If you need to split the cost between Funds, ORGS, ACCT you will need to change the Distribution Percent field and add the additional accounting information.

Step 13 Click Save

A screenshot of the 'Add Item & Accounting' page in a web application. The page has a breadcrumb trail: 'My Finance > My Requisitions > R0044431'. Below the breadcrumb is the requisition number 'R0044431'. There are three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting' (which is active). The form contains several fields: 'Chart*' (dropdown: '1 Univ. of the Incarna...'), 'Index' (dropdown: 'Choose Index'), 'Fund*' (dropdown: '10010 Current Unrestricted Funds'), 'Organization*' (dropdown: '6306'), 'Account*' (dropdown: '6584 Office Supplies'), 'Program*' (dropdown: 'Choose Program'), 'Activity' (dropdown: 'Choose Activity'), 'Location' (dropdown: 'Choose Location'), and 'Project' (dropdown: 'Project'). On the right side, there are input fields for 'Distribution Amount*' (75.00), 'Distribution Percent*' (100.00000000), 'Discount Amount' (0.00), 'Additional Amount' (0.00), and 'Tax Amount' (0.00). Below these are 'Distribution Total' (75.00) and 'Remaining' (0.00). At the bottom right are 'Back' and 'Save' buttons. Red callout boxes with arrows point to the 'Fund*', 'Organization*', 'Account*', 'Program*', and 'Save' fields, with text: 'Enter your Fund', 'Enter your Organization Code', 'Enter your Account Number', 'Enter your Program Code', and 'Click Save when the accounting information is entered' respectively.

Allows you to save where you are and come back to make changes or continue.



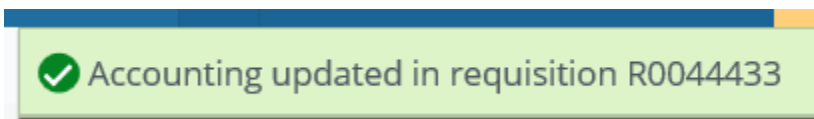
View as a PDF gives you a finished look that your requisition. We recommend waiting until you are ready to complete your requisition to print a copy as a PDF. (Optional) Example of PDF is below.

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

Requestor	Angela Mazzara	Requisition #	R0044431
Phone	210-8325621 Ext	Transaction Date	04/30/2018
Email	williams@uiwtx.edu	Delivery Date	05/01/2018
Organization	Enterprise Applications (6306)	Status	Draft
Accounting Type	Document Level	Currency	USD

Ship To	1000	Vendor	Heights Office Supply (60462)
Address	University of the Incarnate Word 4301 Broadway San Antonio TX 78209	Address	5204 Broadway St San Antonio TX 78209-5725
Attention To	Iris Solcher - Ext	Phone	210-8829671 Fax: 210-8221140
		Email	ezuzula@heightsofficeproducts.com

After you click "Save" button, you will receive a confirmation message that you accounting was added to your requisition.




Step 14 Once you add your accounting information, you can add any attachments by clicking the Attachments button.



My Finance • My Requisitions • Attachments

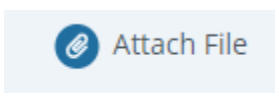
Attachments

Requisition Number R0044422

[← Attachments](#) [Refresh Attachments](#)  [Attach File](#)

Document Name	Document Type	Owner Name	Date of Attachment	
CHRYSANTHEMUM.JPG	REQUISITION	ANGELA JEAN MAZZARA	04/02/2018	
HEIGHTS OFFICE ORDER 041618_SO_0121924.PDF	REQUISITION	ANGELA JEAN MAZZARA	05/09/2018	
HEIGHTS OFFICE SUPPLIES SQ0121796_040518.PDF	REQUISITION	ANGELA JEAN MAZZARA	05/09/2018	

Click **Attach File** to select from saved documents on your computer.



Click the **Choose File** button

Attach Documents ✕

File Path: *
 No file chosen

Document Type: *

Select your file to uploaded


Name	Date modified	Type	Size
Example of a name plate.pdf	2/6/2018 11:06 AM	Adobe Acrobat D...	545 KB
Heights Office Order 041618 SO.0121924....	4/16/2018 5:32 PM	Adobe Acrobat D...	67 KB
Heights Office order 110317.pdf	11/3/2017 5:07 PM	Adobe Acrobat D...	37 KB
Heights Office Products SO0122023.pdf	4/25/2018 9:54 AM	Adobe Acrobat D...	77 KB
Heights Office Products SO0122025.pdf	4/25/2018 9:56 AM	Adobe Acrobat D...	64 KB

Add the **Document Type** from the dropdown box. It will always be **Requisition** for this process.

Attach Documents ✕



File Path: *
 Heights Office Order 041618 SO.0121924.pdf

Document Type: *



Click the **UPLOAD** button to attach your document.

Step 15 After you have added your attachments and your accounting is at 100% you are ready to submit your requisition by clicking the Submit Requisition button. By submitting your requisition, you are starting the process of approvals.

 Attachments
  Delete Requisition

Requisition Summary Save as draft

Requisition Number R0044431

Heights Office Supply (60462)
 5204 Broadway St
 San Antonio TX 78209-5725

Commodities (2)

Number 2 Pencils BSN 435678	25.00
Quantity 100.00 @ 0.2500	Discount 0.00
Additional Charges 0.00	Tax 0.00
Blue Pens XZY456	50.00

Funding 100%

Grand Total - All Commodities **75.00**


Grand Total - All Accounting **75.00**

View as PDF
Submit Requisition

Pending Requisitions 13

R0044431 04/30/2018 \$75.00 Heights Office Supply
Pending

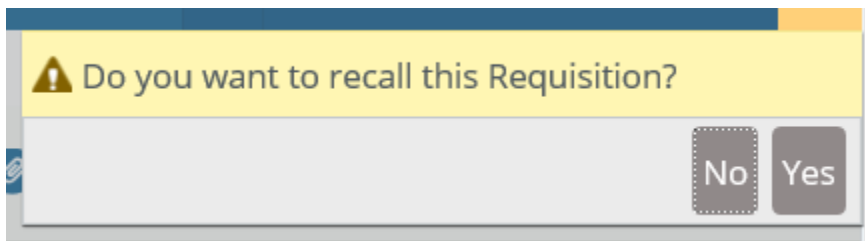
Your requisition is now on your My Requisition Dashboard as Pending. The requisition is pending approval. While your requisition is in a pending status, you can recall the requisition for changes, delete the requisition once recalled and view attachments added to the requisition.

 View Attachments

Once you have opened a pending requisition you can view the documents attached by pressing the View Attachment button. This will open a new tab with Xtender to display the document.

Recall My Requisition

In addition, while in a pending status you can recall your requisition. You will receive a message confirming that you want to recall the requisition before it happens. Recalling returns the requisition to a Draft status. You can then make changes as needed or delete the requisition if necessary.



Step 16 Go back to Step 6 to do your next requisition or click the person icon and exit the Self-Service session.



Receiving a disapproved requisition back

When you log back in to My Requisition, your dashboard will display any requisitions returned (disapproved) for correction.

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 11				
R0044422	04/02/2018	\$5.00	Heights Office Supply	Disapproved

Click on the Disapproved button to open the requisition. Use the **Next** and **Back** button to navigate through the requisition and make necessary changes. When the changes are completed, click the **Submit Requisition** button.

Additional Available Functions

Copy a requisition

You can copy a completed requisition and use it as a template for a new requisition.

Steps:

1. On the My Requisition dashboard page, click the completed requisition you want to copy. The requisition opens on the Requestor Information page.

2. Click Copy Requisition.

3. On the copy prompt, choose the appropriate option.

Yes - The system copies the requisition and creates an identical new requisition that you can edit.

No - The system cancels the copy.

4. Edit the requisition as appropriate, just as you would a new requisition.

Delete a requisition

You can delete any requisition that is in a Draft status.

Steps:

1. On the My Requisitions dashboard page, click the requisition in Draft status you want to delete.

The requisition will open in the Requestor Information page (tab).

2. Click Delete Requisition.

3. On the dele prompt, choose the appropriate option.

Yes – The system deletes the requisition

No – The system cancels the delete.

Edit a requisition

You can edit requisitions in Draft status. To edit a requisition in Pending status, you must recall the requisition.

Steps

1. On the My Requisition dashboard page, click Draft in the Status column for the requisition that you want to edit.

2. Using the Next and Back Buttons, edit the Requestor Information, Vendor Information and Add item & accounting pages as necessary.

3. Click Save as draft if you want to return to the requisition before submitting or submit requisition to send the requisition for approvals.

Recall a requisition

You can recall requisitions that are in pending status.

1. On the My Requisition dashboard page, open the pending requisition that you want to recall.

2. Click Recall My Requisition.

3. On the recall prompt, choose the appropriate option.

Yes – The system recalls the requisition, The My Requisition dashboard page loads with the recalled requisition placed in the draft requisition section with a draft status.

No – The system cancels the recall.

Notes:

Using Account 7640:

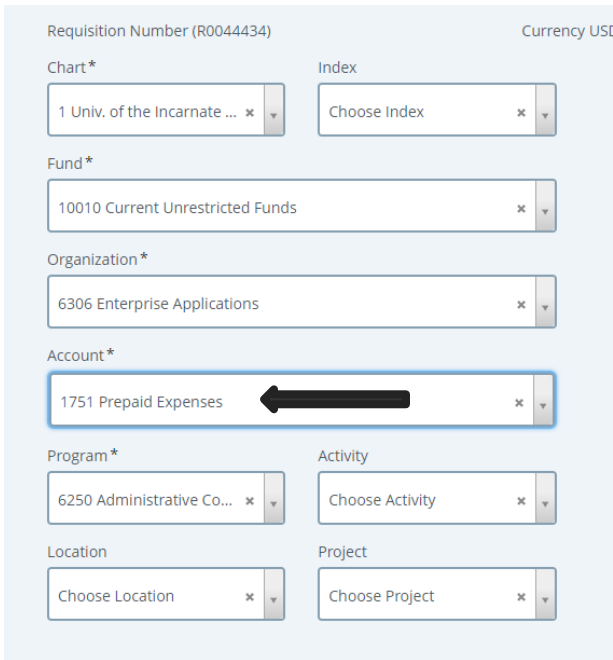
When using Account 7640 in the third set of your budget account, please put your item under the Description section of your requisition. Any other items would go under “Public Comment box”, Use Public Comments instead of additional line items under the description section.

End of the Fiscal Year:

Use June 1 on requisition as we draw near to the end of May. If you do not require expenses, be paid from the current fiscal year than you would date your requisition 6/1/XX so that those expenses are paid out of the next fiscal year.

PRE-PAID expenses are things being purchased and delivered out of the next fiscal year’s budget. Airfare also being taken out of the next year’s budget is consider pre-paid and charged to account 1751.

Enter in the accounting information as you would for any regular requisitions but use the account 1751 for pre-paid expenses. Under the Public Comments, put the complete budget account to charged, so the accounting department can make journal entries.



Requisition Number (R0044434) Currency USD

Chart* Index

1 Univ. of the Incarnate ... x Choose Index x

Fund*

10010 Current Unrestricted Funds x

Organization*

6306 Enterprise Applications x

Account*

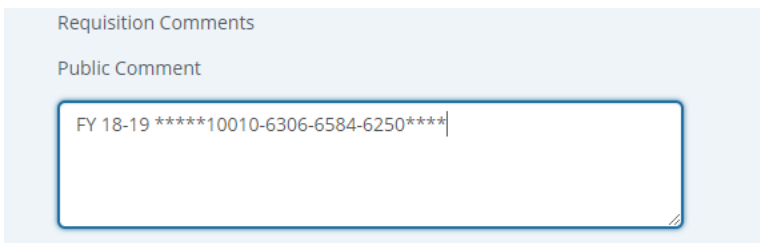
1751 Prepaid Expenses ← x

Program* Activity

6250 Administrative Co... x Choose Activity x

Location Project

Choose Location x Choose Project x



Requisition Comments

Public Comment

FY 18-19 *****10010-6306-6584-6250*****|