

My Requisition Process

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Access MyWord, Click on Finance Self Service, Select My Requisition.



Sign In

LOGIN


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


 Banner 9 Finance Self-Service

ellucian Angela Jean Mazzara

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.

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

The screenshot shows the 'My Requisitions' dashboard in the ellucian system. The user is Angela Jean Mazzara. The dashboard is titled 'My Requisitions' and includes a search bar and a 'Create Requisition' button. The requisitions are organized into three sections: Draft Requisitions (10), Pending Requisitions (13), and Completed Requisitions (36). Each section contains a table of requisitions with columns for Requisition ID, Date, Amount, Vendor, and Status. The 'Draft' status is shown in orange buttons, 'Pending' in purple buttons, and 'Converted to PO' in green buttons. A 'View More' link is present at the end of each section. A watermark for 'Activate Windows' is visible in the bottom right corner.

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 10				
R0044423	04/02/2018	\$32.00	Heights Office Supply	Draft
R0044424	04/02/2018	\$0.00		Draft
View More				
Pending Requisitions 13				
R0044431	04/30/2018	\$75.00	Heights Office Supply	Pending
R0044430	04/30/2018	\$8.00	Heights Office Supply	Pending
View More				
Completed Requisitions 36				
R0043141	11/03/2017	\$170.15	Heights Office Supply	Converted to PO
R0042491	10/09/2017	\$559.96	Corporate Travel Planners	Converted to PO

Requestor Information

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

- This is the Requestor/Delivery Page. You will complete the following steps on this Page:
 - Enter the requested delivery date (must be at least 1 day ahead of the transaction date)
 - Enter the Organization number
 - Attention to
 - Document Text (optional) this could be used for the Issue Check comment
- Click Next to move to the next page

Vendor Information

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

Choose vendor for me

Vendor

x ▲

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) ▼

- 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.
- **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.

Add Item & Accounting Information

R0044431

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

Commodity Description
Number 2 Pencils BSN 433

Unit Of Measure* Unit of Measure is always EA

Quantity* Enter the quantity ordered

Unit Price* Enter the price

Commodity Comments

Public Comment
Enter comments for the commodity item

Private Comment
Enter comments for the commodity item

Commodity Item Total USD 0.00

- 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)
- 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.

Add Accounting Information

My Finance • My Requisitions • R0044431

R0044431

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

Requisition Number (R0044431) Currency USD

Chart* Index Distribution Amount* Distribution Percent*

1 Univ. of the Incarna... Choose Index 75.00 100.00000000

Fund* Discount Amount Additional Amount

10010 Current Unrestricted Funds 0.00 0.00

Organization* Tax Amount

6306 0.00

Account* Distribution Total 75.00

6584 Office Supplies

Program* Activity Remaining 0.00

Choose Program Choose Activity

Location Project

Choose Location Project

Enter your Fund

Enter your Organization Code

Enter your Account Number

Enter you Program Code

Click Save when the accounting information is entered

Back Save

- 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.
- Click **Save**

Adding Attachment



My Finance • My Requisitions • Attachments

Attachments

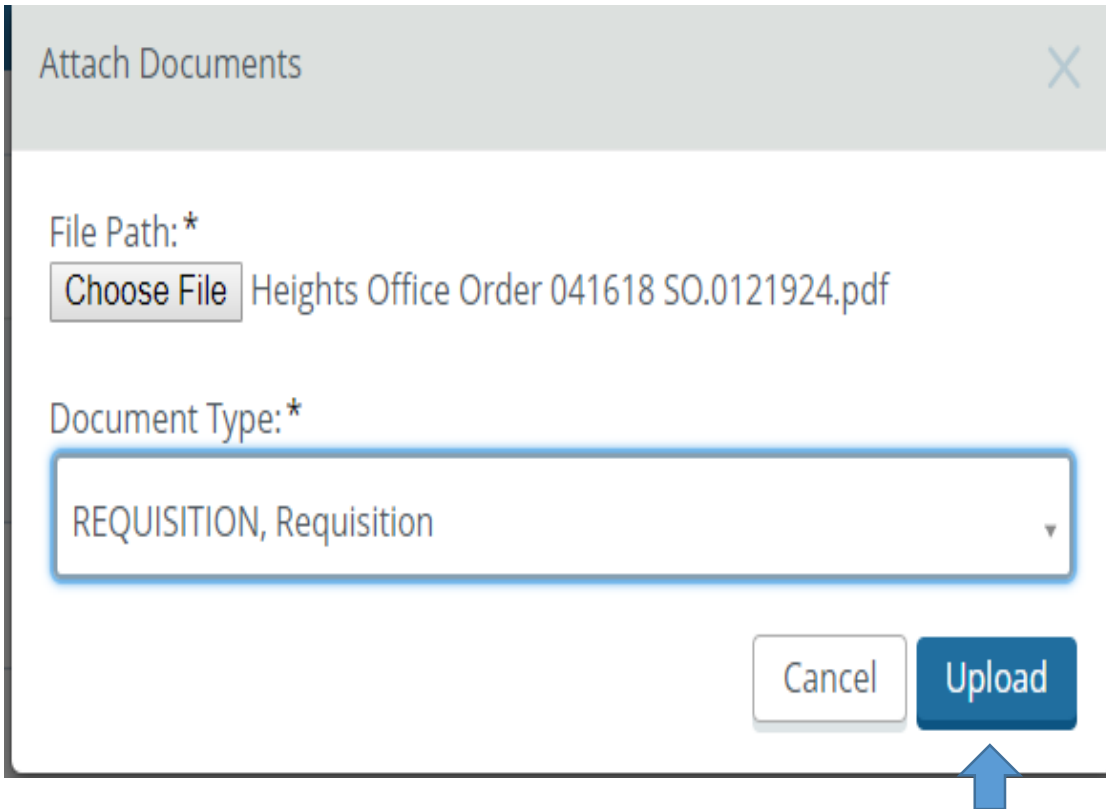
Requisition Number R0044422

< 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 SO0121796_040518.PDF	REQUISITION	ANGELA JEAN MAZZARA	05/09/2018	

- Once you add your accounting information, you can add any attachments by clicking the Attachments button.
- Click **Attach File** to select from saved documents on your computer.

Continued



Attach Documents

File Path: *

Choose File Heights Office Order 041618 SO.0121924.pdf

Document Type: *

REQUISITION, Requisition

Cancel Upload

- Click the **Choose File** button
- Select your file to uploaded from your computer.
- Click Open
- Add the **Document Type** from the dropdown box. It will always be **Requisition** for this process
- Click the **UPLOAD** button to attach your document.

Submit Requisition

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

Activate Windows
Go to Settings to activate Windows.

- 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

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 v Choose Index x v

Fund*

10010 Current Unrestricted Funds x v

Organization*

6306 Enterprise Applications x v

Account*

1751 Prepaid Expenses x v

Program* Activity

6250 Administrative Co... x v Choose Activity x v

Location Project

Choose Location x v Choose Project x v

Requisition Comments

Public Comment

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

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.