

SSB Requestor Training



My Requisitions

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

PURCHASING

located in the

Administration Building, Room 81

- Lisa Bosquez, 210-805-5836, lbosquez@uiwtx.edu
- Jessica Cevallos, 210-805-1236, jevarga1@uiwtx.edu
- Carmen Rivera, 210-805-5837, rivera@uiwtx.edu
- Marisa Vasquez, 210-829-3999, mvasque@uiwtx.edu
- Michael Castilleja, 210-805-3571, micasti2@uiwtx.edu

Access Cardinal Apps

Click on B9 Finance Self Service



Sign In


LOGIN







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



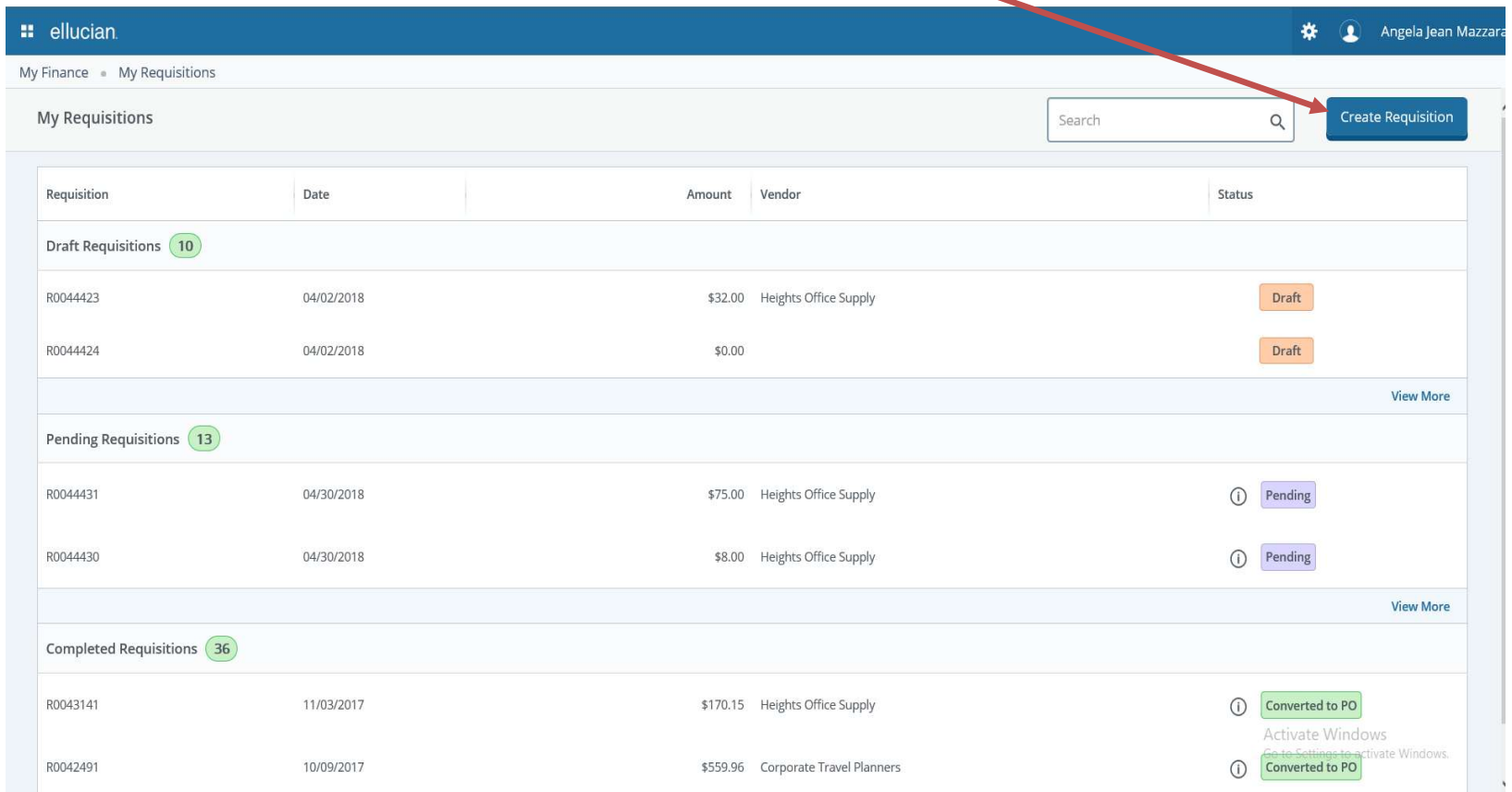
Requestors select My Requisitions

My Finance

 Hello Mrs. Marisa Flores Vasquez,
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.
 My Journals Create and view draft, pending and completed journals and supporting documentation.	 Purchase Orders Create purchase orders or purchase orders in process.
 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.	

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 top navigation bar includes the ellucian logo, a settings gear, and the user name 'Angela Jean Mazzara'. Below the navigation bar, the page title 'My Requisitions' is displayed next to a search bar and a 'Create Requisition' button. The main content area is a table with columns for Requisition, Date, Amount, Vendor, and Status. The table is divided into three sections: Draft Requisitions (10), Pending Requisitions (13), and Completed Requisitions (36). Each section contains a list of requisitions with their respective details and status labels. A 'View More' link is present at the end of each section. A red arrow points from the text above to the 'Create Requisition' button.

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 *
Carmen Rivera

Transaction Date * 02/01/2026 | Delivery Date * 02/02/2026

Requestor Email
rivera@uiwtx.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 *
1 Univ. of the Incarnate Word

Organization *
6254 Purchasing

Ship To Location *
1000 Michael Castilleja

Attention To *
Carmen Rivera

Ship To Location
Attention: Carmen Rivera
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 (select next business day)
 - If you need to add people to the email, add a semicolon and their email (no spaces needed)
 - If item is over \$10,000, select commodity level accounting
 - Enter the Organization number
 - Change name in Attention To Box to recipient name
 - **Do not** make any changes to the Ship To Location fields.
- Click Next to move to the next page

Vendor Information

[My Finance](#) • [My Requisitions](#) • [R0091404](#)

R0091404

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

Choose vendor for me

Vendor

Choose Vendor ^

heights office 🔍

Heights Office Supply (60462)
10203 Kotzebue St Ste 117 San Antonio TX 7821
7-4447

Back Next

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

Vendor Information

[My Finance](#) • [My Requisitions](#) • [R0091404](#)

R0091404

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

Choose vendor for me

Vendor

Heights Office Supply (60462) x v

Vendor Information

Heights Office Supply (60462)
10203 Kotzebue St Ste 117
San Antonio TX 78217-4447

Vendor Email

Choose/Enter Email x v

Currency

Choose Currency x v

[Back](#) [Next](#)

- **Note:** Vendor Email is inactive, so please delete any email address that may appear.
- Once you have your vendor selected click the Next button to move to the next section.
- If you do not find your vendor, leave it blank and be sure to attach their w-9 as part of your backup

Add Item & Accounting Information

R0044431

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

Commodity Description
Number 2 Pencils BSN 433 X

Unit Of Measure*
Choose Unit Of Meas... * Choose Tax Group *

Quantity*
0.00

Unit Price*
0.0000

Quantity X (Unit Price)
0.00 USD 0.00

Amount
0.00

Additional Amount
0.00

Tax Amount
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

Unit of Measure is always EA

Enter the price

Enter the quantity ordered

- 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 • R0092170

R0092170

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number (R0092170) Currency USD

Chart*
1 Univ. of the Incarnat... x v

Fund*
10010 Current Unrestricted Funds x v Enter your Fund

Organization*
6254 x v Enter your Org

Account*
6584 Office Supplies x v Enter your Acct

Program*
6220 General Administr... x v Enter your Program if it does not default

Distribution Amount*

Distribution Percent*
0.00000000

Distribution Total 0.00

Remaining 500.00

Split Accounting →

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 • R0092170

Accounting added to requisition R0092170

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item x v

Commodities (1)

test	500.00
Quantity 1.00 @ 500.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 100%

Requisition Summary Save as draft

Requisition Number R0092170

Heights Office Supply (60462)
10203 Kotzebue St Ste 117
San Antonio TX 78217-4447

Commodities (1)

test	500.00
Quantity 1.00 @ 500.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 100%

Grand Total - All Commodities 500.00

Grand Total - All Accounting 500.00

Back View as PDF Submit Requisition

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

Adding Attachment



Elucian

[My Finance](#) • [My Requisitions](#) • [R0092170](#) • [Attachments](#)

Attachments

Requisition Number R0092170

[← Attachments](#) Attach File Refresh Attachments

Document Name	Document Type	Owner Name	Date of Attachment
There are no records for this requisition. Please click on Attach File for attaching documents			

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

Continued

Attach Documents ×

File Path: *

No file selected.

Document Type: *

REQUISITION, Requisition ▾

- Click the **Browse** button
- Select your file to uploaded from your computer.
- Click Open
- Leave Document Type as Requisition
- Click the **UPLOAD** button to attach your document.

Documentation Verification

My Finance • My Requisitions • R0092170 • Attachments

Attachments

Requisition Number R0092170

[← Attachments](#) Attach File Refresh Attachments

Document Name	Document Type	Owner Name	Date of Attachment	
21540_03052026.PDF	REQUISITION	CARMEN D RIVERA	04/28/2026	

- Click on the Document Name to confirm backup is attached.

Submit Requisition

Requisition Summary	
Requisition Number	R0092170
Heights Office Supply (60462) 10203 Kotzebue St Ste 117 San Antonio TX 78217-4447	
Commodities (1)	
test	500.00
Quantity 1.00 @ 500.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%
Grand Total - All Commodities	500.00
Grand Total - All Accounting	500.00
View as PDF	Submit Requisition

- 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

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 delete 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.