SSB Requestor Training

My Requisitions

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

PURCHASING

located in the

Administration Building, Room 81

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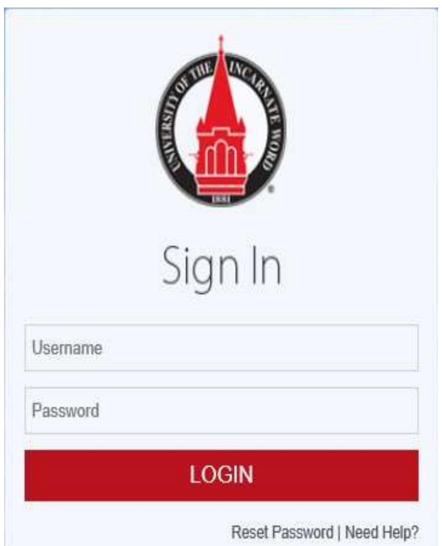
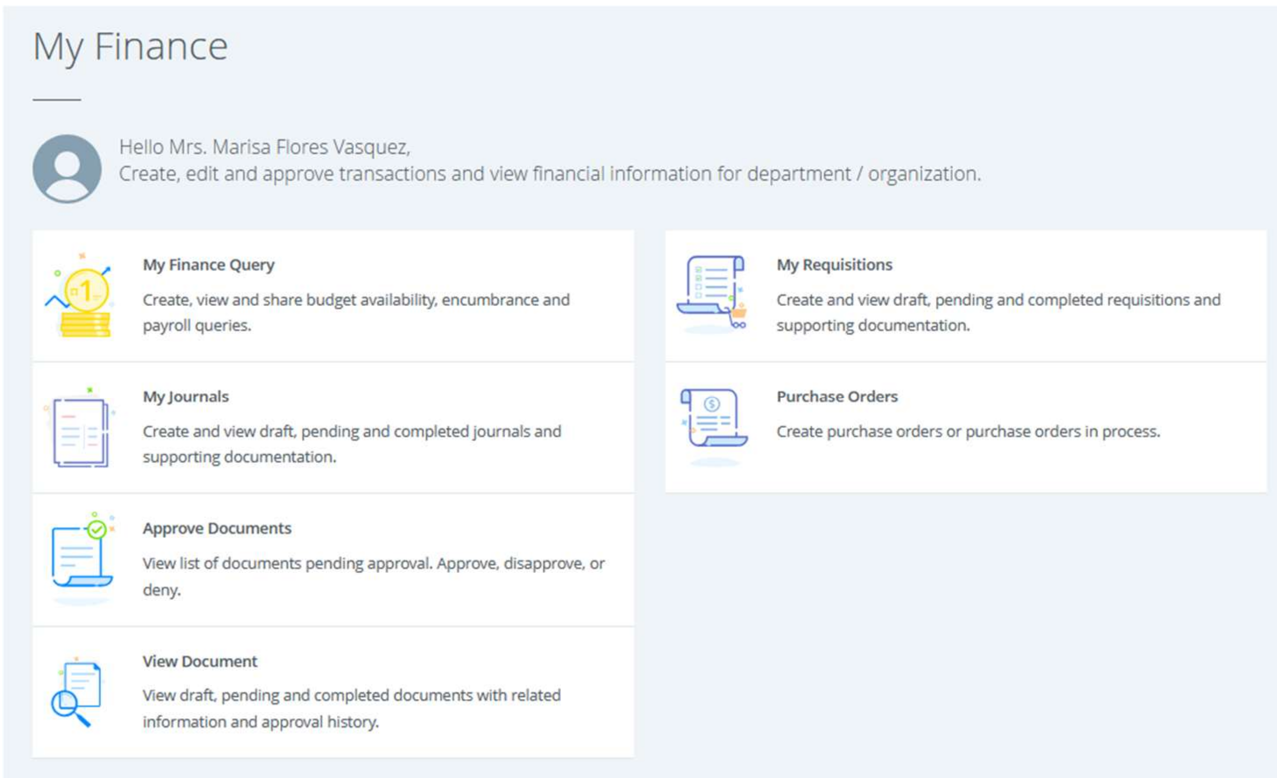
- Carmen Rivera, 210-805-5837, rivera@uiwtx.edu
- Marisa Vasquez, 210-829-3999, mfvasque@uiwtx.edu
- Michael Castilleja, 210-805-3571, micasti2@uiwtx.edu

Access Cardinal Apps

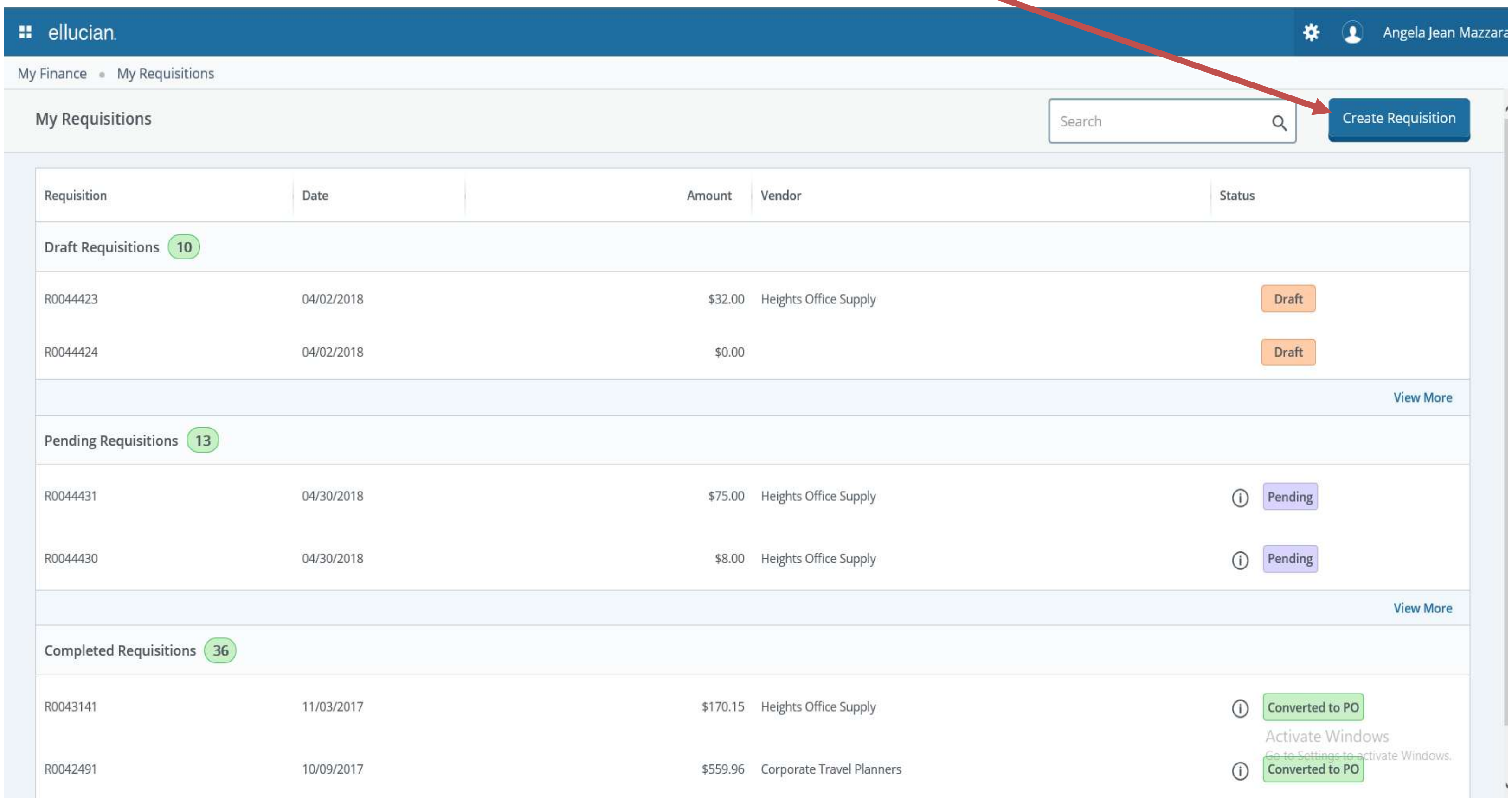


Click on B9 Finance Self Service

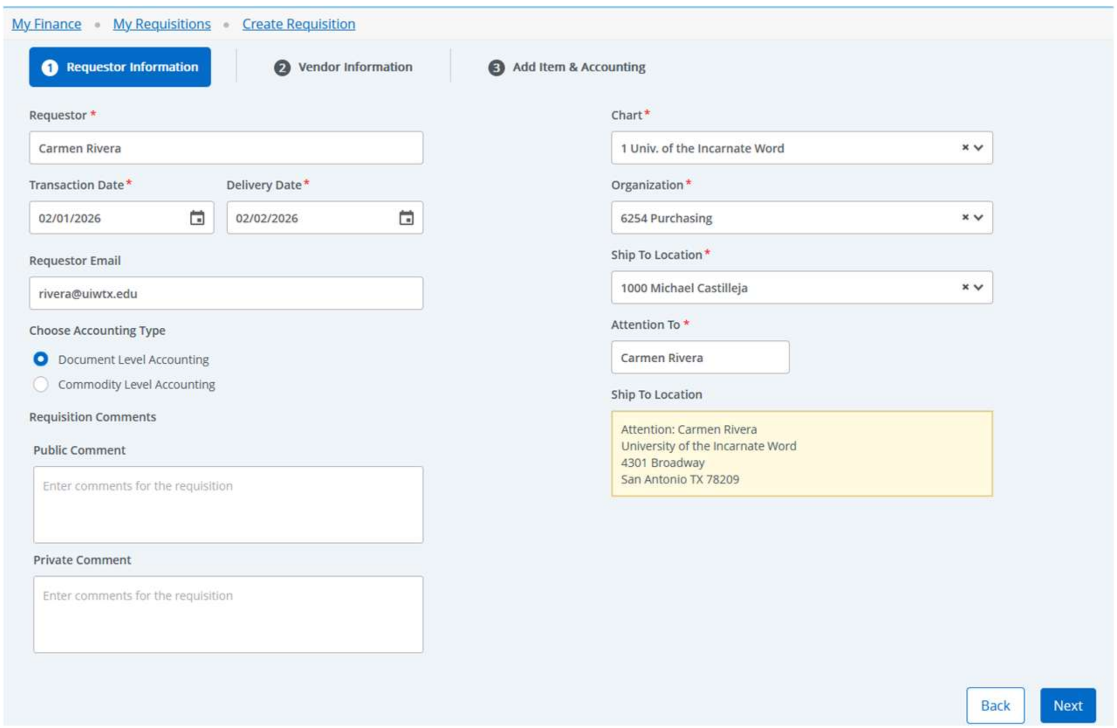
Requestors select My Requisitions



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

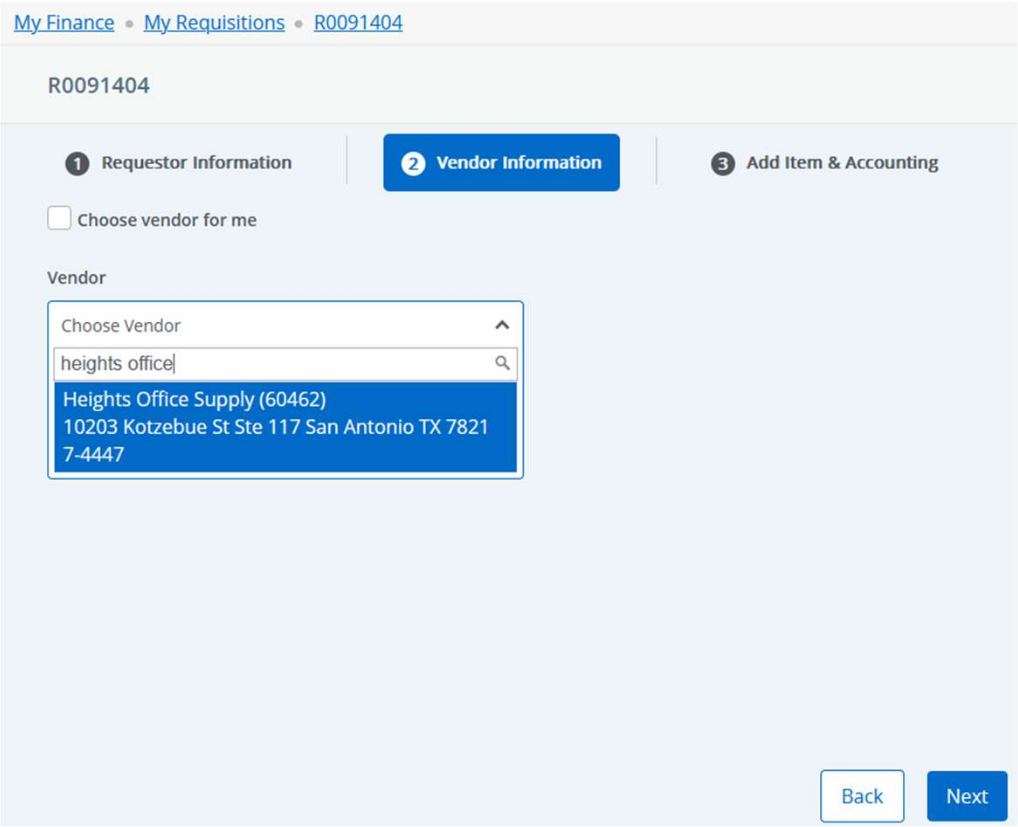


Requestor Information



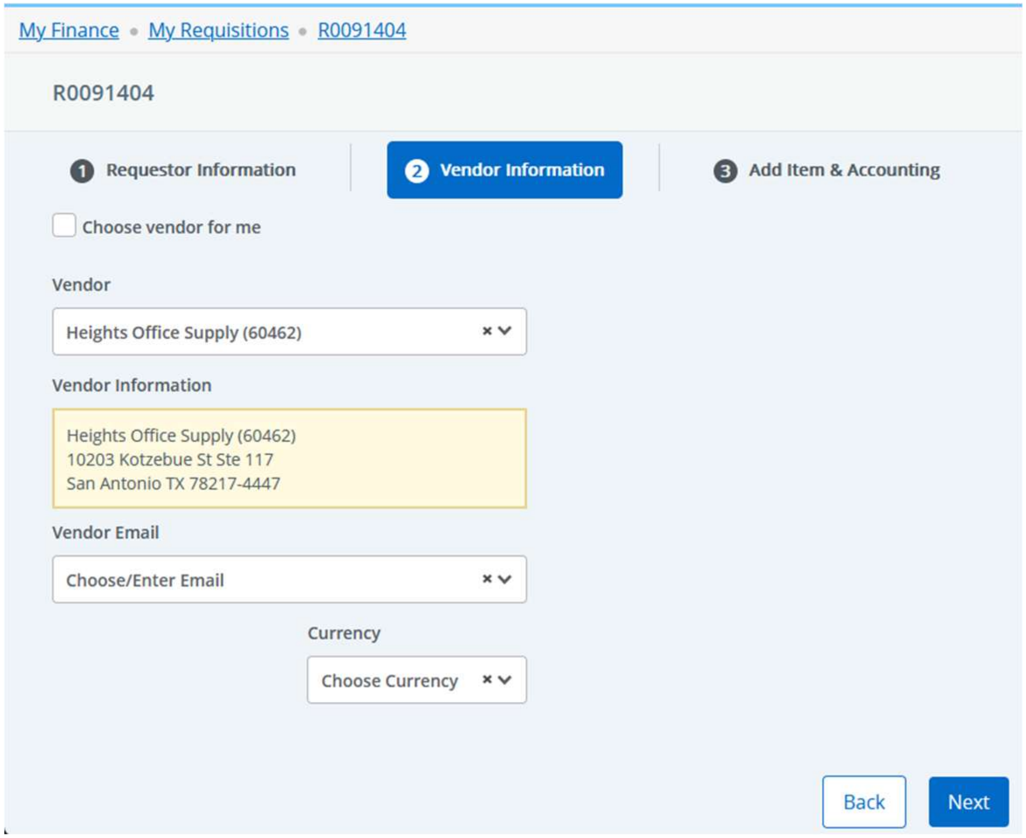
- This is the Requestor/Delivery Page. You will complete the following steps on this Page:
  - Enter the requested delivery date (select next business day)
  - If you need to add people to the email, add a semicolon and their email (no spaces needed)
  - If item is over $10,000, select commodity level 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



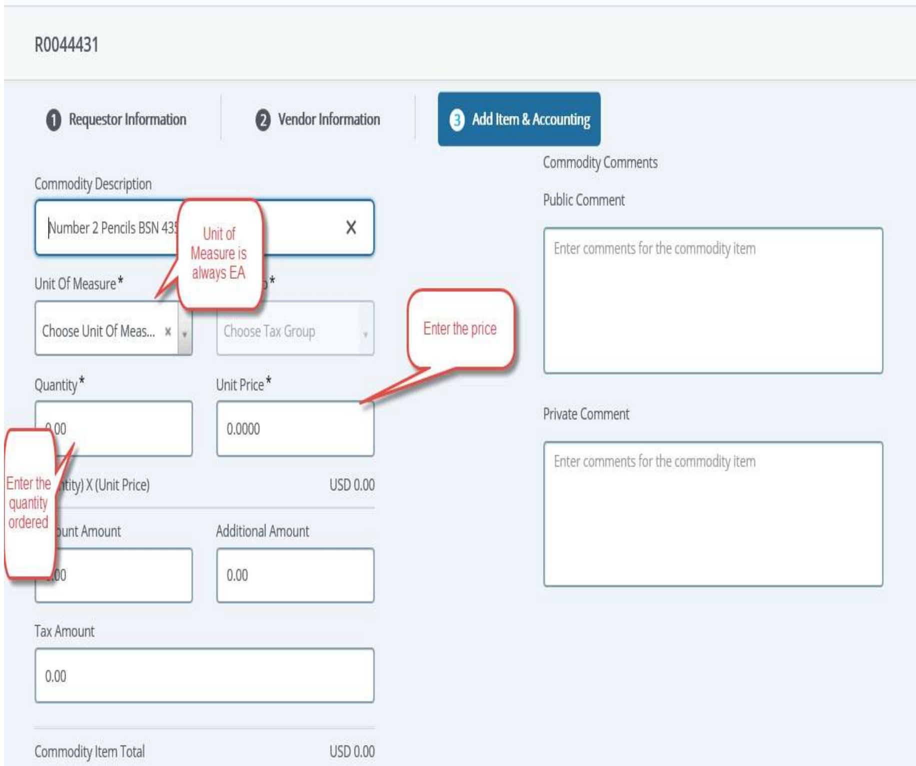
- To select a vendor start typing the vendor's name. A dropdown will appear and you can scroll through to pick the correct vendor.

Vendor Information



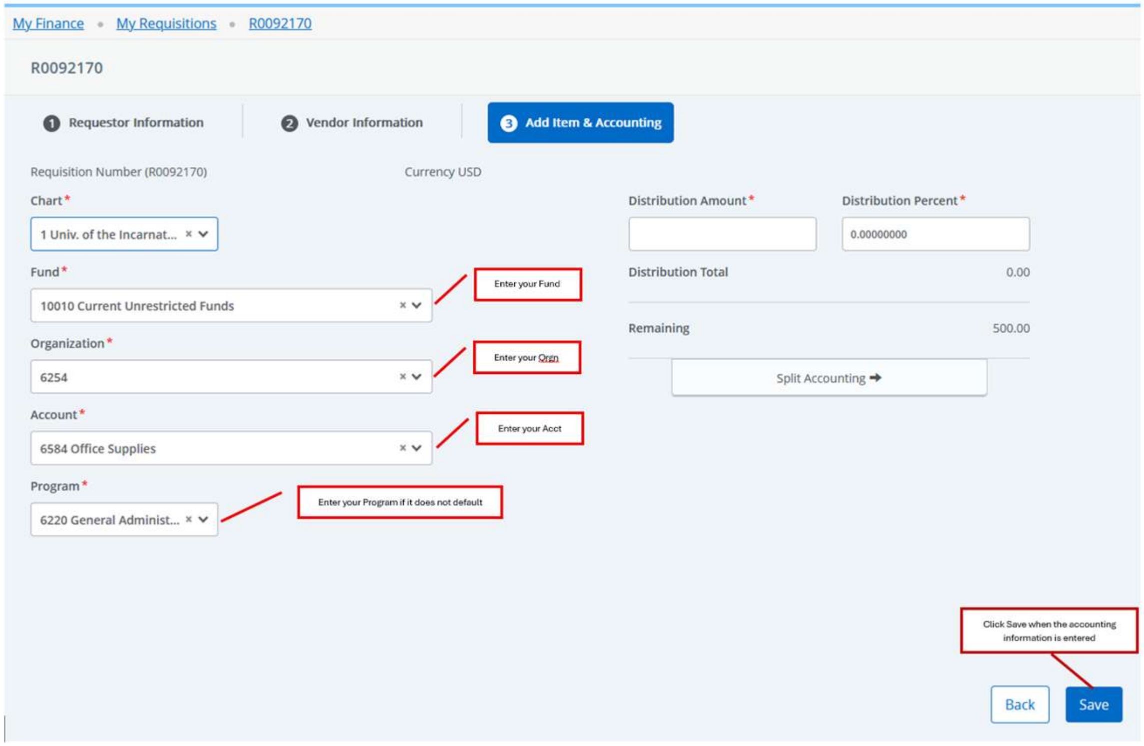
- **Note**: Vendor Email is inactive, so please delete any email address that may appear.
- Once you have your vendor selected click the Next button to move to the next section.
- If you do not find your vendor, leave it blank and be sure to attach their w-9 as part of your backup

Add Item & Accounting Information



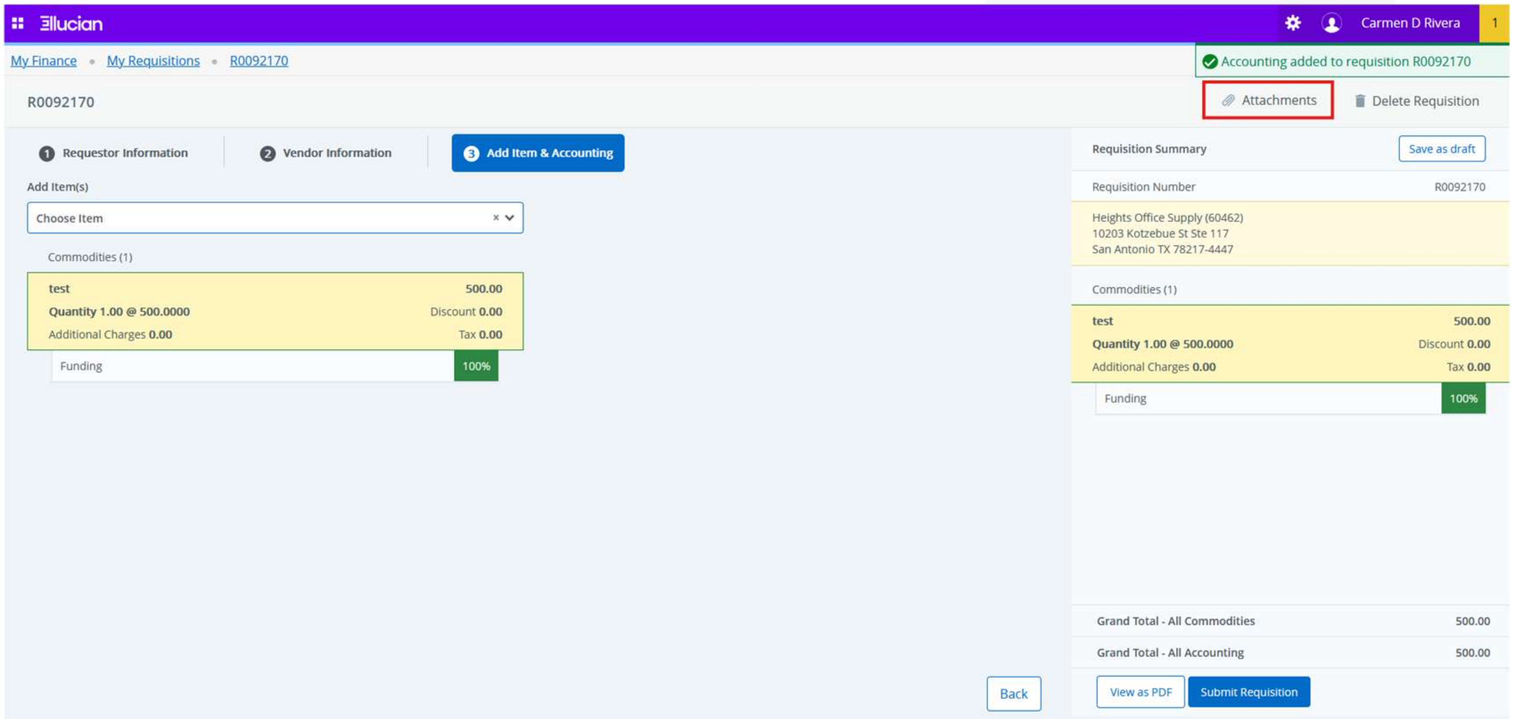
- Enter the following information:
  - Description of the item or service to be ordered
  - (U/M)Unit of Measure – **always** EA
  - Quantity of items
  - Price per item
  - Private or Public Comments (optional)
- Click the **Save** button. At this point, you can either enter another description for another item or click the **Add Accounting** button to add the account information associated with the purchase.

Add Accounting Information



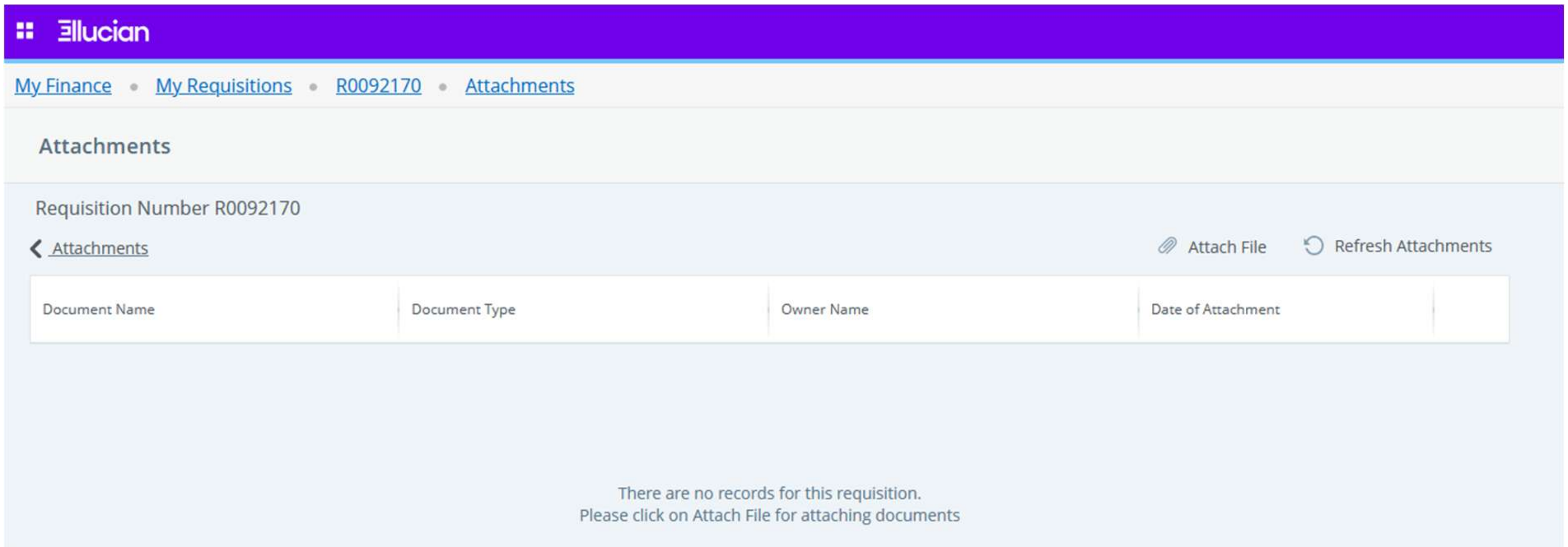
- Accounting Page you will enter the following:
- Enter the **Fund, ORG, ACCT**, and **Program codes**. You can search on any of these fields if you don't remember the number you need to use.
- Note: If you need to split the cost between Funds, ORGS, ACCT you will need to change the Distribution Percent field and add the additional accounting information.
- Click **Save**

Adding Attachment



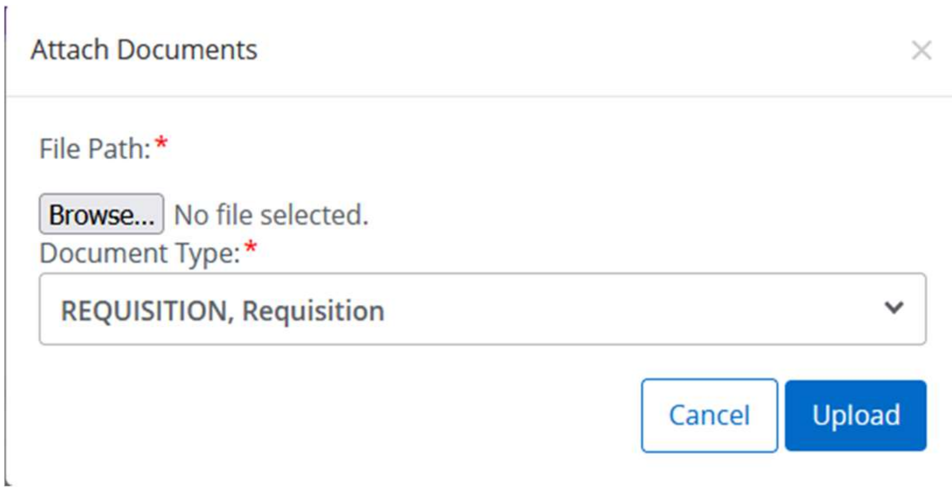
- Once you add your accounting information, you can add any attachments by clicking the Attachments button.

Adding Attachment



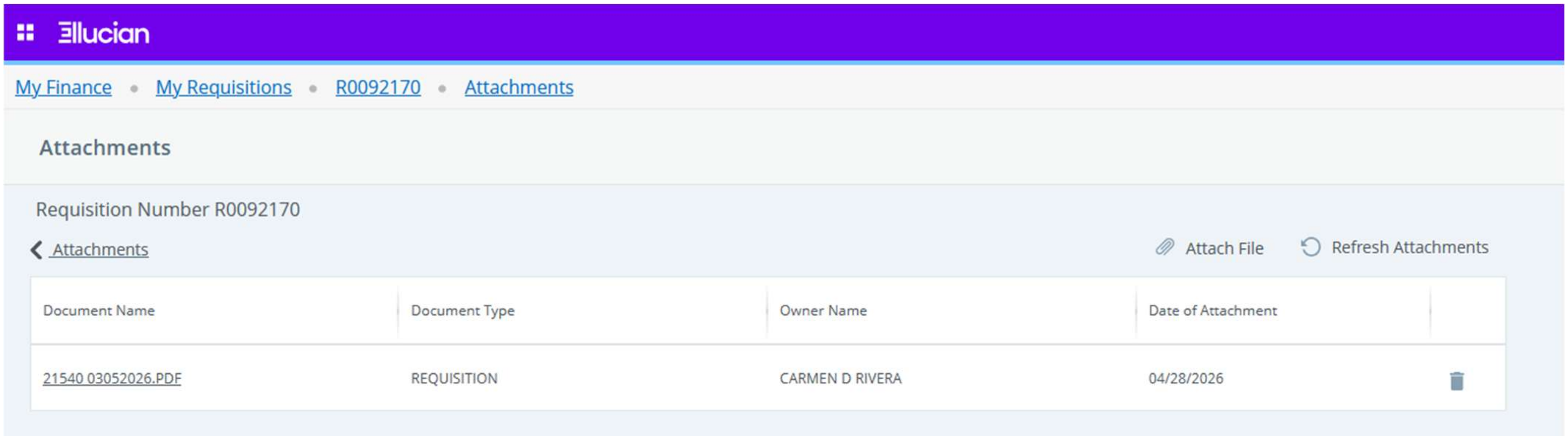
- Click **Attach File** to select from saved documents on your computer.

Continued



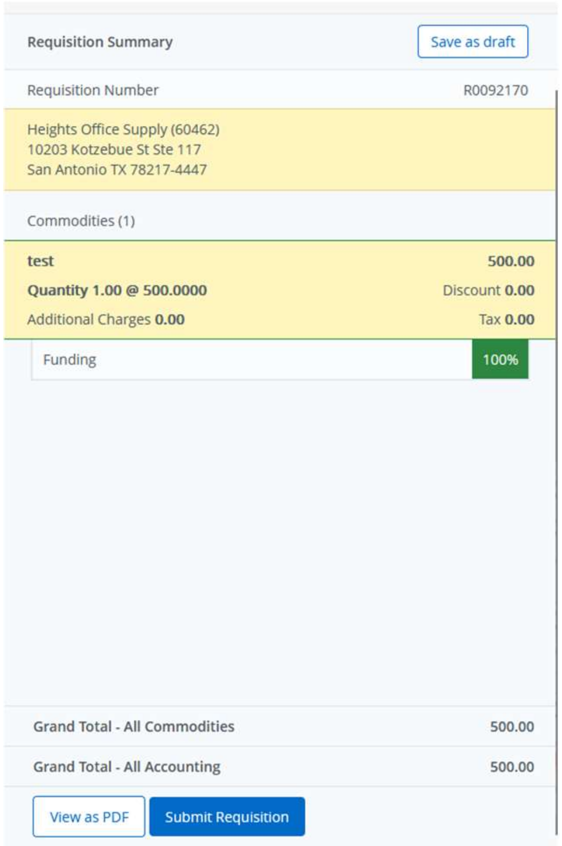
- Click the **Browse** button
- Select your file to uploaded from your computer.
- Click Open
- Leave Document Type as Requisition
- Click the UPLOAD button to attach your document.

Documentation Verification



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

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 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 Button s, 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.