

Guide to

Entering a REQUISITION for Purchase Order

The Fast and Simple Way!



David Brewer, Purchasing Manager
XI250 jdbrewer@sewanee.edu



www.my.sewanee.edu

The easy access hub to Banner, Finance, Chrome River and More!

Let's get started entering a requisition for purchase order. **Open** my.sewanee.edu and click **Finance SSB 9**

The screenshot shows the my.sewanee.edu website interface. The top navigation bar includes the Sewanee logo and utility icons. The main content area is divided into several sections:

- Useful Technology Resources:** A list of links including "Setting Up Access to Wireless", "Sewanee Password Reset through Office.com", "Calendering and Scheduling Software (EMS)", "Voice Mail Sign On", "Request a new or replacement ID", "Banner Maintenance Schedule", and "Gsuite Shared Drive, Group, Site Request Form".
- Employee Software Links:** A list of links including "Webmail", "Employee SSB 9" (circled in red), "Admin Page (Big Banner)", "Chrome River", "Banner Self-Service", "Sewanee Online Directory", and "NeoEd".
- Tiger Travel:** A section featuring a photo of a tiger mascot walking with a suitcase.
- Employee Hub:** A list of links including "Employee Benefits Guide", "Staff Handbook", "Payroll Dates and Leave Time Entry Deadlines", "Benefits Self-Service (Emp Navigator)", and "Employee Holidays".
- Your Banner Data:** A list of links including "Employee Dashboard", "Leave Balances", "Pay Stub", "Your Employee Profile", "W2", "W4", and "View My Emergency Contacts".
- Center for Leadership:** A section featuring a photo of people at a table and the text "CENTER FOR LEADERSHIP".
- Training Resources:** A list of links including "Brightspace", "Cybersecurity Awareness Training in...", and "Driving Safety Course".

A red arrow points from the "Finance SSB 9" link in the "Employee Software Links" section to a magnified view of the same link in the bottom right corner. In this magnified view, the "Finance SSB 9" link is also circled in red.

My Finance

Hello James,
Create, edit and approve transactions and view financial information for department / organization.

Click **My Requisitions** to go to the requisition menu.



- 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.
- Approve Documents**
View list of documents pending approval. Approve, disapprove, or deny.
- Budget Development**
Create and review fiscal year operating budgets for the budget development process.
- Delete Finance Template**
Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- View Document**
View draft, pending and completed documents with related information and approval history.

Click **Create Requisition** to get started



My Requisitions

Search Requisition [Create Requisition](#)

Requisition	Date	Vendor	Amount	Status
Draft Requisitions (1)				
R0005868	02/10/2025	Advanced Diamond Products LLC	\$5,650.00	Draft
Pending Requisitions (1)				
R0005842	02/05/2025	McGriff Insurance Services, LLC	\$12,699.00	In Approval (1)
Completed Requisitions (808)				
R0005883	02/11/2025	American Solutions for Business	\$881.80	Cancelled
R0005878	02/11/2025	Spectrum Technologies, Inc	\$1,324.00	Converted to PO (1)

The boxes highlighted in red are the ONLY boxes that will need data.

Delivery Date: The delivery date should be the same as the transaction date. For invoices containing delayed payment instructions, please reach out to the Purchasing Manager prior to entering the requisition.

Public Comment: Enter the invoice number with the word “Invoice”, followed by the invoice #'s.

Organization: Choose the appropriate Org #. The Org # is commonly known as your 6 digit “Budget” number. If you are allocating an invoice to a Fund, you will need to choose your fund managing Org # here and will change the allocation in the last step before submitting the requisition.

Ship to Location: Choose your building or Student Post Office regardless if the invoice is for a service or item(s).

Click Next to proceed

The screenshot shows the 'ellucian' interface for creating a requisition. The top navigation bar includes the ellucian logo, a settings gear, and the user name 'David Brewer'. The breadcrumb trail is 'My Finance > My Requisitions > Create Requisition'. The main content area is divided into three steps: '1 Requestor Information' (active), '2 Vendor Information', and '3 Add Item & Accounting'. The 'Requestor Information' step contains several fields: 'Requestor *' (filled with 'Brewer, James D.'), 'Transaction Date *' (filled with '02/12/2025'), 'Requestor Email' (placeholder 'Enter Requestor Email'), 'Choose Accounting Type' (radio buttons for 'Document Level Accounting' and 'Commodity Level Accounting'), and 'Requisition Comments' (two text areas: 'Public Comment' and 'Private Comment'). The 'Delivery Date *' field is highlighted with a red box. The 'Chart *' dropdown is filled with 'A The University of the South'. The 'Organization *' dropdown is highlighted with a red box and contains 'Choose Organization'. The 'Ship To Location *' dropdown is highlighted with a red box and contains 'Choose Ship To Location'. The 'Attention To *' field is filled with 'Enter Name', and the 'Tax Group' dropdown is filled with 'Choose Tax Group'. On the right side, there is a 'Requisition Summary' panel with a 'Save as draft' button and the text 'Add details and click Next to build this summary view.'. At the bottom, there are three buttons: 'Back', 'Next' (circled in red with a red arrow pointing down to it), and 'Submit Requisition'.

Your document has now been given a requisition #.

Enter **Vendor** information (either name or Banner ID #). As you type the vendor name in this menu, the system will automatically filter results. If there are multiple address choices for your specified vendor, choose the “payable/remit to” address noted on the invoice. If the vendor does not show as a choice, **STOP**, and contact the Purchasing Office for assistance to complete a new vendor setup. Click Next

ellucian

My.Finance • My.Requisitions • R0005891

R0005891

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Choose vendor for me

Vendor

Boston, Mike (B00621340) x v

Vendor Information

Boston, Mike (B00621340)
dba Rescue 1
102 W. Cliff Drive
Lawrenceburg TN 38464

Vendor Email

Choose/Enter Email x v

Discount

Choose Discount x v

Back Next

Adding items to your Requisition:

Add Items: Type any item description and hit the Enter key.

Unit of Measure: Please choose EACH

Quantity: Enter number of "Eaches" for that line item

Unit Price: Enter price of item. If all entries look correct, click Save

The screenshot displays the 'Add Item & Accounting' step of a requisition process. The breadcrumb trail is 'My Finance > My Requisitions > R0005891'. The requisition ID 'R0005891' is shown at the top. The navigation tabs are '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. The 'Add Item(s)' dropdown menu is highlighted with a red box and contains the text 'Choose Item'. A red arrow points from this dropdown to the 'Unit Of Measure' field, which is set to 'EACH (EA)'. Another red arrow points from the 'Unit Of Measure' field to the 'Quantity' field, which is set to '1.00'. A third red arrow points from the 'Quantity' field to the 'Unit Price' field, which is set to '140.0000'. The 'Commodity Description' field contains 'Amkus Tool Aluminum Grip'. The 'Tax Group' field is set to 'Choose Tax Group'. The 'Commodity Comments' section has two text areas for 'Public Comment' and 'Private Comment'. The 'Discount Amount' and 'Additional Amount' fields are both set to '0.00'. The 'Tax Amount' field is set to '0.00'. The 'Commodity Item Total' is 'USD 140.00'. At the bottom right, there are 'Back' and 'Save' buttons. The 'Save' button is highlighted with a red circle and a red arrow pointing down to it.

If the invoice has multiple line items and/or shipping fees, you will enter the item again and follow the steps on the previous screen until all line items have been entered.

If the invoice has more than 10 line items, you may enter the entire invoice as one line item like the following example:
Laboratory Supplies for Biology—See Invoice or Office Supplies for Advancement—See Invoice

After all line items have been entered and the total \$\$\$ matches the invoice, click **Add Accounting** to proceed.

My.Finance • My.Requisitions • R0005891

R0005891


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

Add Item(s)

Choose Item ✕ ▼

Commodities (4)

Amkus Tool Aluminum Grip	140.00
Quantity 1.00 @ 140.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
41 Piece of Aluminum Stock	100.00
Straight Handle Stanchions	70.00
View More (1)	



Back **Add Accounting**

Allocating Charges:

Index: Enter the 6 digit Org or Fund # that the invoice will be paid from. If this box does not return the option you desire, **STOP** and contact the Purchasing Manager for assistance.

Account: Enter the 4 digit account number of the appropriate budget line the charge should be allocated. If you do not know the number, you may enter any words that are related to the category of the invoice.

If this requisition requires allocating monies from multiple Org numbers, go to the next slide. If not, click **Save**.


R0005891

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requisition Number (R0005891) Currency USD

Chart *	Index	Distribution Amount *	Distribution Percent *
A The University of the... x v	900605 Fire Prevention x v	410.00	100.00000000
Fund *		Discount Amount	Additional Amount
110001 Current Unrestricted Fund		0.00	0.00
Organization *		Tax Amount	
900605 Fire Prevention		0.00	
Account *		Distribution Total	410.00
7240 Equipment Maint. & Repair x v		Remaining	0.00
Program *	Activity		
OMPPGN Operation & Plant ...	Choose Activity		
Location	Project		
Choose Location x v	Choose Project x v		

Back Save



Splitting charges between multiple Org #s: *If you do not need to split payments between multiple Org #s, skip this slide.*

Distribution Amount: Enter the dollar amount of allocation to the first Org # entered (displayed on the left side of the screen). Once the amount is entered, click on the Distribution Percent box and the box will automatically fill with the correct percentage.

Click the **Split Accounting** button and you will be prompted to enter the second set of Org and Account #s in the green boxes. This will automatically fill the Distribution Amount box with the remaining funds to be paid. You may enter as many splits as necessary to finalize the requisition. Once all allocations are complete, click **Save**.

The screenshot shows a requisition form with three main sections: 1. Requestor Information, 2. Vendor Information, and 3. Add Item & Accounting. The form includes various dropdown menus and input fields. Annotations include green boxes around the Index and Account fields, a red box around the Distribution Amount and Distribution Percent fields, a red oval around the Split Accounting button, and a red arrow pointing to the Save button.

Field	Value
Requisition Number	R0005891
Currency	USD
Chart	A The University of the...
Index	900605 Fire Prevention
Fund	110001 Current Unrestricted Fund
Organization	900605 Fire Prevention
Account	7240 Equipment Maint. & Repair
Program	OMPPGN Operation & Plant ...
Activity	Choose Activity
Location	Choose Location
Project	Choose Project
Distribution Amount	205.00
Distribution Percent	50.00000000
Discount Amount	0.00
Additional Amount	0.00
Tax Amount	0.00
Distribution Total	205.00
Remaining	205.00

Submitting the Requisition:

This is the final step in the process. If all data matches related to the total amount of the invoice, vendor information, and allocation of charges, you are ready to **click Submit**. Please write the Requisition number, Vendor Banner ID, Purchase Order number (will be emailed to the requisitioner on completion) and the allocation of charges on the invoice similar to the following:

R0005891
B00621340
P000????
900605-7240

Once the Purchase Order is emailed to the requisitioner, write the PO # on the invoice, print a copy and staple it to the back of the invoice to be presented to the accounts payable team. This PO is your digital signature that all charges have been approved by the Org budget manager and ok to pay.



My Finance • My Requisitions • R0005891

Accounting updated in requisition R0005891

R0005891



Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (4)

Amkus Tool Aluminum Grip	140.00
Quantity 1.00 @ 140.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

41 Piece of Aluminum Stock	100.00
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Straight Handle Stanchions	70.00
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View More (1)

Funding	100%
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Requisition Summary

Save as draft

Requisition Number R0005891

Boston, Mike (B00621340)
dba Rescue 1
Lawrenceburg TN 38464

Commodities (4)

Amkus Tool Aluminum Grip	140.00
Quantity 1.00 @ 140.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

41 Piece of Aluminum Stock	100.00
----------------------------	--------

Straight Handle Stanchions	70.00
----------------------------	-------

Shipping (SHIPPING)	100.00
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Funding	100%
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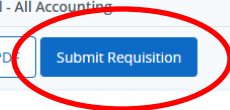
Grand Total - All Commodities 410.00

Grand Total - All Accounting 410.00

Back

View as PDF

Submit Requisition



Once the requisition is submitted, you will be returned to the start screen to either create a new requisition or explore requisitions that have been previously submitted, approved or sitting in the drafts.

After the submitted (Pending) requisition has had time to process in the system, you may hover your mouse over the **i** next to **In Approval** to see the dedicated approver's name for this requisition. This approver will receive an email notification that an approval is needed for a purchase order.

After the requisition has been approved, the data will drop to **Completed Requisitions**. After the purchasing manager has issued the Purchase Order, the status will change to **Converted to PO** and the requisitioner will receive the PO by email.

If you require any additional information or assistance in completing a requisition, please contact David Brewer, Purchasing Manger (jdbrewer@sewanee.edu) x1250.

My Finance • My Requisitions

My Requisitions [Create Requisition](#)

Requisition	Date	Vendor	Amount	Status
Draft Requisitions 1				
R0005868	02/10/2025	Advanced Diamond Products LLC	\$5,650.00	Draft
Pending Requisitions 2				
R0005891	02/12/2025	Boston, Mike	\$410.00	In Approval i
R0005842	02/05/2025	McGriff Insurance Services, LLC	\$12,699.00	In Approval i
Completed Requisitions 808				
R0005883	02/11/2025	American Solutions for Business	\$881.80	Cancelled
R0005878	02/11/2025	Spectrum Technologies, Inc	\$1,324.00	Converted to PO i

[View More](#)