*Guide to*

# Entering a REQUISITION for Purchase Order


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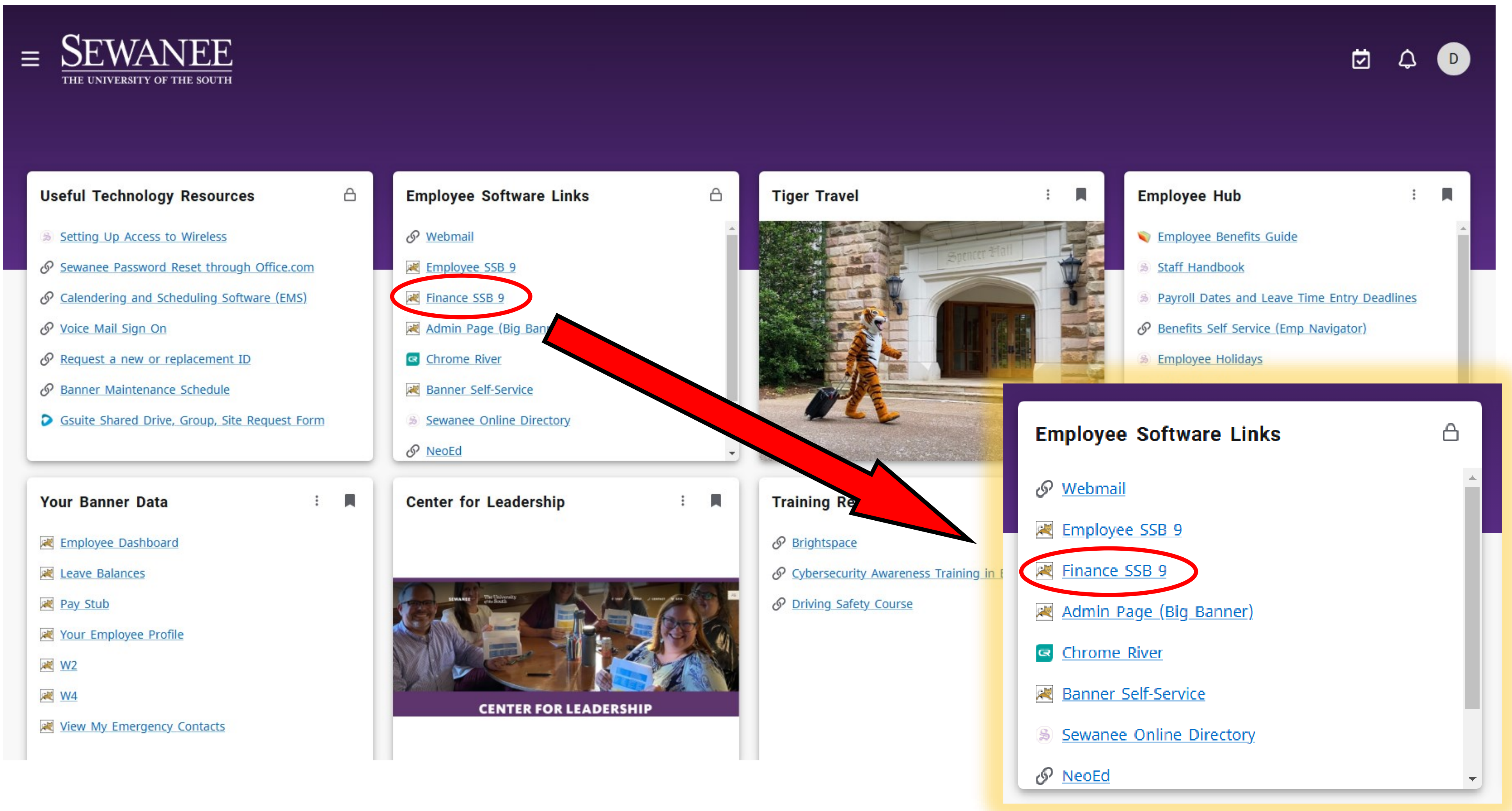
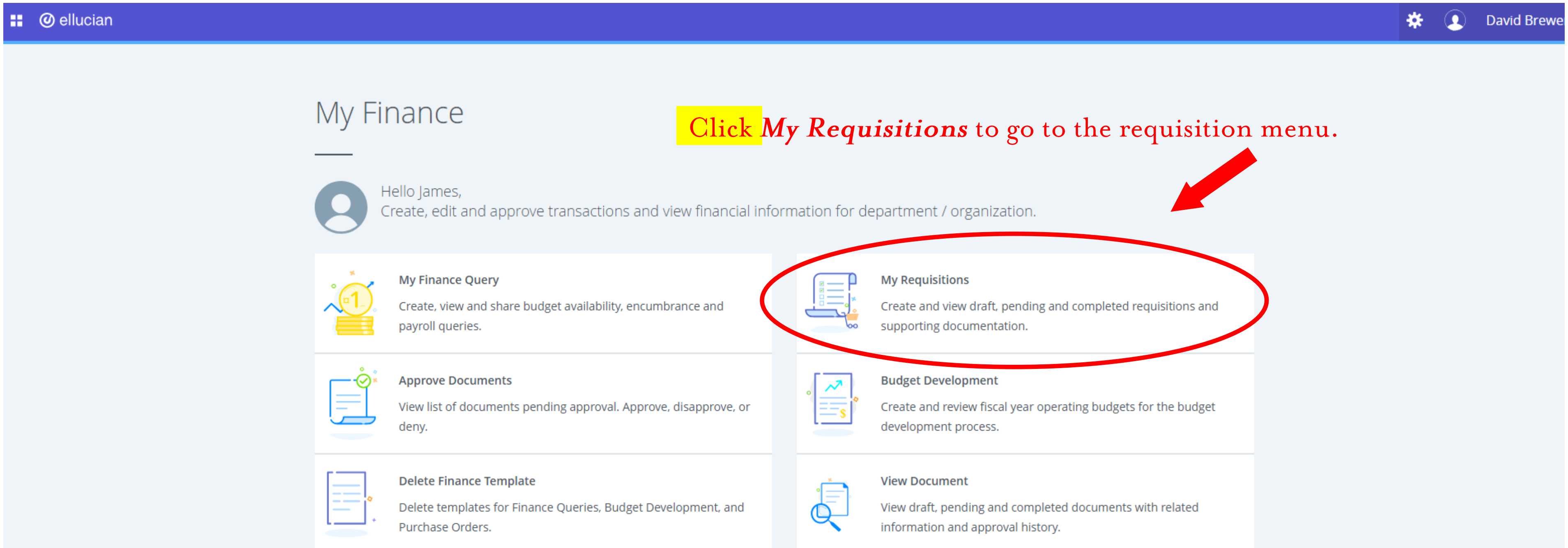
# www.my.sewanee.edu

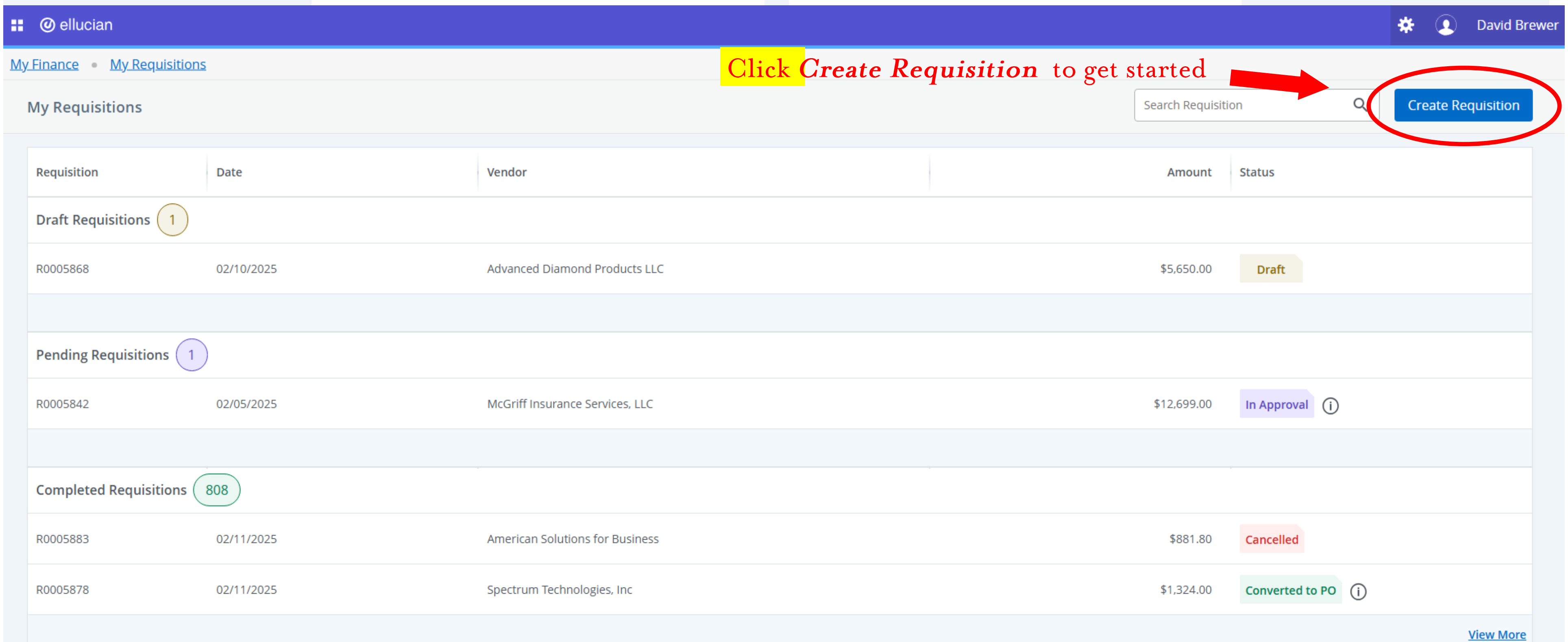
## The easy access hub to Banner, Finance, Chrome River and More!

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

**Finance SSB 9**




ellucian
David Brewe
My Finance
Click My Requisitions to go to the requisition menu.
Hello James,
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.
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.


ellucian
David Brewer
My Finance
My Requisitions
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
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
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The boxes highlighted in red are the ONLY boxes that will need data.

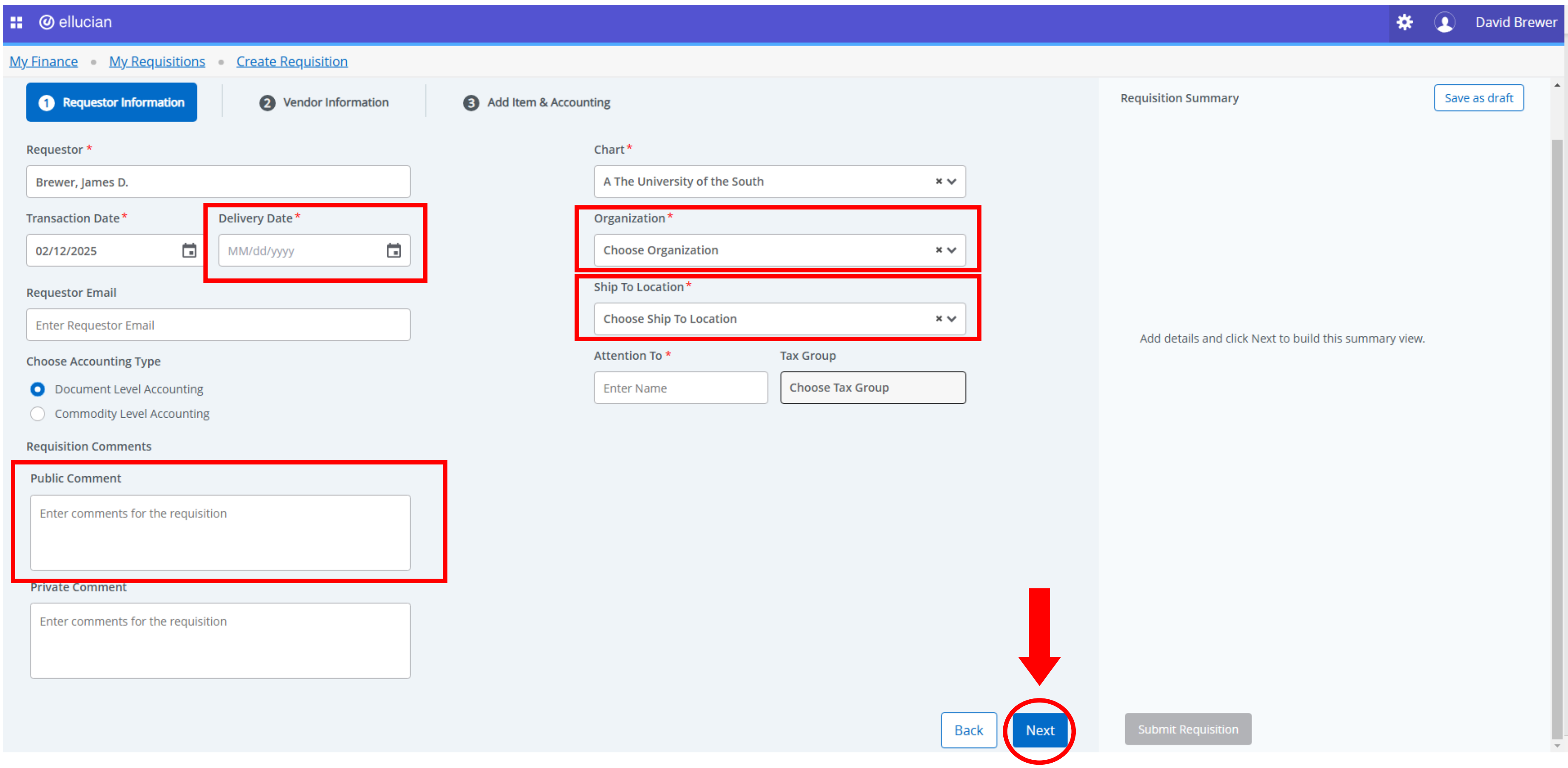
***Delivery Date***: The delivery date should be the same as the transaction date. For invoices containing delayed payment instructions, please reach out to the Purchasing Manager prior to entering the requisition.

***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.

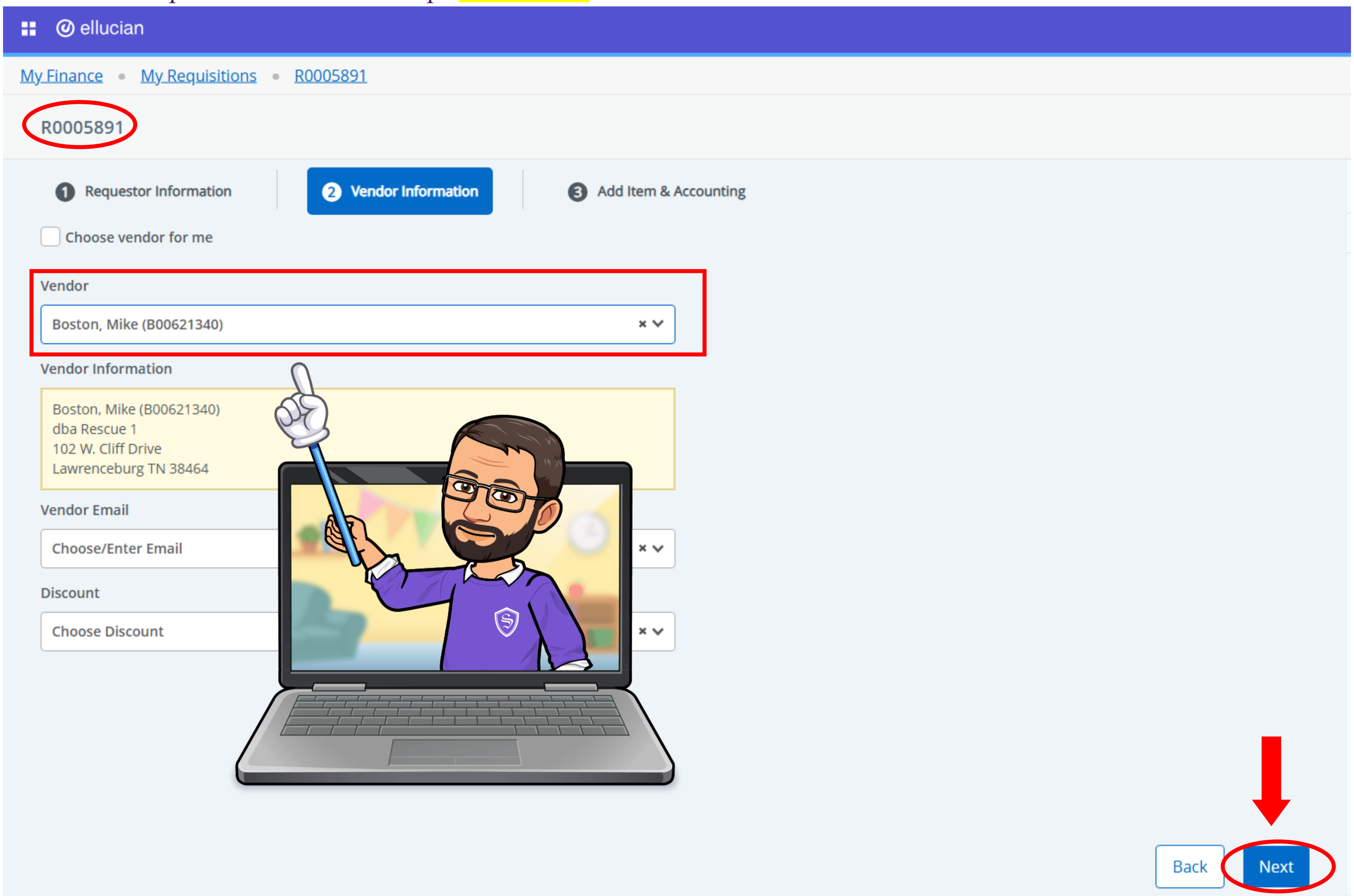
***Ship to Location***: Choose your building or Student Post Office regardless if the invoice is for a service or item(s).

Click **Next** to proceed



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



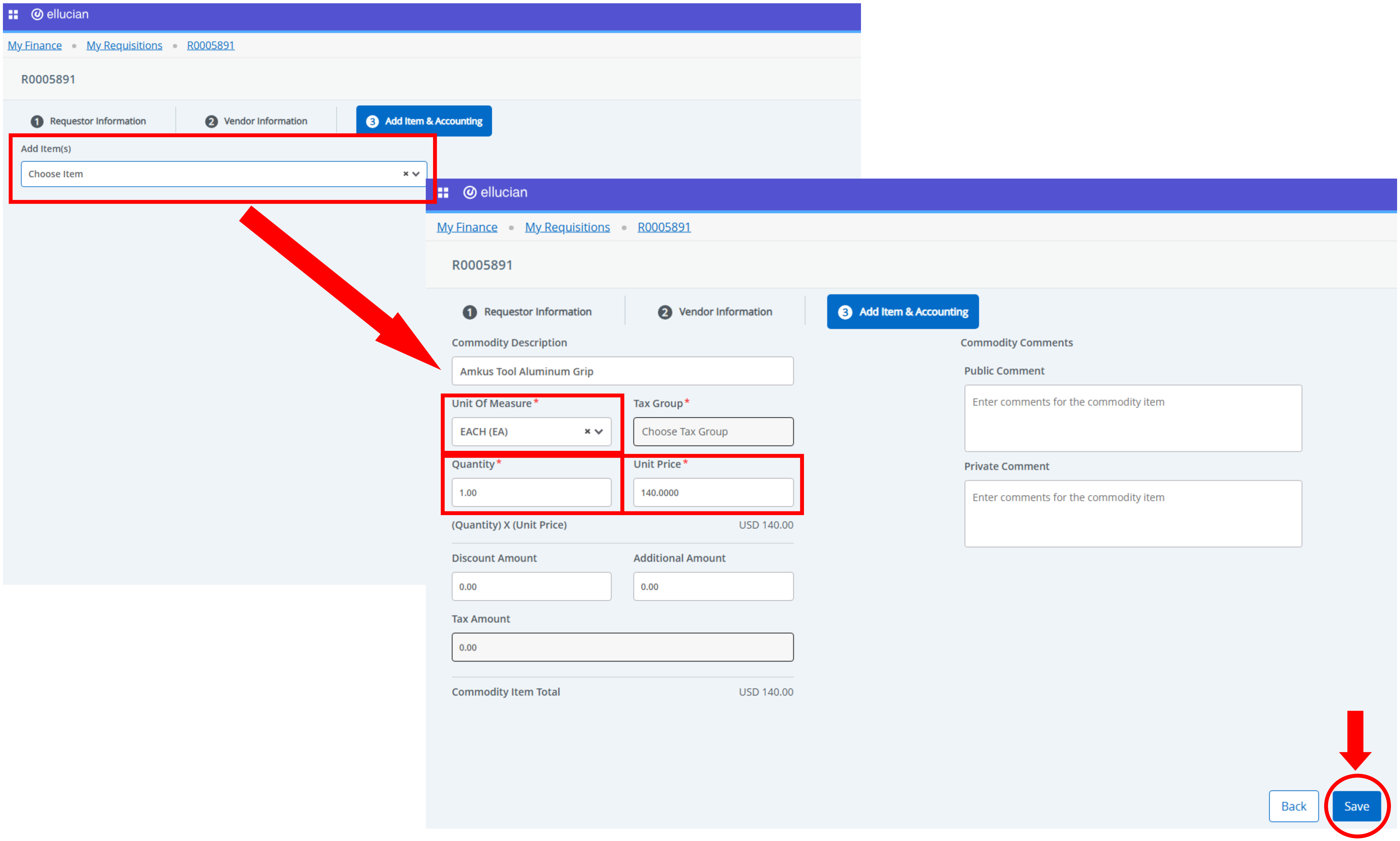
Adding items to your Requisition:

***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

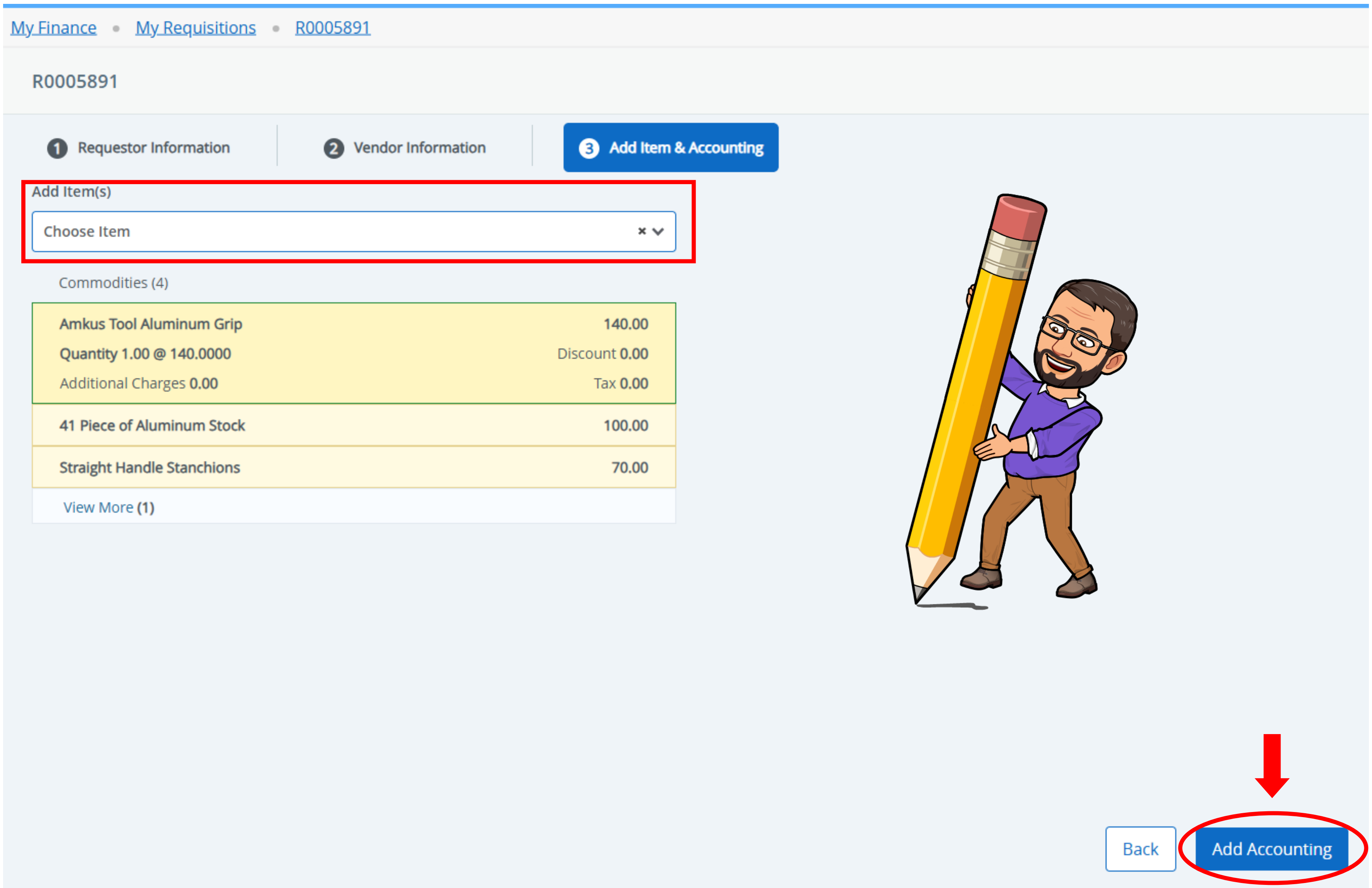
***Unit Price***: Enter price of item. If all entries look correct, click **Save**



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.

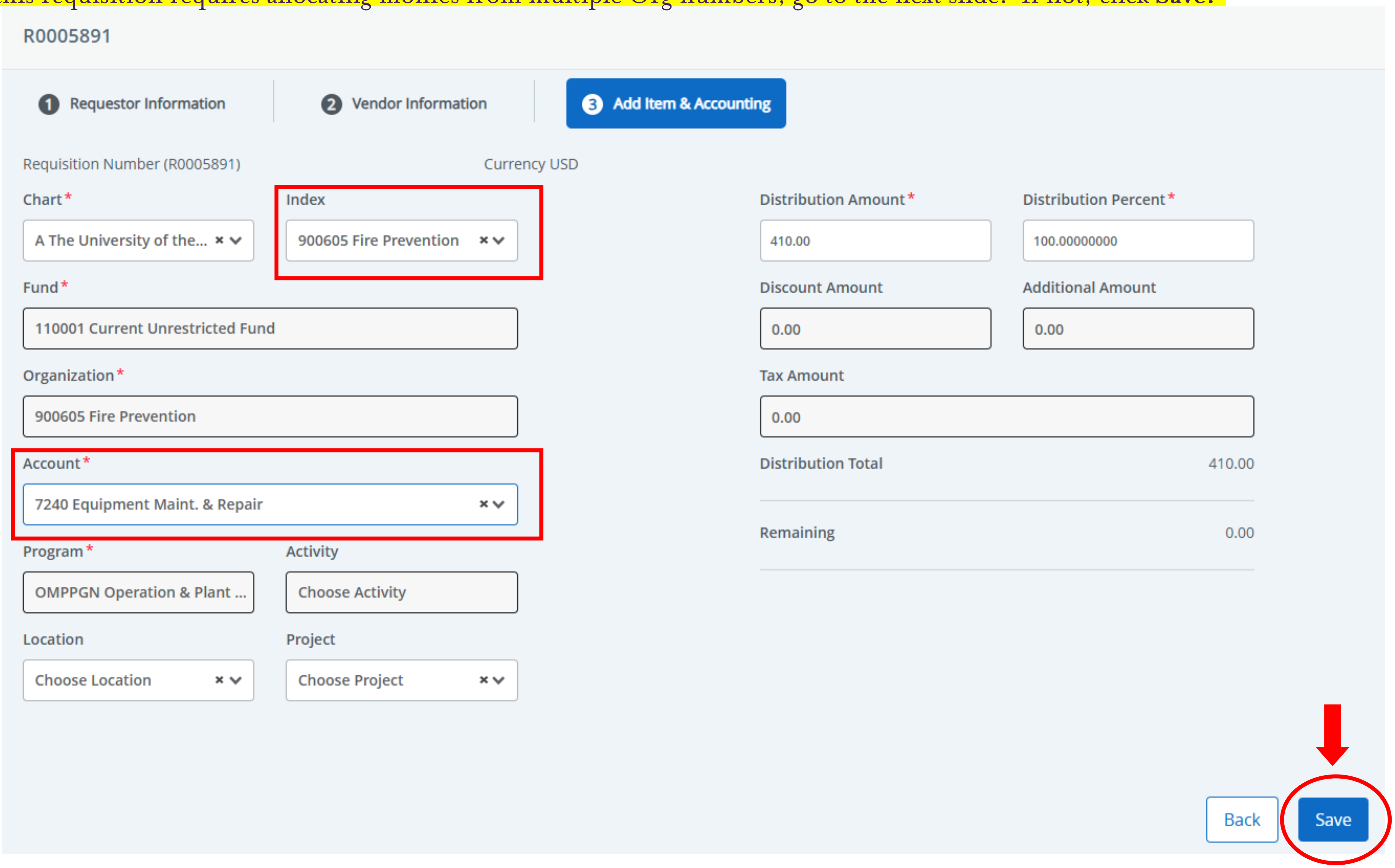


Allocating Charges:

***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.

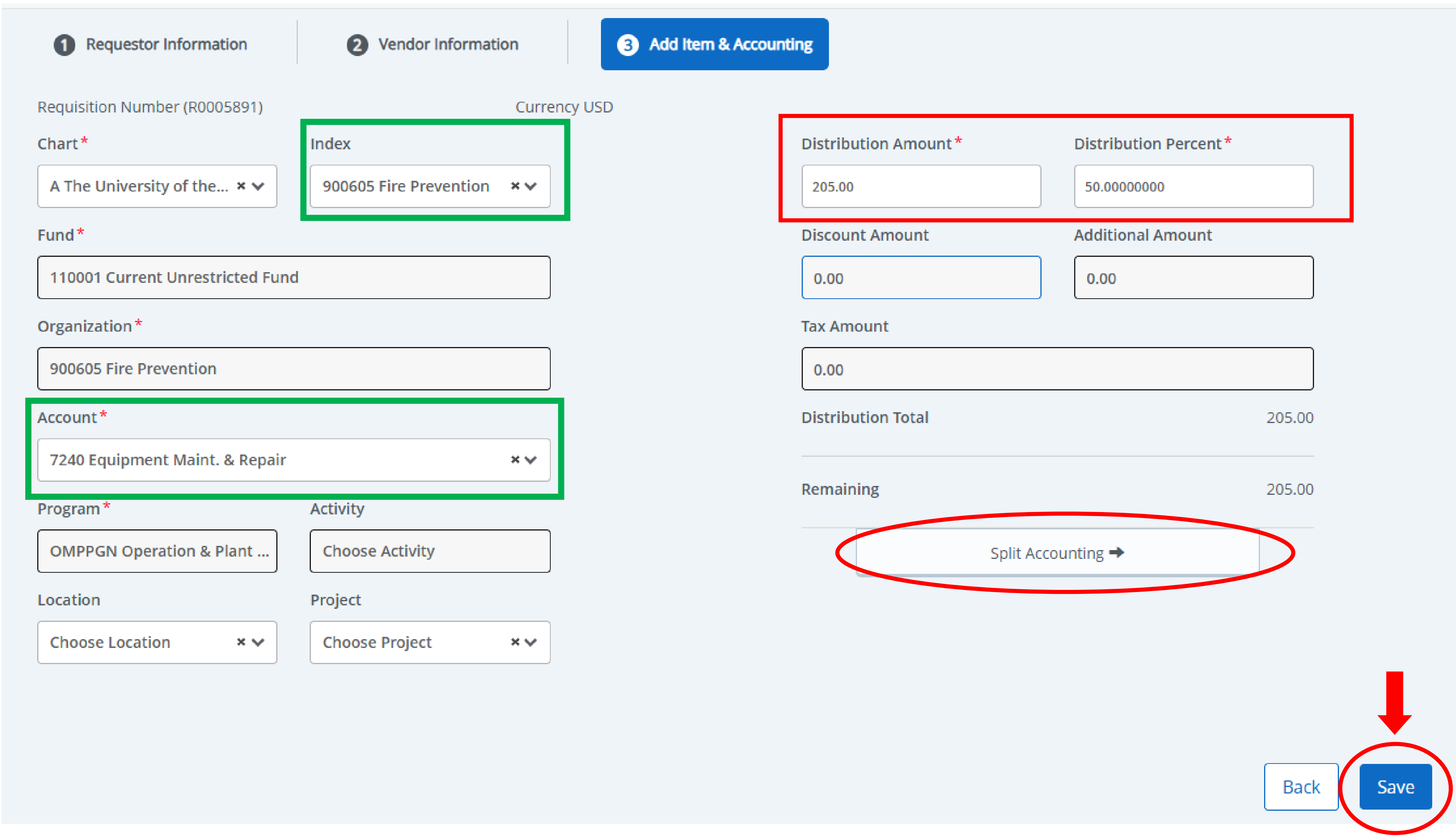
If this requisition requires allocating monies from multiple Org numbers, go to the next slide. If not, click **Save.**



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**.

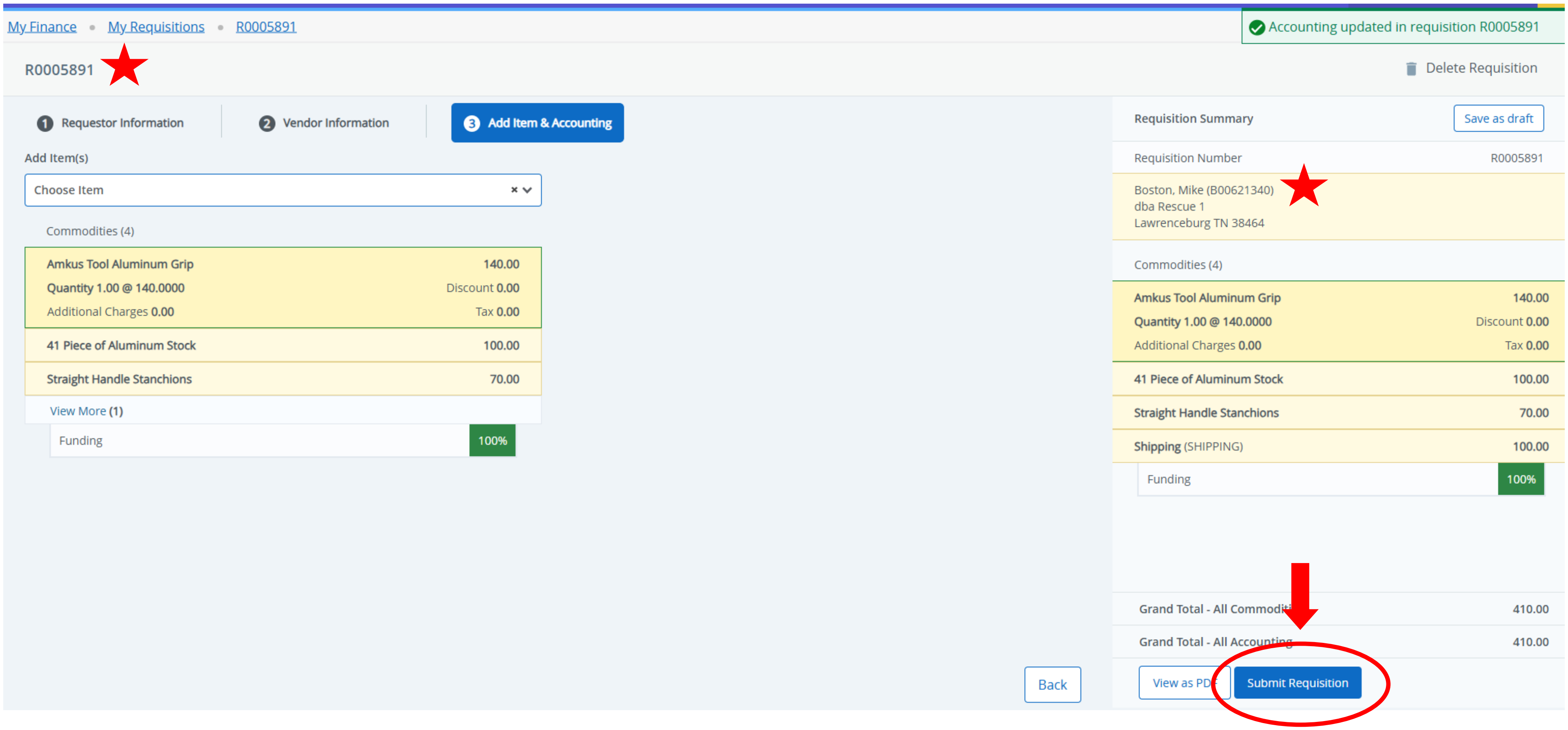


Submitting the Requisition:

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.

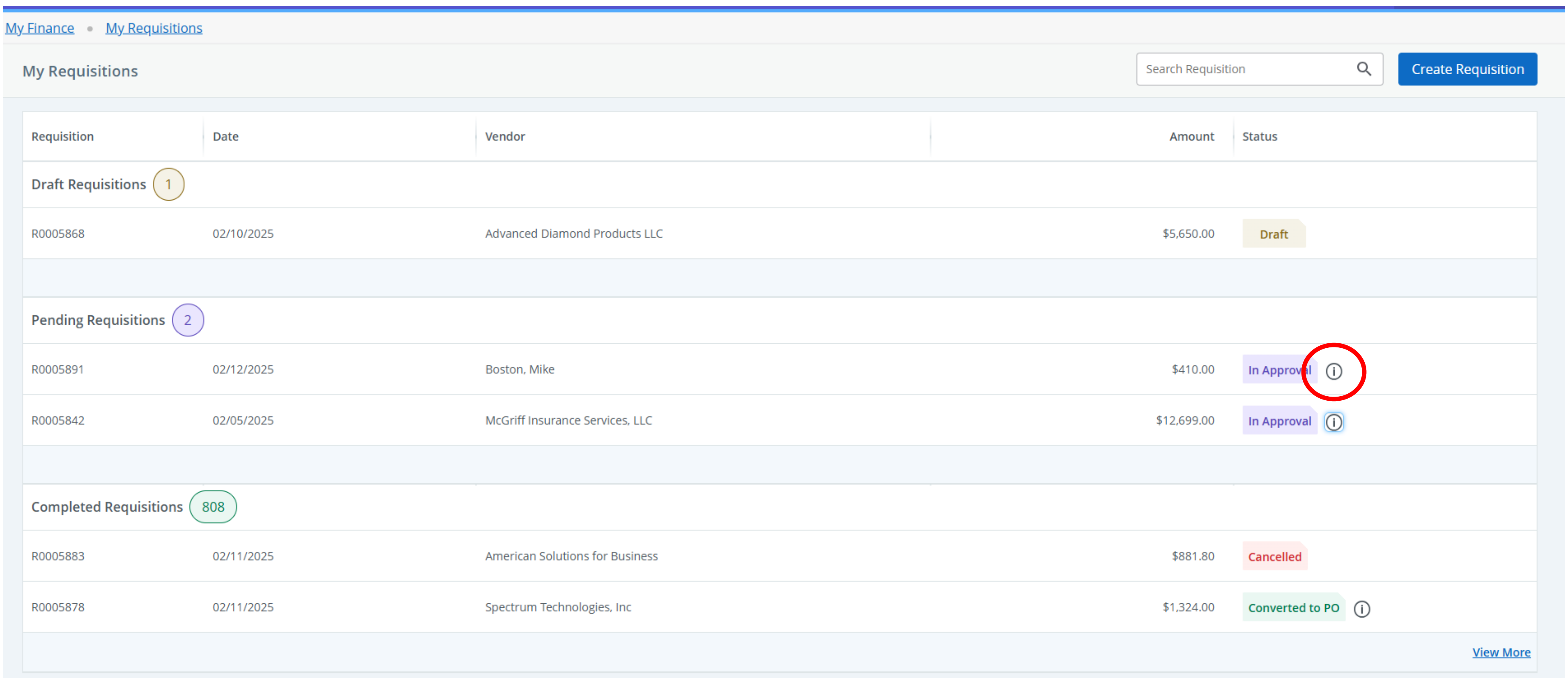


Once the requisition is submitted, you will be returned to the start screen to either create a new requisition or explore requisitions that have been previously submitted, approved or sitting in the drafts.

After the submitted (Pending) requisition has had time to process in the system, you may hover your mouse over the ⓘ 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

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 2 | | | | |
| R0005891 | 02/12/2025 | Boston, Mike | $410.00 | In Approval ⓘ |
| R0005842 | 02/05/2025 | McGriff Insurance Services, LLC | $12,699.00 | In Approval ⓘ |
| 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 ⓘ |

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