






SUNY Orange
Purchase Requisition Data Entry Tutorial



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

My Requisitions

Create Requisition

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 17				
R0000125	08/28/2018	\$1.55	Amazon	Draft
R0000127	08/28/2018	\$1.55	CDW Government Inc	Draft
View More				
Pending Requisitions 10				
R0000124	08/29/2018	\$2.27		 Pending
A0000070	09/28/2018	\$0.54		 Pending
View More				
Completed Requisitions 37				
R0000116	08/24/2018	\$2.29	Amazon	Completed
R0000118	08/29/2018	\$0.38	CDW Government Inc	Completed
View More				

SUNY Orange
Purchase Requisition Data Entry Tutorial

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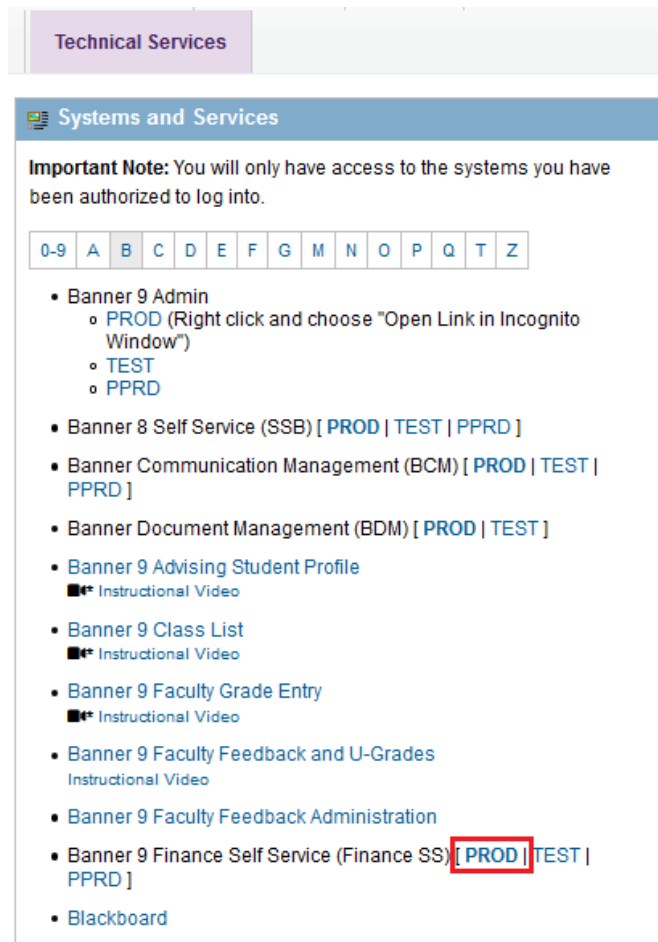
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SUNY Orange Purchase Requisition Data Entry Tutorial

Access Banner SSB Version 9 to Process Purchase Requisitions

Use Firefox or Chrome as your internet browser to access Banner SSB. (Do NOT use Internet Explorer.)

My.SUNYOrange.edu => Technical
Services tab



Technical Services

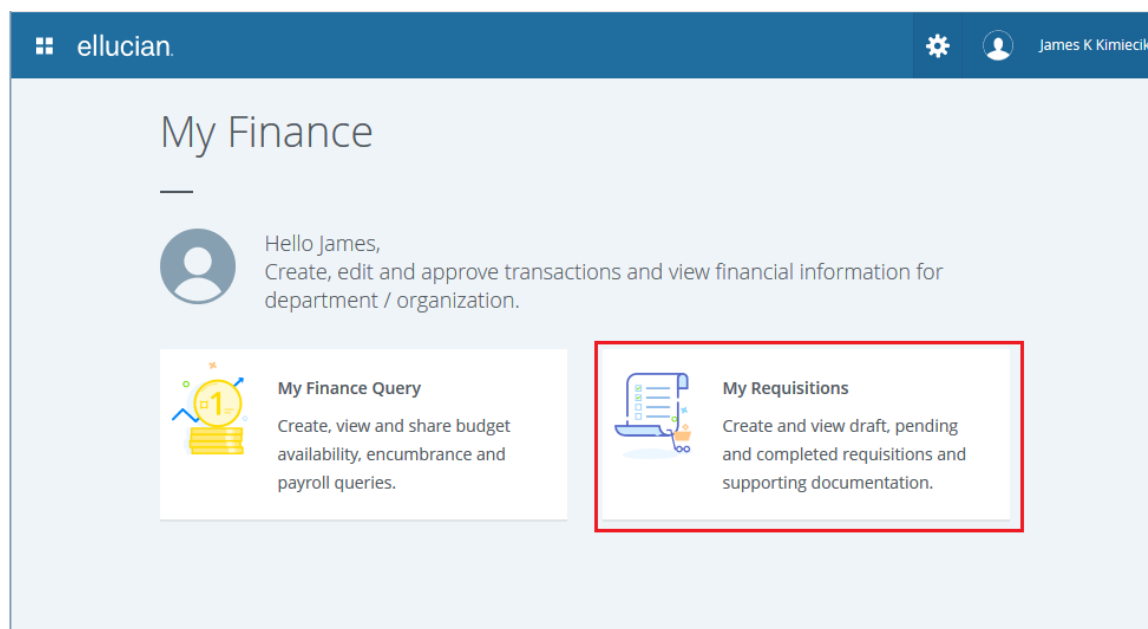
Systems and Services

Important Note: You will only have access to the systems you have been authorized to log into.

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- Banner 9 Admin
 - [PROD](#) (Right click and choose "Open Link in Incognito Window")
 - [TEST](#)
 - [PPRD](#)
- Banner 8 Self Service (SSB) [[PROD](#) | [TEST](#) | [PPRD](#)]
- Banner Communication Management (BCM) [[PROD](#) | [TEST](#) | [PPRD](#)]
- Banner Document Management (BDM) [[PROD](#) | [TEST](#)]
- Banner 9 Advising Student Profile
 - [Instructional Video](#)
- Banner 9 Class List
 - [Instructional Video](#)
- Banner 9 Faculty Grade Entry
 - [Instructional Video](#)
- Banner 9 Faculty Feedback and U-Grades
 - [Instructional Video](#)
- Banner 9 Faculty Feedback Administration
- Banner 9 Finance Self Service (Finance SS) [[PROD](#) | [TEST](#) | [PPRD](#)]
- Blackboard

On the opening screen, click 'My Requisitions'.




ellucian.


James K Kimiecik

My Finance

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.




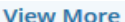



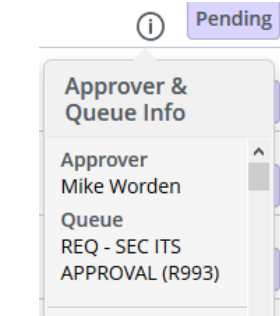
My Requisitions
Create and view draft, pending and completed requisitions and supporting documentation.

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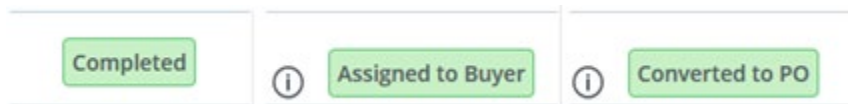
Purchase Requisition – Understanding the Main Menu

The main menu will provide information for all purchase requisitions that you created.

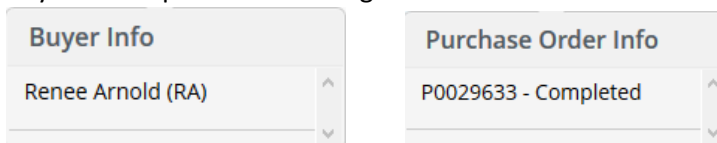
- To Log Off, click on the  icon and click on 'Sign Out'. 
- Breadcrumbs are provide to return to a prior page. 
- There are three sections on the home page: Draft Requisitions; Pending Requisitions; and Completed Requisitions.
 - Draft Requisitions are incomplete. They can be updated/modified and submitted for approval. Requisitions that have been denied will appear in this section as "Disapproved". Requisition that have not been complete are labeled "Draft."
 - Pending Requisitions have been completed and are waiting for approval. (View only)
 - Completed Requisitions have been approved and are in the Business Office queue. (View only)
- Each Section has a view more button . View more will open the section to display all Requisitions within the selected section.
- Click on the 'Information' icon  to display note pertinent to the requisition.
 - For a Pending Requisition, the information icon will display the queue(s) & Approver(s) required to approve the requisition.



- For a Completed requisition, there are three statuses: Completed; Assigned to Buyer; and Converted to PO. Completed indicates the PO has been approved. Assigned to Buyer is the first process the requisition goes through in the Business Office. The buyers name will appear in the informational circle. When the process is completed, the PO status will be displayed as 'Converted to a PO'. The information circle will show the PO number.






- Informational messages in this section will indicate the PO number for a Completed Requisition, or the buyer the requisition was assigned to.



SUNY Orange
Purchase Requisition Data Entry Tutorial

Main Menu:



 James K Kimiecik

My Finance • My Requisitions

My Requisitions


Search

Create Requisition

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 16				
R0000122	08/28/2018	\$1.35	CDW Government Inc	Draft
A0000071	08/28/2018	\$0.45	CDW Government Inc	Draft
View More				
Pending Requisitions 11				
R0000124	08/29/2018	\$2.21		 Pending
A0000070	09/28/2018	\$0.54		 Pending
View More				
Completed Requisitions 37				
R0000116	08/24/2018	\$2.29	Amazon	Completed
R0000118	08/29/2018	\$0.38	CDW Government Inc	Completed
View More				

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Purchase Requisition Data Entry Tutorial

Create Requisition – Create a New Requisition with Single Accounting Code

On the main Requisition menu click on Create Requisition  The Requisition form will be displayed.

Requestor Information Tab

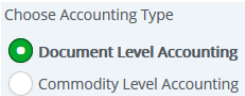
The first tab of the Requisition form will display. On this tab, the Requestor Name, Transaction Date, Email, Accounting Type, Chart of Accounts, Organization, and Ship to Location are required to be filled in. In most cases these fields will be pre-filled for you. (See example on next page.)

Enter the “**Deliver Date**” by entering a ‘T’ in the field and then pressing the TAB key or click on the calendar icon and choose a date. The Delivery Date is an estimated date for when you want the goods to arrive. Delivery date is a required field

Document Comments - Comments are optional. When appropriate, include Vendor Name, Address, Contract Number, or any other pertinent ordering information. Use comments to specify who the requisition order is for, inside delivery information, etc. Public comments will print on the requisition. Private comments will not print on the requisition. (See Appendix E for a printed example)

If all fields are correct, you can click on ‘Next’ to proceed to the second page of the form.

You can change or modify fields on the form:

- Transaction Date – You can change the transaction date. This may be appropriate if it is near the end of fiscal year and your order is for the next fiscal year.
- Document Level Accounting – **Document Level Accounting will be selected by default. This is the default if all items on the requisition will be charged to the same account code.**
 If multiple items will be ordered and charged to different accounting codes, you must use Commodity Level Accounting. (This will be discussed later in the document.)
- Organization – Every profile will have a default organization code. If you order goods for multiple departments, you may need to change the Organization code for correct billing. If you want your default organization code changed, submit a ticket via the helpdesk.
- Ship to Locations - Every profile will have a default Ship to Location. Ship to Location can be modified. The main ship to location codes are: RE – Middletown; NC - Newburgh default; PK -Picking up Order; SE –See Below-for Contracts) If you want your default Ship to Location changed, submit a ticket via the helpdesk.
- Document Comments - Comments are optional. They can be used to specify who the requisition order is for, inside delivery information, etc. Public comments will print on the requisition. Private comments will NOT print on the requisition. (See Appendix E for a printed example)

It is NOT recommended that you change any other fields unless instructed to do so.

SUNY Orange
Purchase Requisition Data Entry Tutorial

My Finance • My Requisitions • Create Requisition



Create Requisition

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

Requestor *

James Kimiecik

Transaction Date * Delivery Date *

10/10/2018  MM/DD/YYYY 

Requestor Email

james.kimiecik@sunyorange.edu

Choose Accounting Type

☒ Document Level Accounting

☐ Commodity Level Accounting

Requisition Comments

Public Comment

Document Level public comments -
This text will appear on the printed requisition.

Private Comment

Document Level public comments -
This text will NOT appear on the printed requisition.

Chart *

O Orange County Community ... x ▾

Organization *

5901 ITS Department x ▾

Ship To Location *

RE Dept No x ▾

Attention To * Tax Group

Dept No Choose Ta... ▾

Ship To Location

Attention: Dept No
Orange County Comm College
Receiving Dept Horton Hall
115 South Street
Middletown NY 10940

Back Next

SUNY Orange Purchase Requisition Data Entry Tutorial

Vendor Information Tab

The second tab on the form is for Vendor Information.

Type in the name of a vendor, or the partial name of a vendor. A list of vendors matching your search criteria will display. Select a vendor from the list. If a vendor does not appear on the list, you will have to contact Purchasing and request that the vendor be added to Banner.

If you can not find a vendor or do not know what vendor to select, check the box “Choose Vendor For Me.” Purchasing will select the best vendor for the item(s) ordered when completing the Purchase Order. Click ‘Next’ to continue.

The screenshot shows the 'Vendor Information' tab of the SUNY Orange Purchase Requisition Data Entry form. The breadcrumb trail is 'My Finance • My Requisitions • R0000125'. The requisition number 'R0000125' is displayed at the top. There are three tabs: '1 Requestor Information', '2 Vendor Information' (which is active), and '3 Add Item & Accounting'. In the 'Vendor Information' tab, there is a checkbox labeled 'Choose vendor for me' which is highlighted with a blue box. Below it is a 'Vendor' dropdown menu with 'Amazon (A00215191)' selected, highlighted with a red box. Under 'Vendor Information', a yellow box displays the selected vendor's details: 'Amazon (A00215191)', 'Capital Services', 'PO Box 035184', and 'Seattle WA 98124-5184'. There is a 'Vendor Email' dropdown menu with 'Choose/Enter Email' selected. At the bottom, there are 'Discount' and 'Currency' dropdown menus. The 'Discount' dropdown has 'Choose Discount' selected, and the 'Currency' dropdown has 'USD United States ...' selected. At the bottom right, there are 'Back' and 'Next' buttons, with the 'Next' button highlighted with a red box.

Using the SUNY Orange Credit Card – M&T Bank

For Requisitions that will be charge to the **SUNY Orange credit card** use vendor **M&T Bank**, vendor number **A00234422**. You will need to scroll through the list to find M&T Bank or search on the vendor name or number.

This screenshot shows a close-up of the 'Vendor Information' tab. The 'Vendor' dropdown menu has 'M&T Bank (A00234422)' selected, with a red box around the dropdown. Below it, the 'Vendor Information' section shows a yellow box with the details for 'M&T Bank (A00234422)': '1769 Route 52' and 'Fishkill NY 12524'.

SUNY Orange
Purchase Requisition Data Entry Tutorial

[Add Item & Accounting Tab](#)

Add an item to order. Enter free form text for the item. Press the TAB key or ENTER key on your keyboard.

My Finance • My Requisitions • R0000125

R0000125

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Ink Cartridge - HP XXXXX

Ink Cartridge - HP XXXXX (Add as new item)




SUNY Orange
Purchase Requisition Data Entry Tutorial

Save

Add the Unit of Measure, Quantity, and Unit Price. (Require Fields) Click on 'Save'.



Commonly used Unit of Measure: (EA=Each, CS=Case, DA=Dozen, etc.).

Comments are optional. They can be used to specify who an item was order for, etc. (See Appendix E for a printed example or a requisition.)



My Finance • My Requisitions • R0000125

R0000125

 Attachments  Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Commodity Description

Ink Cartridge - HP XXXXX

Unit Of Measure *
EACH (EA) *

Tax Group *
Choose Tax Gr...

Quantity *
1.00

Unit Price *
0.4500

(Quantity) X (Unit Price)
USD 0.45

Discount Amount
0.00

Additional Amount
0.00

Tax Amount
0.00

Commodity Item Total
USD 0.45

Commodity Comments

Public Comment

Item Level public comment - This text will appear on the printed requisition.

Private Comment

Item Level private comment - This text will appear on the printed requisition.

Back

Save

SUNY Orange
Purchase Requisition Data Entry Tutorial

If a second item needs to be ordered, enter the item description in the 'Add Item(s)' field. Press the TAB key or ENTER key on your keyboard.

My Finance • My Requisitions • R0000125

R0000125

Att

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Monitor

Monitor (Add as new item)

Ink Cartridge - HP XXXXX0.45

Quantity 1.00 @0.4500

Discount 0.00

Additional Charges 0.00

Tax 0.00

SUNY Orange
Purchase Requisition Data Entry Tutorial

For the second item, enter the unit of measure, Quantity, and Unit Price. (Require Fields) Click 'Save'.

Save

My Finance • My Requisitions • R0000125

R0000125

Att

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Commodity Description

Monitor

Unit Of Measure * Tax Group *

(EA) × Choos...

Quantity * Unit Price *

2.00 0.5500

(Quantity) X (Unit Price) USD 1.10

Commodity Comments

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

SUNY Orange
Purchase Requisition Data Entry Tutorial

When all items have been added, click on 'Add Accounting'.

My Finance • My Requisitions • R0000125

R0000125

Att

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (2)

Ink Cartridge - HP XXXXX	0.45
Quantity 1.00 @	Discount 0.00
0.4500	
Additional Charges 0.00	Tax 0.00

Monitor	1.10
----------------	-------------

Back

Add Accounting

SUNY Orange Purchase Requisition Data Entry Tutorial

Organization code, Fund, and Program are pre-filled with your default value

This screenshot shows the default values for the Purchase Requisition form:

- Fund ***: 1110 Current Unrestrict... x v
- Organization ***: 5901 ITS Department x v
- Account ***: Choose Account x v
- Program ***: 62 G... x v
- Activity**: Cho... x v

If you are ordering items for a different organization, change the Organization code first. If you change the organization code first, the correct Fund and Program code will automatically fill in for you.

This screenshot shows the form with the Fund and Program fields highlighted by blue boxes:

- Fund ***: 1110 Current Unrestrict... x v
- Organization ***: 5901 ITS Department x v
- Account ***: Choose Account x v
- Program ***: 62 G... x v
- Activity**: Cho... x v

This screenshot shows the Organization dropdown menu open, with the '5011 Maintenance Management' option selected and highlighted by a red box:

- Fund ***: Choose Fund v
- Organization ***: Choose Organization ▲
5011 Maintenance Management
- Program ***: Choos... v
- Activity**: Cho... x v

This screenshot shows the form with updated values for Fund, Organization, and Program, all highlighted by blue boxes:

- Fund ***: 1110 Current Unrestrict... x v
- Organization ***: 5011 Maintenance Ma... x v
- Account ***: Choose Account x v
- Program ***: 70 ... x v
- Activity**: Cho... x v

SUNY Orange
Purchase Requisition Data Entry Tutorial

Add the Account Code. Press the ENTER key on the keyboard. Click 'Save' when done.

My Finance • My Requisitions • R0000125

R0000125

Att

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number
(R0000125)

Currency
USD

Chart*
O O... x ▾

Index
Cho... x ▾

Fund*
1110 Current Unrestrict... x ▾

Organization*
5011 Maintenance Man... x ▾

Account*

Choose Account x ▴

7310 | 🔍

7310
Office Supplies

Location
Cho... x ▾

Project
Cho... x ▾

Distribution Amount*
1.55

Distribution Percent*
100.00000

Discount Amount
0.00

Additional Amount
0.00

Tax Amount
0.00

Distribution Total
1.55

Remaining
0.00

Back

Save

Page 15 of 31

SUNY Orange
Purchase Requisition Data Entry Tutorial

Submit Requisition

Review the Requisition for accuracy. When completed click 'Submit Requisition'. Once the Requisition is submitted you cannot make any changes.

The screenshot displays the ellucian system interface for a Purchase Requisition. The top navigation bar includes the ellucian logo, a settings gear, a user profile icon for James K Kimiecik, and the text 'My Finance • My Requisitions • R0000125'. Below this, the requisition number 'R0000125' is prominently displayed, along with links for 'Attachments' and 'Delete Requisition'.

The main content area is divided into three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. The 'Add Item & Accounting' tab is active, showing a list of commodities. A dropdown menu labeled 'Add Item(s)' with the text 'Choose Item' is visible. Below it, a table lists two commodities:

Commodities (2)	
Ink Cartridge - HP XXXXX	0.45
Quantity 1.00 @ 0.4500	Discount 0.00
Additional Charges 0.00	Tax 0.00
Monitor	1.10
Funding	100%

To the right of the commodity list is a 'Requisition Summary' section. It contains a 'Save as draft' button and a table summarizing the items:

Requisition Summary	
Requisition Number	R0000125
Amazon (A00215191) Capital Services Seattle WA 98124-5184	
Commodities (2)	
Ink Cartridge - HP XXXXX	0.45
Quantity 1.00 @ 0.4500	Discount 0.00
Additional Charges 0.00	Tax 0.00
Monitor	1.10
Funding	100%
Grand Total - All Commodities	1.55
Grand Total - All Accounting	1.55

At the bottom of the interface, there are three buttons: 'Back', 'View as PDF', and 'Submit Requisition'. The 'Submit Requisition' button is highlighted with a red rectangular box.

When the requisition is approved, you will receive an email request for supporting documentation. Attach and send the required documentation to requisitions@sunyorange.edu. (See Appendix A)

SUNY Orange Purchase Requisition Data Entry Tutorial

Save as a draft

At any time during the creation of the Purchase Requisition, you can click on 'Save as a draft' to save your form. You can return to it later to update and submit your Requisition. (Note: Remember your Requisition number.)

My Finance • My Requisitions • R0000125

Requisition R0000125 updated successfully

R0000125 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

☐ Choose vendor for me

Requisition Summary: Save as draft

Requisition Number R0000125

Print Requisition

At the bottom right of select requisition screens, there is a 'View as PDF' button. You can view any requisition as a PDF, download the requisition as a PDF, or print the PDF.

Grand Total - All Commodities 2.21

Grand Total - All Accounting 2.21

Back View as PDF

PURCHASE REQUISITION
(Non-negotiable; not a valid Purchase Order)

Requestor James Kimiecik Requisition # R0000124

Phone 845- 3414741 Ext Transaction Date 08/29/2018

Email james.kimiecik@sunyorange.edu Delivery Date 08/29/2018

Organization ITS Department (S901) Status Pending

Accounting Type Commodity Level Currency USD

Ship To RE Vendor

Print Download

Delete Requisition

A "Draft" or "Disapproved" Requisition can be deleted by clicking on 'Delete Requisition'. If you create a requisition and decide it is no longer needed, you have the ability to delete the requisition. It is a good practice to delete requisitions if you are not going to submit them as a valid order. (This will release encumbered funds being held by the requisition.)

My Finance • My Requisitions • R0000125

R0000125 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

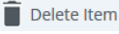
☐ Choose vendor for me

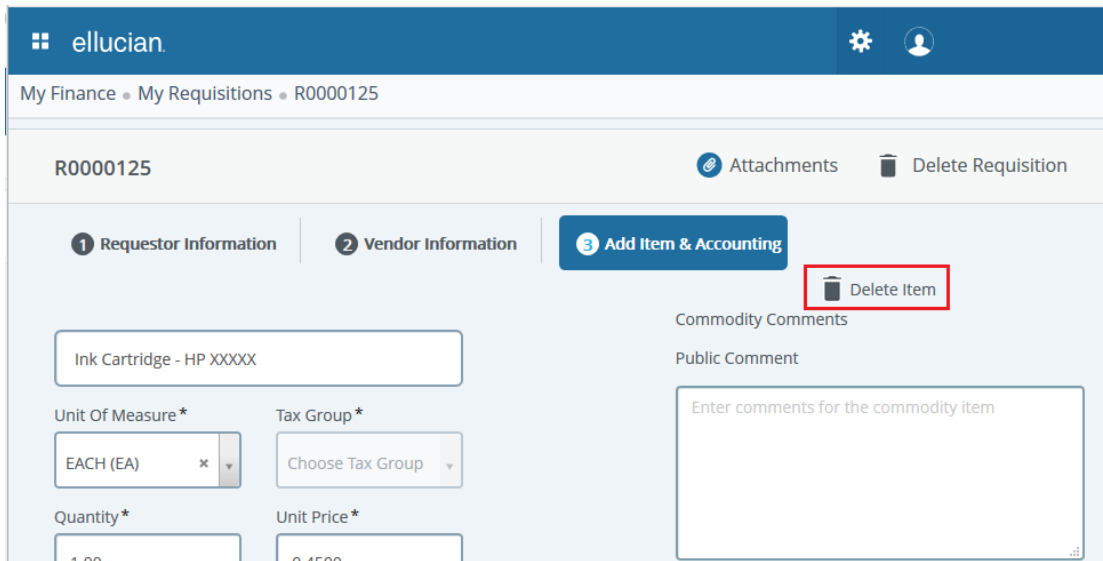
Requisition Summary: Save as draft

Requisition Number R0000125

SUNY Orange Purchase Requisition Data Entry Tutorial

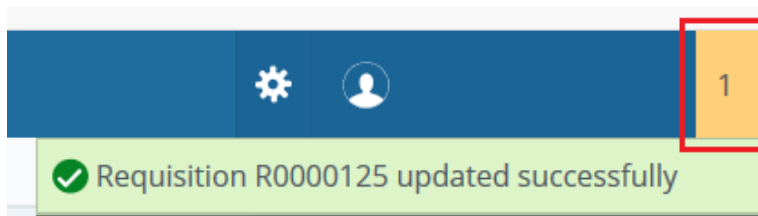
Delete an Item

The 'Delete Item'  icon will allow you to delete a single item from the requisition when you return to edit it.



Message Area

Messages will appear in the upper right corner of the form. The messages will indicate if an update was saved or if you have an error on the form. These messages can be toggled on and off by clicking within the orange box.



SUNY Orange Purchase Requisition Data Entry Tutorial

Returning to a Denied Requisition

If your requisition has been denied by an approver, it will be returned to you and appear in your Draft Requisitions. A “Disapproved” requisition can be modified and submitted again for approval. Click on the requisition to edit it. If the approver typed a comment when denying the requisition, it will appear by clicking on the informational icon.

My Finance • My Requisitions • Draft Requisitions

Draft Requisitions					Create Requisition
<input type="text" value="Search"/>					
Requisition	Date	Amount	Vendor	Status	
< Draft Requisitions 17					
R0000079	08/07/2018	\$27.50	CDW Government Inc	Draft	
R0000078	08/07/2018	\$199.95	Dell Marketing LP	Disapproved	<div><div></div><div>Disapproval Text</div><div>DOCUMENT IS DISAPPROVED -jk</div></div>
R0000070	07/31/2018	\$0.15	CDW Government Inc	Draft	
R0000068	07/31/2018	\$0.25	CDW Government Inc	Draft	

Denied Requisition: After you complete a requisition, the approver can approve or deny the requisition. If the requisition is denied, there may be a valid reason for the denial. The wrong charge code may have been entered, a contract number was not included that is required, description of the goods need to be modified, quantity is incorrect, funds are not available, etc. Ask the approved why the requisition was denied and if it needs to be corrected or deleted.

A completed requisition cannot be changed. However, if the requisition is denied by the approver, the requisition can be modified and corrected. After completing your changes, click on ‘Submit Requisition’. The requisition will be routed back to the approver.

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Purchase Requisition Data Entry Tutorial

Create a Requisition using Multiple Accounting Codes

YOU CAN ORDER MULTIPLE ITEMS FROM THE SAME VENDOR AND USE A DIFFERENT ACCOUNT CODE FOR EACH ITEM ON THE SAME REQUISITION.

Select 'Create Requisition'.

-Insert a delivery date

-**Select "Commodity Level Accounting"**. (This is the distinction between charging all items to one account code on a requisition or using multiple account codes. If this is not done correctly, the requisition has to be deleted and re-entered.)

-After completing all information on the form, select 'Next'.

[My Finance](#) • [My Requisitions](#) • [Create Requisition](#)

Create Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requestor *

James Kimiecik

Transaction Date *

08/28/2018

Delivery Date *

08/28/2018

Requestor Email

james.kimiecik@sunyorange.edu

Choose Accounting Type

☐ Document Level Accounting

☒ **Commodity Level Accounting**

Requisition Comments

Public Comment

Multiple items for different department members.

Chart *

O Orange County Community ...

Organization *

5901 ITS Department

Ship To Location *

RE Dept No

Attention To *

Dept No

Tax Group

Choose Ta...

Ship To Location

Attention: Dept No
Orange County Comm College
Receiving Dept Horton Hall
115 South Street
Middletown NY 10940

SUNY Orange
Purchase Requisition Data Entry Tutorial

Enter Vendor information and select 'Next'

My Finance • My Requisitions • R0000126

R0000126

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting


☐ Choose vendor for me

Vendor

CDW Government Inc (A00001131) × ▾

Enter Item, Unit of Measure, Quantity, and Unit Price. Click on 'Add Accounting'.

My Finance • My Requisitions • R0000126

R0000126  Att

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Commodity Description

Ink Cartridge

Unit Of Measure*

EAC... × ▾

Quantity*

1.00

Unit Price*

0.4500

(Quantity) X (Unit Price)

USD 0.45

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Commodity Item Total

USD 0.45

Commodity Comments

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

Back

Add Accounting

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Purchase Requisition Data Entry Tutorial

Enter Fund, Organization, Account, and Program codes for the first item. Click 'Save'.

Note: The item description is displayed at the top of the form when adding account codes.

My Finance • My Requisitions • R0000126 • Ink Cartridge

Ink Cartridge

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number (R0000126) Currency USD

Chart*

O Or... × ▾

Index

Choo... × ▾

Fund*

1110 Current Unrestricted × ▾

Organization*

5011 Maintenance Manag... × ▾

Account*

7310 Office Supplies × ▾

Program*

70 M... × ▾

Activity

Choo... × ▾

Location

Choo... × ▾

Project

Choo... × ▾

Distribution Amount*

0.45

Distribution Percent*

100.000000

Discount Amount

0.00

Additional Amount

0.00

Tax Amount

0.00

Distribution Total

0.45

Remaining

0.00

Back

Save

SUNY Orange Purchase Requisition Data Entry Tutorial

Add the second item. Press the ENTER key or TAB key on your keyboard.

My Finance • My Requisitions • R0000126

R0000126

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Monitor

Monitor (Add as new item)

Ink Cartridge	0.45
Quantity 1.00 @ 0.4500	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding 100%

Add Unit of Measure, Quantity, and Unit Price for the second item. Click 'Add Accounting'.

My Finance • My Requisitions • R0000126

R0000126

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Commodity Description

Monitor

Unit Of Measure* Tax Group*

EAC... * Choose...

Quantity* Unit Price*

1.00 0.3400

(Quantity) X (Unit Price) USD 0.34

Discount Amount Additional Amount

0.00 0.00

Tax Amount

0.00

Commodity Item Total USD 0.34

Commodity Comments

Public Comment

Enter comments for the commodity item

Private Comment

Enter comments for the commodity item

Back Add Accounting

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Purchase Requisition Data Entry Tutorial

Enter Fund, Organization, Account, and Program codes for the second item. Click 'Save'.

Note: The item description is displayed at the top of the form when adding account codes.

My Finance • My Requisitions • R0000126 • Monitor

Monitor

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requisition Number
(R0000126)

Currency
USD

Chart*
O Or... *

Index
Choo... *

Fund*
1110 Current Unrestricted *

Organization*
5011 Maintenance Manag... *

Account*
7831 Maint Equip Lease *

Program*
70 M... *

Location
Choo... *

Activity
Choo... *

Project
Choo... *

Distribution Amount*
0.34

Distribution Percent*
100.000000

Discount Amount
0.00

Additional Amount
0.00

Tax Amount
0.00

Distribution Total
0.34

Remaining
0.00

Back



Save

Continue this process until all items have been added to the order.

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Purchase Requisition Data Entry Tutorial



When all items have been added and order information has been verified, completed the requisition. Click on 'Submit Requisition'.

ellucian.



My Finance • My Requisitions • R0000126

R0000126

 Attachments  Delete Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (2)

Ink Cartridge0.45

Funding100%

Monitor0.34

Quantity 1.00 @ 0.3400Discount 0.00Additional Charges 0.00Tax 0.00

Funding100%

Requisition Summary

Save as draft

Requisition NumberR0000126

CDW Government Inc (A00001131)
Attn: John Williams
Vernon Hills IL 60061

Commodities (2)

Ink Cartridge0.45

Quantity 1.00 @ 0.4500Discount 0.00Additional Charges 0.00Tax 0.00

Funding100%

Monitor0.34

Funding100%

Grand Total - All Commodities0.79

Grand Total - All Accounting0.79

Back

View as PDF

Submit Requisition

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Fiscal Year Accounting Information

Purchase Requisitions and Purchase Orders must be created in the same fiscal year.

Be mindful at the end of the fiscal year that you may want to encumber funds in the next fiscal year. If this is the case, then adjust the **Transaction Date** to be in the next fiscal year. The transaction date determines the fiscal year encumbrance. (In the example below, a Purchase Order is entered into SSB on 8/15/2018. The Transaction date is 9/5/2018 so that the encumbrance will be in Fiscal Year 2019. If the current date of 8/15/2018 was entered, the encumbrance would be in Fiscal Year 2018. SUNY Orange fiscal year ends on 8/31.)

The screenshot shows the 'ellucian' system interface for a purchase requisition. The breadcrumb trail is 'My Finance • My Requisitions • R0000126'. The requisition number 'R0000126' is displayed at the top. The form is divided into three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. Under the 'Requestor Information' tab, the 'Requisition Number' is 'R0000126' and the 'Requestor*' is 'James Kimiecik'. The 'Transaction Date*' is '09/05/2018', which is highlighted with a red rectangular box. The 'Delivery Date*' is '09/06/2018'. On the right side, under the 'Add Item & Accounting' tab, the 'Chart*' is 'O Orange County Community College', the 'Organization*' is '5901 ITS Department', and the 'Ship To Location*' is 'RE Dept No'.

Funds are encumbered after the Purchase Requisition is approved. If this Requisition is not turned into a Purchase Order, the Purchase Requisition needs to be deleted to release the encumbered funds.

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Purchase Requisition Data Entry Tutorial

Appendix A – Email Notification for Approved Requisitions.

After you complete a requisition and it is approved, you will receive an email notification.

Email example:

Requisition # R0001602 Submitted by James Kimiecik Inbox x



requisition@sunyorange.edu

4:06 PM (25 minutes ago)



to james.kimiecik ▾

Your recently submitted Requisition # R0001602 on 03-AUG-20 for goods or services has been approved.

Emails pertaining to this requisition can be sent to purchasing@sunyorange.edu

Regards,

Purchasing Department

=====

Remember, supporting documentation is required for purchasing approval. Support documentation would include a quote, bid, estimate, hotel information/rate, Travel Reimbursement form, Seminar/Conference/Workshop Authorization Form, etc.

If you have a paper document, please scan it and attach it to the requisition.

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Appendix B – Email for Denied Requisitions.

An email will be sent to the requestor if a requisition is denied by an approver. If you receive an email, check with the approver as to why the requisition was denied. It is probable that the requisition can be corrected and re-submitted.

Example of email:

Requisition # R0000140 Submitted by James Kimiecik has been Denied

Inbox x

requisition@sunyorange.edu

3:17 PM (12 minutes ago) ☆ ↶ ⋮

to james.kimiecik ▾

Requisition R0000140 was recently submitted on 08/29/2018 for goods or services.

This requisition has been denied by one of the approvers. (User ID ITSAPR)


Please research the reason for denial with the approver. Check your Banner Messages for any comments. If there was an error/omission on the Purchase Requisition it can be modified by you and submitted again for approval.

If this requisition is no longer needed, delete the requisition.

Regards,
Purchasing Department

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Purchase Requisition Data Entry Tutorial

Appendix C – Example of a Printed Purchase Order with Document Text and Item Text.


	<p>Orange County Community College 115 South Street, Middletown, NY 10940 Phone: 845-341-4780 Fax: 845-344-2254 845-341-4852 A Unit of the State University of New York</p>	Page 1	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">PO Number:</td> <td style="padding: 2px;">P0029672</td> </tr> <tr> <td style="padding: 2px;">Issue Date:</td> <td style="padding: 2px;">08/31/18</td> </tr> </table> <div style="border: 1px solid black; padding: 2px; font-size: small;"> ABOVE PURCHASE ORDER NUMBER MUST APPEAR ON ALL PAPERS AND PACKAGES RELATIVE TO THIS ORDER. </div>	PO Number:	P0029672	Issue Date:	08/31/18
PO Number:	P0029672						
Issue Date:	08/31/18						
VENDOR: Times Herald Record Attn: Anthony McFarlane 40 Mulberry Street Middletown NY 10940-6357		SHIP TO: Orange County Comm College Receiving Dept Horton Hall 115 South Street Middletown NY 10940 ATTN: Dept No					
FOB: Orange County Community College		TERMS: Net 30 Days					
Quantity	Description	Unit Price	Total Price				
	Document text Example: Contract Number: VEGGIES	Document Text					
6.00 EA	10498 Carrots Orange Deliver to Farmer Brown for P. Cottontail	.4500	2.70				
1.00 EA	10562 Lettuce Green	1.1000	1.10				
THIS PURCHASE ORDER IS NOT VALID UNLESS SIGNED BELOW		TOTAL CHARGES:	3.80				
<u>GENERAL INSTRUCTIONS TO VENDORS:</u>							

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Appendix D – Example of a Printed Purchase for a Credit Card Purchase.

If you complete a requisition for a Credit Card purchase:

- Use "M&T Bank", vendor number A00234422, as the Vendor.
- Specify in the Document Text the Vendor Name, Address, Contract Number, or any other pertinent information.

	<p>Orange County Community College 115 South Street, Middletown, NY 10940 Phone: 845-341-4780 Fax: 845-344-2254 845-341-4852</p> <p style="background-color: black; color: white; text-align: center; padding: 2px;">A Unit of the State University of New York</p>	Page 1	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">PO Number: P0030299</td> </tr> <tr> <td style="padding: 2px;">Issue Date: 09/13/18</td> </tr> </table> <div style="background-color: black; color: white; padding: 5px; text-align: center; font-weight: bold;"> ABOVE PURCHASE ORDER NUMBER MUST APPEAR ON ALL PAPERS AND PACKAGES RELATIVE TO THIS ORDER. </div> <p>Buyer: Maria Sarett</p>	PO Number: P0030299	Issue Date: 09/13/18
PO Number: P0030299					
Issue Date: 09/13/18					
VENDOR: <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> M&T Bank 1769 Route 52 Fishkill NY 12524 </div>	SHIP TO: See Below ATTN:				
FOB: Orange County Community College		TERMS: Net 30 Days			
Quantity	Description	Unit Price	Total Price		
	VENDOR: EMBASSY SUITES, WATERTOWN, NY				
2.00 EA	Nights Room Reservations for SUNYRA Conference For: See Conf #53290977	124.0000	248.00		
2.00 EA	Nights Room Reservations for SUNYRA Conference For: See Conf #53290947 Checkin: Oct. 10, 2018 Checkout: Oct. 12, 2018	124.0000	248.00		
THIS PURCHASE ORDER IS NOT VALID UNLESS SIGNED BELOW		TOTAL CHARGES:	496.00		
Vendor ID: A00234422 Phone: 844-539-2287		REQUISITION INFORMATION: 2018			

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Appendix E – Example of a Printed Requisition with Document Text and Item Text.

PURCHASE REQUISITION
(Non-negotiable; not a valid Purchase Order)

Requestor	James Kimiecik	Requisition #	R0000125
Phone	845- 3414741 Ext	Transaction Date	08/28/2018
Email	james.kimiecik@sunyorange.edu	Delivery Date	08/28/2018
Organization	ITS Department (5901)	Status	Draft
Accounting Type	Document Level	Currency	USD

Ship To	NC	Vendor	Amazon (A00215191)
Address	O.C.C.C. Newburgh Campus One Washington Center Newburgh NY 12550	Address	Capital Services PO Box 035184 Seattle WA 98124-5184
Attention To	O.C.C.C. Newburgh Campus - Ext	Phone	- Fax -
		Email	

Requisition Comments	Document Level public comments - This text will appear on the printed requisition.
-----------------------------	--

Commodities

Item	Description	U/M	Quantity	Unit Price	Other	Total
1	Ink Cartridge - HP XXXXX Item Text: Item Level public comment - This text will appear on the printed requisition.	EA	1.00	0.4500	0.00	0.45
2	Monitor	EA	2.00	0.5500	0.00	1.10

Grand Total - All Commodities	1.55
--------------------------------------	------

Accounting Distributions

Sequence #	Chart-Index-Fund-Orgn-Acct-Prog-Actv-Loctn-Proj	Distribution Percent	Distribution Total
1	O - 1110- 5011- 7310- 70 - -	100.0000	1.55

Grand Total - All Accounting	1.55
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DISCLAIMER - A Purchase Requisition does not represent a valid Purchase Order to provide to a vendor or supplier. As such, this PDF of the Purchase Requisition is restricted to internal use only.