

# Requisition: HOW-TO



Department of Procurement and Business Services  
Procurement Month 2024 Training  
March 19, 2024

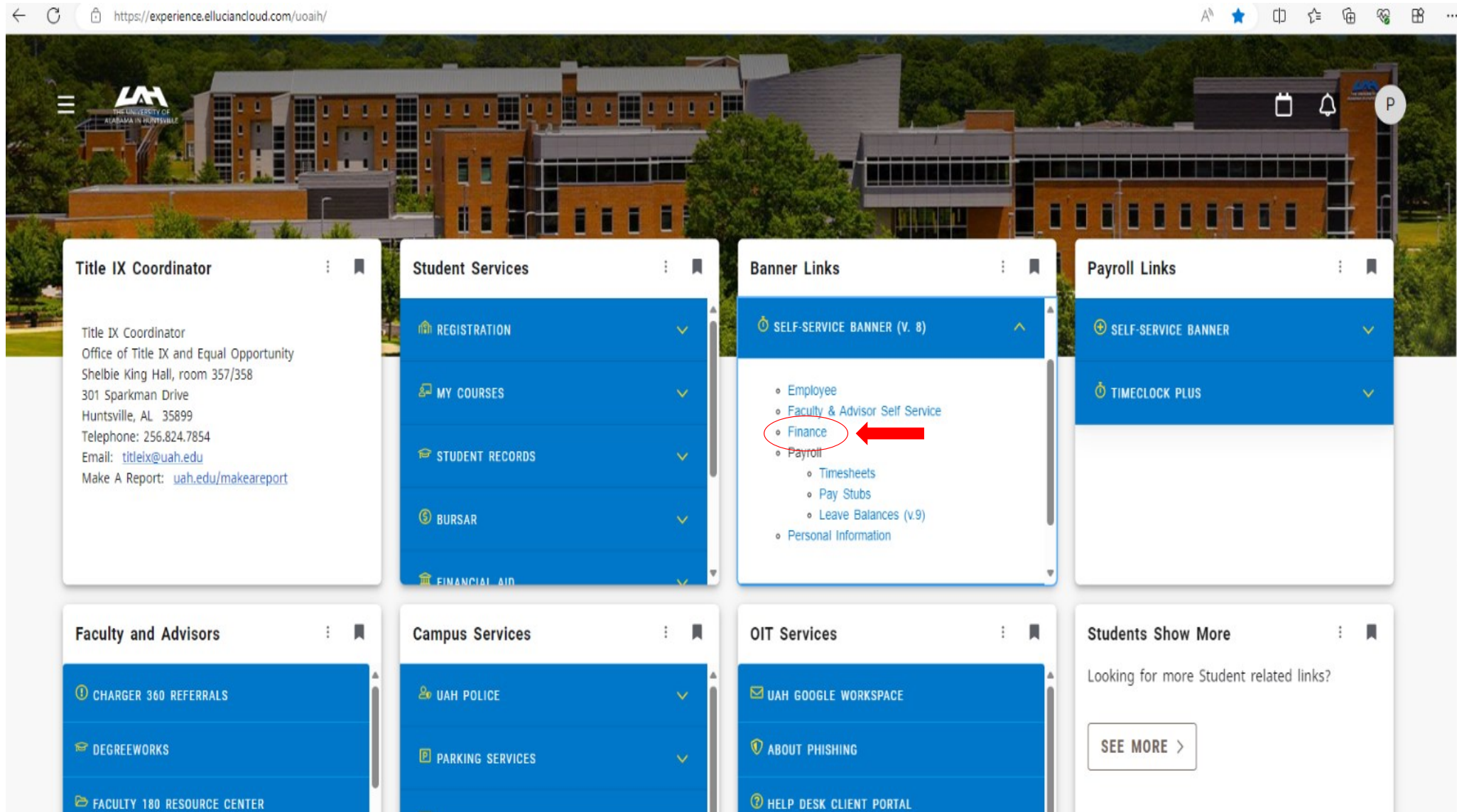
# UAH Banner Self-Service Requisitioning Workbook

## Login into myUAH Faculty & Staff

The screenshot shows the UAH website's navigation bar with links for ABOUT UAH, EVENTS, MAP, GIVING, ALUMNI, DIRECTORY, and a dropdown menu labeled "I AM A...". A search bar is located on the right. Below the navigation bar is the UAH logo and the text "THE UNIVERSITY OF ALABAMA IN HUNTSVILLE". A secondary navigation bar contains links for Admission & Aid, Academics, Research, Campus Life, Athletics, and News. The main content area is titled "FACULTY / STAFF MEMBER" and features a large banner with the text "Welcome, Faculty & Staff" over a photograph of a building's interior. To the right of the banner are four tiles: "Email", "Events Calendar", "Directory", and "myUAH". A red arrow points to the "myUAH" tile. On the far right, there is a vertical yellow sidebar with three buttons: "Apply to UAH", "Visit UAH", and "Request Info".



After you get to the MyUAH page, look for the Banner Links' tab, under Self-Service Banner, select the point labeled Finance.



The page below will appear, select the tab labeled REQUISITION to start the process.

The screenshot shows a web browser window with the URL [https://ssbprod.uah.edu/PROD/twbkwbis.P\\_GenMenu?name=bmenu.P\\_FinanceMnu](https://ssbprod.uah.edu/PROD/twbkwbis.P_GenMenu?name=bmenu.P_FinanceMnu). The page header includes the University of Alabama in Huntsville logo and navigation tabs: Personal Information, Student, Employee, Finance (selected), and Proxy Menu. A search bar is present with a 'Go' button. On the right side, there are links for RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area is titled 'Finance' and lists several menu items: Budget Queries, Encumbrance Query, Requisition (circled in red with a red arrow pointing to it), Approve Documents, View Document, Multiple Line Budget Transfers, Budget Development, e~Print Repository, ARRA Certification, and SSBS - Budget Queries. At the bottom, there is a footer with the text: [ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Multiple Line Budget Transfers | Budget Development | e~Print Repository | ARRA Certification | SSBS - Budget Queries ], RELEASE: 8.11, and © 2024 Ellucian Company L.P. and its affiliates.

The next step automatically sets the date. The transaction date is the day the requisition was made, and the delivery date can be set to a month.

### Requisition

Begin by creating a new requisition, retrieving an existing template, or searching for an existing requisition in process. Enter Vendor ID and Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select the Item number link to add item text for a commodity.

Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for proc

Search In Process Requisitions

Use Template

Transaction Date

Delivery Date

Vendor ID

Address Type  Address Sequence

Vendor Contact  Vendor E-mail



We need to find the Vendor ID. We can do this by scrolling to the bottom of the page, to CODE LOOKUP. The chart of accounts code will always be **H**, and the type will be **VENDOR**.

## Requisition

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Search In Process Requisitions

Use Template

Retrieve

Transaction Date

Delivery Date

Vendor ID  Vendor Validate

Address Type  Address Sequence

Vendor Contact  Vendor E-mail

### Code Lookup

Chart of Accounts Code

Type

Code Criteria

Title Criteria

Maximum rows to return

Execute Query

1	<input type="checkbox"/>	<input type="checkbox"/>	account
2	<input type="checkbox"/>	<input type="checkbox"/>	activity
3	<input type="checkbox"/>	<input type="checkbox"/>	address type
4	<input type="checkbox"/>	<input type="checkbox"/>	buyer
5	<input type="checkbox"/>	<input type="checkbox"/>	chart
			commodity
			currency
			discount
			fund
			index
			location
			organization
			program
			ship
			tax group
			unit of measure
			vendor

Save as Template

Shared

Validate Complete Save In

Code Lookup

Chart of Accounts Code

Type

Code Criteria

Title Criteria

Maximum rows to return



**Under Title Criteria**  
you will enter the name  
of the vendor you wish  
to know the ID of and  
hit Execute Query.  
Nothing may show up  
at first, but don't panic,  
insert the % symbol to  
do a wildcard search.  
Put these symbols  
either in front of,  
behind, or on both  
sides of the ID you  
wish to find.

#### Code Lookup

Chart of Accounts Code	H ▾
Type	vendor ▾
Code Criteria	<input type="text"/>
Title Criteria	(EXAMPLE): Dell Marketing
Maximum rows to return	10 ▾
<input type="button" value="Execute Query"/>	



#### Code Lookup

Chart of Accounts Code	H ▾
Type	vendor ▾
Code Criteria	<input type="text"/>
Title Criteria	%Dell Marketing%
Maximum rows to return	10 ▾
<input type="button" value="Execute Query"/>	











The Vendor ID will be an A----- followed by 8 numbers, enter this into the Vendor ID box under the delivery date. **DO NOT** copy and paste this number. After you enter the Vendor ID, press VENDOR VALIDATE to the right of the ID.

*Code lookup results*

Hold	Vendor ID	Name
No	A25034444	Dell Marketing LP

Search In Process Requisitions

Use Template  

Transaction Date	<input type="text" value="6"/> 	<input type="text" value="MAR"/> 	<input type="text" value="2024"/> 
Delivery Date	<input type="text" value="6"/> 	<input type="text" value="MAR"/> 	<input type="text" value="2024"/> 
Vendor ID	<input type="text" value="A25034444"/>	<input type="button" value="Vendor Validate"/>	
Address Type	<input type="text"/>	Address Sequence	<input type="text"/>
Vendor Contact	<input type="text"/>		Vendor E-mail





Pressing Vendor Validate will automatically fill in all required fields. Under Requestor Name and Requestor E-mail, it will present YOUR information. In the ATTENTION TO box, it will present your name, type / and then enter the name of the recipient. Under COMMENTS, enter the Department of the recipient.

Transaction Date	6	MAR	2024
Delivery Date	4	APR	2024
Vendor ID	A25034444	Vendor Validate	
Address Type	BU	Address Sequence	1
Vendor Contact	Kevin Herring	Vendor E-mail	
Vendor Name	Dell Marketing LP		
Vendor Address	One Dell Way Round Rock TX 78664		
Phone Number	512-5139586		
Fax Number	866-5018288		
Requestor Name	your name		
Requestor E-mail	your email address		
	Area Code	Phone Number	Extension
Requestor Phone	256	8246484	
Requestor Fax			
Chart of Accounts	H	Organization	305001
Currency Code	USD	Discount Code	None
Ship Code	REC	Attention To	name/ name of recipient
Comments	department (if chemical add storage location)		Document Text

Next, click on the link DOCUMENT TEXT, beside the Comments' box. These comments may vary. Click save at the bottom of the page and X out to return. After every section is filled, you can move onto the commodity lines.

ssbprod.uah.edu/PROD/bwfktext.P\_Write\_Text?doclink=2531031&doctype=1

Document/Commodity Text

**Enter Document Text, Print:**

Equote # 1348039843090384

This computer will go to Jane Doe in procurement.

ssbprod.uah.edu/PROD/bwfktext.P\_Write\_Text?doclink=2531031&doctype=1

Document/Commodity Text

**Enter Document Text, Print:**

Dell Equote #898989888

ssbprod.uah.edu/PROD/bwfktext.P\_Write\_Text?doclink=2531031&doctype=1

Document/Commodity Text

**Enter Document Text, Print:**

Encumber funds for the fiscal year

ssbprod.uah.edu/PROD/bwfktext.P\_Write\_Text?doclink=2531031&doctype=1

Document/Commodity Text

**Enter Document Text, Print:**

ISSUE CHECK WITH PURCHASE ORDER

Invoice # 8898008

Under COMMODITY DESCRIPTION, enter all details of the item.

ex: Formic acid 98% - 100% LC-MS, 50 ML

If you run out of room, press the number to the far left of the box you're entering, this will pop up with a screen similar to the document text tab, and you can enter the rest of your information.

under unit measurement (U/M) select EA for EACH, make sure you enter the quantity of items you're ordering, and their unit price.

You can only have 5 items in one requisition, if you need more, put 1 of 2 (1 of 3, 2 of 3... etc) in the comments.

- If it's a rush order, enter RUSH into the commodity Code, if it's a change order, enter CHANGE into the commodity code.

Item	Commodity Code	Commodity Description	U/M	Quantity	Unit Price	Discount Amount	Additional Amount
1		Formic acid 98% - 100%...	EA	Total # ordered	cost of 1 item		
2		Repair Elevator at SKH...	EA	1			
3		Printers, Model #, item #....	EA	2			
4			EA	1			
5			None				

Commodity Validate

Press when complete.



The following table will be automatically filled in once COMMODITY VALIDATE is pressed.

***Calculated Commodity Amounts***

Item	Extended Amount	Discount Amount	Additional Amount	Net Amount
1				
2				
3				
4				
5				
Totals:				

The next step is filling out the **FOAPAL line**

**Dollars** should be selected. Chart will always be **H**, and the index is the **Orgn** from where you're drawing the money. Press VALIDATE. It will send you to the top of the page and give you an error message.

Dollars       Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	H	305001							
2									
3									
4									
5									

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**Accounting amounts not equal to net amount total**

It will automatically populate the Fund, the Orgn, and Program for you. **YOU MUST ENTER THE ACCOUNT.**

Dollars       Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	H		15000	305001		60			
2									
3									
4									
5									

You then need to enter the account code that correlates with the item you're buying, and enter the amount taken from the Account into the Accounting tab.

- Anything \$5,000+ (including shipping) in equipment should go under the account number 8101.
- Any Fund # starting with a 2 or 159 needs an Office of Inspector General Exclusions Database Form included.

Once everything is completed, press VALIDATE

<input checked="" type="radio"/> Dollars		<input type="radio"/> Percents							
Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	H		15000	305001	7465	60			1200
2	H		15000	305001	7433	60			1000
3									
4									
5									

Save as Template

Shared

You will receive this error message, ignore it.

⚠ Mixing asset and non-asset accounts results in an incomplete fixed asset record





After you have validated everything, press Complete. It will then bring you to the top of the page and present you with a requisition number R0-----. You have then completed a requisition! You can print this out, save a pdf or save them in a spreadsheet!

Dollars       Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	H		15000	305001	7465	60			1200
2	H		15000	305001	7433	60			1000
3									
4									
5									

Save as Template

Shared



