Requisitions are the first step in the purchasing process, providing approvers with the necessary information to approve the purchase and the Purchasing Department with the details they need to generate a Purchase Order. Requisitions in ctcLink consist of four basic elements: headers, lines, schedules, and distributions. Each requisition has one header, which can have multiple lines. Each line can have multiple schedules, and each schedule can have multiple distributions. The schedule defines when and where you want the line items delivered. The distribution defines internal accounting information for the schedule, including which accounts and departments should be charged for the goods and services being purchased.

A requisition in ctcLink Purchasing can have one of five different statuses during its life cycle:

- Approved
- Canceled
- Complete
- Open
- Pending Approval

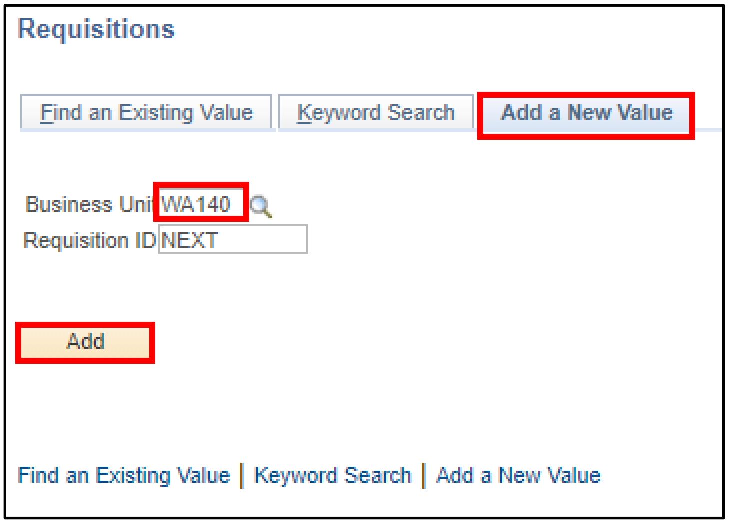
The **Requisition** page enables you to enter item information, modify lines as needed, establish schedules and distributions, and define internal delivery and accounting information. You can also establish defaults that can improve your efficiency in creating requisitions.

## Create Requisition

**Navigation: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions**

The Requisitions search page displays.

1. To create a new requisition, select the **Add a New Value** tab.
2. The **Business Unit** should default to WA150. (Images shown are from Clark College.)
3. Leave the **Requisition ID** defaulted to **NEXT.** The system will assign a unique requisition ID once the requisition is created and saved.
4. Select the **Add** button. The **Maintain Requisitions** page will display.

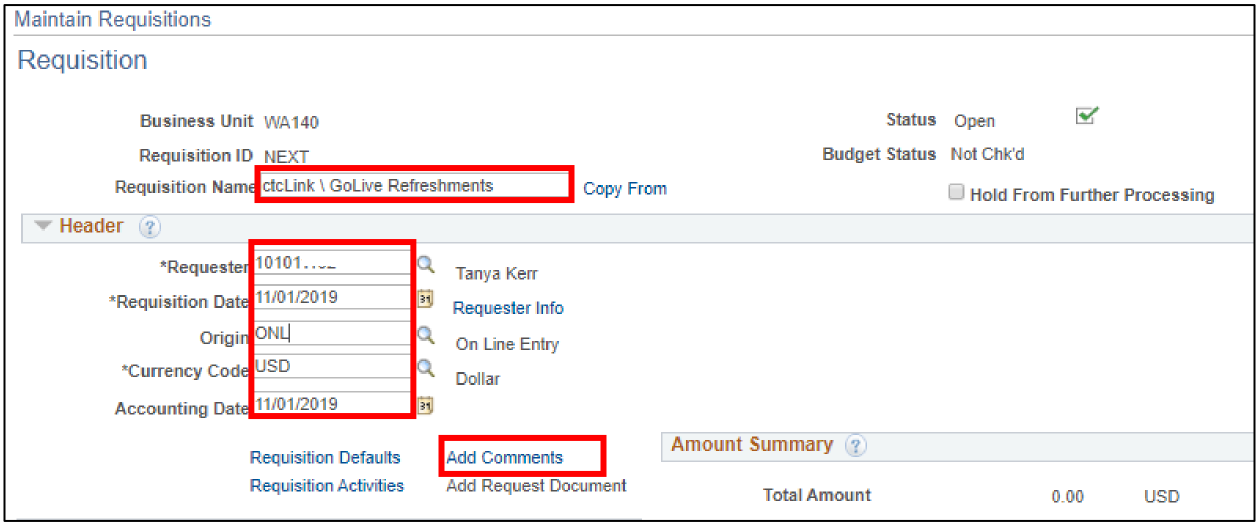


Requisitions

Business Unit WA140

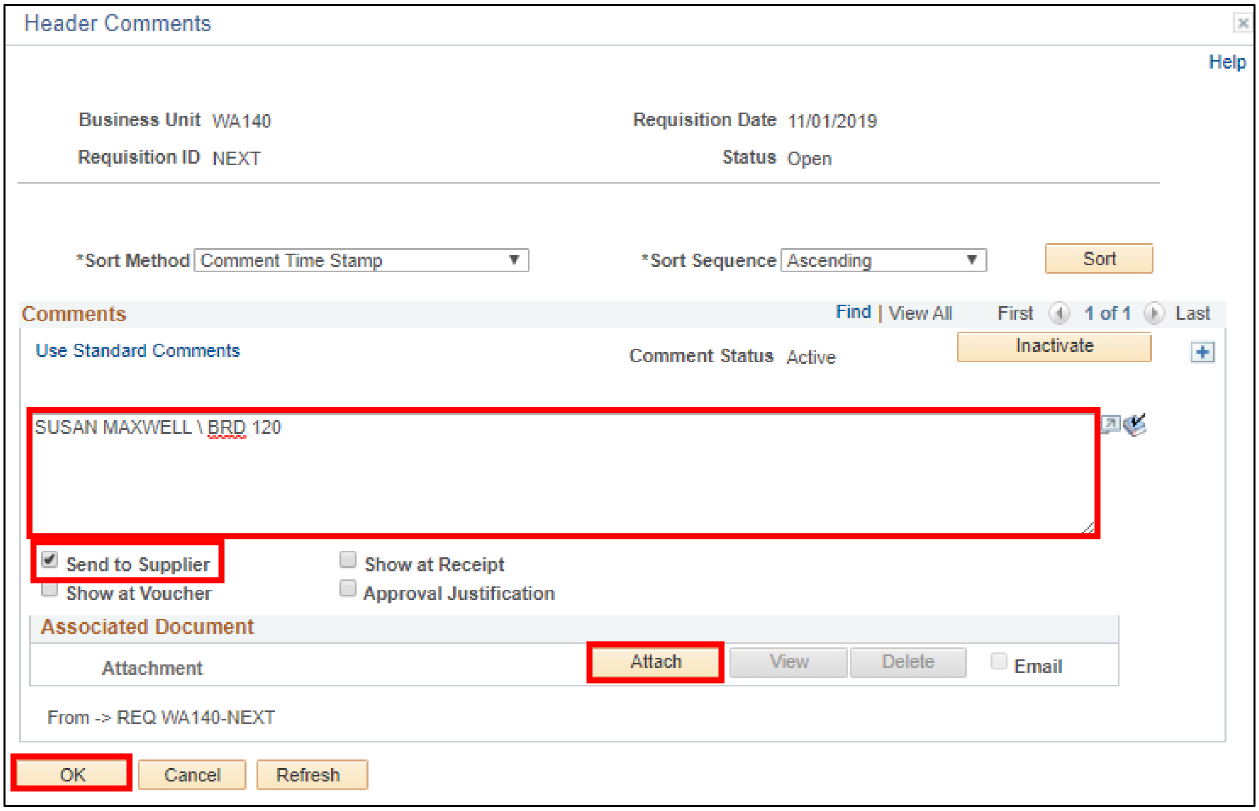
Requisition ID NEXT

5. In the **Requisition Name** field, enter the department abbreviation (such as NURS for Nursing) and a short description that will help quickly identify the purpose of the requisition. This field displays for approvers and will be useful when searching for requisitions in the future.
6. Under the **Header** section, the **Requester** field displays the ID of the person logged into the system and entering the requisition.
7. The **Requisition Date** will default to the current system date, but you can change it if needed.
8. The **Origin** field should default to ONL, indicating the requisition is being generated online.
9. The **Currency Code** field should default to USD.
10. The **Accounting Date** will also default to the current system date. This field determines the open period or allowable open date range for budget checking a requisition. If the requisition's accounting date falls before or after the open period date range, the system provides a message or warning to prevent you from running budget checking.
11. The **Requisition Defaults** link can be used to improve efficiency for multi-line purchase requisitions by eliminating the need to re-enter chartfield details and other information required for each line. The information entered through this link will default to all lines entered on that purchase requisition. Please review the steps under the **Details** section below to understand the significance of each field included in the defaults.



Business Unit WA140
Requisition ID NEXT
Requisition Name ctcLink \ GoLive Refreshments
Status Open
Budget Status Not Chk'd
☐ Hold From Further Processing
*Requester 10101[illegible] Tanya Kerr
*Requisition Date 11/01/2019
Origin ONL On Line Entry
*Currency Code USD Dollar
Accounting Date 11/01/2019
Total Amount 0.00 USD

12. Select the **Add Comments** link, and the **Header Comments** section will display
13. In the **Comments** section, enter the employee name and mailstop that the goods should be delivered to along with any other special delivery instructions.
14. Check the **Send to Supplier** checkbox. This enables the information entered in the comments section to be printed on the purchase order after it is created.
15. If there is a quote or other scanned documentation that needs to be submitted with the requisition, it can be attached by selecting the **Attach** button. You will be prompted to browse to the location where the attachment saved and then upload that document. Attachments will be viewable by approvers and the Purchasing Department.
16. Select the **OK** button to return to the **Maintain Requisitions** page.


Header Comments
Help
Sort
Comments
Find | View All
First
1 of 1
Last
Use Standard Comments
Inactivate
Associated Document
Attachment
Attach
View
Delete
OK
Cancel
Refresh

Business Unit WA140
Requisition ID NEXT
Requisition Date 11/01/2019
Status Open

*Sort Method Comment Time Stamp
*Sort Sequence Ascending

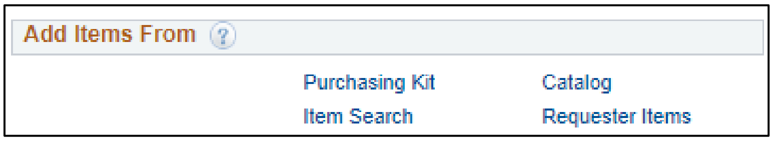
Comment Status Active

SUSAN MAXWELL \ BRD 120

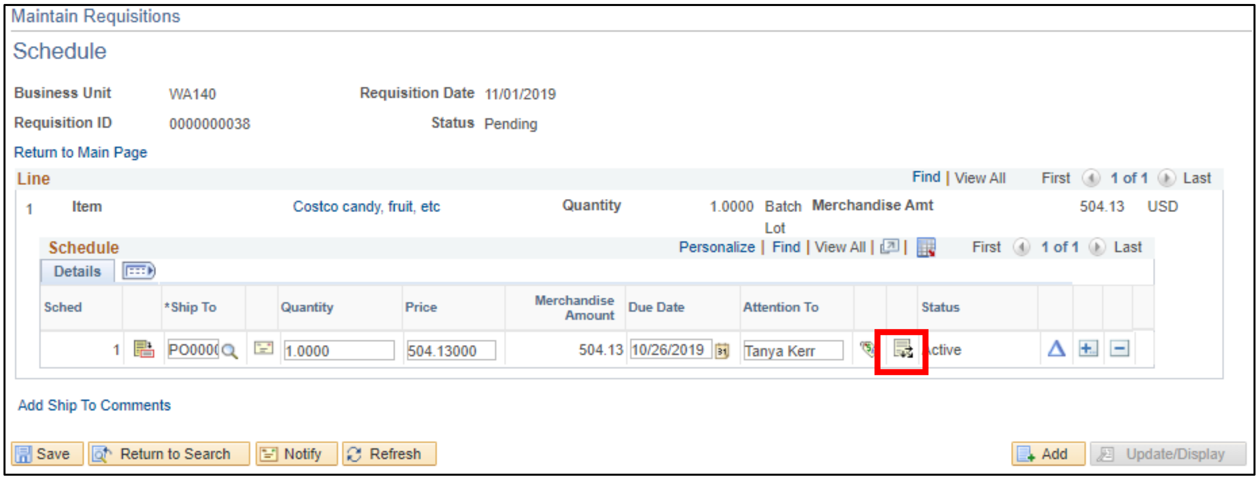
☑ Send to Supplier
☐ Show at Voucher
☐ Show at Receipt
☐ Approval Justification
☐ Email

From -> REQ WA140-NEXT

17. The **Add Items From** section contains four links to functions that are not currently being utilized, so this section should be ignored.


Add Items From
Purchasing Kit
Catalog
Item Search
Requester Items

18. Go to the Requisition **Line** subsection and select the **Details** tab. Selecting the **Details icon** provides separate screen where you can more easily review the line information from the various tabs AFTER it has been entered. This page can't be used to enter all of the necessary line information.
19. The **Item** field should be left blank. This field is NOT used for the vendor's item number or SKU. This is a globally configured field that is not user friendly and contains information that does not need to be entered at the requisition stage.
20. The **Description** field should be used to enter the vendor item numbers, part numbers, model numbers or SKU if known, or a brief description of the item. This field has a 254 character limit. Please use the **Thought Bubble icon** to enter the vendor information and a description of the item along with any additional information that needs to be communicated to Purchasing.
21. Enter the desired amount into the **Quantity** field.
22. The **UOM** field is required and allows you to select the appropriate unit of measure for the line.
23. Enter the **Category** code that most closely aligns with the item being purchased. Selecting the magnifying glass will allow you to search either by the Category ID or by the Description. Changing the



Maintain Requisitions

Schedule

| | | | |
|---|---|---|---|
| **Business Unit** | WA140 | **Requisition Date** | 11/01/2019 |
| **Requisition ID** | 0000000038 | **Status** | Pending |

Return to Main Page

**Line**

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 1 | Item | Costco candy, fruit, etc | Quantity | 1.0000 | Batch Lot | Merchandise Amt | 504.13 | USD |

**Schedule**

| Sched | *Ship To | Quantity | Price | Merchandise Amount | Due Date | Attention To | Status |
|---|---|---|---|---|---|---|---|
| 1 | PO000( | 1.0000 | 504.13000 | 504.13 | 10/26/2019 | Tanya Kerr | Active |

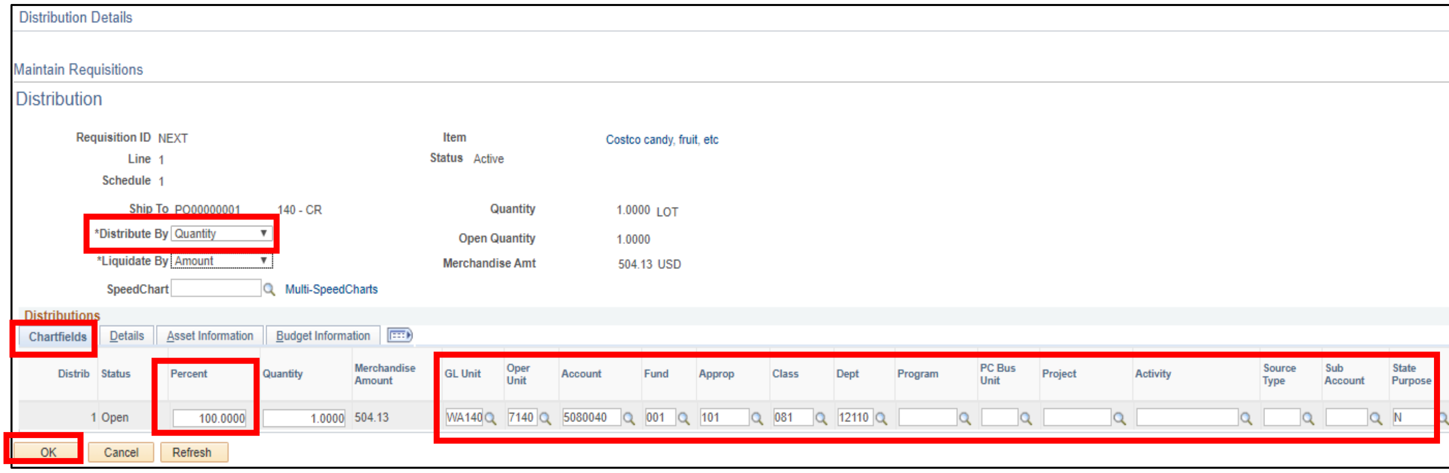
Add Ship To Comments

Select the **Distribution Icon** button on right hand side.

- The **Distribution** page is where you will enter the necessary budget information to determine how and where the cost of item will be charged. The **Distribute By** field will default to amount but can be changed to quantity if appropriate. This is only relevant if the cost of the line item is being allocated between multiple budget accounts.
- The **Percent** field allows you to allocate the line item expense to multiple budget accounts. The sum of the line distribution percentages must equal 100 percent.
- There are seven required fields on the **Chartfields Tab:**
  - **GL Unit –** must always be set to WA1
  - **Account –** e ne t e t pe o e pen e n ep ce t e o u o ect co e A o A o e p e
  - **Oper Unit** – must always be set to 71
  - **Fund –** generally the same except for fund 101 which is now Fund 001 and Appropriation 101
  - **Dept –** ep ce t e n t e o u et nu e
  - **Class –** replaces the Program in the old budget number
  - **State Purpose –** this field is mandated by the state to track IT-related purchases. You must select Y/N.

  **Tip – you can enter the chartfield information on the **Requisition Defaults** page available under the **Header** section at the top of the PO. Doing that will then default that information to ALL lines of the requisition. If you do have different budget information for each line, then you will need to make sure it is entered separately.

37. You do not need to enter any additional information on the **Details, Asset Information** or **Budget Information** tabs.



Distribution Details

Maintain Requisitions

Distribution

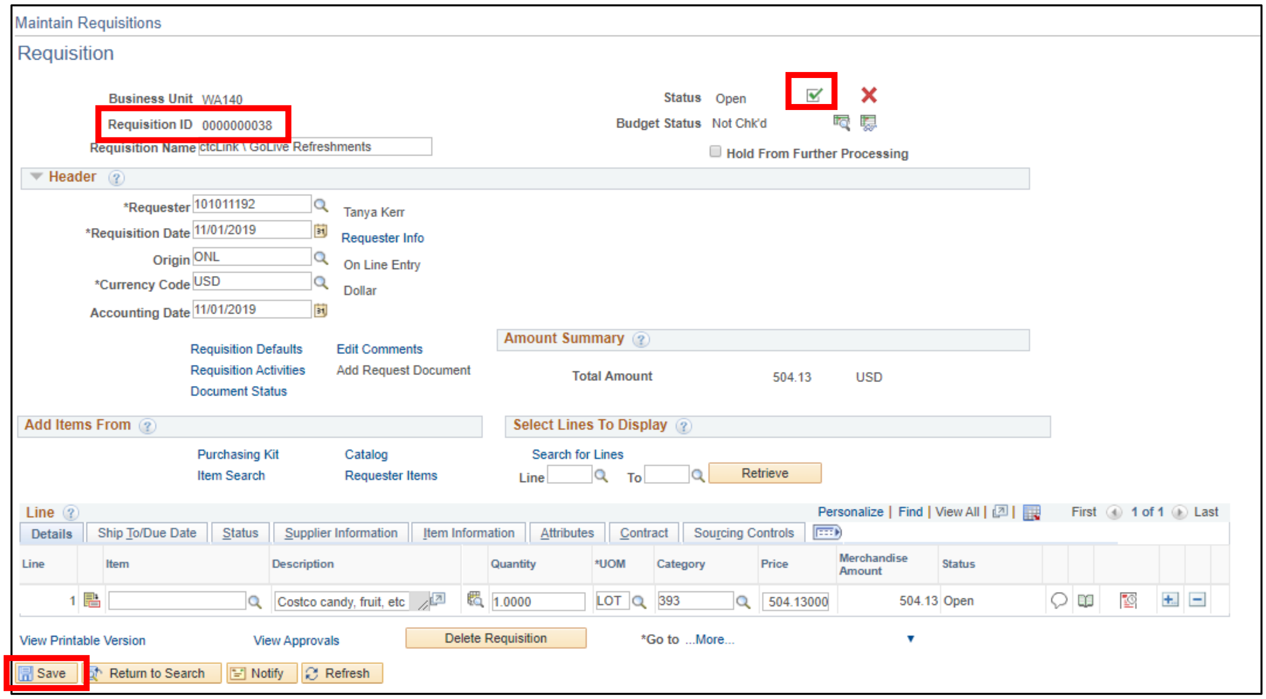
Requisition ID NEXT
Line 1
Schedule 1
Ship To PO00000001 140 - CR
*Distribute By Quantity
*Liquidate By Amount
SpeedChart
Item Costco candy, fruit, etc
Status Active
Quantity 1.0000 LOT
Open Quantity 1.0000
Merchandise Amt 504.13 USD

Distributions

| Distrib | Status | Percent | Quantity | Merchandise Amount | GL Unit | Oper Unit | Account | Fund | Approp | Class | Dept | Program | PC Bus Unit | Project | Activity | Source Type | Sub Account | State Purpose |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Open | 100.0000 | 1.0000 | 504.13 | WA140 | 7140 | 5080040 | 001 | 101 | 081 | 12110 | | | | | | | N |

Multi-SpeedCharts
Chartfields
Details
Asset Information
Budget Information
OK
Cancel
Refresh

38. Select the **OK** button. The Schedule page will display.
39. On the Schedule page, select the **Save** button. The Requisition page will display.
40. On the Requisitions page, you can click the **Save** button at any time to avoid losing your work. After you save the requisition, a **Requisition ID** will be populated. DO NOT CHANGE this field.
41. After you have entered all the necessary information and are ready to submit the requisition for approval you should select the green check mark to the right of the **Status** field to **Submit For Approval**.
    ☑ Once submitted, the **Status** field will change to Pending.



Maintain Requisitions

Requisition

Business Unit WA140
Requisition ID 0000000038
Requisition Name ctcLink \ GoLive Refreshments
Status Open
Budget Status Not Chk'd
☐ Hold From Further Processing

Header

*Requester 101011192 Tanya Kerr
*Requisition Date 11/01/2019
Origin ONL On Line Entry
*Currency Code USD Dollar
Accounting Date 11/01/2019

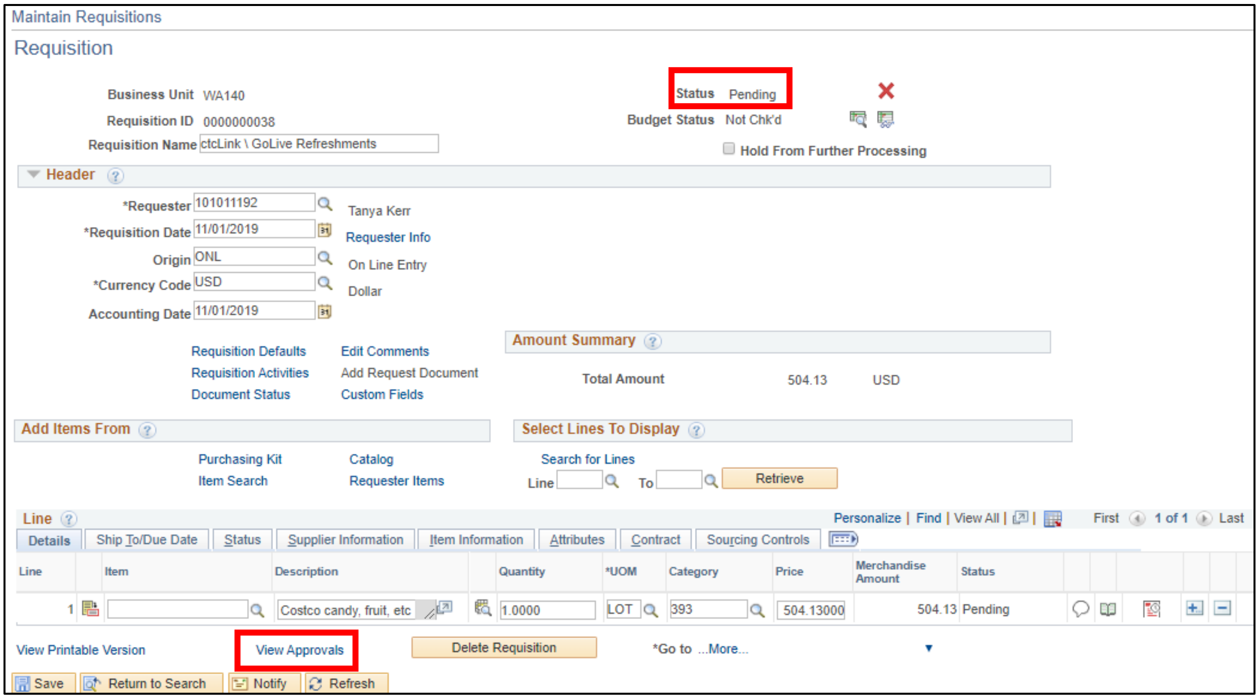
Amount Summary

Total Amount 504.13 USD

| Line | Item | Description | Quantity | *UOM | Category | Price | Merchandise Amount | Status |
|---|---|---|---|---|---|---|---|---|
| 1 | | Costco candy, fruit, etc | 1.0000 | LOT | 393 | 504.13000 | 504.13 | Open |

Requester Info
Requisition Defaults
Requisition Activities
Document Status
Edit Comments
Add Request Document
Add Items From
Purchasing Kit
Item Search
Catalog
Requester Items
Select Lines To Display
Search for Lines
Line
To
Retrieve
Line
Personalize | Find | View All |
First 1 of 1 Last
Details
Ship To/Due Date
Status
Supplier Information
Item Information
Attributes
Contract
Sourcing Controls
View Printable Version
View Approvals
Delete Requisition
*Go to ...More...
Save
Return to Search
Notify
Refresh

42. You can select the **View Approvals** link at the bottom of the page to display the approval hierarchy that the purchase requisition will go through. You can go back into the requisition at any time to see where it is in the process.



Maintain Requisitions

Requisition

Business Unit WA140

Requisition ID 0000000038

Requisition Name ctcLink \ GoLive Refreshments

Status Pending

Budget Status Not Chk'd

☐ Hold From Further Processing

Header

*Requester 101011192 Tanya Kerr

*Requisition Date 11/01/2019

Requester Info

Origin ONL On Line Entry

*Currency Code USD Dollar

Accounting Date 11/01/2019

Requisition Defaults | Edit Comments
Requisition Activities | Add Request Document
Document Status | Custom Fields

Amount Summary

Total Amount 504.13 USD

Add Items From

Purchasing Kit | Catalog
Item Search | Requester Items

Select Lines To Display

Search for Lines

Line To Retrieve

Line

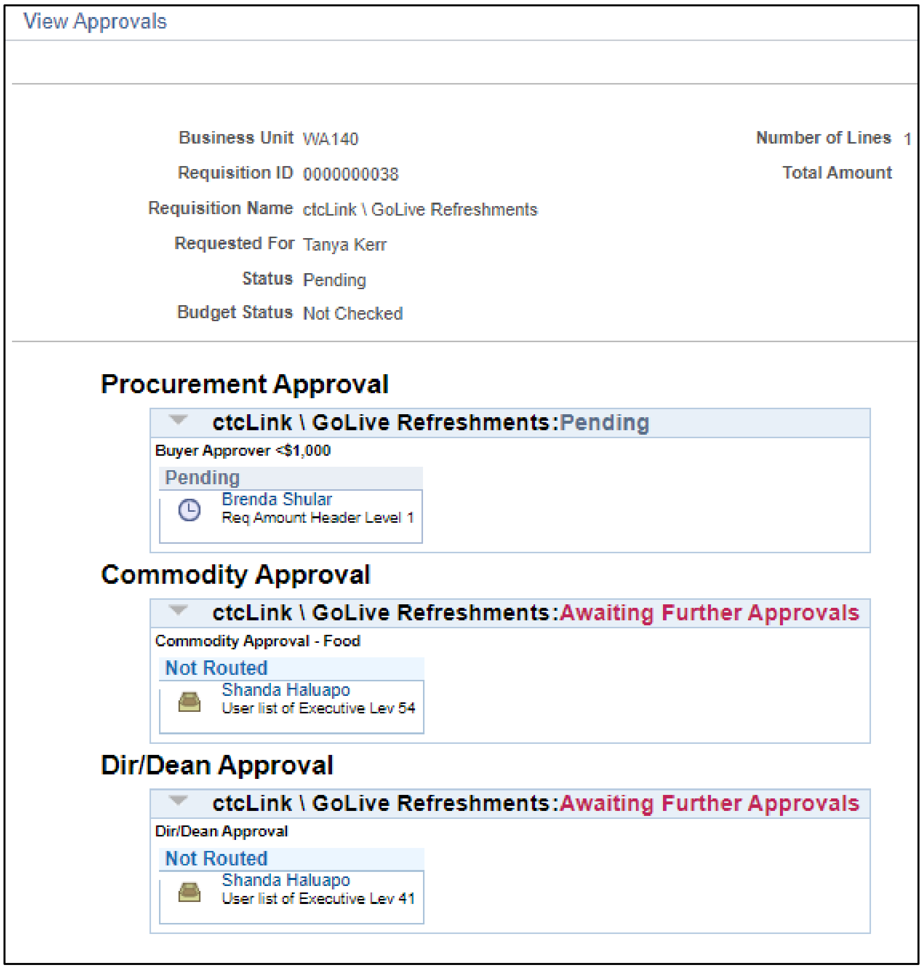
Personalize | Find | View All | First 1 of 1 Last

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

| Line | Item | Description | Quantity | *UOM | Category | Price | Merchandise Amount | Status |
|---|---|---|---|---|---|---|---|---|
| 1 | | Costco candy, fruit, etc | 1.0000 | LOT | 393 | 504.13000 | 504.13 | Pending |

View Printable Version | View Approvals | Delete Requisition | *Go to ...More...

Save | Return to Search | Notify | Refresh



View Approvals

Business Unit WA140

Requisition ID 0000000038

Requisition Name ctcLink \ GoLive Refreshments

Requested For Tanya Kerr

Status Pending

Budget Status Not Checked

Number of Lines 1

Total Amount

**Procurement Approval**

ctcLink \ GoLive Refreshments:Pending

Buyer Approver <$1,000

Pending

Brenda Shular
Req Amount Header Level 1

**Commodity Approval**

ctcLink \ GoLive Refreshments:Awaiting Further Approvals

Commodity Approval - Food

Not Routed

Shanda Haluapo
User list of Executive Lev 54

**Dir/Dean Approval**

ctcLink \ GoLive Refreshments:Awaiting Further Approvals

Dir/Dean Approval

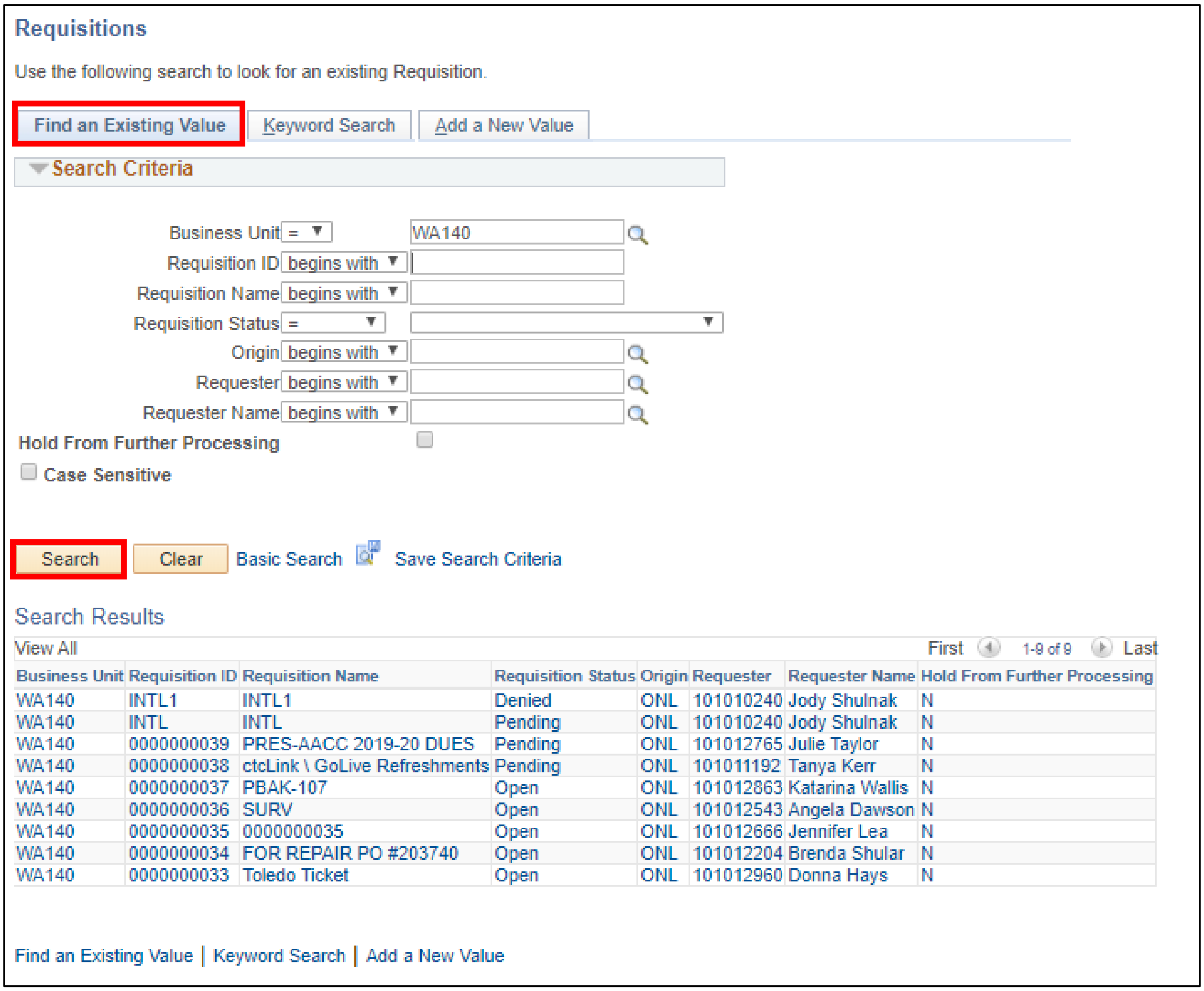
Not Routed

Shanda Haluapo
User list of Executive Lev 41

# Searching for a Requisition

**Navigation: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions**

If you need to search for a requisition at any point in the future, select the **Find an Existing Value** tab. Select **Business Unit** WA140 and then you can search by entering any of the identifying fields and selecting the **Search** button.


Find an Existing Value
Keyword Search
Add a New Value
Search Criteria
Search
Clear
Basic Search
Save Search Criteria
View All
First
1-9 of 9
Last
Find an Existing Value | Keyword Search | Add a New Value

Requisitions

Use the following search to look for an existing Requisition.

Business Unit = WA140
Requisition ID begins with
Requisition Name begins with
Requisition Status =
Origin begins with
Requester begins with
Requester Name begins with
Hold From Further Processing ☐
☐ Case Sensitive

Search Results

| Business Unit | Requisition ID | Requisition Name | Requisition Status | Origin | Requester | Requester Name | Hold From Further Processing |
|---|---|---|---|---|---|---|---|
| WA140 | INTL1 | INTL1 | Denied | ONL | 101010240 | Jody Shulnak | N |
| WA140 | INTL | INTL | Pending | ONL | 101010240 | Jody Shulnak | N |
| WA140 | 0000000039 | PRES-AACC 2019-20 DUES | Pending | ONL | 101012765 | Julie Taylor | N |
| WA140 | 0000000038 | ctcLink \ GoLive Refreshments | Pending | ONL | 101011192 | Tanya Kerr | N |
| WA140 | 0000000037 | PBAK-107 | Open | ONL | 101012863 | Katarina Wallis | N |
| WA140 | 0000000036 | SURV | Open | ONL | 101012543 | Angela Dawson | N |
| WA140 | 0000000035 | 0000000035 | Open | ONL | 101012666 | Jennifer Lea | N |
| WA140 | 0000000034 | FOR REPAIR PO #203740 | Open | ONL | 101012204 | Brenda Shular | N |
| WA140 | 0000000033 | Toledo Ticket | Open | ONL | 101012960 | Donna Hays | N |