9.2 Review & Update Existing Requisition

Purpose: Use this document as a reference for reviewing and modifying an existing requisition in ctcLink.

Audience: Purchasing staff

Review a Requisition

Navigation: NavBar > Navigator > Purchasing > Requisitions > Review Requisition Information > Requisitions

1. The **Requisition Inquiry** search page displays.
2. Enter **Business Unit**.
3. Enter additional search criteria to identify your requisition.
4. Select **OK**.

5. The **Requisitions Details** tab displays.
6. Select the **Status** tab.

7. The **Status** tab displays.
8. Select the **Requisition** ID.

9. The **Requisition Details** window displays.
10. Select the **More** tab.

11. The **More** tab displays.
12. Select the **Contract** tab.

13. The **Contract** tab displays.
14. Select **Return**.

Requisition Details

Business Unit	WA170	Req ID	0000003353
Requester	Lonnie Gibson		
Requisition Date	03/09/2018	Merchandise Amount	6,350.00	USD
Req Status	Approved	Pre-Encumbrance Balance	0.00	USD

Requisition Details

Line	Status	Item ID	Description	SetID	Contract ID	Contract Version	Contract L Nbr
1	Approved		Dual Sex Muscle Figure 45 part				

Return

15. Section complete.

Update a Requisition

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

1. The **Requisitions** search page displays. Select **Find an Existing Value.** Enter search criteria to find the requisition:
    1. If it didn't default, enter or select the business unit in the **Business Unit** field.
    2. Enter additional search criteria or enter the Requisition number in the **Requisition ID** field.
    3. Select **Search**.

2. The **Requisitions** page displays. You can access the **Change Order** button in the following ways:
   1. Select the **Create Header Change** triangle.
   2. Select the **Details** button next to the item number.
   3. Select the line **Status** tab.

⚠ **Note:** If this triangle is not visible, it may be because your status is not approved.

Maintain Requisitions

Requisition

Business Unit	WA170
Requisition ID	0000003353
Requisition Name	BPFG Test Req

Status Approved △ ✗

Track Batch 1

☐ Hold From Further Processing

▼ Header ?

*Requester	101000000		101000000
*Requisition Date	08/07/2018	📅	Requester Info
Origin	ONL	🔍	On Line Entry
Currency Code	USD		Dollar

Requisition Defaults   Edit Comments
Requisition Activities   Add Request Document
Document Status
Current Change Reason

Amount Summary ?

Total Amount   2,500.00   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	📋	Speaking Services	5.0000	EA	005	500.00000	2,500.00	Approved	💬 📖 🔳 ➕

View Printable Version   View Approvals   Delete Requisition   *Go to ...More...   [▾]

🖫 Save   🔍 Return to Search   ✉ Notify   ⟳ Refresh   🖫 Ad

3. A confirmation message will display. Select **Yes** to acknowledge the message.

Message

This action will create a change order. Continue? (10200,27)

The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.

Yes   No

4. The **Requisition** page displays. Use the **Details** section to change/update the requisition line item(s):
   1. As appropriate, update the item quantity in the **Quantity** field.
   2. As appropriate, update the item price in the **Price** field.
   3. Select **Save.**

Maintain Requisitions

Requisition

Business Unit WA170
Requisition ID 0000003353   Track Batch 1
Requisition Name BPFG Test Req

Status Approved ✖

☐ Hold From Further Processing

▼ Header ❓

*Requester 101000000 🔍 101000000
*Requisition Date 08/07/2018 📅 Requester Info
Origin ONL 🔍 On Line Entry
Currency Code USD Dollar

Requisition Defaults   Edit Comments
Requisition Activities   Add Request Document
Document Status
Current Change Reason

Amount Summary ❓

Total Amount   4,000.00   USD

Add Items From ❓   Select Lines To Display ❓

Purchasing Kit   Catalog   Search for Lines
Item Search   Requester Items   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 📑		Speaking Services	8.0000	EA	005 🔍	500.00000	4,000.00	Approved	💬 📖	🔲	➕

View Printable Version   View Approvals   Delete Requisition   *Go to ...More...   [▼]

💾 Save   ↩ Return to Search   ✉ Notify   ↻ Refresh   📄 A

5. The **Reason Code Page** displays. Use it to enter your reason for modifying the requisition.
   Completion is mandatory.
   1. If it didn't default, enter or select the reason in the **Reason Code** field. Doing so will
      populate the **Comment** field.
   2. Select **OK**.

Reason Code Page   ✖

                                                   Help

Enter a reason code and comment for making changes that are being tracked.

Reason Code QUANTITY 🔍

Comment vendor has changed quantity
         minumum

☐ Use Same Reason Code

[OK]

6. The updated **Requisition** page displays. Note that the **Track Batch** field now reflects the number of times the Requisition has changed.

7. Process complete.