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

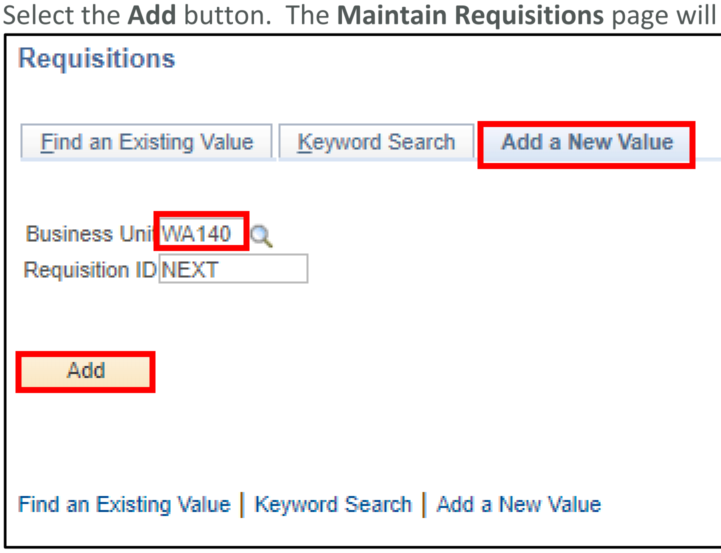
The **Requisition** page enables you to enter item information, modify lines as needed, establish schedules and distributions, and define internal delivery and accounting information. You can also establish defaults that can improve your efficiency in creating requisitions.

Create Requisition

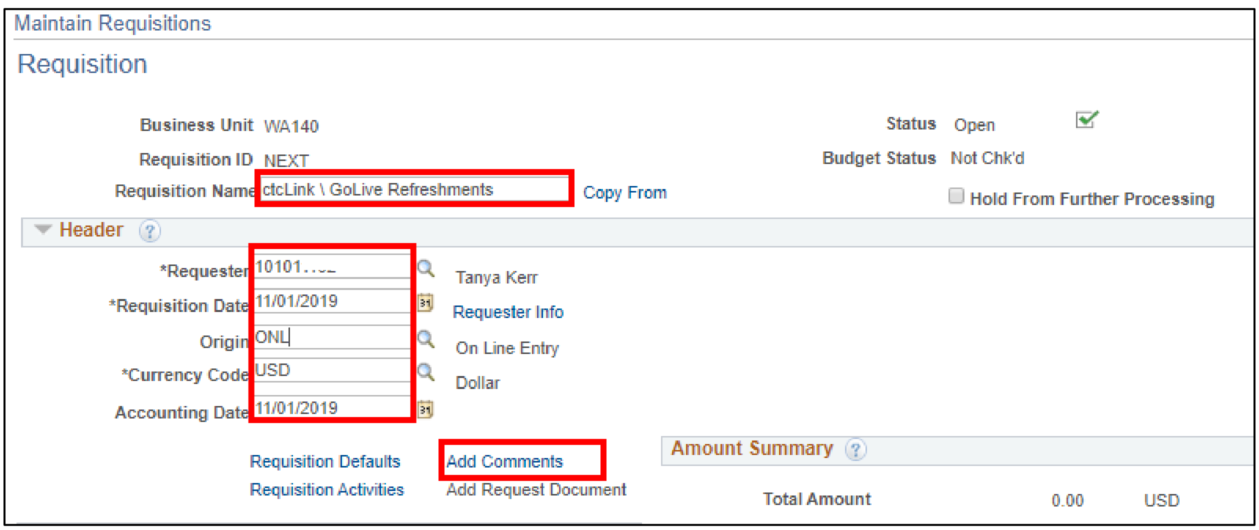
Navigation: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

The Requisitions search page displays.

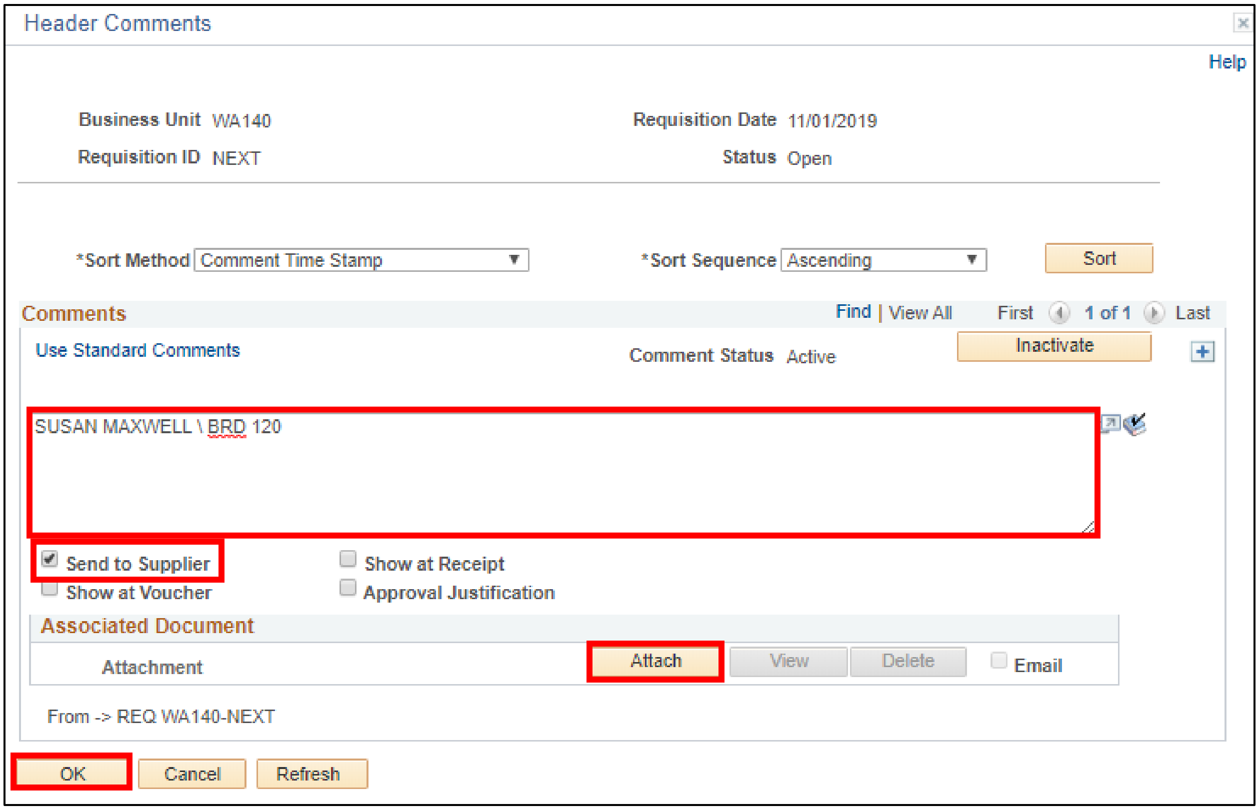
1. To create a new requisition, select the **Add a New Value** tab.
2. The **Business Unit** should default to WA150. (Images shown are from Clark College.)
3. Leave the **Requisition ID** defaulted to **NEXT.** The system will assign a unique requisition ID once the requisition is created and saved.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



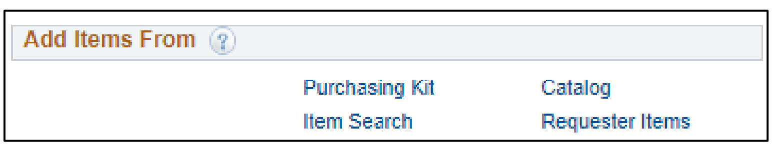
5. In the **Requisition Name** field, enter the department abbreviation (such as NURS for Nursing) and a short description that will help quickly identify the purpose of the requisition. This field displays for approvers and will be useful when searching for requisitions in the future.
6. Under the **Header** 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.

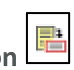


12. Select the **Add Comments** link, and the **Header Comments** section will display
13. In the **Comments** section, enter the employee name and mailstop that the goods should be delivered to along with any other special delivery instructions.
14. Check the **Send to Supplier** checkbox. This enables 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.



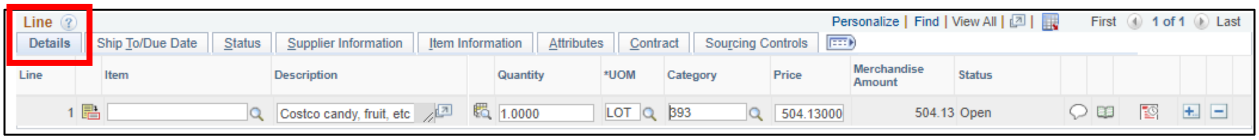
17. The **Add Items From** section contains four links to functions that are not currently being utilized, so this section should be ignored.



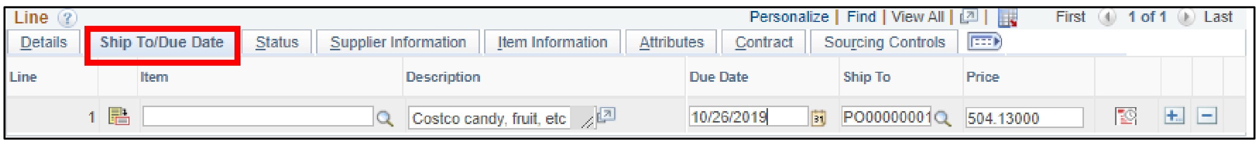
18. Go to the Requisition **Line** subsection and select the **Details** tab. Selecting the **Details icon**  provides separate screen where you can more easily review the line information from the various tabs AFTER it has been entered. This page can't be used to enter all of the necessary line information.
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

Description dropdown box to “Contains” will allow you to search for a key word(s) anywhere in the description. If you are unable to find a suitable Category code, you should select UNC – Uncategorized.

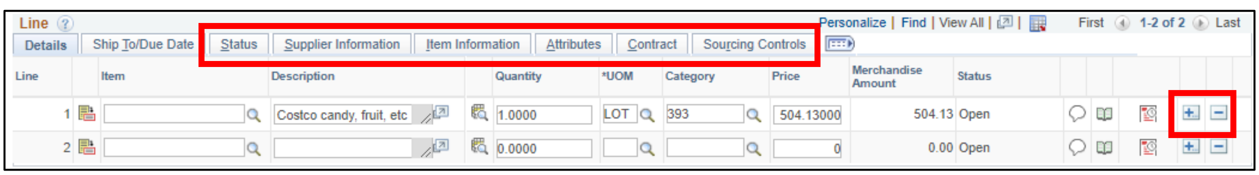
24. Enter the price per unit in **Price** field and the Merchandise Amount will automatically calculate.



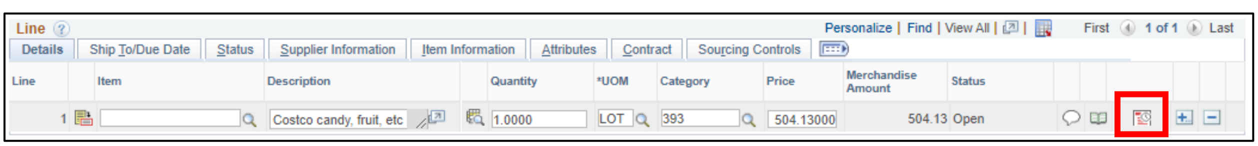
25. Select the **Ship To/Due Date** tab. The key fields you have already entered or skipped will automatically populate.
26. The **Due Date** field should be used to communicate when you need the item.
27. The **Ship To** field should default to 150-000001 which is the code for Central Receiving. There is no need to change this field. Remember any specific delivery instructions should be included with the employee name and mailstop entered in the comments in step 13 above.



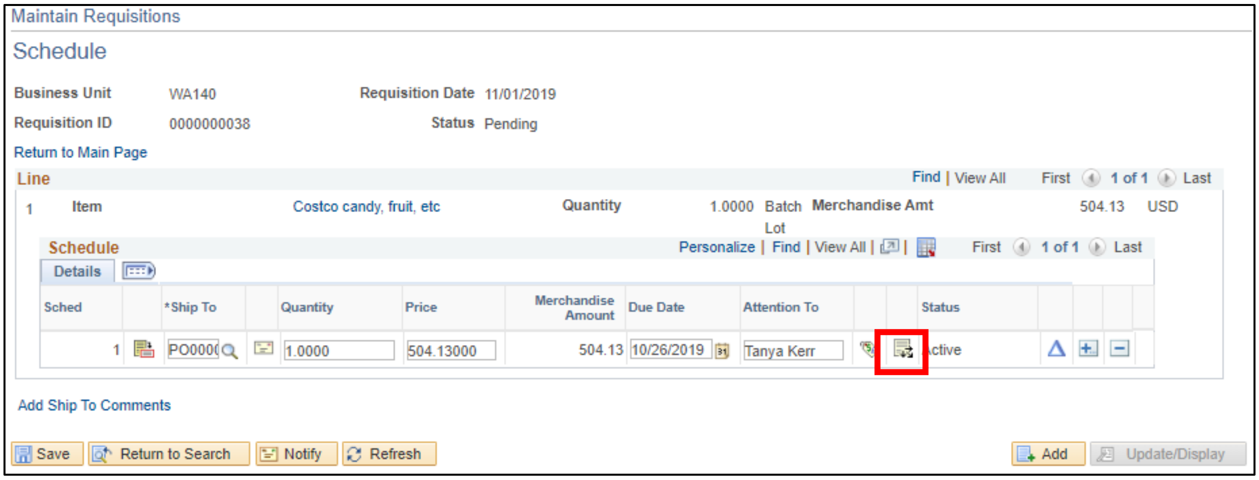
28. You do not need to enter any additional information on the **Status, Supplier Information, Item Information, Attributes, Contract** or **Sourcing Controls** tabs.
29. If you need to add or delete additional lines to the requisition, select the add/delete icons to the right.



30. Return to the **Details** tab.
31. Select the **Schedule Icon** button  to access the Schedule page, where you can view shipment details and distribution information for each line item.



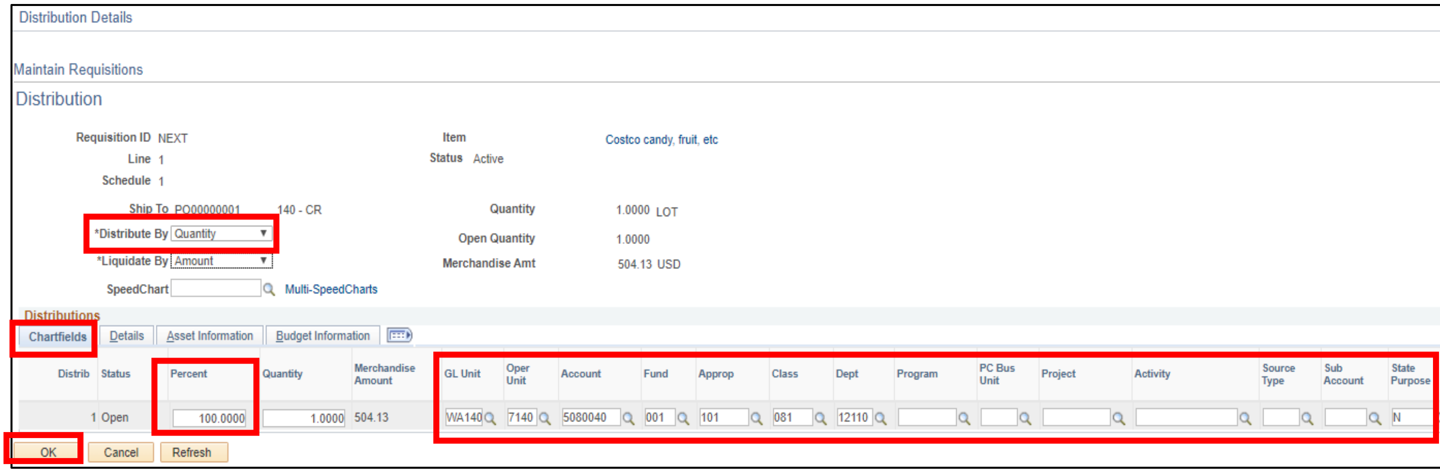
32. On the Schedule page, the fields all default based on previous information entered above. You do not need to change any of these fields.



33. Select the **Distribution Icon** button on right hand side. 
34. 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.
35. 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.
36. There are seven required fields on the **Chartfields Tab:**
    - **GL Unit –** must always be set to WA150
    - **Account –** defines the type of expense and replaces the old sub-object codes (EA or JA for example)
    - **Oper Unit** – must always be set to 7150
    - **Fund –** generally the same except for fund 101 which is now Fund 001 and Appropriation 101
    - **Dept –** replaces the Org in the old budget number
    - **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.

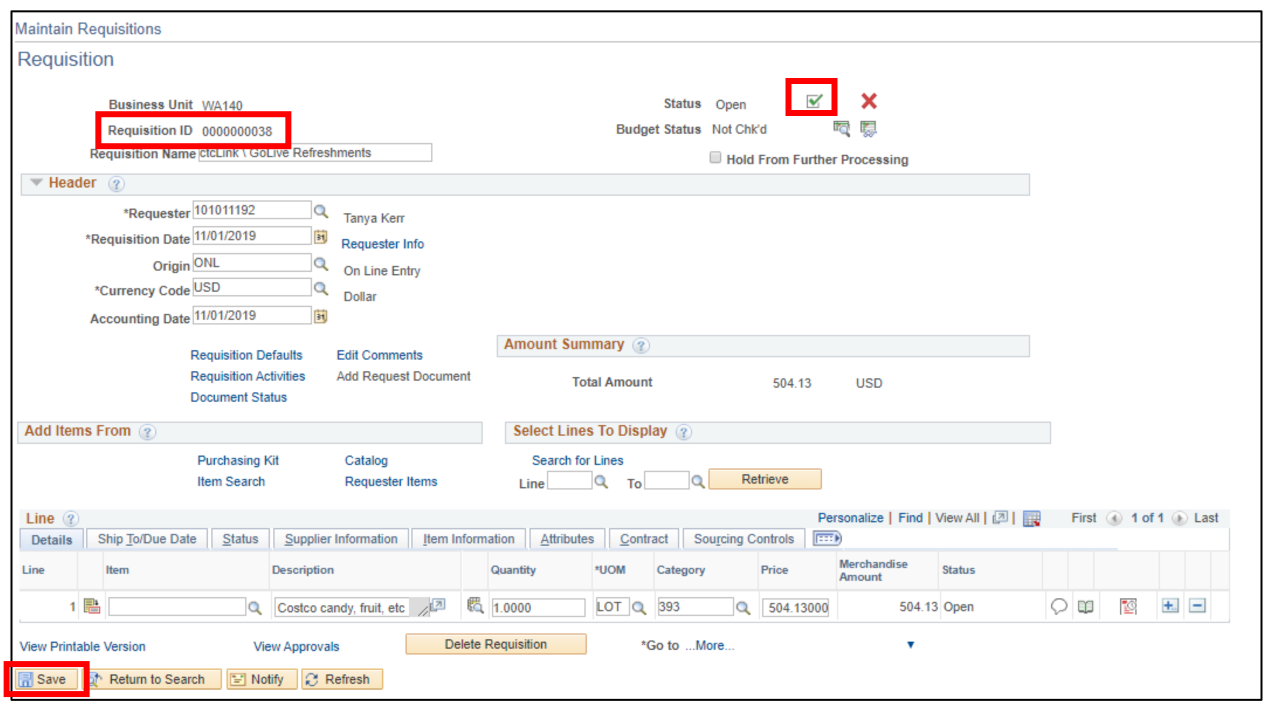
    Tip – you can enter the chartfield information on the **Requisition Defaults page available under the **Header** section at the top of the PO. Doing that will then default that information to ALL lines of the requisition. If you do have different budget information for each line, then you will need to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

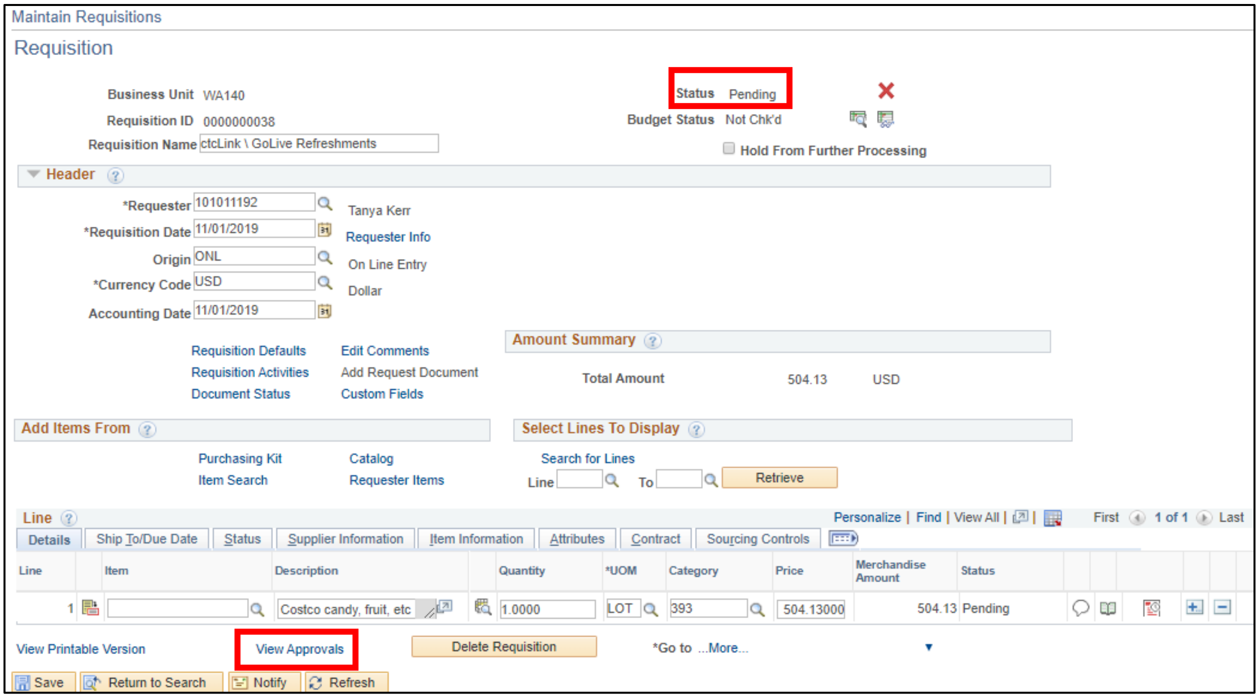


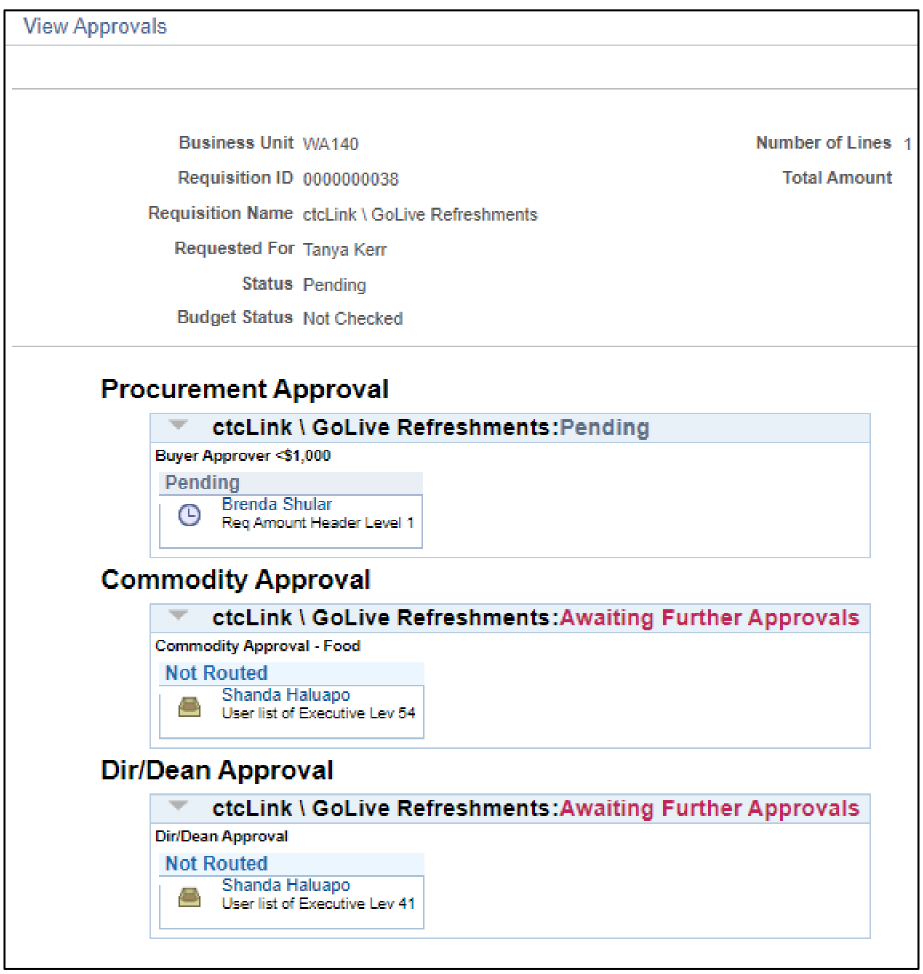
38. Select the **OK** button. The Schedule page will display.
39. On the Schedule page, select the **Save** button. The Requisition page will display.
40. On the Requisitions page, you can click the **Save** button at any time to avoid losing your work. After you save the requisition, a **Requisition 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.



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.

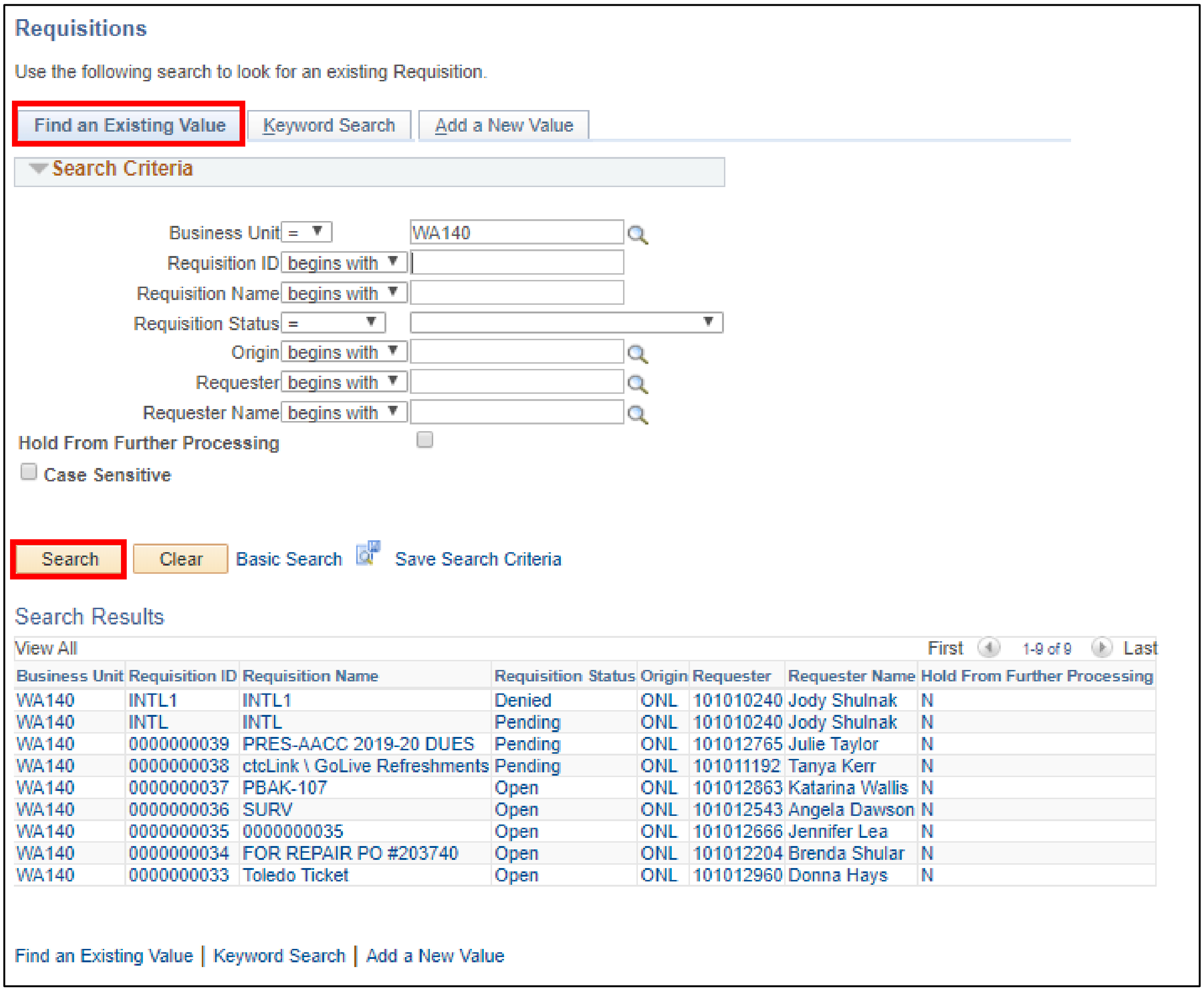

Maintain Requisitions
Requisition
Business Unit WA140
Requisition ID 0000000038
Requisition Name ctcLink \ GoLive Refreshments
Status Pending
Budget Status Not Chk'd
Hold From Further Processing
Header
*Requester 101011192 Tanya Kerr
*Requisition Date 11/01/2019 Requester Info
Origin ONL On Line Entry
*Currency Code USD Dollar
Accounting Date 11/01/2019
Requisition Defaults
Requisition Activities
Document Status
Edit Comments
Add Request Document
Custom Fields
Amount Summary
Total Amount 504.13 USD
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
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.


Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value | Keyword Search | Add a New Value

Search Criteria

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 | Clear | Basic Search | Save Search Criteria

Search Results

View All First 1-9 of 9 Last

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

Find an Existing Value | Keyword Search | Add a New Value