

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 WA140.
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.

The screenshot shows the 'Requisitions' page with three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The 'Add a New Value' tab is selected and highlighted with a red box. Below the tabs, there are two input fields: 'Business Unit' with the value 'WA140' and a search icon, and 'Requisition ID' with the value 'NEXT'. Below these fields is an 'Add' button, also highlighted with a red box. At the bottom of the page, there are three links: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.

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.

Maintain Requisitions

Requisition

Business Unit WA140 Status Open

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name **ctcLink \ GoLive Refreshments** Copy From Hold From Further Processing

Header ?

*Requester 10101... 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 Add Comments Amount Summary ?

Requisition Activities Add Request Document

Total Amount 0.00 USD

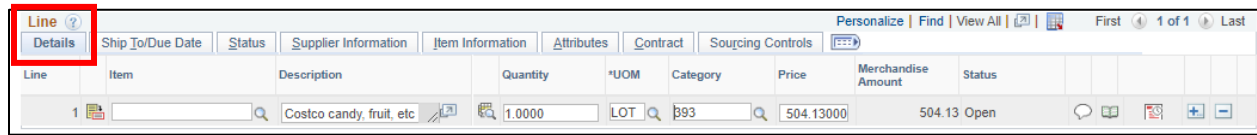
12. Select the **Add Comments** link, and the **Header Comments** section will display
13. In the **Comments** section, enter the employee name and mailstop that the goods should be delivered to along with any other special delivery instructions.
14. Check the **Send to Supplier** checkbox. This enables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

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.

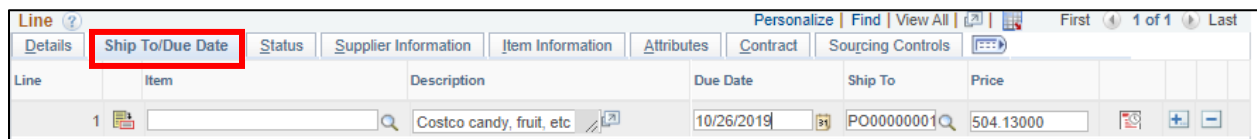
24. Enter the price per unit in **Price** field and the Merchandise Amount will automatically calculate.



25. Select the **Ship To/Due Date** tab. The key fields you have already entered or skipped will automatically populate.

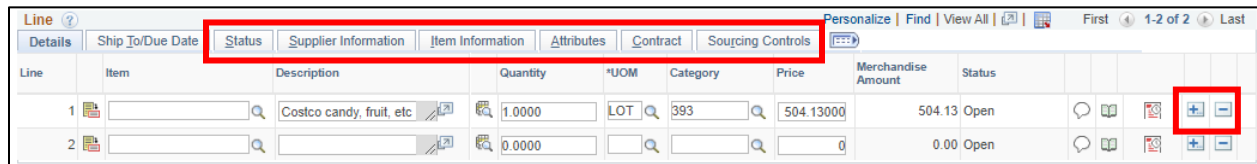
26. The **Due Date** field should be used to communicate when you need the item.

27. The **Ship To** field should default to PO00000001 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.




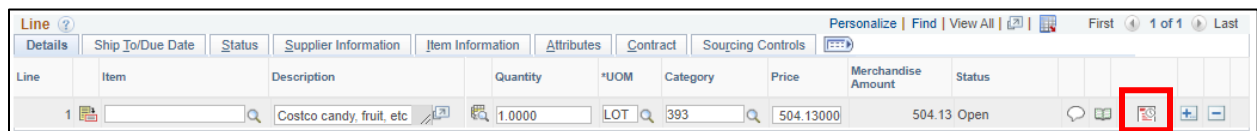
28. You do not need to enter any additional information on the **Status, Supplier Information, Item Information, Attributes, Contract** or **Sourcing Controls** tabs.

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**  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.

Maintain Requisitions

Schedule

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

Return to Main Page

Line Find | View All First 1 of 1 Last

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

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

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PO0000	1.0000	504.13000	504.13	10/26/2019	Tanya Kerr	Active

Add Ship To Comments

Save Return to Search Notify Refresh Add Update/Display

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 WA140
- **Oper Unit** – must always be set to 7140
- **Account** – defines the type of expense and replaces the old sub-object codes (EA or JA for example) – refer to crosswalks located on the Clark website www.clark.edu/faculty-staff/ctclink/myclarkfinance.php
- **Fund** – generally the same except for fund 101 which is now Fund 001 and Appropriation 101
- **Class** – replaces the Program in the old budget number – refer to crosswalks
- **Dept** – replaces the Org in the old budget number – refer to crosswalks
- **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

Item Costco candy, fruit, etc
Status Active

Ship To PO00000001 140 - CR
Quantity 1.0000 LOT
Open Quantity 1.0000
Merchandise Amt 504.13 USD

*Distribute By Quantity
*Liquidate By Amount

SpeedChart Multi-SpeedCharts

Distributions

Chartfields Details Asset Information Budget Information

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

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 000000038
Requisition Name cclink \GOLIVE Refreshments

Status Open
Budget Status Not Chk'd

Header

*Requester 101011192 Tanya Kerr
*Requisition Date 11/01/2019
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

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

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

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 **Status Pending**
 Requisition ID 0000000038 Budget Status Not Chk'd
 Requisition Name ctcLink \ GoLive Refreshments 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 **Select Lines To Display**

Purchasing Kit Catalog
 Item Search Requester Items

Search for Lines
 Line: To: **Retrieve**

Line

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

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 Number of Lines 1
 Requisition ID 0000000038 Total Amount
 Requisition Name ctcLink \ GoLive Refreshments
 Requested For Tanya Kerr
 Status Pending
 Budget Status Not Checked

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