



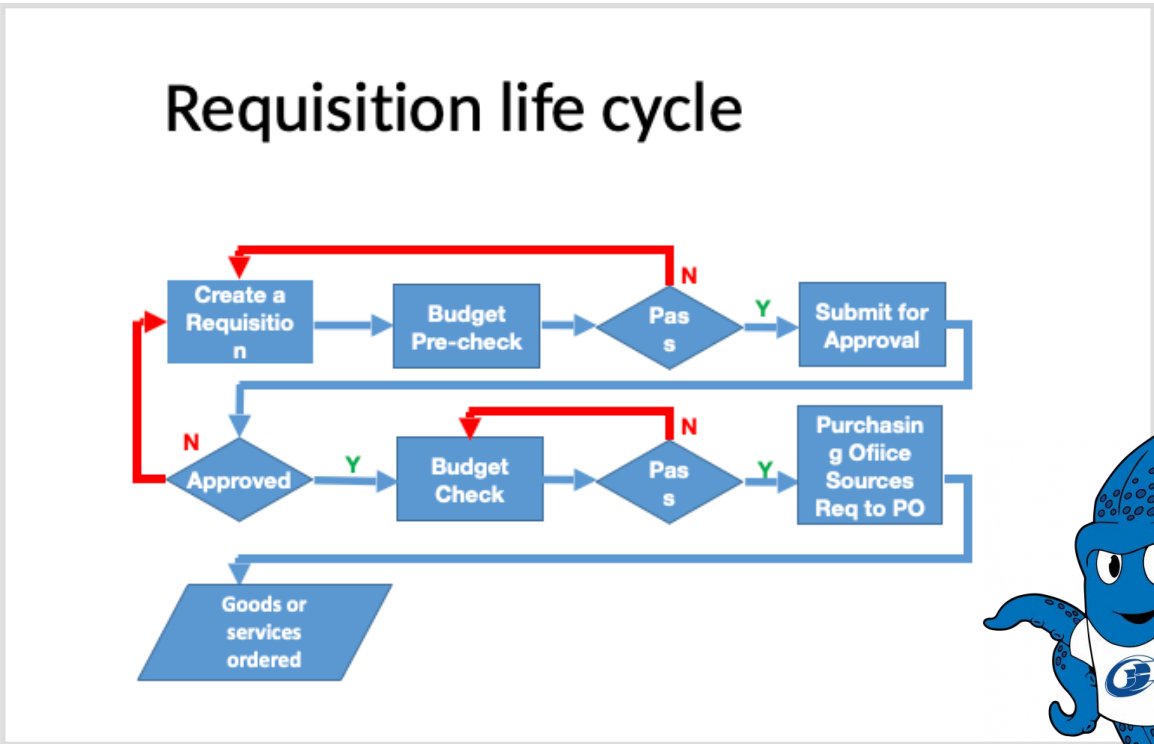
South Puget Sound
COMMUNITY COLLEGE

Creating a Purchasing Requisition
in ctcLink

Creating a Purchasing Requisition in ctcLink

Table of Contents

- Table of Contents1
- Overview of procedure2
- Gather necessary information2
- Log in and Navigate to Requisitions in ctcLink.....2
- Create the Purchase Requisition4
- Attach Supporting Documentation7
- Budget pre-check and submit for approval8
- Approval Process8



Overview of procedure

Purchase Requisition (or purchase requests) are the first step in the Procure to Pay process. After you have completed these procedures and submit your Purchase Requisition, the Purchasing Office will process the Purchase Requisition into a Purchase Order, assign it to a vendor, and order the goods or services.

Gather necessary information

Before submitting a purchase requisition, the REQUESTER needs to:

- A. Gather product Information such as quotes, examples, and specifications.

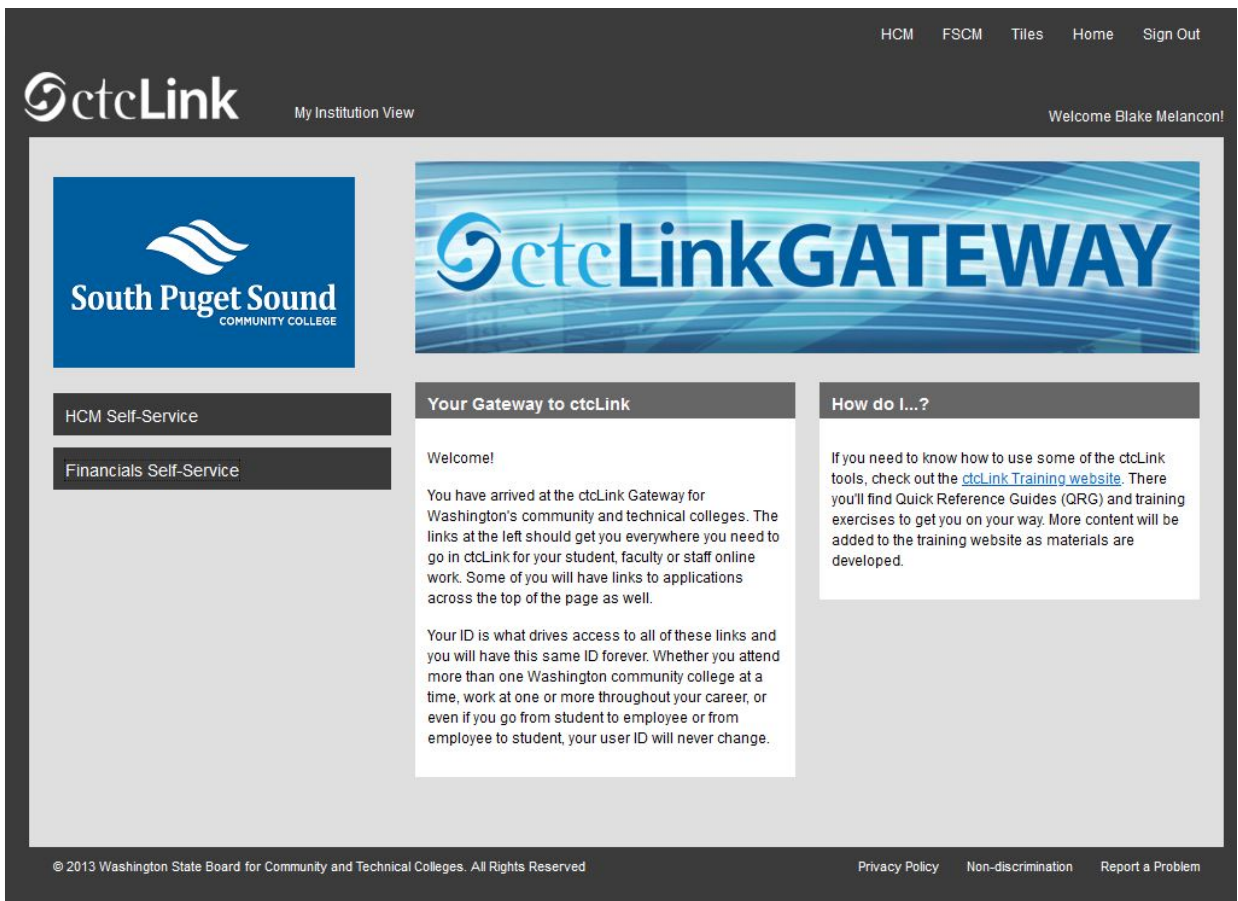
- B. Know the budget Chartfields required for the purchase. Get these from your budget manager. For all South Puget Sound Comm College purchases,
 - Business Unit (General Ledger Unit) = WA240
 - Operating Unit = 7240

For your purchases you will also need (from your budget manager):

- Account
- Fund
- Approp – only if you were provided this information by the budget manager
- Dept
- Class
- PC Bus Unit – only if you were provided this information by the budget manager (for grants/Capital Projects ONLY)
- Project - only if you were provided this information by the budget manager (for grants/capital Projects ONLY)
- Activity - only if you were provided this information by the budget manager (for grants/Capital Projects ONLY)


Log in and Navigate to Requisitions in PeopleSoft

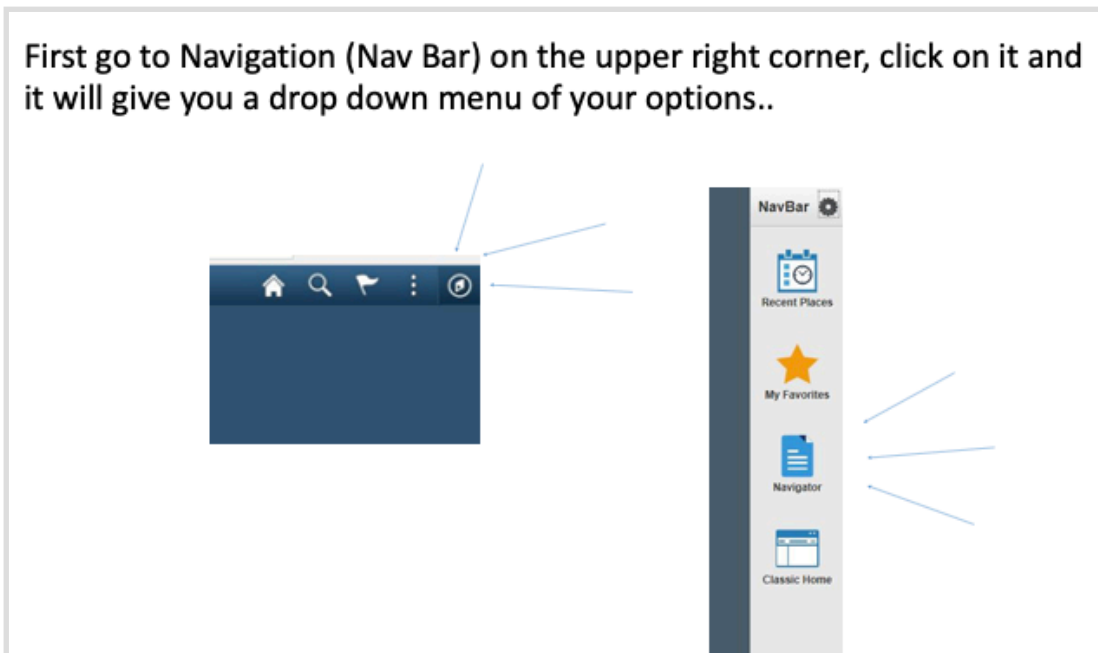
To create and submit a purchase requisition, the REQUESTER needs to login with your ctLink ID# and password.



From the ctclink Gateway:

1. choose FSCM from the top tabs.

2. Use the Navigator icon  on the righthand side of the window.



3. Select Purchasing > Requisitions > Add/Update Requisition
4. Verify that the Add a New Value tab is selected.
5. If the Business Unit has not defaulted to WA240, Type WA240 into the Business Unit field.
6. If the Requisition ID has not defaulted to NEXT, Type NEXT as the Requisition ID.
7. When the values are correct, click the ADD button.

Requisitions

Find an Existing Value
Add a New Value

Business Unit

Requisition ID

Add

[Find an Existing Value](#) | [Add a New Value](#)

Create the Purchase Requisition

Maintain Requisitions

Requisition

<p>Business Unit <input type="text" value="WA240"/></p> <p>Requisition ID <input type="text" value="NEXT"/></p> <p>Requisition Name <input style="width: 150px;" type="text"/> Copy From</p> <p>Header ⓘ</p> <p>*Requester <input style="width: 80px;" type="text" value="101053027"/> <input type="text" value="Blake Melancon"/> Requester Info</p> <p>*Requisition Date <input style="width: 80px;" type="text" value="06/21/2022"/> <input type="text" value="On Line Entry"/></p> <p>Origin <input style="width: 80px;" type="text" value="ONL"/> <input type="text" value="On Line Entry"/></p> <p>*Currency Code <input style="width: 80px;" type="text" value="USD"/> <input type="text" value="Dollar"/></p> <p>Accounting Date <input style="width: 80px;" type="text" value="06/21/2022"/></p> <p>Add Items From ⓘ</p> <p>Purchasing Kit Item Search</p> <p>Catalog Requester Items</p> <p>Line ⓘ</p>	<p>Status <input checked="" type="checkbox"/> Open</p> <p>Budget Status <input type="checkbox"/> Not Chk'd</p> <p><input type="checkbox"/> Hold From Further Processing</p> <p>Card Number <input style="width: 100px;" type="text"/></p> <p>Expiration Date <input type="checkbox"/> Use Procurement Card</p> <p>Amount Summary ⓘ</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 60%;">Total Amount</td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">USD</td> </tr> </table>	Total Amount	0.00	USD
Total Amount	0.00	USD		

8. The top section of the Maintain Requisition page includes a free form field for Requisition Name. Name your Requisition with your Department, Goods/Services, and Vendor, i.e FAC_Repairs_Acme Repair Shop. Please abbreviate as necessary.

Note: There is a character limit on this field, the priority is the vendor name.

Below the Requisition are two main parts, **Header** and **Line** data.

Maintain Requisitions

Requisition

Business Unit WA240 Status Open
 Requisition ID NEXT Budget Status Not Chk'd
 Requisition Name Copy From Hold From Further Processing

Header ⓘ

*Requester 101053027 Blake Melancon Card Number
 *Requisition Date 06/21/2022 Requester Info Expiration Date Use Procurement Card
 Origin ONL On Line Entry
 *Currency Code USD Dollar
 Accounting Date 06/21/2022

Amount Summary ⓘ

Total Amount 0.00 USD

[Requisition Defaults](#) [Add Comments](#)
[Requisition Activities](#) [Add Request Document](#)

Add Items From ⓘ

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Header

Line ⓘ

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	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open

Line

In the **Header** area:

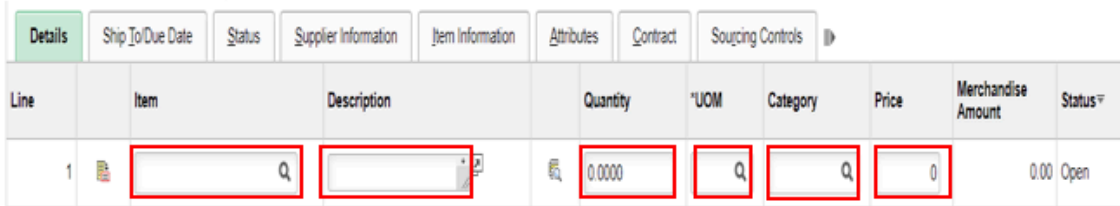
9. Enter your ctclink ID# (EMPLID) or the # for the Requester if you are creating the requisition on behalf of someone else. You can use the look-up tool to find the correct EMPLID.
10. Skip the Requisition Date, Origin, and Accounting Date fields. Currency Code will always be USD.

Below the **Header** area:

11. Select Requisition Defaults hyperlink directly below the Accounting Date field. Select Override radio button under Default Options near the top left-hand side of the page.

IT IS NOT NECESSARY TO ENTER A SUPPLIER on the requisition.

On the Requisition Line, select an **Item** (optional) and **Description** (can be overwritten) will be defaulted based on the Item.



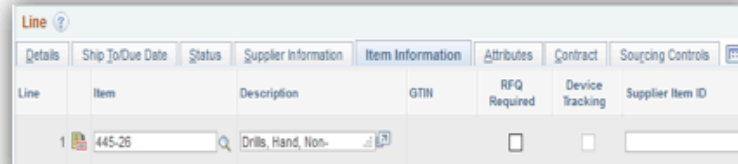
Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open

Specify **Quantity** and identify its corresponding Unit of Measure.

Category is used to classify what is being purchased. This is also tied to the Item you've selected.

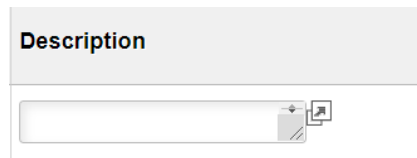
Price is the unit price of the goods/services purchased.

Supplier Item ID can be found under Item Information tab



Line	Item	Description	GTIN	RFQ Required	Device Tracking	Supplier Item ID
1	445-26	Drills, Hand, Non-		<input type="checkbox"/>	<input type="checkbox"/>	

12. Click the Display Description Module icon next to the Description field.



Description

13. TYPE the description information into the description window. Include things like item number, model, color, general description. **DO NOT INCLUDE QUANTITY.** **CLICK Return when complete to close the window.**

14. Enter the desired quantity in the Quantity field. You can use the look-up tool to enter the Unit of Measure (UOM). Note: Most frequently used are each (EA), box (BOX) or case (CS).

15. Enter the Category with these steps:

1. First use the look-up tool and filter on the description field to "contains."
2. Search using a one or two word description of the category of item.
3. Select the correct category

16. Enter the Price into the correct field.

17. If the requisition has more than one line-item, Click the plus sign at the end of the row

Adding Chartstring to Requisition

The screenshot shows a requisition system interface. At the top, there are tabs for 'Supplier Information', 'Item Information', 'Attributes', 'Contract', and 'Sourcing Controls'. Below these is a table with columns: Description, Quantity, *UOM, Category, Price, Merchandise Amount, Status, and a plus sign icon. The first row shows a quantity of 0.0000, a price of 0, and a status of 'Open'. A red circle highlights the plus sign icon at the end of this row, with the text 'OPEN Schedule' written above it.

Below this is a 'Line' section with a table showing item details: 1 Item, Description, Quantity (0.0000), UOM (Each), Merchandise Amt (0.00), and USD. Below the line details is a 'Schedule' section with a table. The first row in the schedule table has columns: Sched (1), *Ship To (SOM1602), Quantity (0.0000), Price (0.00000), Merchandise Amount (0.00), Due Date, Attention To, and Status (Active). A red circle highlights the plus sign icon at the end of this row, with the text 'Open Distributions' written above it.

At the bottom, there is a 'Fields' section with tabs for 'Details', 'Asset Information', and 'Budget Information'. Below these are columns for: istrib, Status, Percent, Quantity, Merchandise Amount, GL Unit (WA240), Account, Oper Unit, Fund, Dept, Program, Class, Approp, PC Bus Unit, and Project. There are 'Cancel' and 'Refresh' buttons at the bottom left.

18. Enter the following budget Chartfield information using the look-up tool and information that was provided by budget manager.

- GL Unit - PeopleSoft should default this to WA240
- Account -
- Fund
- Oper Unit - 7240
- Approp – only if you were provided this information by the budget manager
- Dept
- Class
- PC Bus Unit – only if you were provided this information by the budget manager (for grants/Capital Projects ONLY)
- Project - only if you were provided this information by the budget manager (for grants/capital Projects ONLY)
- Activity - only if you were provided this information by the budget manager (for grants/Capital Projects ONLY)
- State Purchase - Always select "Null" if not an IT purchase

19. Select OK.

20. If the cost of the requisition is being *split across multiple budgets*, scroll to the right of the window and click the plus sign to add additional lines. Cost can be split by percentage, amount, or item quantity. Type the percentage as a number (do not include the % symbol).

If the requisition is being charged to *only one budget*, you do not need to add additional lines. Use 100 in the percent field.

Attach Supporting Documentation

21. Add cart, quote, and supporting documentation by using the "Add Comments" hyperlink. Type general comments for the Purchasing Office and/or Vendor in the Comment field if desired. Add everything that you would like to communicate to the Purchasing office and/or the vendor. You can copy and paste a website, provide sales person contact information, etc. If more than one document needs to be attached to the requisition, select the plus sign near the Inactivate button to add an addition line.

Header Comments

Business Unit WA240 Requisition Date 06/21/2022
Requisition ID NEXT Status Open

*Sort Method *Sort Sequence

Comments 1 of 1 View All

Use Standard Comments Comment Status Active **To add additional Comments**

Select if comment needs to be sent to Supplier

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment	Attach	View	Delete	<input type="checkbox"/> Email
	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/>

From -> REQ WA240-NEXT

22. Once your requisition is complete, click "Save". This will then assign as Requisition Number to your Req.

< Employee Self Service

Business Unit WA240
 Requisition ID 000000018
 Requisition Name AT_LACEY 3 UPGRADE_LONG BLDG

▼ Header

*Requester 101053027 Blake Melancon
 *Requisition Date 06/14/2022 Requirer Info
 Origin ONL On Line Entry
 Currency Code USD Dollar
 Accounting Date 06/14/2022

[Requisition Defaults](#) [Edit Comments](#)
[Requisition Activities](#) [Add Request Docur](#)
[Document Status](#)

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line

Line	Item	Description
1		Project: S2 Access WSIPC


[View Printable Version](#) [View Approvals](#)



Save [Return to Search](#) [Previous in List](#) [Next in List](#)

Budget pre-check and submit for approval

23. Before the Purchasing Department can approve your requisition, you should complete the Budget Pre-check. First locate the Budget Status heading near the top right-hand side of the screen. Click the Budget Pre-Check icon to pre-check the budget. OBSERVE the budget status [green check mark icon] has changed from *Not Chk'd* to *Prov Val*.

24. Perform Budget Check by selecting the circled box.

Status Open 

Budget Status Prov Valid  

Hold From Further Processing

Card Number

Expiration Date Use Procurement Card

24. If the Chartstrings are correct, the Budget Status will move to "Prov Valid". If the Req fails budget check, click the "Error" hyperlink which will open on a new tab. This will provide information as to why the Req failed Budget Check.

25. Click on the green check mark next to the Status heading to enter the requisition into the Approval Workflow. Notice the the status changes from "Open" to "Pending".

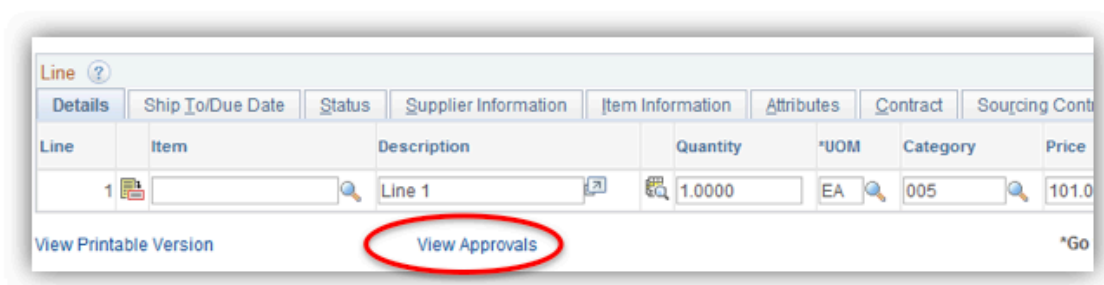
There are a few modification scenarios with Requisition, each with their own set of options and outcomes:

Requisition Document Status	Requisition Budget Status	Modification Options and Outcomes
Open	Not Checked	Free to make changes without affecting status.
Open	Prov Valid	Free to make changes, but changes to amount or distribution information will reset the Budget Status to "Not Checked".
Pending	Not Checked	Certain changes can be made, but changes to the Requisition amount will cause the approval process to reset.
Pending	Prov Valid	Same as above, but additionally, changes to distributions will reset the Budget Status to "Not Checked".
Approved	Not Checked	Must have special permission to work on "Approved" Requisitions. Can manually initiate a Change Order that will go through the approval process. Updating certain fields (price or quantity) will automatically initiate a Change Order.
Approved	Prov Valid / Valid	Same as above, but additionally, changes to distributions will reset the Budget Status to "Not Checked".

Approval Process

To view the approval progress, **CLICK** View Approvals at the bottom of the screen to monitor approval process if desired.

Another task you can perform before submitting your Requisition for approval is to do an Approval Preview. At the bottom of the Maintain Requisitions front page, below the Line detail section, is a **View Approvals** link:



Clicking this link will bring up a list of the people who will be involved in approving your Requisition. This link can also be used to track where your Requisition is in its approval process after it's been submitted.

APPROVAL OF A REQUISITION

Requisition Approvals

Values	Description
Approve	Status changes to Complete upon saving. The system sends an email to the requester stating that the requisition has been Approved.
Deny	Status changes to Denied upon saving. The system sends an email to the requester stating that the requisition has been Denied.
Recycle	Status changes to Recycled upon saving. The system sends an email to the last user who approved the requisition.

Enter Comments pertinent to your approval action.

After the approval workflow has been completed, your requisition will be moved into the queue for the Purchasing Department to purchase your goods/services.