Create Purchasing Requisitions

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.

Following are the most common statuses for a requisition in ctcLink. Understanding the status will help you determine where a requisition in its life cycle.

- Open – the requisition is still being entered and has not been submitted for approval.
- Pending Approval – the requisition is in the approval workflow. Depending on the dollar amount, a requisition may require up to five approvals.
- Approved – the requisition has successfully gone through the entire approval process and is waiting to be sourced to a purchase order.
- Denied – the requisition has been sent back to the requester for some reason. Generally, the Purchasing Department denies requisitions so the requester can make necessary corrections to allow the requisition to be processed. A budget manager may also deny a requisition to indicate that the purchase is not permitted.
- Cancelled – this is a final action that will stop the requisition from being able to be sourced to a purchase order.

The **Requisition** page enables you to enter item information, modify lines as needed, establish schedules and distributions, define internal delivery and accounting information, and confirm whether funds are available in the distribution schedule (budget) you have entered. You can also establish defaults that can improve your efficiency in creating requisitions. Please do not change any of the fields on the various tabs within the requisition unless directed to do so in these instructions or by the Purchasing Department.

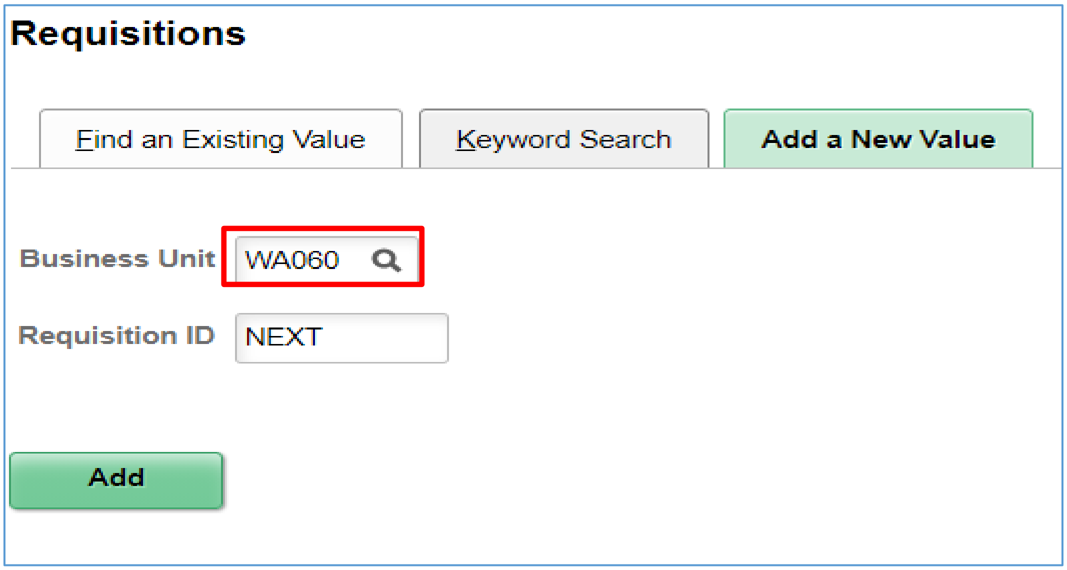
Create a Requisition

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

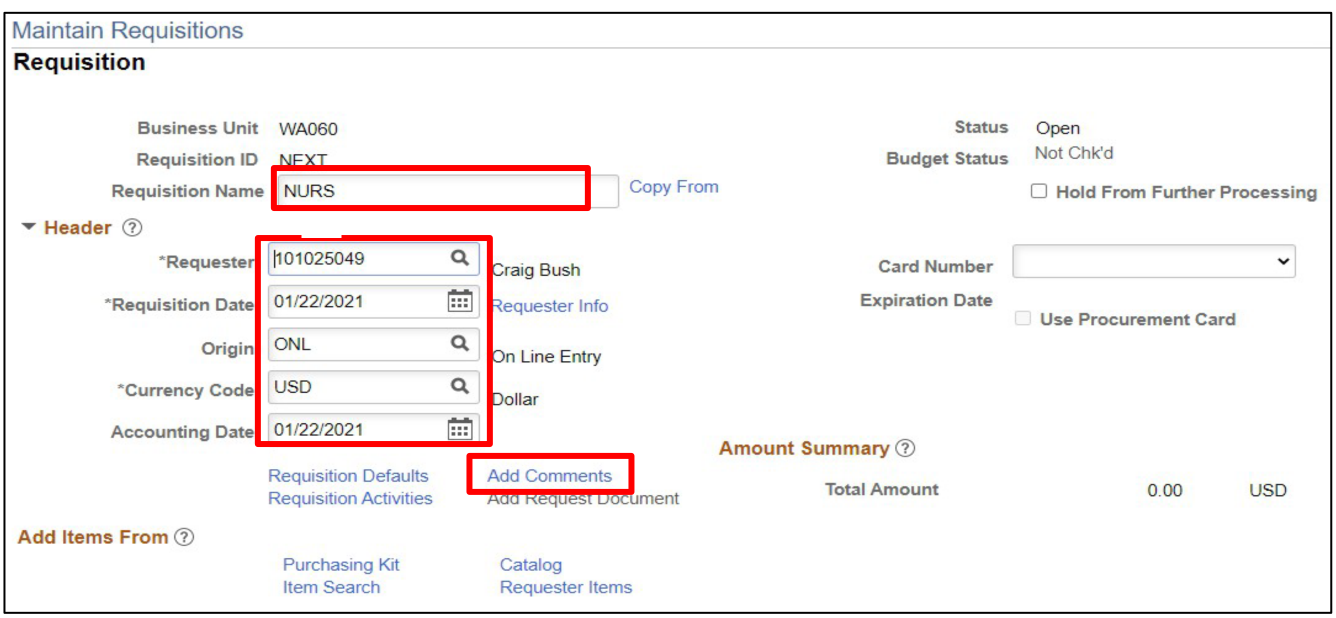
The Requisitions search page displays.

1. To create a new requisition, select the **Add a New Value** tab.
2. The **Business Unit** should default to WA060.
3. Leave the **Requisition ID** defaulted to **NEXT.** The system will assign a unique requisition ID once the requisition is created and saved.

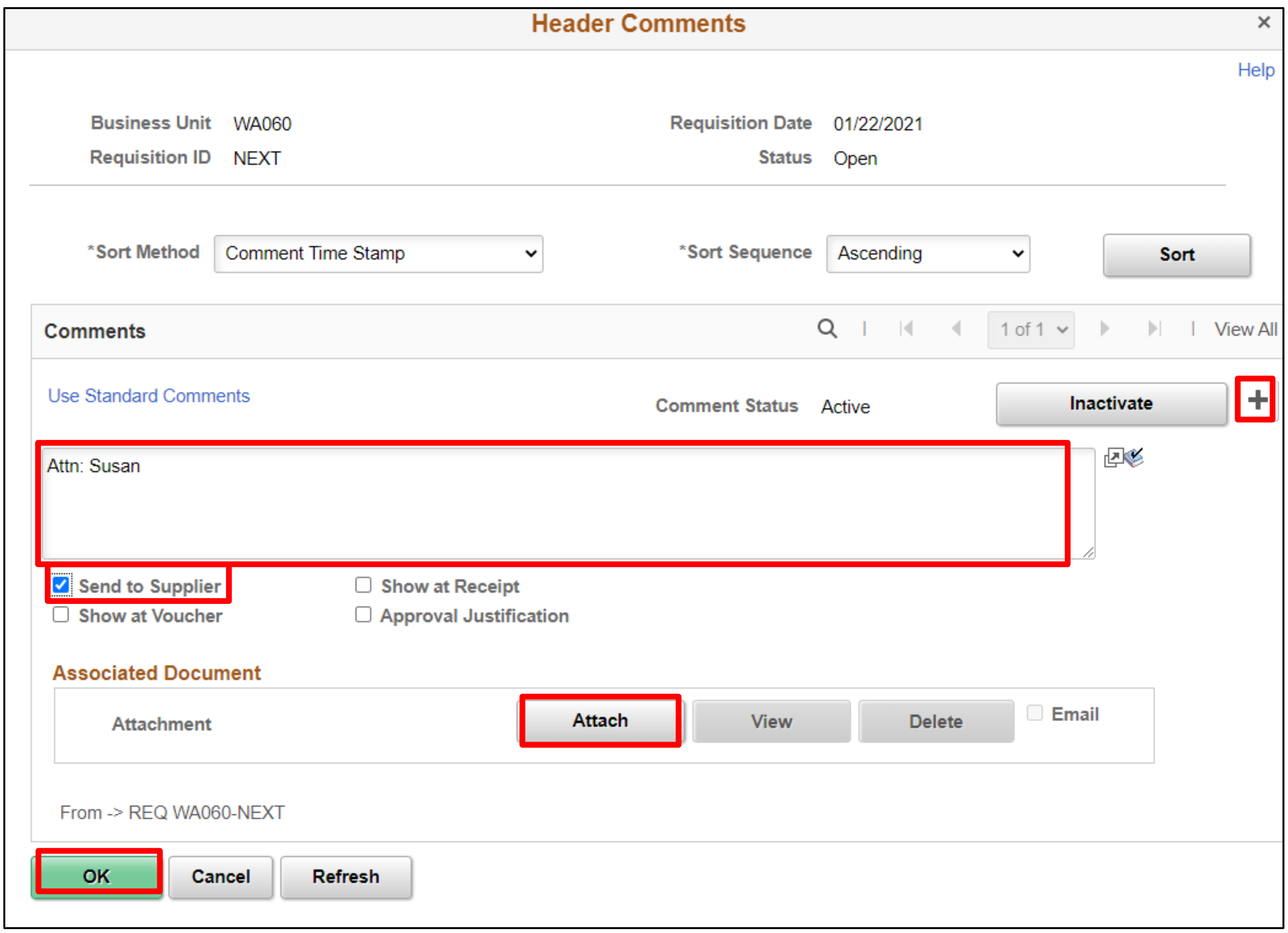
4. Select the **Add** button. The **Maintain Requisitions** page will display.



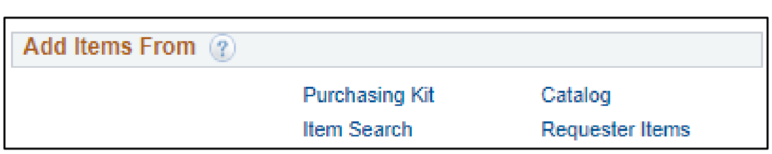
5. In the **Requisition Name** field, enter the department abbreviation (such as NURS for Nursing) and the name of the preferred vendor. This field displays for approvers and buyers and will be useful when searching for requisitions in the future.
6. Under the **Header** section, the **Requester** field 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.
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 any pertinent information such as quote number, contract number, special instructions, vendor info, etc… This field should never be left blank.
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. This would include the Foundation Approval Form for all purchases that are charging the Foundation budget. You will be prompted to browse to the location where the attachment is saved and then upload that document. Attachments will be viewable by approvers and the Purchasing Department. PeopleSoft only allows one document to be attached per comment. If you have multiple attachments, you will need to create multiple comments by clicking the **+** button. You can also attach additional documents to the line level comments below.
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. You will create a separate line for each item

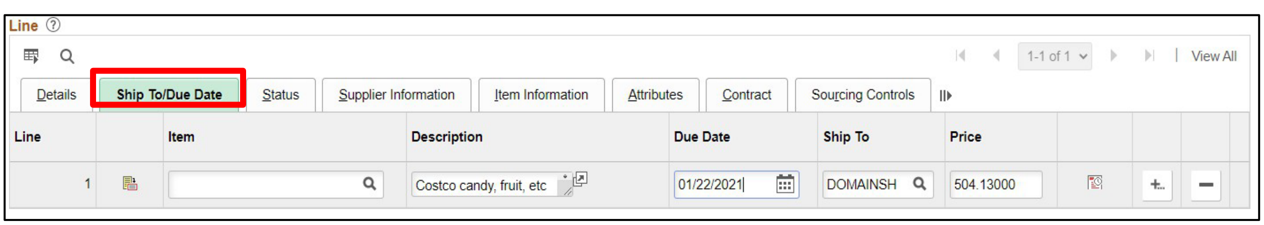
or service being ordered. **<u>Please DO NOT include nor add a separate line for tax</u>.** Sales/use tax is calculated separately when the Purchase Order is created.

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 including size, color and any other specific information Purchasing would need to make the purchase. This field has a 254 character limit. Please use the **Thought Bubble icon**  to provide as much information as possible so Purchasing can easily determine what you want to buy and the vendor you wish to buy it from. This would include links to the vendor's website.

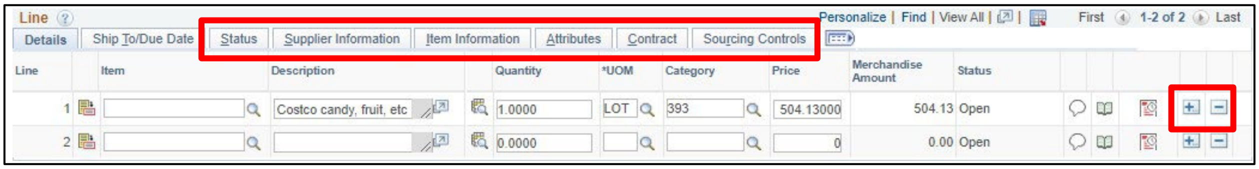
    ****TIP: If you are planning to use a new vendor that you haven't used in the past – please help Purchasing by requesting the W-9 Form in advance from your vendor and attaching it to requisition. This will expedite the process of creating the vendor in ctcLink.**

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. It is very important that you enter the correct Category code for all IT purchases and for any food/beverages/meals that are being provided for meetings as these types of purchases trigger additional approvals. Please use Category code **393** for food and codes **203-209** for IT. For all other purchases, if you are unable to find a suitable Category code, you may 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 or in the case of subscription renewal – when the expiration date is. This is not a guarantee. It is a desired date of delivery from the end-user.
27. The **Ship To** field should be reflected in the appropriate drop-down option. **Please select your appropriate campus**. Remember any specific delivery instructions should be included with the employee name and mailstop entered in the comments in step 13 above.

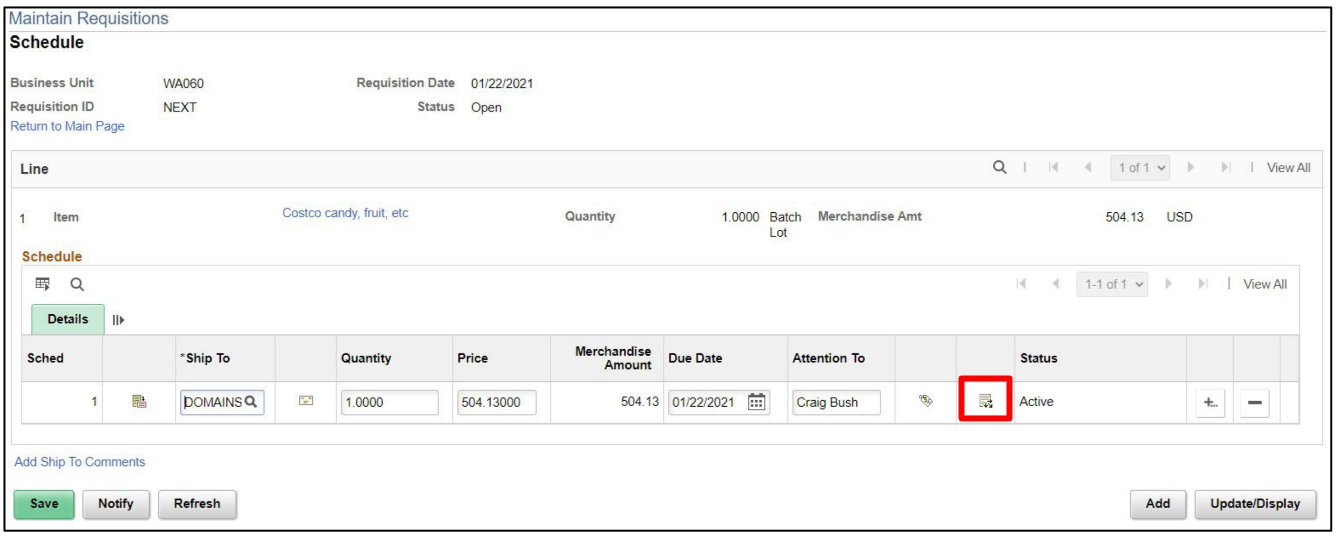


28. You do not need to enter any additional information on the **Status, Supplier Information, Item Information, Attributes, Contract** or **Sourcing Controls** tabs.
29. If you need to add or delete additional lines to the requisition, select the add/delete icons to the right.



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.



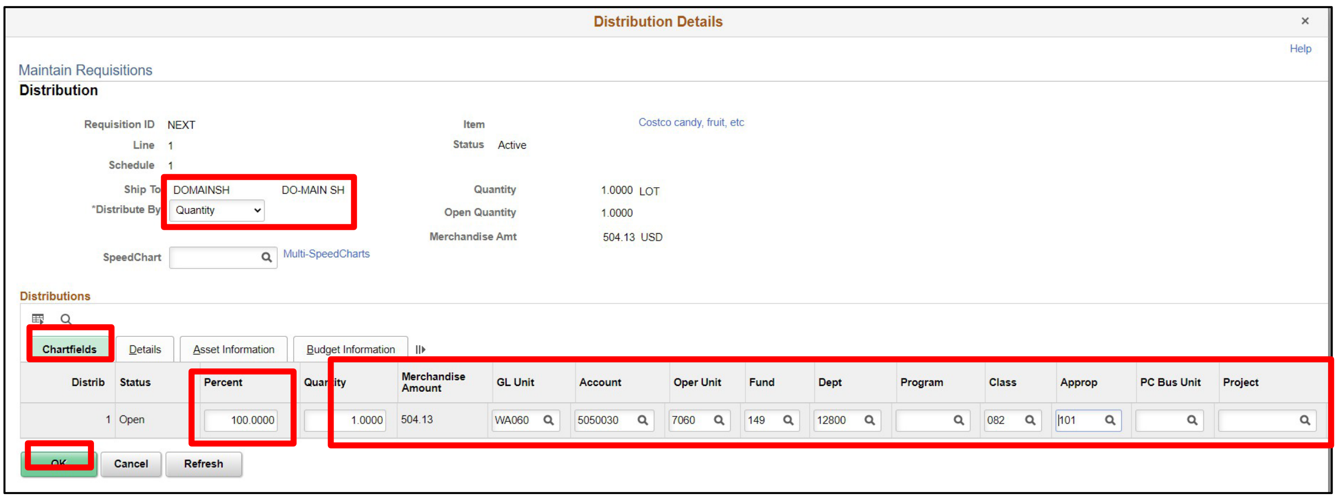
33. Select the **Distribution Icon** button. 
34. The **Distribution** page is where you will enter the necessary budget information to determine how and where the cost of item will be charged. The **Distribute By** field will default to amount but can be changed to quantity if appropriate. This is only 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 WA060
    - **Oper Unit** – must reflect your appropriate location
    - **Account** – defines the type of expense and replaces the old sub-object codes (EA or JA for example). Please double check that the Account number that defaults is accurately reflecting what is being purchased
    - **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.

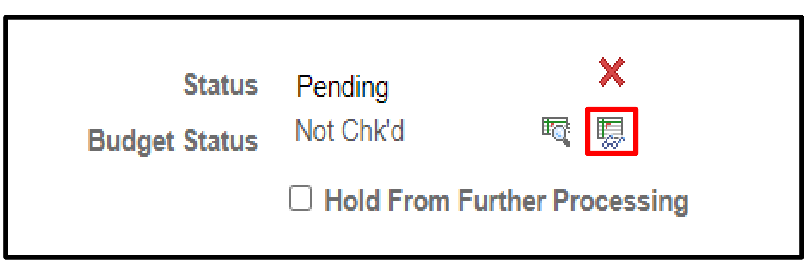
****TIP** – you can enter the chartfield information on the **Requisition Defaults** page available under the **Header** section at the top of the PO. Doing that will then default that information to ALL lines of the requisition. If you do have different budget information for each line, then you will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

- If you are using a grant budget or capital projects budget, please contact your business office for more information. Additional chartfields are required for such budgets.

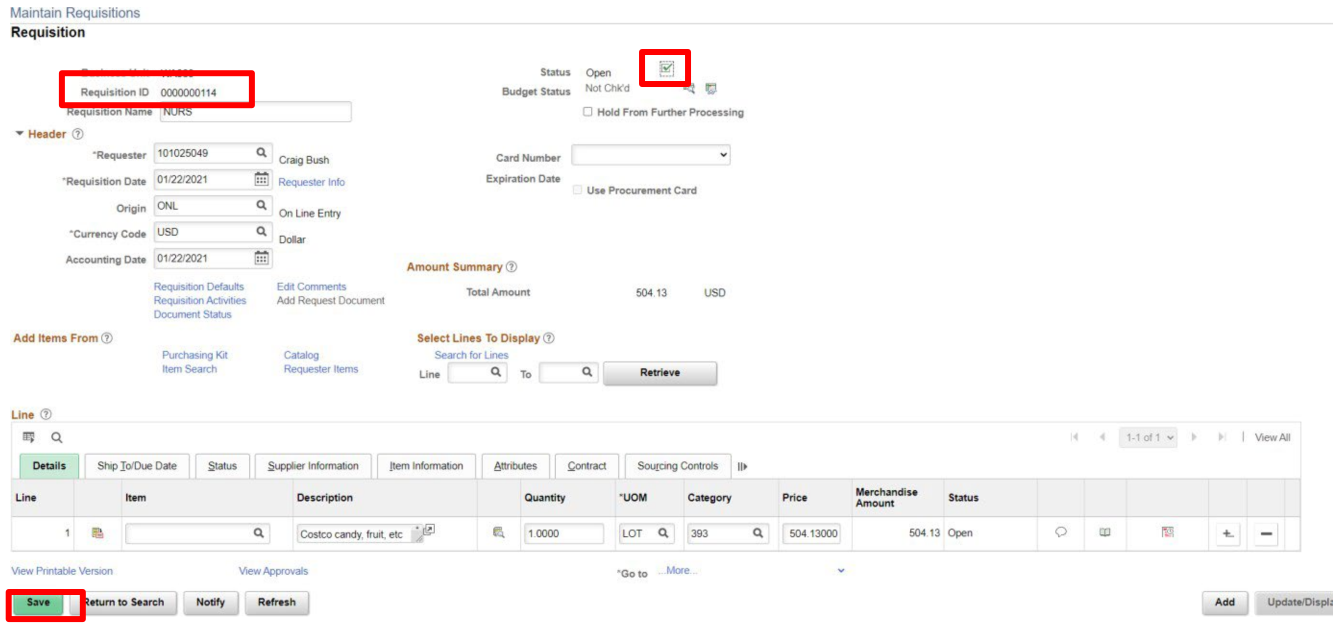
37. You do not need to enter any additional information on the **Details, Asset Information** or **Budget Information** tabs.



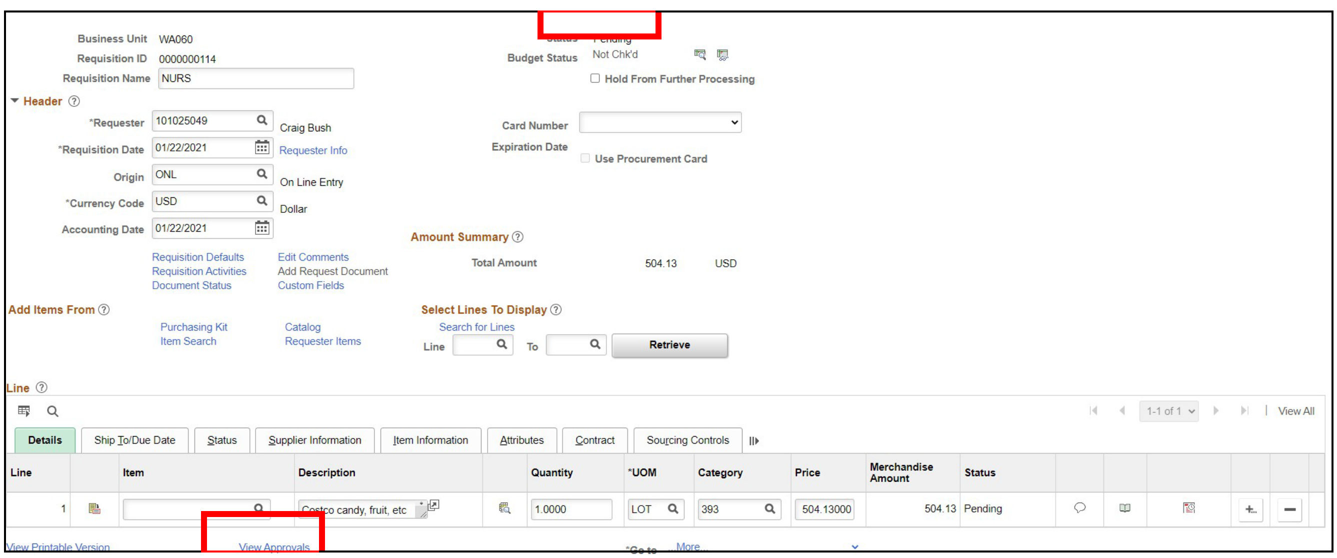
38. Select the **OK** button. The Schedule page will display.
39. On the Schedule page, select the **Save** button. The Requisition page will display.
40. On the Requisitions page, you can click the **Save** button at any time to avoid losing your work. After you save the requisition, a **Requisition ID** will be populated. DO NOT CHANGE this field.
41. Select the Budget Pre-check button to validate the selected budget can be used. The requisition can only be processed into a purchase order if the budget status is in Prov Valid or Valid status. Even if the requisition is approved, if the budget is not approved in the system it will not appear as available for processing to the purchasing department. If you receive a budget error, please contact your budget manager or budget director for support.

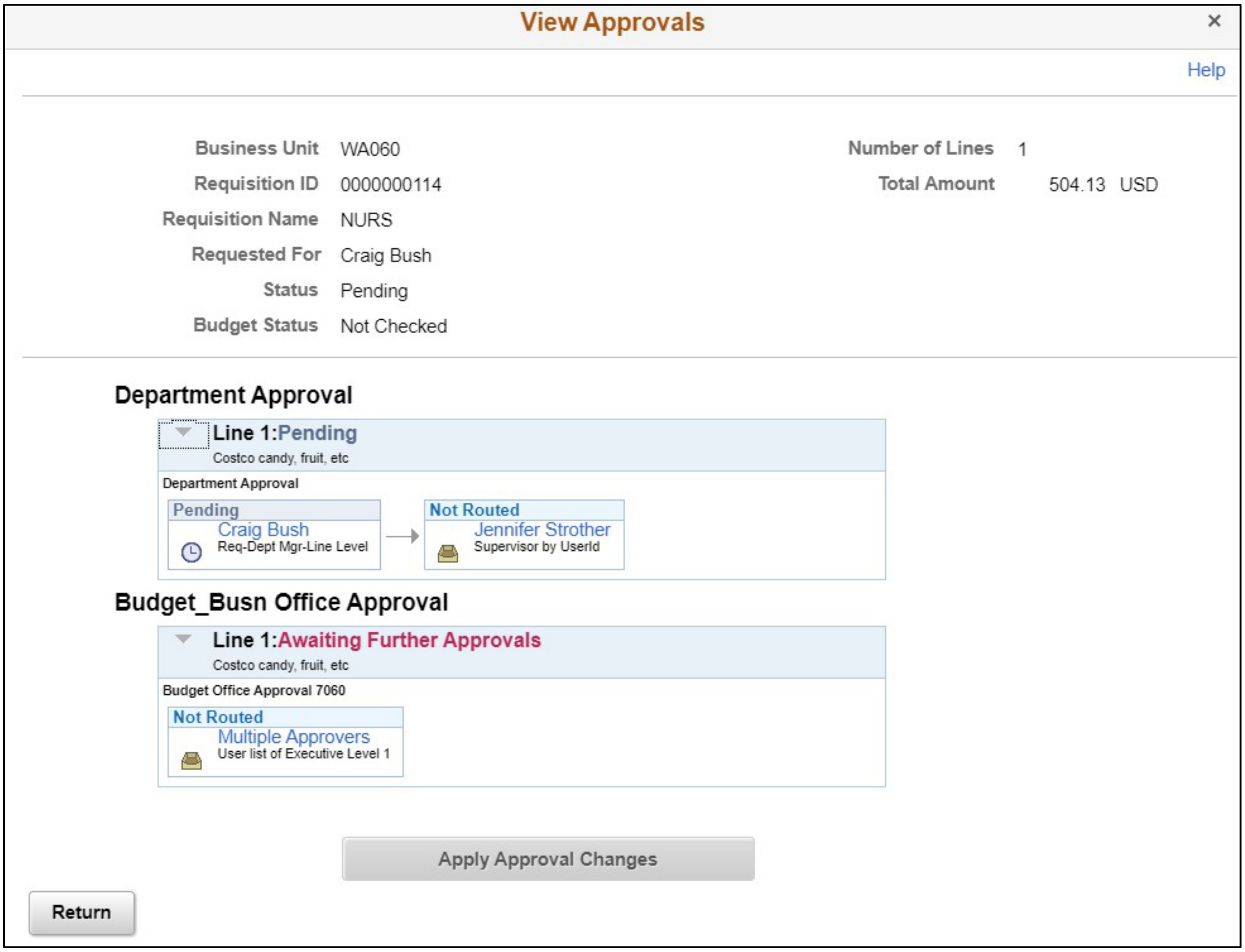


42. After you have entered all the necessary information and the budget is validated, you are ready to submit the requisition for approval. Select the green check mark to the right of the **Status** field to **Submit For Approval**. Once submitted, the **Status** field will change to Pending.



43. 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.





<u>PLEASE NOTE</u>

Please attach quotations, unsigned contracts, and any other pertinent information in the Comments section of the Header. These documents often contain crucial information allowing Purchasing to process orders with less back and forth.

After the PO has been submitted to the vendor and work has been completed, please send all invoices to accountspayable@seattlecolleges.edu.

Updated March 12, 2025