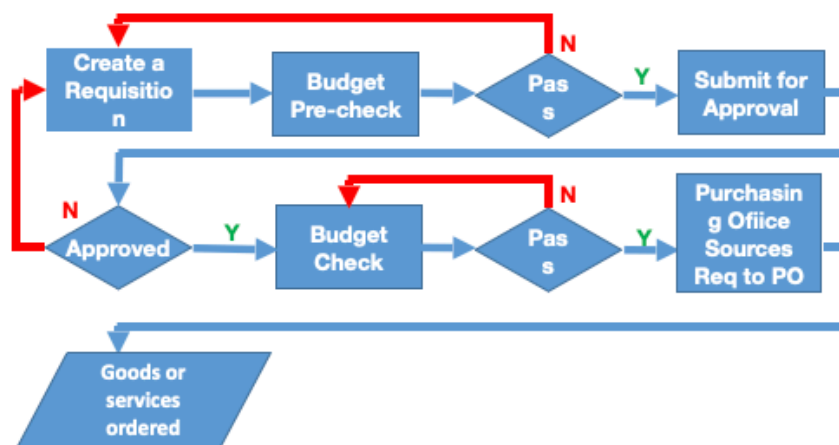


## Creating a Purchasing Requisition in PeopleSoft

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### Requisition life cycle



### **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:

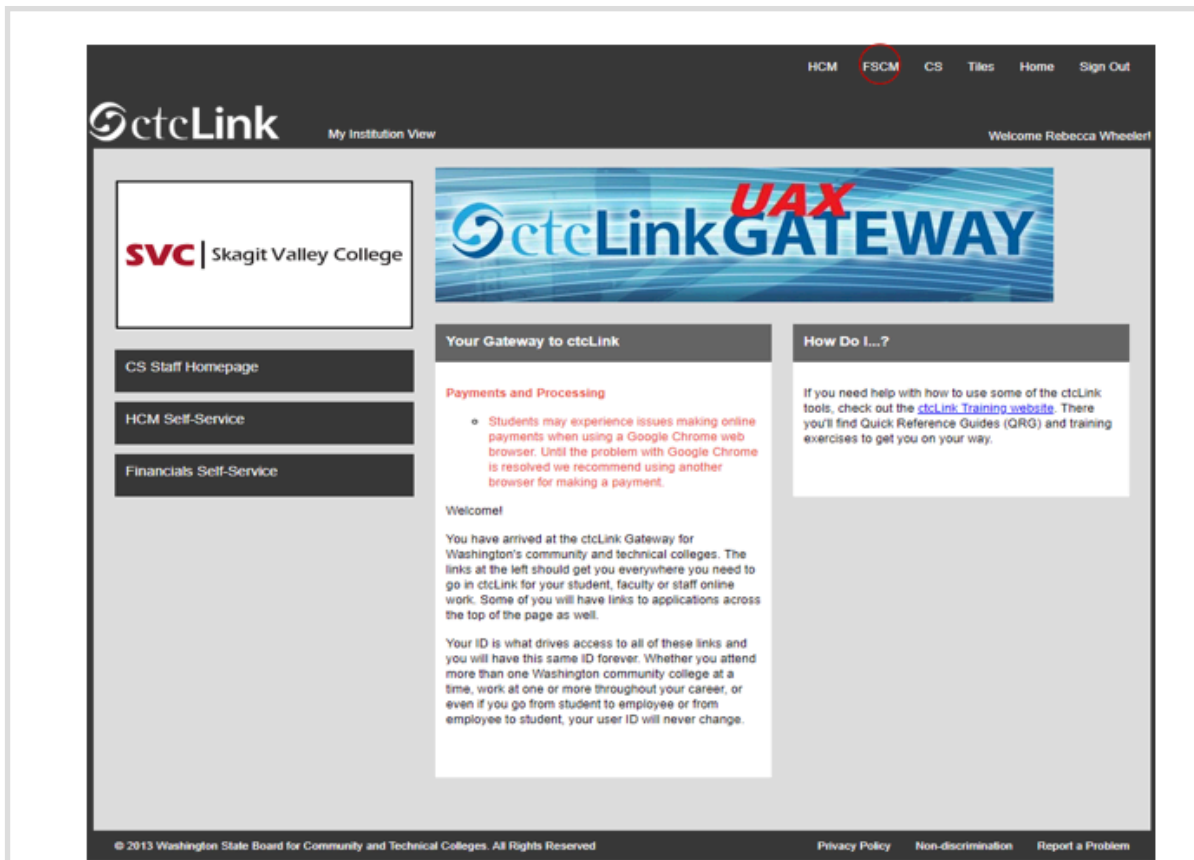
- A. Gather product Information such as quotes, examples, and specifications.
- B. Know the budget Chartfields required for the purchase. Get these from your budget manager. For all Skagit Valley College purchases,
  - Business Unit (General Ledger Unit) = WA040
  - Operating Unit = 7040

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 access the SVC ctcLink system (PeopleSoft). Login with your ctcLink ID# and password.

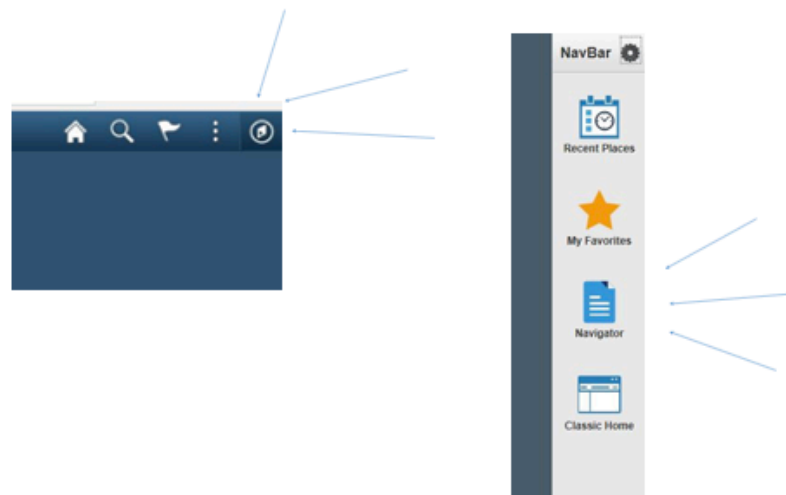


From the ctclink Gateway:

1. choose FSCM from the top tabs.

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

First go to Navigation (Nav Bar) on the upper right corner, click on it and it will give you a drop down menu of your options..



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 WA040, Type WA040 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**

The Maintain requisitions page displays

**Maintain Requisitions**

**Requisition**

Business Unit  Status ☒ Open

Requisition ID  Budget Status ☐ Not Chkd

Requisition Name   ☐ Hold From Further Process

▼ **Header** ⓘ

\*Requester   Rebecca Wheeler

\*Requisition Date   [Requester Info](#)

Origin   On Line Entry

\*Currency Code   Dollar

Accounting Date

**Amount Summary** ⓘ

[Requisition Defaults](#) [Add Comments](#) [Add Request Document](#) 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 Preferred Vendor and, if possible, the requester's first and last name. You can also add a department specific numbering scheme.

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.

The screenshot displays the 'Maintain Requisitions' page. The 'Requisition' header section is highlighted with a red box and labeled 'Header' in red text. It includes fields for Business Unit (WAG40), Requisition ID (NEXT), Requisition Name, Requester (101036046, Rebecca Wheeler), Requisition Date (09/27/2021), Origin (ONL, On Line Entry), Currency Code (USD, Dollar), and Accounting Date (09/27/2021). Below this, there are links for 'Requestion Defaults', 'Add Comments', 'Add Request Document', and 'Amount Summary'. The 'Line' section is also highlighted with a red box and labeled 'Line' in red text. It shows a table with columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first line item is visible with a quantity of 0.0000 and a status of Open.

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.

Skip the Line and Schedule sections. DO NOT ENTER A SUPPLIER on the requisition.

Business Unit WA040 Requisition Date 09/24/2021  
 Requisition ID NEXT Status Open

**Default Options** ⓘ

☐ Default  
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ Override  
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

**Line**

Buyer  Unit of Measure   
 Supplier  Supplier Location   
 Category  [Supplier Lookup](#)

In the **Line** area, add Budget Information (the Chartstring):

**Distributions**

Details Asset Information ||▶

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Approp	Dept	Class
1	<input type="text"/>	WA040 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

12. 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.

13. Enter the following budget Chartfield information using the look-up tool and information that was provided by budget manager. **Do not enter Account here.**

- GL Unit - PeopleSoft should default this to WA040
- Fund
- Oper Unit - 7040
- 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)

14. Select Ok.

### **Attach Supporting Documentation**

15. Add cart, quote, and supporting documentation by using the 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.

The screenshot shows a software interface for managing requisitions. At the top, it displays 'Business Unit: WA040', 'Requisition ID: NEXT', 'Requisition Date: 09/24/2021', and 'Status: Open'. Below this, there are two dropdown menus: '\*Sort Method' set to 'Comment Time Stamp' and '\*Sort Sequence' set to 'Ascending'. A section titled 'Comments' includes a search icon, a list of comments (currently empty), and a 'Comment Status' filter set to 'Active'. Below the comments section, there are four checkboxes: 'Send to Supplier', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'. At the bottom, there is an 'Associated Document' section with a table header 'Attachment' and buttons for 'Attach', 'View', 'Delete', and 'Email'.

### **Input line item information**

16. Select the Details tab in the Line information at the bottom of the page to enter Item Information.

Skip the Item field. This is not a vendor item number, model number or SKU.

The first level of detail below the Requisition Line is the **Requisition Schedule**. Click on the red and white icon. Schedule gives you the ability to move to the section where you will enter the accounting detail.

The screenshot shows the 'Line' interface with tabs for Details, Ship To/Due Date, Status, Supplier Information, Item Information, Attributes, Contract, and Sourcing Controls. The 'Details' tab is active, displaying a table with columns: Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first row shows Line 1, Item 1, Description, Quantity 0.0000, UOM, Category, Price 0, Merchandise Amount 0.00, and Status Open. A red and white icon (a document with three arrows) is highlighted with a red box in the bottom right corner of the table.

The next level of detail below the Schedule is the Requisition **Distribution** detail (or accounting information). You can get to the Distribution detail screen by clicking on the icon that looks like a piece of paper with three arrows:

The screenshot shows the 'Schedule' interface with tabs for Details and Distribution. The 'Details' tab is active, displaying a table with columns: Sched, \*Ship To, Quantity, Price, Merchandise Amount, Due Date, Attention To, and Status. The first row shows Sched 1, \*Ship To, Quantity 0.0000, Price 0.00000, Merchandise Amount 0.00, Due Date, Attention To, and Status Active. A red and white icon (a document with three arrows) is highlighted with a red box in the bottom right corner of the table.

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







The screenshot shows a 'Description' window with a title bar and a text input field. To the right of the input field is a small icon of a document with three arrows, which is the Display Description Module icon.

18. 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.*

19. 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).



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



<div> Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls </div>									
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1			 0.0000	 Q	 Q	 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 ?							
<div> Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls </div>							
Line	Item	Description	GTIN	RFQ Required	Device Tracking	Supplier Item ID	
1	 445-26	 Drills, Hand, Non-		<input type="checkbox"/>	<input type="checkbox"/>		

20. 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

21. Enter the Price into the correct field.

22. Enter the Account into the correct location:

1. Scroll to the right of the page, and CLICKS the Schedule icon. 
2. CLICK the Distributions  icon.
3. TYPE or USE the look-up tool to enter the Account.

23. SCROLL to the right to the State Purpose field. USE the Look-Up tool to open the menu. CHOOSE the appropriate response based on the type of the item.

1. If the item is NOT an IT item, choose N.
2. If the item is IT equipment to replace something we already have, choose Y. For example, we are replacing an existing computer.
3. If the item is IT equipment that is to meet a new need, choose X. For example, we received a grant and are purchasing ten new iPads for staff/clients/faculty that have never had iPads before.

Choose OK, and then click to Return to Main Page.

24. If the requisition has more than one line-item, Click the plus sign at the

end of the first-row item to add a lines. Repeat the procedure for each additional item as needed.

When a Requisition is saved, it is assigned a **Requisition ID** number. This will be the next available sequence number from PeopleSoft.

#### Maintain Requisitions

##### Requisition

Business Unit	WA040	Status	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition ID	0000000022	Budget Status	Not Chk'd	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition Name	0000000022	<input type="checkbox"/> Hold From Further Processing			

If a **Requisition Name** was not specified, it defaults to the Requisition ID; this can be overwritten with a new name if needed. Also, new Requisitions are created with an "Open" status, which it keeps after being saved. This status won't change until the Requisition is submitted for approval.

25. Click the Save button at the bottom of the page to complete your requisition.

You initiate a Budget Pre-Check from the Maintain Requisitions front page by clicking on the rightmost icon to the right of the Requisition's Budget Status indicator:

#### Maintain Requisitions

##### Requisition

Business Unit	WA040	Status	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition ID	0000000022	Budget Status	Not Chk'd	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition Name	0000000022	<input type="checkbox"/> Hold From Further Processing			

A successful Budget Pre-Check will return a Budget Status of **Prov Valid** (for "provisionally valid") meaning that budget was available for the provided amounts and sources:

#### Maintain Requisitions

##### Requisition

Business Unit	WA040	Status	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition ID	0000000022	Budget Status	Prov Valid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition Name	0000000022	<input type="checkbox"/> Hold From Further Processing			

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".

### **Budget pre-check and submit for approval**

26. 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*.

- If a pop-up window appears stating the document has failed the budget test, CLOSE the pop-up window. CONTACT the Purchasing Department.
- If the budget status is anything other than Prov Val after the budget pre-check, DO NOT SUBMIT FOR APPROVAL. Just save the requisition and contact the Purchasing Department.

27. Click on the green check mark next to the Status heading to enter the requisition into the Approval Workflow Engine (AWE). Notice the the status changes from Open to Pending.

### **Approval Process**

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

## APPROVAL OF A REQUISITION

To approve a Requisition, Navigate to Worklist > Worklist

Worklist

Worklist for CTC\_BCABLING: Bill Cabling - SBCTC

Detail View

Publish as Feed

Worklist Filters

Feed

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link	Personnel	Find   View All	First	1-16 of 16	Last
Nice Cook	07/12/2018	Transaction Approved	Approval Workflow	3-Low	<a href="#">VoucherApproval_38492_WACTC</a> <a href="#">BUSINESS UNIT WU170</a> <a href="#">Voucher C-00003872 ROC A O.R.</a> <a href="#">VoucherApproval_38535_WACTC</a> <a href="#">BUSINESS UNIT WU170</a> <a href="#">Voucher C-00003873 ROC A O.R.</a>		Mark Worked		Reassign	
Casey Wood	07/30/2018	Transaction Approved	Approval Workflow	3-Low	<a href="#">VoucherApproval_38535_WACTC</a> <a href="#">BUSINESS UNIT WU170</a> <a href="#">Voucher C-00003873 ROC A O.R.</a>		Mark Worked		Reassign	
CTC_TTOLEFREE	08/06/2018	Transaction Approved	Approval Workflow	3-Low	<a href="#">Credit Invoice_15_Credit Invoice</a> <a href="#">Approval_Inst_010-08-16_W.O.</a> <a href="#">BUSINESS UNIT WU170</a> <a href="#">Invoice USC-00000175a</a> <a href="#">ROC A O.R.</a> <a href="#">Credit Invoice_15_Credit Invoice</a>		Mark Worked		Reassign	

The Worklist provides a line item overview as well as links that will take you to a review screen showing details on the approval actions taken or needed for each line item.

## 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.**