

Requisition Inquiry

Purpose: Use this document as a reference for viewing requisitions in ctcLink.

Audience: Requester and/or Finance Purchasing staff.

 You must have at least one of these local college managed security roles:

- ZD Requisition Inquiry


If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Review Requisition Information

Navigation: Purchasing > Requisitions > Review Requisition Information > Requisitions

OR

Alternative navigation: Purchasing > Requisitions > Add/Update Requisitions (Available if user has the ZZ Requisition Entry role).

 If the user selects a requisition in approved status, then a message displays: *"Your operator profile indicates that you do not have authority to change approved requisitions...Select "OK" to transfer to inquiry..."*. After transferring to the Requisition Inquiry screen, follow the steps above to review the requisition details.

1. The **Req Inquiry** search page displays.
2. Enter your local **Business Unit**.
3. Enter a variety of field values or combination fields values to define search criteria. Leaving fields 'blank' will pull all available values. Some examples are:
 - Enter or lookup **Requisition Name**.
 - Enter or lookup **Requisition ID**.
 - Select a **Request State**, such as Open or Approved.
 - Enter a range of dates, by entering the **Date From** and **Date To**.
 - Select a specific **Requester** or leave blank to pull all values.
4. Select **OK**.

Requisition Inquiry

Business Unit

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

To

Supplier SetID

Supplier ID

Item SetID

Item Description

254 characters remaining

Department

To Req

Origin

Supplier Lookup

Supplier Details

Supplier Name

Item ID

☐ Direct Ship

- The **Req Inquiry** page displays the search results.
- Click on the **Requisition number** (hyperlink) to view requisition details including line information such as:
 - Line comments.
 - Attachments.
 - Schedule.
 - Distribution details.
- Select the **Schedule icon** to access the Schedule Details and Distribution icon.

Requisitions

Req Inquiry 1-6 of 70

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
WA210	0000001228	dell-zltnk-hpc118faculty	Approved	Harper Howard	07/28/2023	2,235.00 USD
WA210	0000001227					
WA210	0000001226					
WA210	0000001225					
WA210	0000001224					
WA210	0000001223					

Requisition Details

Business Unit: WA210 Req ID: 0000001228

Requester: Harper Howard

Requisition Date: 07/28/2023 Merchandise Amount: 2,235.00 USD

Req Status: Approved Pre-Encumbrance Balance: 0.00 USD

Requisition Details

Line	Status	Item ID	Description	Supplier ID	Name	Req Qty	UOM	Merchandise Amt	Amount Only		
1	Approved	967-28	OptiPlex Micros and Video Conf	V000012297	Dell Marketing LP	1.0000	Each	2,235.00 USD			<input type="button" value="Schedule"/>

- The Schedule Details window displays. Review as needed.
- Select the **Distribution Details** icon.

10. The **Distribution Information** window displays.
11. Optional to view additional information by selecting the following tabs:
 - The **Details** tab provides the Status, Merchandise Amount, and ChartString.
 - The **More** tab provides the Status, Req Qty, and Merch Amt Base.
 - The **Asset Information** tab provides the Status, Tag number, if the item is to be Capitalize, and Cost Type.
 - The **Budget Information** tab provides the Status, Budget Status, Merchandise Amount, Pre-Encumbrance Balances, and Commitment Control Close Flag.
12. Select the **Return** button(s) to close opened windows and return to the main Requisition Inquiry page.

The screenshot shows the 'Requisition Details' window with the 'Schedule Details' tab selected. Below it, the 'Distribution Information' window is open, showing the 'Details' tab. A red arrow points to the 'Return' button at the bottom left of the 'Distribution Information' window.

Sched	Status	Due Date	Ship To	Ship Via Code	Freight Terms	One Time Addr	Price	Req Qty	Merchandise Amt	Revision
1	Active	08/27/2023	WHRECVG	COMMON	DES		2,235.00000	1.0000	2,235.00 USD	

Distrib	Status	Location	Req Qty	Merchandise Amt	GL Unit	Account	Oper Unit	Fund	Approp	Dept	Class	State Purpose	PC Bus Unit	Project	Acti
1	Processed	WH_MAIN	1.0000	2,235.00 USD	WA210	5030010	7210	149		31115	012	N			

13. On the **Req Inquiry** main page, select the **Status** tab.
14. If applicable, for each Requisition Id number, select the associated icons to view details:
15. **Document Status** icon.
16. **Approval Status** icon.
17. **Comments** icon.
18. **Header Comments** icon.

Requisitions

Req Inquiry

Details **Status**

Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card	15	16	17	18
WA210	0000001228	dell-zillinek-hpc118faculty	J		Y									
WA210	0000001227	Transact Renewal-Malcolm	J											
WA210	0000001226	Amazon	J		Y				Y					
WA210	0000001225	DW MG Amazon Supplies	J											
WA210	0000001224	TRICO Office Bookshelf	J		Y									
WA210	0000001223	fastspring-zillinek-action1-23	J		Y				Y					

Search

Notify

Reviewing Document Status

i From the **Req Inquiry** page, select the **Document Status** icon to view related documents such as Purchase Orders, Vouchers, and Payments. The Document Status page opens in a new separate page.

Document Status

Business Unit

WA210

Document Date

07/28/2023

Currency

USD

Requester

Harper Howard

Req ID

000001228

Status

Approved

Document Type

Requisition

Merchandise Amt

2,235.00

Budget Status

Valid

Requisitions

Inventory

Sourcing Events

Procurement Contracts

Purchase Orders(1)

Service Work Orders

Receipts

Returns

Vouchers

Payments

Show All

Associated Document

Documents

Related Info

1-1 of 1

View All

Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions	WA210	Purchase Order	000001121	Approved	08/14/2023	V000012267	210	

Return to Search

Reviewing Approval Status

i From the **Req Inquiry** page, select the **Approval Status** icon to view the Approval workflow and status. The Approval Status page opens in a new separate page. Note that the **View Printable Version** link is available on the approval status page.

Reviewing Header Comments

- i** From the Req Inquiry page, select the **Header Comments** icon to view comments and associated documents and attachments. The Header Comments window displays. Select **OK** to return to the main Req Inquiry page.

Requisitions

Header Comments

Business Unit WA210 Req ID 0000001228

☒ Retrieve Active Comments Only

*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments

Comment Status Active

see attached equote 3000157741657

☐ Send to Supplier ☐ Shown at Receipt
☐ Shown at Voucher ☐ Approval Justification

Associated Document

Attachment HPC118_faculty_equote_3000157741657.pdf ☐ Email

From -> REQ WA210-0000001228

Optional to View Approved Requisitions Via Manage Requisitions

- i** Depending upon the local college security setup, the **ZD Requisition Inquiry** role allows Requesters to review approved requisitions (otherwise, with the ZZ Requisition Entry role, they cannot view their approved requisitions).

Navigation: Employee Self-Service > Procurement > Manage Requisitions

OR

Navigation: eProcurement > Manage Requisitions

1. The **Manage Requisitions** search page displays.
2. Enter your local **Business Unit**.
3. Enter a variety of field values or combination fields values to define search criteria. Leaving fields 'blank' will pull all available values. Some examples are:
 - Enter or lookup **Requisition Name**.
 - Enter or lookup **Requisition ID**.
 - Select a **Request State**, such as Open or Pending.
 - Select a **Budget Status**, such as Not Budget Checked or Document in Processing.
 - Enter a range of dates, by entering the **Date From** and **Date To**.
 - Select a specific **Requester** or leave blank to pull all values.
4. Select **Search**.
5. The **Manage Requisitions** results displays.

Employee Self Service
Manage Requisitions

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit

WA140

Requisition Name

Requisition ID

Request State

Budget Status

Date From

08/16/2023

Date To

08/16/2023

Requester

Entered By

PO ID

Search

Clear

Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000010167	MOTOR POOL GPS TRACKING...	WA140	08/16/2023	Pending	Valid	837.00 USD	[Select Action]	Go
▶ 0000010166	PURCHASING DELL TONER	WA140	08/16/2023	Pending	Valid	554.97 USD	[Select Action]	Go
▶ 0000010165	HR-CAREERARC-23/24	WA140	08/16/2023	PO(s) Created	Valid	9,000.00 USD	[Select Action]	Go
▶ 0000010164	Q4 2023 IFA Title II	WA140	08/16/2023	Pending	Valid	614.11 USD	[Select Action]	Go

Create New Requisition

Review Change Request

Review Change Tracking

Manage Receipts

Requisition Report

6. Click on the arrow icon next to the **Requisition Number** for viewing access of the **Request Lifespan** and **Line Information**.

Requisition Inquiry

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Requisitions ?

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Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
0000010167	MOTOR POOL GPS TRACKING...	WA140	08/16/2023	Pending	Valid	837.00 USD	[Select Action]	Go

Requester Phoenix Reed

Pre-Encumbrance Balance

837.00

Entered By Phoenix Reed

USD

Priority Medium

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving

Returns

Invoice

Payment

Request Lifespan:

Line Information

Personalize | Find | [Icon] [Icon] First 1 of 1 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	SUBSCRIPTION: FOR 24 HOUR RE...	Pending Approval	69.7500	USD	12.0000	MTH		X

0000010166	PURCHASING DELL TONER	WA140	08/16/2023	Pending	Valid	554.97 USD	[Select Action]	Go
0000010165	HR-CAREERARC-23/24	WA140	08/16/2023	PO(s) Created	Valid	9,000.00 USD	[Select Action]	Go
0000010164	Q4 2023 IFA Title II	WA140	08/16/2023	Pending	Valid	614.11 USD	[Select Action]	Go

Create New Requisition

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Requisition Report

⚠ The **ZZ Requisition Inquiry** role provides view-access only. Depending upon your local college security roles, you may (or may not) have access to use the Action functionality or drill down into various links available on the **Manage Requisitions** page. If you receive an error message 'You are not authorized to access this component..', select **OK** to return to the Requisition Lifespan view page.

You are not authorized to access this component. (40,20)

You have not been granted security authorization for the component you are attempting to access. You may have access to the designated component and page, but not in the specified action mode (such as Correction or Update/Display). Contact your system administrator.

OK

7. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to [Requisition Inquiry](#). This link will open in a new tab/window.