## **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

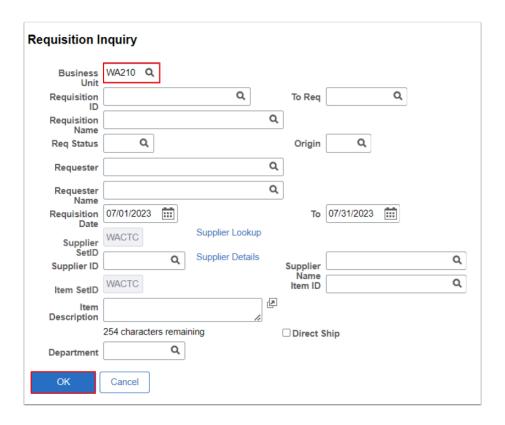
Alternative navigation: Purchasing > Requisitions > Add/Update Requisitions (Available if user has the ZZ Requisition Entry role).

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.

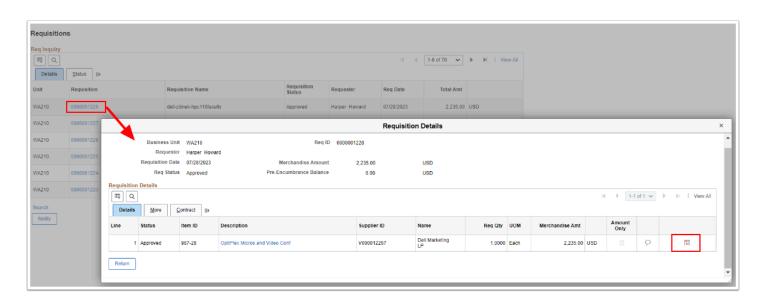
- 1. The **Req Inquiry** search page displays.
- 2. Enter your local Business Unit.
- 3. Enter a variety of field values or combination fields values to define search criteria. Leaving fields 'blank' will pull all available values. Some examples are:
  - Enter or lookup Requisition Name.
  - Enter or 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.

OR

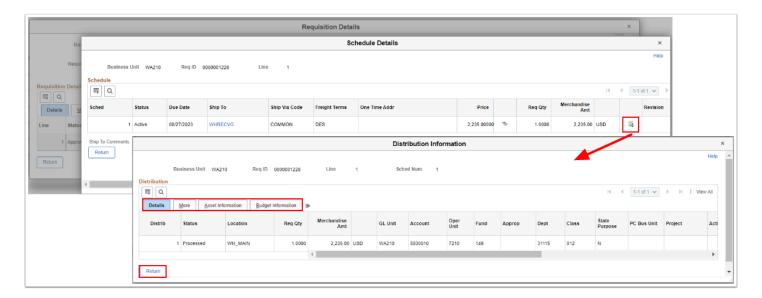


- 5. The **Req Inquiry** page displays the search results.
- 6. Click on the **Requisition number** (hyperlink) to view requisition details including line information such as:
  - · Line comments.
  - · Attachments.
  - Schedule.
  - · Distribution details.
- 7. Select the **Schedule icon** to access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

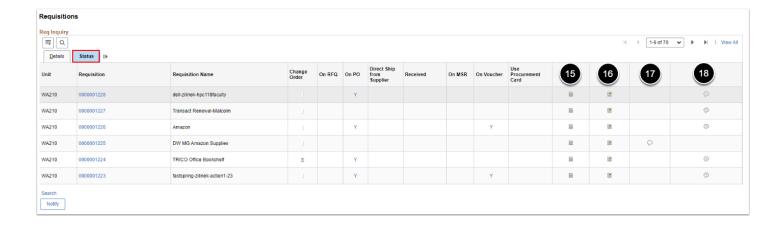


- 8. The Schedule Details window displays. Review as needed.
- 9. Select the **Distribution Detail**s icon.

- 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.

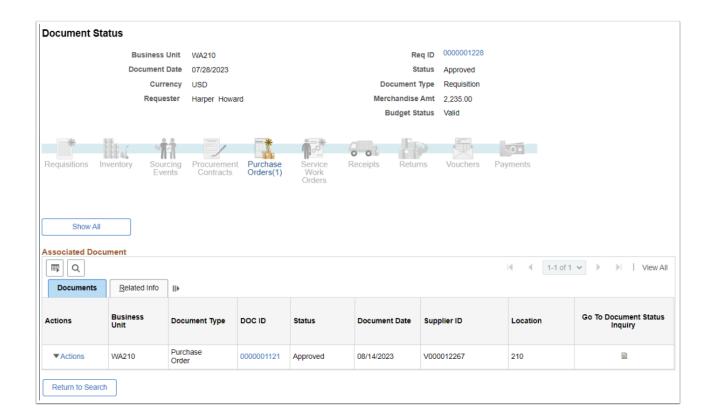


- 13. On the **Req Inquiry** main page, select the **Status** tab.
- 14. If applicable, for each Requisition Id number, select the associated icons to view details:
- 15. **Document Status** icon.
- 16. **Approval Status** icon.
- 17. **Comments** icon.
- 18. **Header Comments** icon.



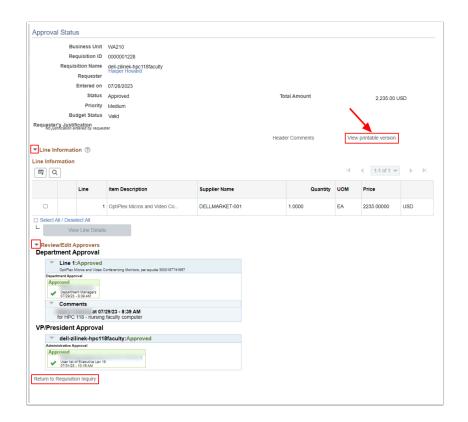
#### **Reviewing Document Status**

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.

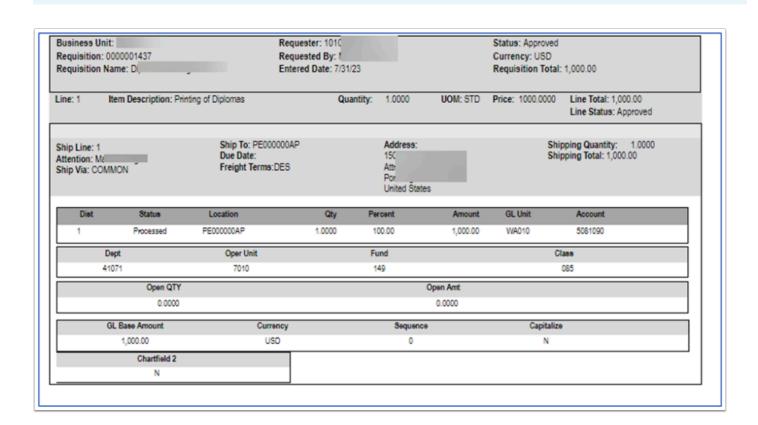


### **Reviewing Approval Status**

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.



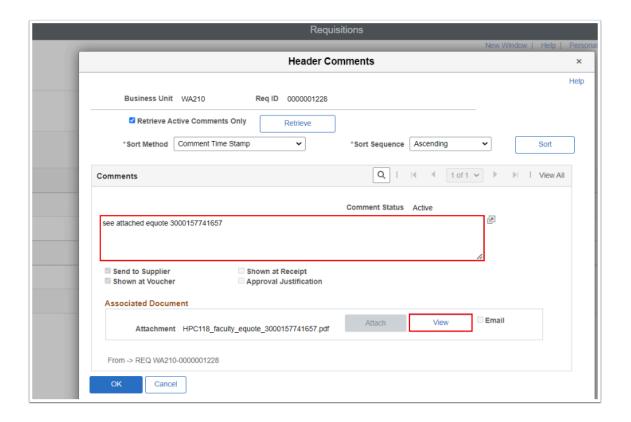
**1** Example of a printed Requisition is below.



#### **Reviewing Header Comments**

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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.



# Optional to View Approved Requisitions Via Manage Requisitions

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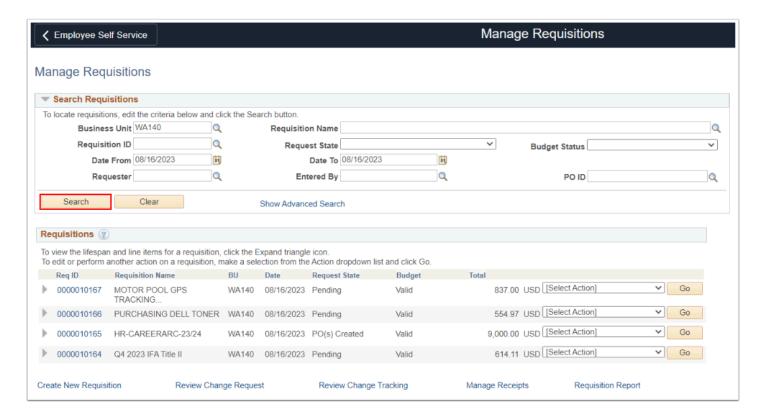
Depending upon the local college security setup, the **ZD Requisition Inquiry** role allows Requesters to review approved requisitions (otherwise, with the ZZ Requisition Entry role, they cannot view their approved requisitions).

Navigation: Employee Self-Service > Procurement > Manage Requisitions

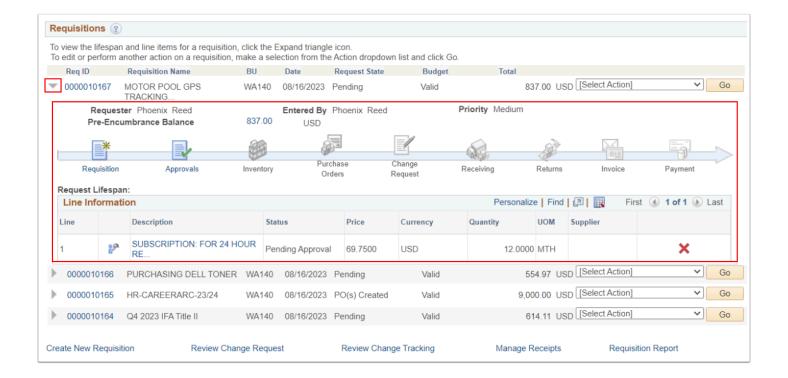
OR

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.



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



The **ZZ Requistion 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.