Submit Requisitions for Approval

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

Audience: Finance staff.

- You must have at least one of these local college managed security roles:
- ZZ Requisition Entry

You must also set these User Preference Definitions:

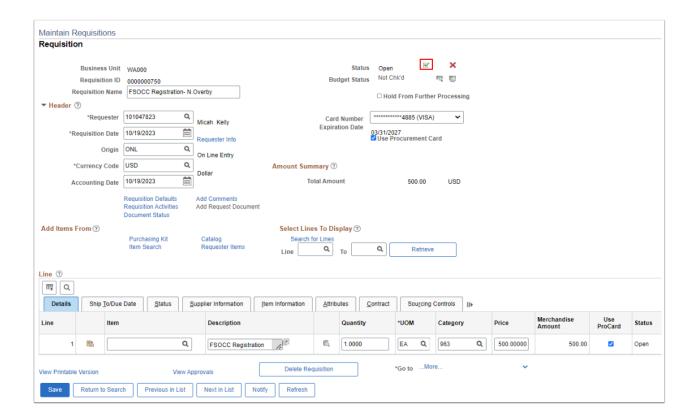
- <u>User Preferences: Requisition Entry</u>
- Requester Setup

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

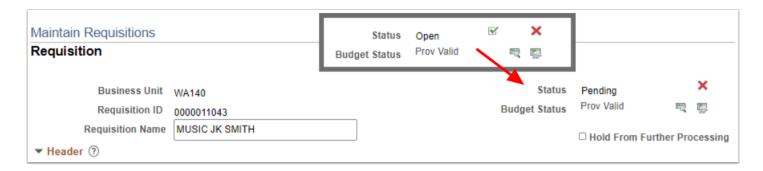
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Navigation: Purchasing > Requisition > Add/Update Requisitions

- 1. The Requisitions search page displays. Select the **Find an Existing Value** tab.
- 2. Enter the **Business Unit**.
- 3. Use the Search Criteria to find an existing **Requisition ID**.
- 4. Select the **Search** button.
- 6. The **Maintain Requisitions** page displays.
- 7. Select the **Submit For Approval** icon that looks like a box with a green checkmark.
 - Recommend selecting the **Budget Pre-Check** (paper with glasses) icon to check budget status prior submitting for Approval. If Budget passes Budget Check, the Budget Status changes from 'Not Chk'd' to 'Prov Valid'.



- 8. The **Status** will change from Open to **Pending** and the Submit for Approval button will go away.
- 9. Select the **View Approvals** link to preview approval workflow.



10. Process complete.

Video Tutorial

The video below demonstrates the process actions described in 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 link to <u>Submit Requisitions for Approval</u> . This link will open in a new tab/window.