

Review or Update Existing Requisitions

Purpose: Use this document as a reference for reviewing approved requisitions, reviewing requisition details, and modifying or updating an existing requisition in ctcLink.

Audience: Purchasing staff.

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

- ZD Purchasing Inquiry

You must also set these User Preference Definitions:

- [User Preferences: Requisition Entry](#)
- [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.

Review or Update Existing Requisitions

Overview of Approved Requisitions

1. The **Requisition Inquiry** search page displays.
2. Enter **Business Unit**.
3. Enter additional search criteria to identify or refine your requisition results, enter or lookup criteria such as:
 - Requisition ID/Name.
 - Requester ID/Name.
 - Requisition Status.
 - Supplier ID/Name or utilize the Supplier Lookup or Details links.
 - Department.
4. Select the **OK** button.

Requisition Inquiry

Business Unit

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier

Supplier SetID

Supplier ID

Item SetID

Item Description

Department

To Req

Origin

To

Supplier Details

Supplier Name

Item ID

254 characters remaining

☐ Direct Ship

5. The **Req Inquiry** results displays.
6. Review the details as needed.
7. Select the Status tab to review details.

Requisitions

Req Inquiry

1-1 of 1

[View All](#)

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
WA120	0000005150	AllVolleyball_VB_Sports	Approved	Eli Kennedy	08/16/2023	873.90	USD

[Search](#)

8. Section complete.

****QRG UPDATES IN PROCESS - APPRECIATE YOUR PATIENCE****

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.

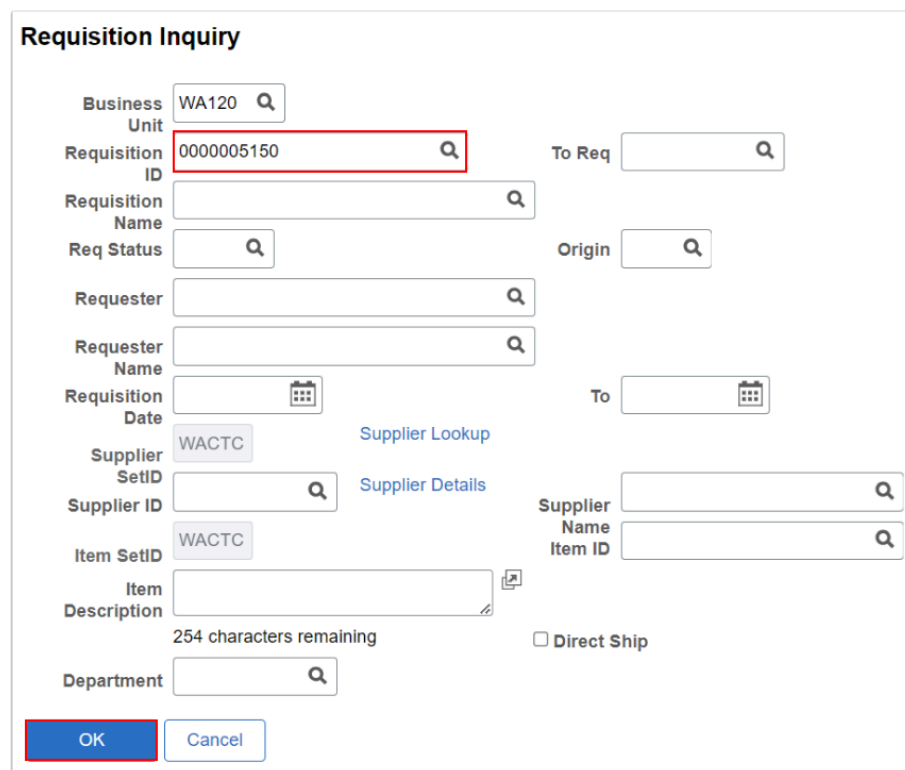
Video Tutorial Via Panopto

View the external link to [Overview of Approved Requisitions](#). This link will open in a new tab/window.

Reviewing Requisition Details

Navigation: Purchasing > Requisitions > Review Requisition Information > Requisitions

1. The **Requisition Inquiry** search page displays.
2. Enter **Business Unit**.
3. Enter additional search criteria to identify or refine your requisition results, enter or lookup criteria such as:
 - Requisition ID/Name.
 - Requester ID/Name.
 - Requisition Status.
 - Supplier ID/Name or utilize the Supplier Lookup or Details links.
 - Department.
4. Select the **OK** button.



The screenshot shows the 'Requisition Inquiry' search form. It contains various input fields for search criteria, including Business Unit (WA120), Requisition ID (0000005150), Requisition Name, Req Status, Requester, Requester Name, Requisition Date, Supplier SetID (WACTC), Supplier ID, Item SetID (WACTC), Item Description (with a 254 character limit), and Department. There are also fields for To Req, Origin, To, Supplier Name, and Item ID. Links for 'Supplier Lookup' and 'Supplier Details' are present. At the bottom, there are 'OK' and 'Cancel' buttons. The 'Requisition ID' field is highlighted with a red border.

5. The **Req Inquiry** results displays.

6. Select the **Requisition ID number** to open the Requisition Details window.

Requisitions

Req Inquiry

Details Status

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
WA120	0000005150	AllVolleyball_VB_ Sports	Approved	Ell Kennedy	08/16/2023	873.90	USD

Search

Notify

7. The **Requisition Details** window displays.

8. On the Details tab select the line **Description** link to open and review the line **Item Description** window.

9. Select the **OK** button to return to Requisition Details main page.

Requisition Details

Business Unit WA120 Req ID 0000005150

Requester Ell Kennedy

Requisition Date 08/16/2023 Merchandise Amount 873.90 USD

Req Status Approved Pre-Encumbrance Balance 873.90 USD

Requisition Details

Details More Contract

Line	Status	Item ID	Description
1	Approved		Target Challenger Volleyball
2	Approved		Vertical Challenger . https://

Return

Item Description

Item ID

Transaction Item Description

Target Challenger

Volleyball target challenger is the ultimate in target technology
Adjustable pole height and target ring
Sturdy net collects balls for easy retrieval
Includes 22 lb weight for stability and 2 wheels

Preferred Language Item Descr

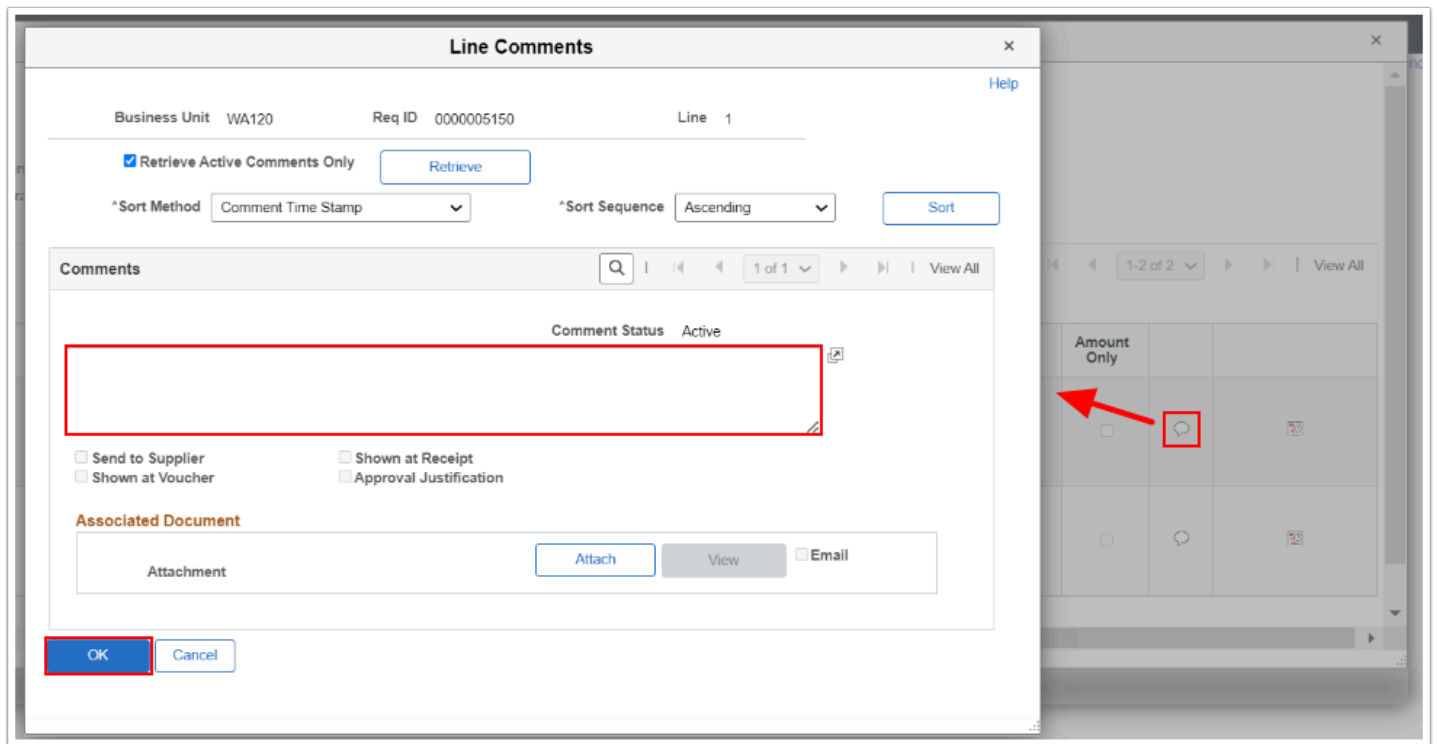
OK Cancel

Qty	UOM	Merchandise Amt
0000	Each	436.95 USD
0000	Each	436.95 USD

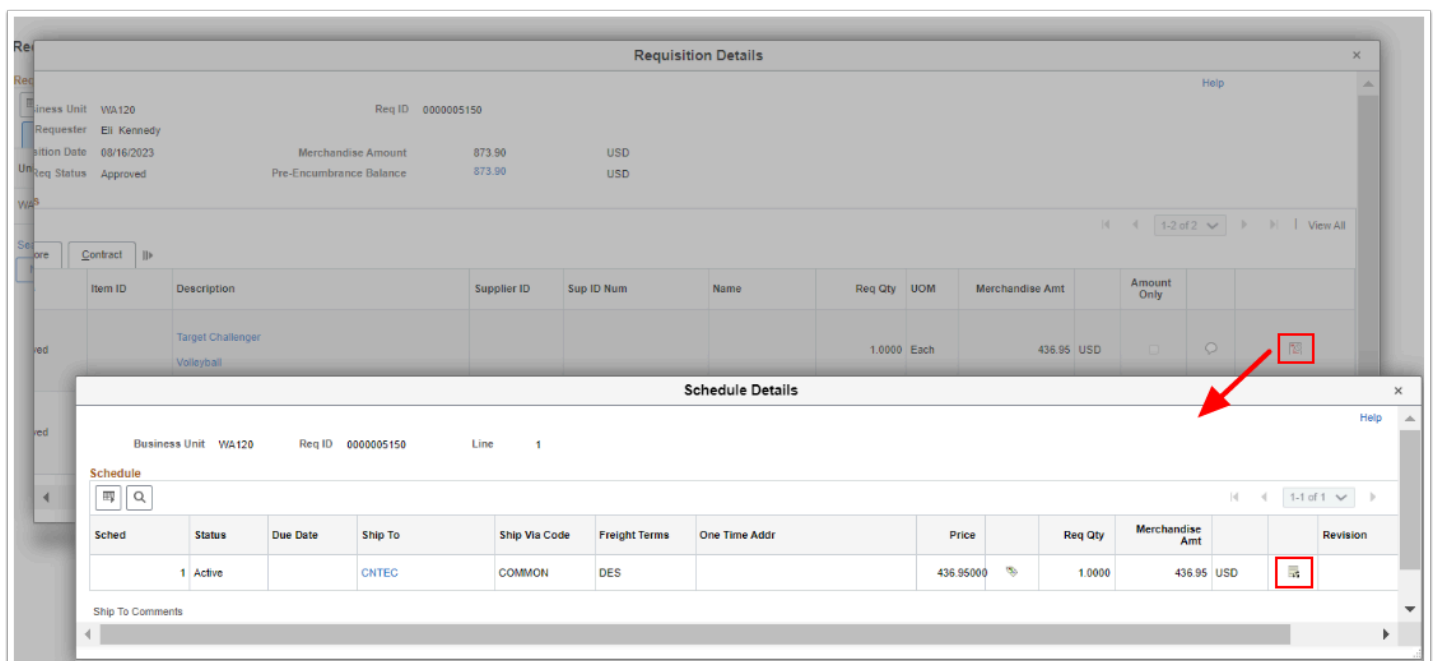
10. On the Details tab select the line **Comments icon** to open and review the **Line Comments** window.

11. Review the line comments and/or associated document(s). Optional to attach documents if the **Attach** button is not grayed out.

12. Select the **OK** button to return to Requisition Details main page.



13. On the Details tab select the line **Schedule Details icon** to open and review the line **Schedule Details** window.
14. Review the schedule details. Optional select to Ship To link to view the Requisition Ship To Address.
15. Select the **Distribution Details icon** to open and review the Accounting Distribution.



16. The **Distribution Information** window displays.
17. Select the **Details** tab to view details such as the Merchandise Amount, and Accounting Distribution details.

18. Select the **Asset Information** tab to view details such as the Profile ID, Tag Number, Empl ID, Cost Type.
19. Select the **Budget Information** tab to view details such as Budget Status and Pre-Encumbrance Balance.
20. Select the **Return** button to close out each window(s) to return back to the **Req Inquiry** main page.

17 Details

Distrib	Status	Location	Req Qty	Merchandise Amt	GL Unit	Account	Oper Unit	Fund	Approp	Dept	Class	State Purpose	PC Bus Unit	Project	Activit
1	Open	CNTEC	1.0000	436.95	USD	WA120	5030010	7120	522	42158	264	N			


18 Asset Information

Distrib	Status	Location	Req Qty	AM Unit	Profile ID	CAP #	Sequence	Tag Number	Empl ID	Capitalize	Cost Type
1	Open	CNTEC	1.0000							<input type="checkbox"/>	

19 Budget Information

Distrib	Status	Location	Req Qty	Budget Status	Budget Date	Merchandise Amount	Pre-Encumbrance Balance	Currency	Pre-Encumbered Base Balance	Base Currency	Commitmen Close I
1	Open	CNTEC	1.0000	Valid	08/16/2023	436.95	436.95	USD	436.95	USD	<input type="checkbox"/>

Return

 Select the **Search** link to bring up the Requisition Inquiry search page to search again.

22. Section complete.

Modify or Update a Requisition

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

- ZZ Requisition Entry

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

! Only Approved lines are available to be sourced to a PO. Lines can be 'denied' but not be 'deleted'. Once a line is denied, they will not follow through to the PO.

Navigation: Purchasing > Requisitions > Add/Update Requisitions

1. The **Requisitions** search page displays. Select **Find an Existing Value**. Enter search criteria to find the requisition:
 - a. If it didn't default, enter or select the business unit in the **Business Unit** field.
 - b. Enter additional search criteria or enter the Requisition number in the **Requisition ID** field.

- c. Select **Search**.
2. The **Requisitions** page displays.
3. Select the **Create Header Change** triangle.

i FYI - You can access the **Change Order** button in the following ways:

- Select the **Create Header Change** triangle.
- Select the **Details** button next to the item number.
- Select the line **Status** tab.

! **Note:** If this **triangle** is not visible, it may be because your status is not approved.

Maintain Requisitions

Requisition

Business Unit: WA140
 Requisition ID: 000004504
 Requisition Name: TS / Surge protectors

Status: Approved
 Budget Status: Valid
☐ Hold From Further Processing

Header

*Requester: 101012404 Sunny Thompson
 *Requisition Date: 09/28/2021
 Origin: ONL On Line Entry
 Currency Code: USD Dollar
 Accounting Date: 09/28/2021

Amount Summary

Total Amount: 65.94 USD
 Pre-Encumbrance Balance: 0.00 USD

Add Items From

Purchasing Kit Item Search
 Catalog Requester Items

Select Lines To Display

Search for Lines
 Line: To: Retrieve

Line

Line	Item	Description	Status
1		Power Strip Surge Protector with USB, 8ft Extension Cord Flat Plug USB C Power Strip with 10 AC Outlets 4 USB Ports, 1875w/15A, Wall Mountable Surge Protection Outlet Strip for Home Office	Approved

View Printable Version View Approvals *Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh

4. The **Requisition** page updates and displays "Track Batch" next to the Requisition ID number.
 Use the **Details** section to change/update the requisition line item(s):
 - a. As appropriate, update the item quantity in the **Quantity** field.
 - b. As appropriate, update the item price in the **Price** field.
5. Select **Save**.

Maintain Requisitions
Requisition

Business Unit: WA140
Requisition ID: 0000004504
Requisition Name: TS / Surge protectors

Status: Approved
Budget Status: Valid

Header

*Requester: 101012404 Sunny Thompson
*Requisition Date: 09/28/2021
Origin: ONL
Currency Code: USD
Accounting Date: 09/28/2021

Amount Summary

Total Amount: 65.94 USD
Pre-Encumbrance: 0.00 USD
Balance: 0.00 USD

Add Items From

Purchasing Kit Item Search
Catalog Requester Items

Select Lines To Display

Search for Lines
Line: To: Retrieve

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Power Strip Surge Protector with USB, 8ft Extension Cord Flat Plug USB C Power Strip with 10 AC Outlets 4 USB Ports, 1875w/15A, Wall Mountable Surge Protection Outlet Strip for Home Office	4.0	EA	UNG	21.98000	65.94	Approved

View Printable Version View Approvals *Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh

6. The message displays that changes have occurred and the requisition schedule has been set to "Out of Balance".
7. Select **OK**.

Maintain Requisitions
Schedule

Business Unit: WA140
Requisition ID: 0000004504
Requisition Date: 09/28/2021
Status: Approved

[Return to Main Page](#)

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amt	Status
1		Power Strip Surge Protector wi	4.0000	Each			87.92 USD	

Schedule

Sched	*Ship To	Quantity	Price	Merchandise	Due Date	Attention To	Status
1	PO00000001						

The quantity on line 1, schedule 1 (4) does not match the sum of distributed quantities (3). (10100,11)

The sum of distributed quantities for a schedule must equal the quantity of that schedule. Either adjust the schedule quantity or the distribution rows to make the quantities match. This schedule will be set to "Out of Balance". Out of balance requisition schedule lines cannot be saved.

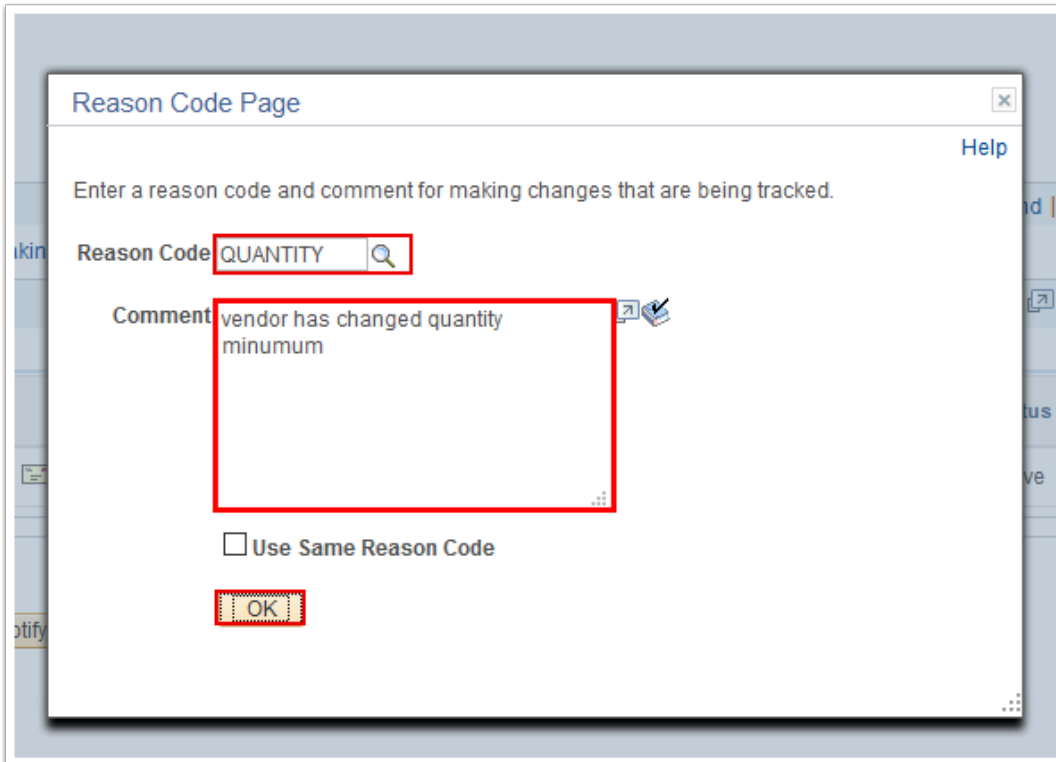
OK

Add Ship To Comments

Save Return to Search Previous in List Next

5. The **Reason Code Page** displays. Use it to enter your reason for modifying the requisition. Completion is mandatory.
 - a. If it didn't default, enter or select the reason in the **Reason Code** field. Doing so will populate the **Comment** field.
 - b. Select **OK**.

💡 Use the comment section to add individual details or justification of the change order.







The image shows a 'Reason Code Page' dialog box. It has a title bar with a close button. Inside, there's a 'Help' link in the top right. The main text says 'Enter a reason code and comment for making changes that are being tracked.' Below this, there's a 'Reason Code' field containing the text 'QUANTITY' with a search icon to its right. Underneath is a 'Comment' text area containing the text 'vendor has changed quantity mininum' (note the typo 'mininum'). To the right of the comment area are two small icons: a speech bubble and a checkmark. Below the comment area is a checkbox labeled 'Use Same Reason Code'. At the bottom left is an 'OK' button. The dialog box is set against a background that shows parts of other application windows.

6. The updated **Requisition** page displays. Note that the **Track Batch** field now reflects the number of times the Requisition has changed.


Maintain Requisitions

Requisition


Business Unit WA170 Status Approved   


Requisition ID 0000003353  Track Batch 2

Requisition Name BPPG Test Req ☐ Hold From Further Processing

Header 

*Requester 101000000 101000000

*Requisition Date 08/07/2018  [Requester Info](#)

Origin ONL  On Line Entry


Currency Code USD Dollar

[Requisition Defaults](#) [Edit Comments](#)


[Requisition Activities](#) [Add Request Document](#)

[Document Status](#)

[Current Change Reason](#)


Amount Summary 

Total Amount 4,000.00 USD



Add Items From 


[Purchasing Kit](#) [Catalog](#)





[Item Search](#) [Requester Items](#)








Select Lines To Display 


[Search for Lines](#)


Line  To  [Retrieve](#)

Line 

[Personalize](#) | [Find](#) | [View All](#) |   First  1 of 1  Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls					
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1		Speaking Services	 8.0000	EA	005 	500.00000	4,000.00	Approved				

[View Printable Version](#) [View Approvals](#) [Delete Requisition](#) *Go to ...More... 

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) 

7. Section complete.