9.2 Review & Update Existing Requisition

Purpose: Use this document as a reference for reviewing and modifying an existing requisition in ctcLink.

Audience: Purchasing staff

Review a Requisition

Navigation: NavBar > Navigator > Purchasing > Requisitions > Review Requisition Information > Requisitions

- 1. The **Requisition Inquiry** search page displays.
- 2. Enter **Business Unit**.
- 3. Enter additional search criteria to identify your requisition.
- 4. Select OK.

Manager Se	If Service				Requisitions
Requisition I	nquiry				
Business	WA170 Q				
Requisition ID	000003353	Q	To Req	٩]
Requisition Name			Q		
Req Status	Q		Origin	Q	
Requester			Q		
Requester Name			Q		
Requisition Date]	То		
Supplier SetID	WACTC	Supplier Lookup			
Supplier ID	c	Supplier Details	Supplier Name		Q
Item SetID	WACTC		Item ID		Q
Item Description		.:	Direct	Ship	
	254 characters rer	maining			
Department	C	2			
	Show Keyword Se	earch			
OK	Cancel				

- 5. The **Requisitions Details** tab displays.
- 6. Select the **Status** tab.

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Requisitions	5										
Req Inquiry											
lling Q						1-1 of 1 \sim	Þ				
Details	Details Status II>										
Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt					
WA170	0000003353	American 3B Newport Model	Approved	Lonnie Gibson	03/09/2018	6,350.00	USD				
Search											
Notify											

The **Status** tab displays. Select the **Requisition** ID.

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	Requisitions	5										New	Window	Help F	ļ
1	Req Inquiry														
	m, q										14	1-1	of 1 🖂	\vdash	
	Details	Status II>													
	Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card				
	WA170	0000003353	American 3B Newport Model			Y		Y		Y			B	Ģ	-
	Search														
	Notify														
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- 9. The **Requisition Details** window displays.
- 10. Select the **More** tab.

	Requisition Details											
Business Unit WA170 Requester Lonnie Gibson		Req ID	Req ID 0000003353									
	Requisition Date	03/09/2018	Merchandise Amount	6,350.00	USD							
	Req Status	Approved	Pre-Encumbrance Balance	0.00	USD							
Requisitio	Requisition Details											
ा ⊂् Details	More	<u>C</u> ontract II▶										
Line	Status	Item ID	Description	Original Substituted Item	Description	Supplier ID	Supplier					
1	Approved		Dual Sex Muscle Figure 45 part			V000014165	American 3B Scientific					
Return]											

- 11. The **More** tab displays.
- 12. Select the **Contract** tab.

	Requisition Details										
	Business Unit Requester	WA170 Lonnie Gibson	Req ID	000003353							
	Requisition Date Req Status	03/09/2018 Approved	Merchandise Amount Pre-Encumbrance Balance	6,350.00 0.00	USD						
Requisiti III; O	on Details										
Detai	ls More	<u>C</u> ontract II⊧			_						
Line	Status	Item ID	Description		Buyer	Supplier Item ID	GTIN	Supplie			
	1 Approved		Dual Sex Muscle Figure 45 part		101005241						
Return	Return										

- 13. The **Contract** tab displays.
- 14. Select Return.

	Requisition Details										
	Business Unit WA170 Requester Lonnie Gibson		Req ID	00000335	3						
	Requisition Date	03/09/2018	Merchandise Amount	Merchandise Amount 6,350.00		USD					
	Req Status	Approved	Pre-Encumbrance Balance	Pre-Encumbrance Balance 0		USD					
Requisitio	n Details										
≣; Q											
Details	<u>M</u> ore	Contract III+									
Line	Status	Item ID	Description		SetID	Contract ID	Contract Version	Contract L Nbr			
1	Approved		Dual Sex Muscle Figure 45 part								
Return											

15. Section complete.

Update a Requisition

Navigation: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

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

Requisitions									
Use the following search to look for an existing Requisition.									
Find an Existing Value Keyword Search Add a New Value									
Search Criteria									
Business Unit = 🗸 🛛 🔍 🔍									
Requisition ID begins with 🧹 0000003353									
Requisition Name begins with 🗸									
Requisition Status = V									
Origin begins with 🗸									
Requester begins with 🗸									
Requester Name begins with 🧹									
Hold From Further Processing									
Search Clear Basic Search 🖾 Save Search Criteria									

- 2. The **Requisitions** page displays. You can access the **Change Order** button in the following ways:
 - 1. Select the **Create Header Change** triangle.
 - 2. Select the **Details** button next to the item number.
 - 3. 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 WA170				Status Appr	oved	∆ ×					
Requisition ID 0000003353	Track Batch 1										
Requisition Name BPFG Test Re	q			Пно	old From Further	Processing					
▼ Header (?)											
*Requester 10100000	10100000										
*Requisition Date 08/07/2018	Requester Info										
Origin ONL	On Line Entry										
Currency Code USD	Dollar										
Requisition Def	aults Edit Comments										
Requisition Acti	vities Add Request Document	Amount Summ	ary 👔								
Document Statu	IS	Tete									
Current Change	Reason	Iota	I Amount		2,500.00	USD					
Add Items From (?)		Select Lines	To Displ	ay 🕐							
Purchasing Kit	t Catalog	Search for L	ines								
Item Search	Requester Items	Line	С То	Q	Retrieve						
Line (9)					Deree	polize Find Vic			irat	() 1 of	L 🕀 Loot
Dotailo Ohio Ta/Duo Data Otatua	Our alian lafa marking the set lafa		0	o at O auraia	Perso	manze Find vie	w All 🗠 🖽	F	iist	· 101	e Stast
Details Ship To/Due Date Status	Supplier mormation item mor	mation <u>Auriputes</u>		raci Sou <u>i</u> cir							
Line Item	Description	Quantity	*UOM	Category	Price	Amount	Status				
1	Speaking Services	5.0000	EA	005	500.00000	2,500.00	Approved	P	m	2	+
View Printable Version View	Approvals Delete	Requisition	*	Go toMore		~					
🖷 Save 🛛 💽 Return to Search 🛛 🖃 Notify	/ 🤗 Refresh										I + <i>F</i>

3. A confirmation message will display. Select **Yes** to acknowledge the message.

Message
This action will create a change order. Continue? (10200,27)
The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.
Yes No

- 4. The **Requisition** page displays. Use the **Details** section to change/update the requisition line item(s):
 - 1. As appropriate, update the item quantity in the **Quantity** field.
 - 2. As appropriate, update the item price in the **Price** field.
 - 3. Select Save.

Maintain Requisitions	
Requisition	
Business Unit WA170 Requisition ID 0000003353 Track	Status Approved X
Requisition Name BPFG Test Req	Hold From Further Processing
*Requester 101000000 (Line Entry *Requisition Date 08/07/2018 Frequester Info Origin ONL On Line Entry Currency Code USD Dollar Requisition Defaults Edit Comments Requisition Activities Add Request Do Document Status Current Change Reason	ment Amount Summary @ Total Amount 4,000.00 USD
Add Items From (?)	Select Lines To Display 👔
Purchasing Kit Catalog Item Search Requester Iter	Search for Lines Line Q To Q Retrieve
Line 👔	Personalize Find View All 💷 🧱 🛛 First 🕚 1 of 1 🕟 Last
Details Ship To/Due Date Status Supplier Information	m Information Attributes Contract Sourcing Controls
Line Item Description	Quantity 'UOM Category Price Merchandise Amount Status
1 📑 Speaking Services	8.0000 EA 005 Q 500.00000 4,000.00 Approved 🖓 🖽 🛃
View Printable Version View Approvals	Delete Requisition *Go toMore
🖫 Save 🔯 Return to Search 🔄 Notify 📿 Refresh	

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

	Reason Code Page	×
		Help
	Enter a reason code and comment for making changes that are being tracked.	l bi
ıkin		
	Comment vendor has changed quantity minumum	5
14 0		tus
=		ve
	Use Same Reason Code	
otify		

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

Maintain Requis	sitions										
Requisition											
B R Requ	Requisition ID 0000003353 uisition Name BPFG Test Re	Track Batch 2]	Sta	tus Approved	A State	×essina				
Theader	2										
*Requ Cui	*Requester 101000000 uisition Date 08/07/2018 Origin ONL rrency Code USD Requisition Defr	10100000 Requester Info On Line Entry Dollar auto Comments	A								
	Requisition Activ Document Statu Current Change	/files Add Request Document s Reason	Amount Summar	y 🕐	4,00	10.00 U	ISD				
Add Items Fro	om 🕐		Select Lines To	Display (2)						
	Purchasing Kit Item Search	Catalog Requester Items	Search for Line	To	Q Retriev	re					
Line 🕐						Pers	onalize Find Vi	ew All 💷 🔣	First	④ 1 of	f 1 🕑 Last
Details Ship	p <u>T</u> o/Due Date <u>S</u> tatus	Supplier Information Item Inform	nation <u>A</u> ttributes	<u>C</u> ontract	Sourcing Contr	ols 💷					
Line Ite	em	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1 📑		Speaking Services	8.0000	EA	005 Q	500.00000	4,000.00	Approved	9 🖽	1	+
View Printable Ver	rsion View	Approvals Delete F	Requisition	*Go to	More		~				
		~									

7. Process complete.