

Dashboard: Create, Track, & Manage Requisitions

Purchase Requisitions

Create Requisition

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 0				
Pending Requisitions 0				
Completed Requisitions 17				
R1073834	04/28/2017	\$45,450.00	OmniUpdate, Inc.	Converted to PO
R1071658	08/11/2016	\$8,700.00	Best Bid	Converted to PO

[View More](#)

- Create new Requisitions
- Search for and copy completed requisitions
- Continue work on requisitions placed in draft
- View the status of pending requisitions

Create Requisition

Requestor: Who is Requesting the Requisition

1 Requestor Information

2 Vendor Information

3 Add Item & Accounting

Requestor *

Transaction Date *

Delivery Date *

Choose Accounting Type

Document Level Accounting

Commodity Level Accounting

Requisition Comments

Document Text/Public Comments

Document Text/Private Comments

Don't use

Chart *

1 Washenaw Community College x

Organization *

Choose Organization x

Ship To Location *

Choose Ship To Location x

Attention To *

Enter Name

Requisition Summary Save as draft

Add details and click Next to build this summary view.

Back
Next

- **Requestor:** Enter Name of Person Requesting\Name of Person Entering Req
- **Transaction Date:** Current Date (Leave Default). Only change towards end of year when entering reqs against, next year's budget.
- **Delivery Date:** 30 Days
- **Org:** Enter Org #
- **Ship to Location:** Where should the receiving department deliver the purchase?
- **Accounting Type:** Default: Document Level (Purchased charged to one FOAPAL)
- **Attention To:** Name of Requestor or contact person
- **Document Text (Public Comments):** Used for pertinent information regarding the overall purchase or Requisition. Notes to Purchasing, Update Vendors Contact Info, New Vendor Information, Email or Fax PO, Quote/Invoice attached, Discounts, etc. If there is a contract or EULA (end user license agreement) associated with req.
- **Document Text/Private Comments (Don't Use)**
- **Click Next**

Vendor: Who Are You Ordering From?

Attachments Delete Requisition

- 1 Requestor Information
- 2 Vendor Information**
- 3 Add Item & Accounting

Choose vendor for me

Vendor

Choose Vendor

Discount: Choose Discount

Currency: Choose Currency

Requisition Summary Save as draft

Requisition Number R

Existing Vendor

- **Vendor** – Business Name or Code. To narrow search, enter as much of the vendor name as possible or enter Vendor code if known.
- **People Search:** Enter @ ID's, ex: @00012345 or Name of person

New Vendor

- If purchasing from a New Vendor: Type **NewVendor** (all one word) in the Vendor Field, and go back to first screen and add Vendor Contact Information to the Document Text/Public Comment Box. Be sure to complete/submit required New Vendor documentation to purchasing: Contact purchasing pur@wccnet.edu for details.

Best Bid

- If it's a Bid: Type in BestBid (all one word) in the Vendor Code field and enter supporting information for Bid in Document Text/Public Comment Box (located on first screen of req.

Back Next

View as PDF Submit Requisition

R1076327

Add Item (Commodity): What are You Purchasing?

Attachments Delete Requisition

- 1 Requestor Information
- 2 Vendor Information
- 3 Add Item & Accounting

Add Item(s)

Requisition Summary Save as draft

Requisition Number R1076327

CERTIPORT (CERT)
 1276 S 820 E Ste 200
 American Fork UT 84003-3574

Add Item(s)

This field should only be used to enter descriptions of items being ordered.

- **Include Item #'s and or part #'s first**, and then the complete description of item(s) being ordered. **Description should mimic quote/invoice.** (field is only 40 characters long, including spaces). When you get towards middle of the field, press tab key to continue typing description in Item Text (Public Comments) field.
- **Press Tab when done entering item description**

Back

View as PDF

Submit Requisition

Add Item (Commodity) Continued: What are You Purchasing?

R1075831

Attachments Delete Requisition

- 1 Requestor Information
- 2 Vendor Information
- 3 Add Item & Accounting**

Commodity Description

Description carried over from previous screen

Unit Of Measure*

Quantity*

Unit Price*

(Quantity) X (Unit Price)

USD 3,500.00

Discount Amount

Commodity Item Total

USD 3,500.00

Commodity Comments

Item Text/Public Comments

Continue Item description

Item Text/Private Comments

Don't use

Back

Save

Requisition Summary

Save as draft

Requisition Number

R1075831

View as PDF

Submit Requisition

Add Item(s)

- U/M (unit of measure) – Click drop down to review choices. Otherwise choose N/A press **(TAB)**
- Quantity: **(TAB)**
- Unit Price: **(TAB)**

Item Text/Public Comments – Note: The information entered prints on the PO

- Used to continue description of item(s), when description exceeds 50 characters. **Note:** The text does not wrap in the field, **press enter to start a new line when you get to middle of the field.**

Click Save

Add additional Item(s) / Commodities & FOAPAL (Accounting)

Attachments Delete Requisition

R1076327

- 1 Requestor Information
- 2 Vendor Information
- 3 Add Item & Accounting**

Add Item(s)

Commodities (1)

(GMetrix) MOS Practice Test Site License	100.00
Quantity 1.00 @ 100.0000	Discount 0.00

Requisition Summary Save as draft

Requisition Number R1076327

CERTIPORT (CERT)
1276 S 820 E Ste 200
American Fork UT 84003-3574

Commodities (1)

(GMetrix) MOS Practice Test Site License	100.00
Quantity 1.00 @ 100.0000	Discount 0.00

Grand Total - All Commodities 100.00

Grand Total - All Accounting 0.00

Back

Add Accounting

View as PDF

Submit Requisition

To add additional items, follow previous steps.

If there are no additional items, click **Add Accounting** to add FOAPAL

Add FOAPAL (Accounting)

Attachments Delete Requisition

R1076327

- 1 Requestor Information
- 2 Vendor Information
- 3 Add Item & Accounting

Requisition Number (R1076327) Currency USD

Chart* Index

1 Washenaw Communi... * Choose **Don't use**

Fund*

Choose Fund

Organization*

23312 IS/User Support

Account*

Choose Account

Program* Activity

Choose Program 5 Choose Activity 6

Location Project

Choose **Don't use** Authorized by Budget Dept

Distribution Amount* Distribution Percent*

100.00 100.00000000

Discount Amount

0.00

Distribution Total 100.00

Remaining 0.00

Requisition Summary Save as draft

Requisition Number	R1076327
CERTIPORT (CERT) 1276 S 820 E Ste 200 American Fork UT 84003-3574	
Commodities (1)	
(GMetrix) MOS Practice Test Site License	100.00
Quantity 1.00 @ 100.0000	Discount 0.00
Accounting Total	0.00
Commodity Total	100.00
Balanced	0%
Grand Total - All Commodities	100.00
Grand Total - All Accounting	0.00

For detail regarding FOAPAL, please reference the following spreadsheets on the following network drive:
O:\data\F-O-A-P-A-L Descriptions

Back Save View as PDF Submit Requisition

FOAPAL – numbering system used for reporting, tracking, classifying and reporting financial transactions. WCC only has 1 chart of accounts, which is defined by entering the number 1

1. Chart – Automatically Added, Index not used
2. Fund – Source of revenue (general fund, grants, Perkins, scholarships, etc.)
3. Org – Automatically Added (dept, the money has been allocated to).
4. Account – A 4 digit code that identifies what was purchased (books, supplies, etc)
5. Program –Categorizes the purpose of transaction (research, instructional, IT, etc)
6. Activity - Used for tracking department charges. (Who benefits from the purchase)
7. Location – WCC does not currently use

R1076327

Requestor Information | Vendor Information | **Add Item & Accounting**

Add Item(s)

Choose Item

Commodities (1)

(GMetrix) MOS Practice Test Site License	100.00
Quantity 1.00 @ 100.0000	Discount 0.00

Funding 100%

Attachments | Delete Requisition

Requisition Summary Save as draft

Requisition Number R1076327

CERTIPORT (CERT)
1276 S 820 E Ste 200
American Fork UT 84003-3574

Commodities (1)

(GMetrix) MOS Practice Test Site License	100.00
Quantity 1.00 @ 100.0000	Discount 0.00

Funding 100%

Grand Total - All Commodities 100.00

Grand Total - All Accounting 100.00

Back | View as PDF | Submit Requisition

This screen summarizes the purchase

You can also correct the FOAPAL

- To correct the FOAPAL, Click on Funding over in the Summary area, and then click on the FOAPAL String.

You can also attach quotes and or invoices to requisition. *(helpful if Req# was written on quote/invoice).*

Note: When attaching quotes/invoices. Add a note to the Document Text (Public Comments) stating **Banner Attachment Document** Also, email quote/invoice or info to Purchasing – pur@wccnet.edu be sure to also include Req# in email . **Note:** Attachment must be PDF

Next Screen Details how to attach quotes/invoices

Washtenaw Community College

Purchase Requisition • Attachments

Attach Documents (Quotes or Invoices)

Requisition Number R1075831

Refresh Attachments Attach File

Document Name	Document Type	Owner Name	Date of Attachment
There are no records for this requisition. Please click on Attach File for attaching documents			

Requisition Summary

Requisition Number R1075831

Commodities (1)

Funding 100%

- Click **Attach File** and Browse to select Document,

Washtenaw Community College

Purchase Requisition • Attachments

Attach Documents

File Path:* Browse...

Document Type:* REQUISITION, Requisition

Cancel Upload

Requisition Number R1076327

Attach File

Requisition Summary

Requisition Number R1076327

CERTIPORT (CERT)
1276 S 820 E Ste 200
American Fork UT 84003-3574

Commodities (1)

- Click Document type and select **Requisition** from the list of choices. Click upload

Note: Can only attach PDF documents

Requisition Number

Refresh Attachments Attach File

Document Name	Document Type	Owner Name	Date of Attachment
CERTIPORT PDF ATTACHMENT.PDF	REQUISITION	NICHOLE A MARBURY	11/03/2017

Confirmation that document was attached

Options

1. **Save as a Draft** – Select when you are not ready to submit requisition and or need to make changes.
2. **View as PDF** – View a PDF of Purchase
3. **Submit Requisition** – When ready to submit for approval. This will move the requisition to the next approver and into the pending area on your Dashboard.

Note: Email approver to notify them that req was entered.

File uploaded successfully

Requisition Summary

Save as draft

Requisition Number R

Commodities (1)

Funding 100%

Grand Total - All Commodities

Grand Total - All Accounting 3,500.00

View as PDF Submit Requisition

- After submitting Req, you are returned to your Dashboard.
- Your Req, will move to the Pending Requisition.
- Requisitions are Internal requests to purchase items, once process is completed, it turns into a Purchase Order (PO) , which is a legal binding contract. **IMPORTANT** Only the Purchasing department can forward PO information to Vendor

Purchase Requisitions

Requisition	Date	Amount	Vendor	Status
Draft Requisitions 3				
R1075812	11/02/2017	\$115.16		Draft
R1075813	11/02/2017	\$50.00	CERTIPORT	Disapproved
View More				
Pending Requisitions 1				
R1075831	11/03/2017	\$3,500.00	CERTIPORT	Pending
Completed Requisitions 17				
R1073834	04/28/2017	\$45,450.00	OmniUpdate, Inc.	Converted to PO
R1071658	08/11/2016	\$8,700.00	Best Bid	Converted to PO
View More				

Under Completed Requisitions Section

Please note the status of your Requisition

- **Completed** - Requisition Approved
- **Assigned to Buyer** – Assigned to Purchasing Department
- **Converted to PO** – Requisition Converted to Legal Binding Document – **IMPORTANT** only purchasing can relay PO information to Vendor.