

A Requisition is formal request from a department for a Purchase Order for goods or services. Requisitions are used for those purchases that cannot be made using other means such as a Purchasing Card (P-Card). After you submit a Requisition for approval, you can view its status, edit, cancel, or copy it to create a new Requisition. In addition, if you Requisition was approved, you can locate the Purchase Order number and information.

Searching for Requisitions



1. Click the **Buying and Paying** tile and then click the **Requisition Management** tab.

ARC < Welcome to ARC			Buying and Paying		
Create Requisitions	Create Requisitions				
Requisition Management		Staples Office Supplies	McKesson Medical/Surgical	Special Request	Fixed Cost (Multi-Year)
Change Order Processing			MCKECCON		
Purchase Order Review		i i staples.	MERESSON	H	H
Receipt Processing					
Supplier Review					
Voucher Entry		Update Requester Defaults	Requisitions		
T Vendor Inquiry					
P-Card Reconcile Transactions			.		
Approvals ~					
📕 Voucher Maintenance 🗸 🗸					

Or, click NavBar > Main Menu >eProcurement > Manage Requisitions or use the Navigation Search. The Manage Requisitions > Search Requisitions page appears. Information entered here applies to all lines on your Requisition.

Manage Requisitions						
Search Requisitions						
To locate requisitions, edit the criteria below	w and click the	e Search button.				
Business Unit COLUM	Q	Requisition Name				Q
Requisition ID	Q	Request State	All but Complete		Budget Status	
Date From 05/22/2019	Ē	Date To	05/29/2019	Ē.		
Requester ez2248	Q	Entered By		Q	PO ID	Q
Search Clear		Show Advanced Searc	h			

- 2. Enter a **Requisition ID** or enter other search criteria.
- 3. Click **Search**. The Search Results appear.

Search Requ	isitions						
o locate requisitio	ns, edit the criteria below	and click the Sea	arch button.				
Busines	s Unit COLUM	Q	Requisition Name				Q
Requisi	tion ID 0000138956	Q	Request State	All but Complete 🔹	В	udget Status	
Date	From	31	Date To	31			
Req	uester	0	Entered By	0			0
			,			POID	4
Search	Clear		Show Advanced Search	h			
Search Requisitions (2)	Clear	uisition, click the E	Show Advanced Searc	h			
Search Requisitions (2 to view the lifespar to edit or perform a Reg ID	Clear Clear and line items for a requirementer action on action	uisition, click the E sition, make a sele	Show Advanced Searc	h ropdown list and click Go.	Total		



Viewing Requisition Status

1. Expand the triangle icon to Requisition Lifespan that shows the status of Requisition.

Requisitio	ns (2)									
To view the li To edit or pe	fespa rform	in and line items for a requisition another action on a requisition,	n, click the E make a sel	Expand triangle ection from the	icon. Action dropdo	wn list and click G	io.				
Req ID		Requisition Name	BU	Date	Request State	Budget	Tota	il .			
0000138	959	0000138959	COLUM	05/06/2019	Pending	Valid		10,500.00 US	SD [Select Action]	•	Go
R	eque re-Er	ster Eric V. Zaretsky neumbrance Balance	Ent 10500.00	ered By Eric ' USD	V. Zaretsky	Pr	riority Medium				
	*				;		6	<u>a</u>			->
Requ	uisition	Approvals	Inventory	Purc Orc	hase ers	Change Request	Receiving	Returns	Invoice	Payment	~
Request L	ifesp	an:									
Line Infe	orma	tion					Per	sonalize Find	[친] 🔜 First 🕚	1 of 1 🕑 L	_ast
Line		Description	Status		Price	Currency	Quantity	UOM	Supplier		
1	P	Fetal Bovine Serum - etc., e	Pendi	ng Approval	350.0000	USD	30	0.0000 EA	ATLANTA BIOLOGICAL	• 🗙	

Notice the **Status** column for each line of the Requisition.

2. You can click the **Approvals** link on the lifespan line to view details on Approval Status. The Approval Status page appears.

Business Unit	COLUM		
Requisition ID	0000138959		
Requisition Name	0000138959		
Requester	Eric V. Zaretsky		
Entered on	05/06/2019		
Status	Pending	Total Amount	10,500.00 USD
Priority	Medium		
Budget Status	Valid		
no juomeaton entered by t	View Documents		View printable version
Line Information (2)			
Line Information (2)			
 Line Information (2) Review/Edit Approvers 			
► Line Information ② ▼ Review/Edit Approvers Department Appro	val		
Line Information (2) Review/Edit Approvers Department Appro Line 1 Scher	val dule 1 Distribution 1:Pending		
Line Information (2) Review/Edit Approvers Department Appro Line 1 Schee Item Fetal Bovine S	val dule 1 Distribution 1:Pending erum -etc., etc.		
Line Information @ Review/Edit Approvers Department Appro Line 1 Schee Item Fatal Borles Department Approval	val Jule 1 Distribution 1:Pending		
Cline Information Cline Information Cline Information Cline 1 Schee Rem Fetal Bovine S Department Approva Pending Pending Department Approva Operatment Approva	val Jule 1 Distribution 1:Pending erum - etc., etc., ra		
Line Information (2) Review/Edit Approvers Department Approv Line 1 Schee Mem Fetal Bowler S Department Approval Pending	val Jule 1 Distribution 1:Pending erum - etc., etc., rs al g Approval		
Line Information	val dule 1 Distribution 1:Pending erum - etc., etc. rs g Approval 0000138955:Awaiting Further Approvals		
Line Information	val dule 1 Distribution 1:Pending erum - etc., etc., rs al g Approval 0000138959:Awaiting Further Approvals val		
Line Information () Review/Edit Approvers Department Approv Line 1 Scheet men Fete Bovies 8 Department Approv Opartment Approve Opartment Approve Central Purchasing Approve Not Requisition Central Purchasing Approve Not Requisition	val dule 1 Distribution 1:Pending erem - etc., etc. g Approval 0000138959:Awaiting Further Approvals val		

3. Click the Multiple Approvers links to view the Approvers list along with contact information.

	<u></u>	
S https://arctrn.enterprise.colum	bia.edu/psc/f — 🔲 >	<
https://arctrn.enterprise.	columbia.edu/psc/fn92trn_3/E	
Approver #1		
Name: Empl ID: Department: Supervisor ID: Telephone: Reports To Position Number:	Teresa Nunes	
Email ID:	tn2311@columbia.edu	
Approver #2		1
Name: Empl ID: Department: Supervisor ID: Telephone: Reports To Position Number:	Reedy,Paul	
Email ID:	pr2201@columbia.edu	
Approver #3		1
Name: Empl ID: Department:	Mark Hawkins	
Supervisor ID: Telephone: Reports To Position Number:		

Job Aid: Managing Requisitions

Editing a Requisition

You can modify Requisitions depending on where they are in the approval process. If a Purchase Order has been generated, all actions must be done through a Change Order. Refer to the <u>Change Order Job Aid</u> for more detail.

1. Navigate to the Manage Requisition page.

Manage	e Req	uisitions	*20					
▼ Searc	h Requi	isitions						
To locate	requisitio	ons, edit the criteria belo	w and click the Se	arch button.				
	Busines	s Unit COLUM	Q	Requisitio	n Name			Q
	Requisi	tion ID	Q	Reque	st State All but C	omplete 🔻	Budget Status	*
	Date	From 05/03/2017	B1		Date To 05/10/20	17 🛐		
	Req	uester ez2248	Q	Ent	ered By	Q	POID	Q
Sea Requisiti	arch	Clear		Show Advand	ed Search		coduction	
To view the To edit or	e lifespar perform a	n and line items for a rec another action on a requ	quisition, click the l iisition, make a sel	Expand triang ection from th	le icon. e Action dropdowr	list and click Go.	* Hor	
Req ID	0	Requisition Name	BU	Date	Request State	Budget	Total	
00000	088123	0000088123	COLUM	05/09/2017	Pending	Valid	10,000.00 USD [Select Action]	▼ Go
00000	088122	0000088122	COLUM	05/08/2017	Open	Not Chk'd	1 000 00 USD [Select Action]	▼ Go

Requisitions that you created appear on the page.

- 2. You can either work with the Requisitions displayed or enter a Requisition ID and click Search.
- 3. Select Edit from the dropdown and click Go.

Total		
10,000.00 USD	[Select Action] Approvals	Go
1,000.00 USD	Cancel	Go
	Copy Edit	
	View Print View Print	
Manage Receipts	[Select Action]	

The Edit Requisition – Review and Submit page appears.

Edit Requisition - Review and Submit								
Review the item information and submit the req for approval.		My Pr	references	Requisition Sett	ings			
Requisition Summary			L		-			
Business Unit COLUM	Columbia University	Requisition N	lame 0000088	123				
Requester ez2248	Eric Zaretsky	Requisitio	on ID 0000088	123 Sole/Sing	le Source			
*Currency USD		Pri	iority Medium	*				
Cart Summary: Total Amount 10,000.00 USD								
Expand lines to review shipping and accounting details		4	Add More	e Items				
Requisition Lines ②								
Line Description Item ID	Supplier	Quantity I	UOM	Price	Total	Details	Comments	Delete
▶ 🖬 1 👷 Computer maintenance	APPLE INC	1.0000 Ea	ch	10000.0000	10000.00		💬 Edit	Î
Select All / Deselect All Select line	es to: 🕞 Add to Favorites	Add to Template(s)	Î Delete Sele	ected \$	Mass Change			
				Total Amount	10,000.00 USD			
			Pre-Enci	umbrance Balance	10000.00 USD			

- 4. You can edit Requisition Settings or expand the Line Item to edit the Requisition Line.
- 5. Make the desired edits.
- 6. Click Check Budget.
- 7. Click Save and Submit.



Restarting Requisition Workflow

You may encounter a situation where the approval workflow is terminated and you will need to resubmit the Requisition. Follow the steps below to restart workflow:

- 1. Navigate to the Manage Requisitions page.
- 2. Enter a Requisition ID and click Search.
- Select Edit from the dropdown and click Go. The Edit Requisition – Review and Submit page appears.
- 4. If a change is required to the lined details, expand the Line Item to edit the **Requisition Line** and make the necessary changes to the **Quantity** or **Price**.

Or, if no change is to the Requisition Line is necessary, you can enter Approval Justification comments.

App	oval Justification	* Caro.
	Enter approval justification for this requisition	
		(3)
		4

- 5. Click Check Budget.
- 6. Click Save and Submit.

Canceling a Requisition

If you no longer need to make your purchase, you can cancel a Requisition. If a Purchase Order has been generated, all actions must be done through a Change Order.

1. Click Main Menu>eProcurement>Manage Requisitions. The Manage Requisitions page appears. You can also use the Navigation Search.

Manage Requisitions	*20	D.7.		*NOD-1	
Search Requisitions					
To locate requisitions, edit the criteria bel	ow and click the Se	arch button.			
Business Unit COLUM	Q	Requisition Name			
Requisition ID	্	Request State All but C	Complete 🔻	Budget Status	•
Date From 05/03/2017	1	Date To 05/10/20	017		
Requester ez2248	Q	Entered By	Q	POID	0
Search Clear		Show Advanced Search		Coduction	
Requisitions ②					
To view the lifespan and line items for a re To edit or perform another action on a req	quisition, click the uisition, make a set	Expand triangle icon. ection from the Action dropdow	n list and click Go.	# Blon	
Req ID Requisition Name	BU	Date Request State	Budget	Total	
0000088123 0000088123	COLUM	05/09/2017 Pending	Valid	10,000.00 USD [Select Action]	▼ Go
0000088122 0000088122	COLUM	05/08/2017 Open	Not Chk'd	1,000.00 USD [Select Action]	▼ Go

Requisitions that you created appear on the page.

- 2. You can either work with the Requisitions displayed or enter a Requisition ID and click Search.
- 3. Select **Cancel** from the dropdown and click **Go**.

				<u> </u>						
) [Sele	ect Action]		•	Go						
Can	cel									
Cop	y hờ									
Edit										
View	/ Cycle									
View	/ Print									
[Sele	ect Action]									
-										
Requ	isition	Details p	bage	appe	ars	•				
Requisiti	on Details for:		Eric V. Z	Zaretsky						
	Business Unit	COLUM		Date	06/04/2	019				
	Requisition ID	0000138976		Status	Open					
	Requisition Name	0000138976		Total		520.00 USD				
Line Details	5									
Line Number	Item Description					Status	Price		Qty	
	1 1 year service agreer	ment for Hydro Picosyst				Open	520.00000	Each	1.0000	
							-			

4. Click Cancel Requisition.

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK



Copying a Requisition

If you need to create a new Requisition that is identical or similar to a previous Requisition, you can copy the previous Requisition, edit it accordingly, and submit it as new.

1. Navigate to the Manage Requisitions page.

Manage Requ	lisitions	*20	0-1			*Noura			
Search Requi	sitions								
To locate requisitio	ns, edit the criteria belo	ow and click the Se	earch button.						
Busines	s Unit COLUM	Q	Requisition N	ame					C
Requisit	ion ID	Q	Request S	tate All but Com	nplete 🔻	Budge	et Status		•
Date	From 05/03/2017	Ħ	Dat	e To 05/10/2017	Ħ				
Requ	iester ez2248	Q	Entered	d By	Q		POID		Q
Search Requisitions	Clear		Show Advanced §	Search			nction		
To view the lifespan To edit or perform a	and line items for a re- nother action on a requ	quisition, click the E lisition, make a sel	Expand triangle ic ection from the Ac	on. tion dropdown li:	st and click Go.	* Mor			
Reg ID	Requisition Name	BU	Date Rec	uest State	Budget	Total			
0000088123	0000088123	COLUM	05/09/2017 Per	nding	Valid	10,000.00 USD [Se	elect Action]	•	Go
0000088122	0000088122	COLUM	05/08/2017 Ope	en	Not Chk'd	1,000.00 USD [Se	elect Action]	Y	Go

Requisitions that you created appear on the page.

- 2. You can either work with the Requisitions displayed or enter a Requisition ID and click Search.
- 3. Select **Copy** from the dropdown and click **Go**.

Сору	Go
Approvals	
Cancel	
Сору	
Edit ¹	
View Cycle	
View Print	
[Select Action]	

The Checkout – Review and Submit screen for the new Requisition copy appears.

Checkout - Review and Sub	mit									
Requiring Summary	req for approval.	My Preferences 🗰 Requisition Settings								
Business Unit COLUM Requester az2248 "Currency USD		Columbia University Regulation Name Enc V Zaretsky Sola/Single Source Priority Medium •								
Cart Summary: Total Amount 10,500.00 I Expand lines to review shipping and acc	USD ounting details			Add More I	tems					
Line Description	Item ID Select lines to:	Supplier ATLANTA BIOLOGICALS INC	Quantity 30.0000 Add to Template(s)	UOM Each	Price 350.0000	Total 10500.00 Mass Change	Details	Comments	Delete	
hinning Summany					Total Amount	10,500.00 USD				
Edit for All Lines Ship To Location Address	1000010109 2920 Broadway Alfred Lemer Hall FL 01 RM/STE 0109 New York, NY 10027									
Attention To Comments	Professor Smith									
Requisition Comments and Attachments	5									

- 4. Edit the Requisition as desired.
- 5. Follow the procedures for uploading documentation, budget checking and submitting as you would a new Requisition.

Getting Help

Please contact the Finance Service Center

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now https://columbia.service-now.com