

USING THE MY REQUISITIONS TILE 9.2

Users who have been assigned the “Requester” role to enter requisitions will have the “My Requisitions” tile on their Homepage. This tile provides a fast snapshot view of the current status of Requisitions that you have entered, so that you can view related PO, Delivery Receipt, and Payment information. If you encounter any issues using this tile, please reach out to the PS Financials Functional Lead Analyst.



I. My Requisitions Definitions

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	CTE-CLUB COLORS	LBCCD/0000051740	01/06/2023	0772425	Approved	Valid	2879.92 USD
	CTE-HJ PROMOTIONAL	LBCCD/0000051772	01/10/2023	0772425	PO(s) Dispatched	Valid	15000.00 USD
	CTE-KNBC GRAPHICS	LBCCD/0000051723	01/04/2023	0772425	PO(s) Dispatched	Valid	5000.00 USD
	CULINARY-CALIFORNIA FOOD TRUCK	LBCCD/0000051851	01/20/2023	0772425	PO(s) Dispatched	Valid	149540.00 USD
	CTE-CLUB COLORS (PENNANTS)	LBCCD/0000051758	01/09/2023	0772425	Partially Dispatched	Valid	1372.32 USD
	JEWELRY-HOME DEPOT	LBCCD/0000051816	01/18/2023	0772425	Partially Received	Valid	2700.00 USD
	FACS-DELL	LBCCD/0000051797	01/12/2023	0772425	Partially Received	Valid	2103.92 USD

a. Fields:

- i. Requisition Name: Whatever name you've given your req will appear here.
- ii. Business Unit/Requisition ID: The Business Unit will always be “LBCCD”, and then the req number
- iii. Requisition Date: date that the req was entered into the system
- iv. Requester: the employee ID of the person who entered the requisition
- v. Request Status:
 1. Pending – your req is still pending approval by your Dean/Director and/or a Fiscal Accountant
 2. Denied – your req has been denied and directions for what needs to be corrected should have been sent to you.
 3. Approved – your req has completed the approval process.
 4. PO(s) Created – your PO has been created, but has not been dispatched by the Buyer yet.
 5. PO(s) Dispatched – your PO has been issued to the vendor. You should have also received a copy from the Buyer.
 6. Partially Received – Some items on your PO have been received at the warehouse. You should have received an email notification for the line(s) that were received.
 - a. Sometimes the PO will have a line for Sales Tax or Shipping Costs that do not need to be received, but it may still cause the status to be “Partially Received”.
 7. Received – All line items have been received.
 8. Complete – your PO has been closed out because no further activity is expected or it has been canceled.
- vi. Budget Status:
 1. Not Chk'd – your req had not been Budget Checked yet. Any requisitions that are still pending approval from the Dean/Director/Executive and Fiscal Accountants will have this status..
 2. Error in Budget Check (Error): If your req has been Approved, but does not pass Budget Check, it's Budget Status will be in Error status. The system automatically sends an email to the requester when this occurs. You can reach out to a Fiscal Accountant for clarification if needed.
 3. Valid: If your req has been Approved and the Budget Check process has confirmed that there are sufficient funds in the account string to cover the cost, the req's Budget Status will be Valid. Only reqs that are Approved and Valid are eligible to be processed into Purchase Orders by the Buyers.
- vii. Total Amount: total dollar amount value of your req

II. Changing the Filter settings

When you click into the My Requisitions tile, the system will automatically pull ONLY reqs that are dated within the last 3 months and are not in “Complete/Closed” status. If you wish to see the status of reqs beyond the past 3 months or Req/POs

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that have already been closed, click on the Filter button in the upper left-hand corner (see screenshot below) to update the settings.

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0000052530	LBCCD/0000052530	03/10/2023	0770380	Pending	Not Chk'd	450.00 USD
	0000052529	LBCCD/0000052529	03/10/2023	0005423	Pending	Not Chk'd	3005.00 USD
	TRIO NOSOTROS	LBCCD/0000052528	03/10/2023	0673677	Pending	Not Chk'd	6500.00 USD

A window will pop up where you can change the date range AND/OR the statuses that you would like to see. You will not be able to see requisitions entered by other users unless that access has been requested from the Business System Analyst.

Filters

Business Unit: LBCCD

Requisition Name: []

Requisition ID: []

PO Number: []

From Date: 12/15/2022

To Date: []

Requester: 0000000

Entered by: []

Request State: All but Complete

Budget Status: []

Item ID: []

Item Description: []

Ship To Location: []

Supplier Item ID: []

Clear

Filter fields:

- Business Unit:** must ALWAYS be LBCCD
- Requisition Name:** enter a req name if you wish to see only that req in the results; otherwise leave it blank so that the system will pull multiple results
- Requisition ID:** enter a req number if you wish to see only that req in the results; otherwise leave it blank so that the system will pull multiple results
- PO Number:** enter a Purchase Order Number if you wish to see only that PO in the results; otherwise leave it blank so that the system will pull multiple results
- From Date:** This will be auto-populated with the date that is 90 days prior to today's date. You can update this by entering the furthest date that you would like the system to pull Requisition results from (example: 7/1/20XX for all reqs entered from the beginning of the current Fiscal Year). ***DO NOT LEAVE THIS FIELD BLANK***
- To Date:** This will automatically be blank. If left blank, the system will pull all reqs up to the current date. You can enter a value if you'd like to see a specific date range.
- Requester:** Your ID# will be auto-populated in this field. You will not be able to see other users' requisitions unless given permission by the Business Systems Analyst to do so.
- Entered By:** Leave blank. You will not be able to see other users' requisitions unless given permission by the Business Systems Analyst to do so.
- Request State:** Leave blank to see ALL statuses. If you only want to see reqs in a specific status, choose a status in the drop-down menu.
- Budget Status:** Once a requisition has been fully approved (Request State = Approved), the system will run the Budget Check process, where the req's dollar amount value is checked against the remaining balance on the account string(s) that the req is being funded from to ensure that there is sufficient funding to cover the costs. There are 3 statuses that occur:

Budget Status

- Document In Processing
- Error in Budget Check
- Not Budget Checked
- Provisionally Valid
- Valid

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- a. **Not Budget Checked (Not Chk'd):** any requisitions that are still pending approval from the Dean/Director/Executive and Fiscal Accountants will have this status. No action is needed since it has not gone through the Budget Check process yet.
- b. **Error in Budget Check (Error):** If your req has been Approved, but does not pass Budget Check, it's Budget Status will be in Error status. The system automatically sends an email to the requester when this occurs. You can reach out to a Fiscal Accountant for clarification if needed.
- c. **Valid:** If your req has been Approved and the Budget Check process has confirmed that there are sufficient funds in the account string to cover the cost, the req's Budget Status will be Valid. Only reqs that are Approved and Valid are eligible to be processed into Purchase Orders by the Buyers.

III. View Requisition Status/Progress

When you click on a Requisition Line, you will be able to see a summary of the Req Details, a chart of different icons representing the status of your requisition, and the Line details.

In the example below, the Requisition has progressed all the way to the "Invoice" stage. Once a payment has been made, the "Payment" icon will go from greyscale to colored. You can click on each of these colored icons to see additional information.

Requisition Summary

Requisition Name: PROMO DIRECT POLOS	Requester:
Business Unit: LBCCD	Entered By:
Requisition ID: 0000053023	Budget Check Status: Valid
Requisition Date: 06/01/2023	Total Amount: 5274.40 USD
Request State: Partially Received	

[View Requisition Header Comments/Attachments](#)

Requisition Lifeline

Lines

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount	
	Line 1 - SPORT-TEK MICRO-MESH COLORBLOCK POLO		WAREHOUSE	Received	200.0000	Each	24.97	4994.00 USD	View
	Line 2 - SETUP FEE		WAREHOUSE	PO Dispatched	1.0000	Each	35.00	35.00 USD	Cancel Line View
	Line 3 - FEE-SIZES-2XL		WAREHOUSE	PO Dispatched	40.0000	Each	2.00	80.00 USD	Cancel Line View
	Line 4 - FEE-SIZES-3XL		WAREHOUSE	PO Dispatched	10.0000	Each	4.00	40.00 USD	Cancel Line View
	Line 5 - SHIPPING		WAREHOUSE	PO Dispatched	1.0000	Each	125.40	125.40 USD	Cancel Line View

In the example below, the purchase did not require receiving, so the icon for Receiving remained greyed out even after payment has been processed.

Details

Requisition Summary

Requisition Name:	Requester:
Business Unit: LBCCD	Entered By:
Requisition ID:	Budget Check Status: Valid
Requisition Date: 07/27/2023	Total Amount: 5000.00 USD
Request State: PO(s) Dispatched	

[View Requisition Header Comments/Attachments](#)

Requisition Lifeline

Lines

Item Image	Description	Item ID	Ship To	Line State	Quantity	UOM	Price	Total Amount	
	Line 1 -		WAREHOUSE	PO Dispatched	1.0000	Batch Lot	5000.00	5000.00 USD	Cancel Line View