



REQUISITION ENTRY

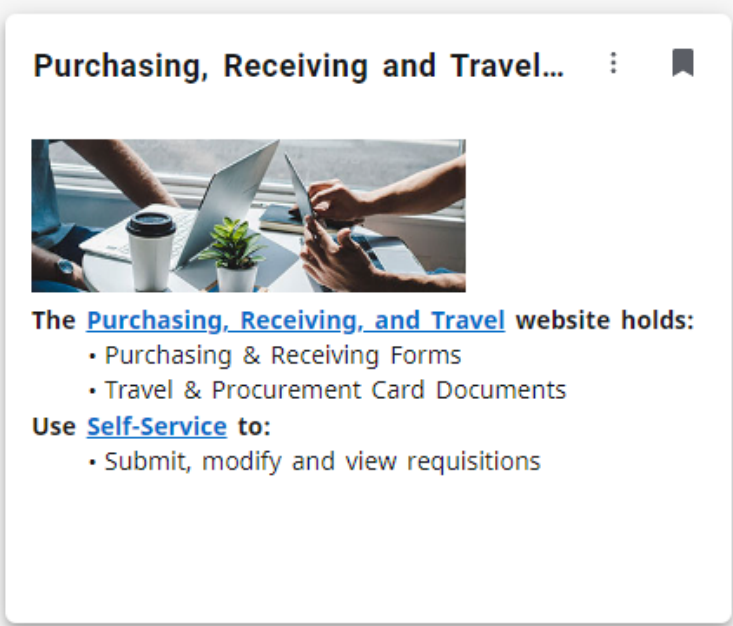
INSTRUCTIONS FOR SELF-SERVICES

Accessing the Requisition Entry Form.....	2
Entering a Requisition.....	3-6
View and Modify a Requisition.....	7-8


Revised August 2023

ACCESSING THE REQUISITION ENTRY FORM

1. Sign into <https://experience.elluciancloud.com/cotc/>
2. Locate the Purchasing, Receiving and Travel Card and click on Self Service.



Purchasing, Receiving and Travel...



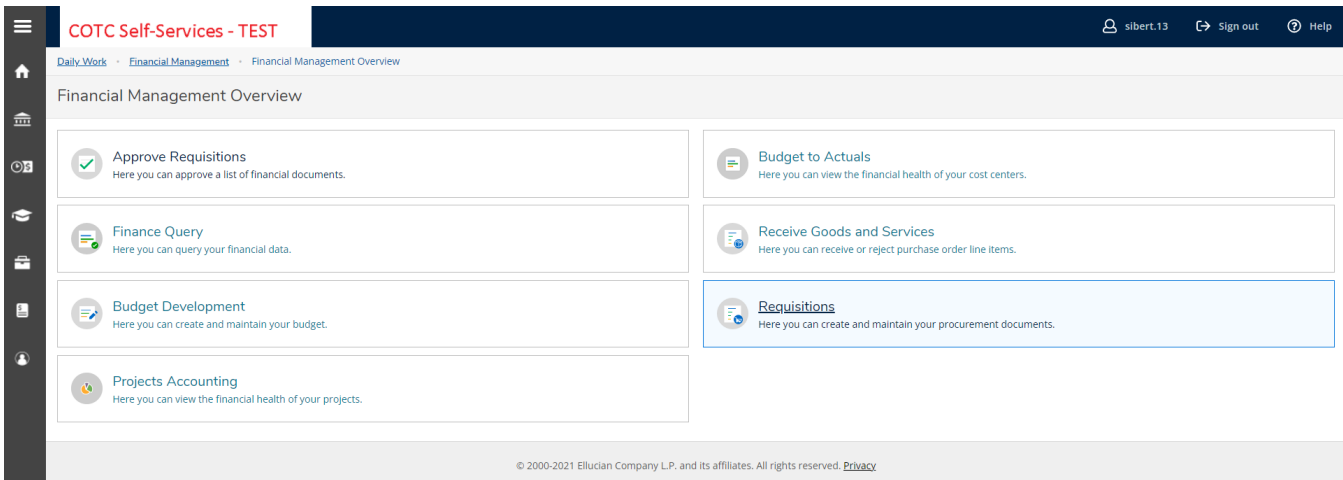
The [Purchasing, Receiving, and Travel](#) website holds:

- Purchasing & Receiving Forms
- Travel & Procurement Card Documents

Use [Self-Service](#) to:

- Submit, modify and view requisitions

1. When the Financial Management page opens, select **Requisitions**.



COTC Self-Services - TEST silbert.13 [Sign out](#) [Help](#)

[Daily Work](#) · [Financial Management](#) · Financial Management Overview

Financial Management Overview

- Approve Requisitions**
Here you can approve a list of financial documents.
- Budget to Actuals**
Here you can view the financial health of your cost centers.
- Finance Query**
Here you can query your financial data.
- Receive Goods and Services**
Here you can receive or reject purchase order line items.
- Budget Development**
Here you can create and maintain your budget.
- Requisitions**
Here you can create and maintain your procurement documents.
- Projects Accounting**
Here you can view the financial health of your projects.

© 2000-2021 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)

ENTERING A REQUISITION

1. Click the **Create** tab

Document Types: Requisition, Purchase Order, Payment Request

Requisition Date	Requisition	Total	Approvers/Next Approvers
10/27/2021	0029225 Outstanding 0035388 Action Waste Transfer	\$40.00	Kimberly Sibert
10/27/2021	0029221 Outstanding 0189174 Greystone Healthcare Management Cor	\$10.00	Kimberly Sibert
9/22/2021	0029204 Outstanding 0120590 City of Newark	\$1.00	Kimberly Sibert

Page 1 of 1 Per Page: 10 Total: 3

Note about this page:

Under the **View** tab, you are provided with a list of your previously entered requisitions. Clicking on the **Filter** bubble will allow you to filter your previously entered transactions by Document Type, Vendor, Amount, Date Range or Status.

Document Types: Requisition, Purchase Order, Payment Request

Document Type: Requisition x, Purchase Order x, Payment Request x

Requisition Date	Requisition	Total	Approvers/Next Approvers
12/10/2021	0029232 Outstanding 0216143 GGINK, LLC	\$10.00	Kimberly Sibert
10/27/2021	0029225 Outstanding 0035388 Action Waste Transfer	\$40.00	Kimberly Sibert
10/27/2021	0029221 Outstanding 0189174 Greystone Healthcare Management Cor	\$10.00	Kimberly Sibert
9/22/2021	0029204 Outstanding 0120590 City of Newark	\$1.00	Kimberly Sibert

Page 1 of 1 Per Page: 10 Total: 4

2. Header Instructions by field:

- a. **Document Type** – Requisition should always auto-populate.
- b. **Initiator** – Your Name will auto-populate below the field. Do not input your name again.
- c. **Ship To** – Be sure NW Newark Campus is ALWAYS selected.
- d. **Vendor ID** – Input the Vendor Name and click on the search symbol or hit Enter. If there are multiple choices, be sure to review carefully for the appropriate selection. (The less information you enter here, the better. This is not a very intuitive field)
- e. **AP Type** – This will always auto-populate to AP Operating Accounts Payable.
- f. **Requisition Date** – This should be the date that you submit the requisition.
- g. **Confirmation Email Address** – The initiators email address will auto-populate. You can add others that you wish to be notified of the requisition’s submittal by inputting the email addresses separated by commas. (Approvers will automatically be notified – do not use this field to notify them)
- h. **Next Approvers** – Your next approver will auto-populate when submitted. We recommend you not use this field unless you are the UBM, in which case, please add your next approver if needed.
- i. **Printed Comments** – This is an optional field. Anything you input in this field will print on the actual Purchase Order once approvals are all in place. Typically, POs are sent to vendors, and they will see anything you input in this field.
- j. **Business Purpose** – THIS IS A REQUIRED FIELD. Please detail the reason for the expense.

The screenshot shows the 'COTC Self-Services - TEST' interface for creating a requisition. The form is titled 'Requisitions' and has a 'Create' tab selected. The form contains several input fields: Document Type (Requisition), Requisition Date (12/10/2021), Initiator (Kimberley Sibers), Confirmation Email Address (sibert.13@osu.edu), Ship To (NW Newark Campus), Vendor ID (Vendor Lookup), and AP Type (AP Operating Accounts Payable). There are also sections for Approvers, Next Approvers (Next Approver Lookup), Printed Comments - Prints on PO, and Business Purpose/Internal Comments. At the bottom, there is an 'Items' table with columns for Line Items, Description, Vendor Part, Quantity, Unit, Price, and Extended Price, and an 'Add Item' button.

3. Adding Expense lines

a. Click **Add Item**.

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price
------------	-------------	-------------	----------	------	-------	----------------

[Add Item](#)

- b. **Description:** Describe first item on your quote or estimate. You may include item numbers and other specifics, but please be sure to include what the item is (i.e. syringe, fence posts, guest speaker, membership for xyz organization, etc.).
- c. Vendor Part is not a required field.
- d. **Quantity:** How many of this item are you ordering?
- e. **Unit:** Scroll through the drop-down list for the appropriate selection.
- f. **Price:** What is the per-item cost for this good or service?
- g. **GL Account:** This is an intuitive field. As you input your budget information, it will drop down a list of all GL lines available to you. If you are splitting the item between multiple budgets, click **Add GL Account**.
- h. If you are done with the requisition, click **Save and Attach**.
- i. To add more line items, click **Add Item**.

Items

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price
------------	-------------	-------------	----------	------	-------	----------------

New Item

Description * Vendor Part

Quantity * Unit Price Extended Price

GL Account * Project Amount

[Add GL Account](#)

[Cancel](#) [Add Item](#)

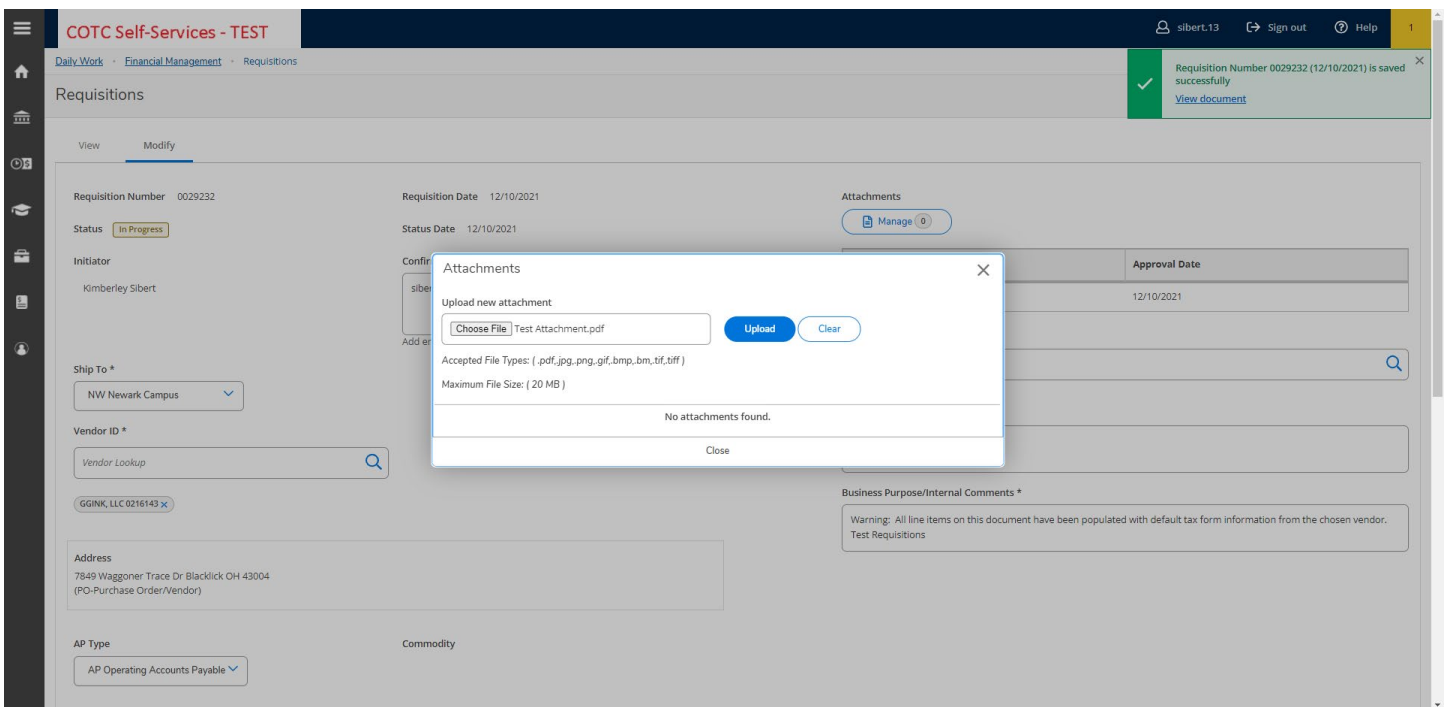
[Cancel](#) [Save and Attach](#)

© 2000-2021 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)

4. Adding your attachments: **Supporting documentation is now required when entering a requisition.***

- a. Select and attach the estimate, quote, membership renewal, speaker agreement, etc. in this area. You may enter multiple documents if necessary.
 Reminder: This should not typically be an invoice as no orders should be placed prior to all approvals being in place and a Purchase Order being created and issued.
- b. Once you select the document to attach, click **Upload**. You may repeat that step for multiple documents.
- c. When your documents have been uploaded, click **Close** to submit your requisition.
- d. Submission will be complete at this point and a requisition number is assigned (as indicated in the upper right hand of your screen).

Your requisition will now be forwarded to the appropriate Unit Budget Managers for electronic approvals.



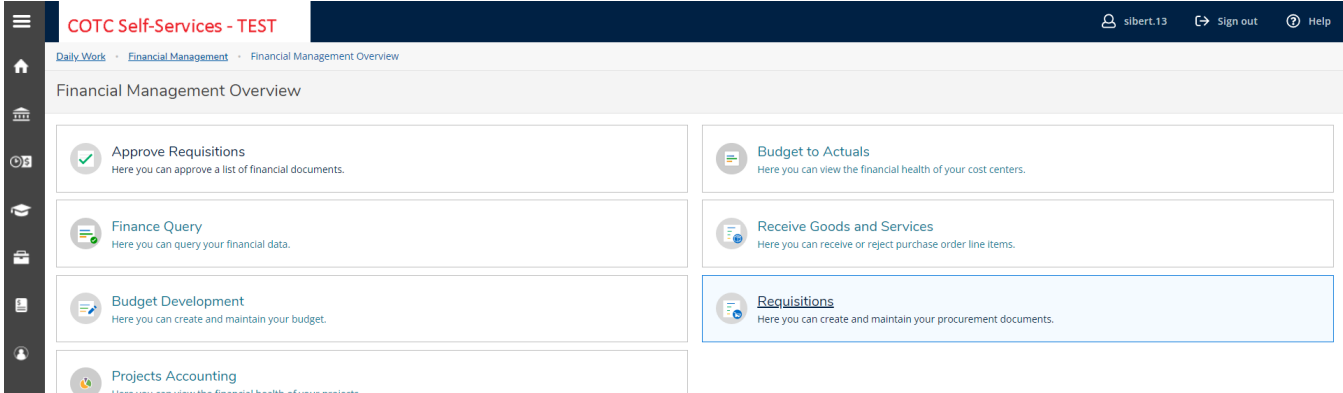
*For blanket requisitions in which a quote or estimate is not available, you may use the “COTC Blanket Purchase Order Backup Form” which will be available in the Forms Repository on the COTC Portal.

VIEW and MODIFY A REQUISITION*

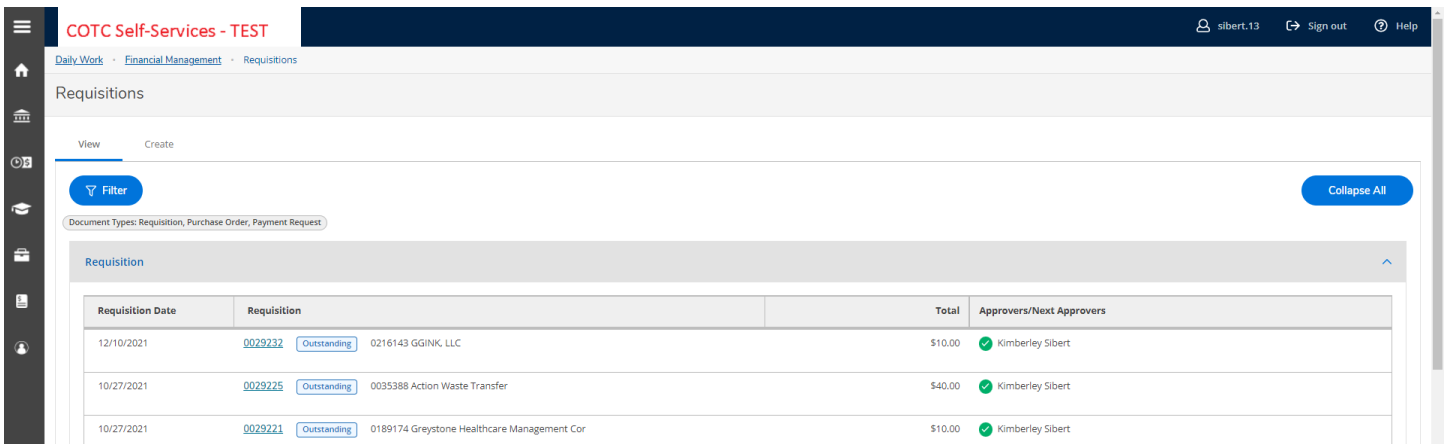
*You can only modify prior to the requisition being approved.

*You must contact the Purchasing Office for assistance if a requisition requires complete cancellation.

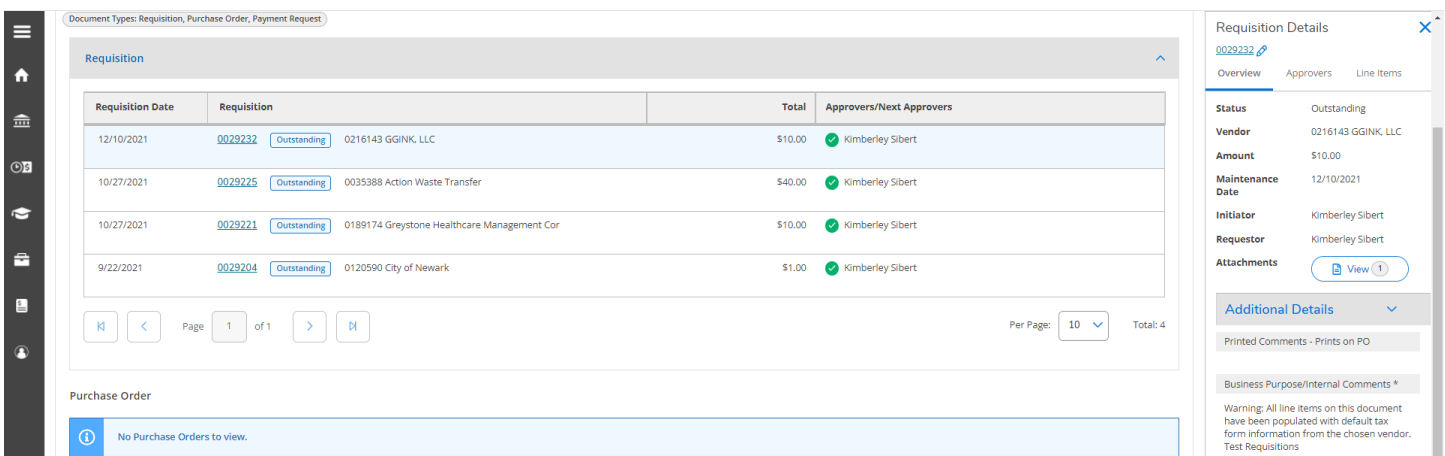
1. While in the Financial Management section, select **Requisitions**.



2. Click on the requisition number that you wish to view, modify, or delete



3. A side panel will open, allowing you to View, the requisition with tabs for Overview, Approvers, Line Items and Additional Details. Click on the Requisition Number within that side panel to Edit.



4. The re-opens a **Modify** tab with the ability to modify all fields originally found within the Requisition Entry Form.

5. When modifications are complete click **Save**.

View **Modify**

Requisition Number 0029232 Requisition Date 12/10/2021
Status **Outstanding** Status Date 12/10/2021

Initiator
Kimberley Sibert

Confirmation Email Address *
sibert.13@osu.edu
Add email addresses separated by commas

Ship To *
NW Newark Campus

Vendor ID *
Vendor Lookup

GGNK LLC 0216143

Address
7949 Waggoner Trl, Blacklick OH 43004
(PO-Purchase Order/Vendor)

AP Type
AP Operating Accounts Payable

Commodity

Attachments
Manage (1)

Approvers	Approval Date
Kimberley Sibert	12/10/2021

Next Approvers
Next Approver Lookup

Printed Comments - Prints on PO

Business Purpose/Internal Comments *
Testing Requisition Modification

Line Items	Description	Vendor Part	Quantity	Unit	Price	Extended Price	
1	Test		1.000	EA	\$10.0000	\$10.00	

Add Item

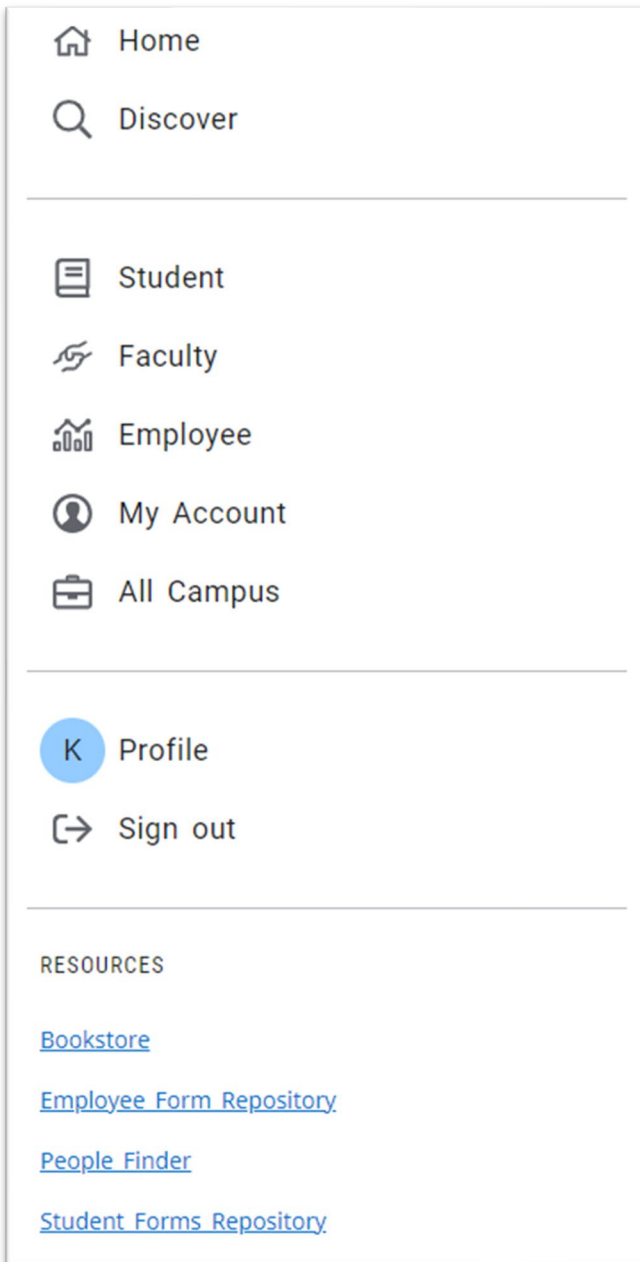
Cancel Save

Locating Purchasing Related Forms

1. At the top left of the page (<https://experience.elluciancloud.com/cotc/>) click the three lines.



2. Click Employee Form Repository near the bottom.



3. Scroll down to the Purchasing areas.

Purchasing

[Bid Request Form](#)

[Bid Waiver Form](#)

[Purchase Order Terms and Conditions](#)

[COTC Tax Exempt Form](#)

[Requestion Form \(optional backup to web req\)](#)

[Substitute W9 Form - COTC](#)

Purchasing - Pcard

[Allocating or Editing a Transaction- Bank of America Pcards](#)

[COTC PCard Reconciliation Form](#)

[Procurement Card Tracking Log](#)

[Creating an Expense Report - Bank of America Pcards](#)

[Pcard Policy](#)

Purchasing - Travel

[Travel Request/Reimbursement Form \(Overnight\)](#)

[Travel Reimbursement Form \(Local Only\)](#)

[Newark Campus Mileage Reimbursement Request Form](#)

[Travel Policy](#)