REQUISITION ENTRY

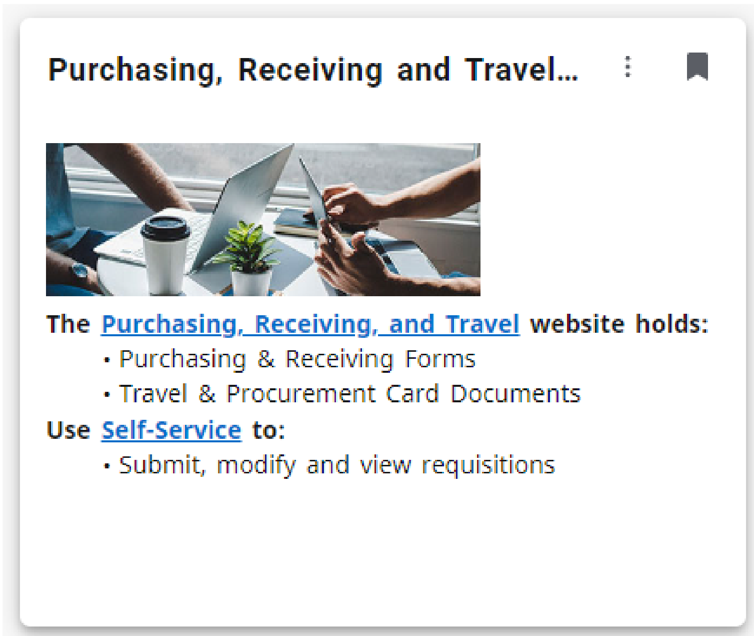
INSTRUCTIONS FOR SELF-SERVICES

Revised August 2023

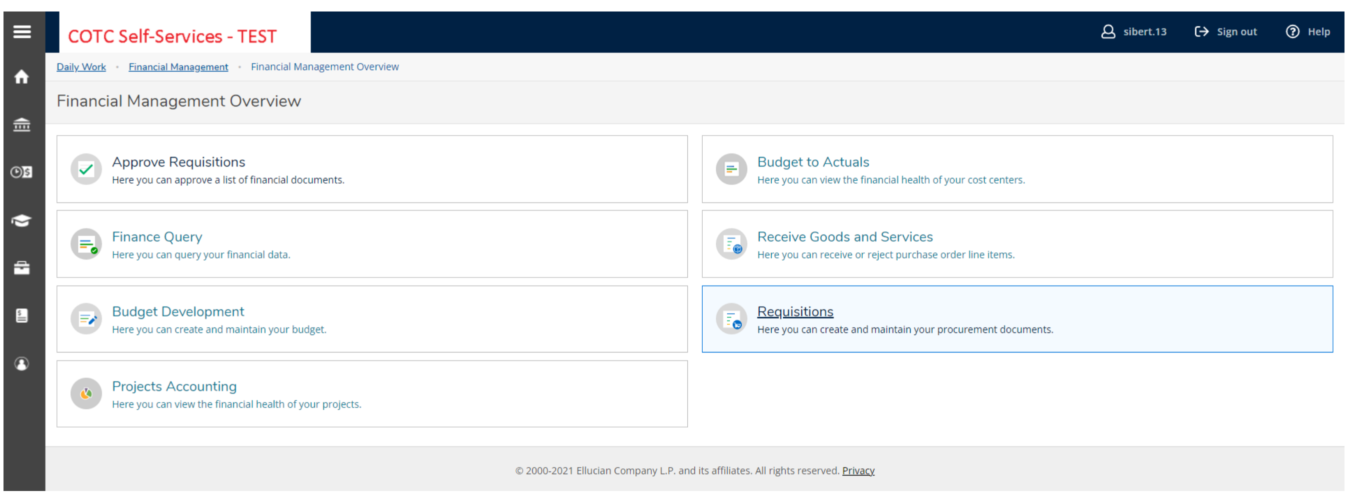
ACCESSING THE REQUISITION ENTRY FORM

1. Sign into https://experience.elluciancloud.com/cotc/

2. Locate the Purchasing, Receiving and Travel Card and click on Self Service.

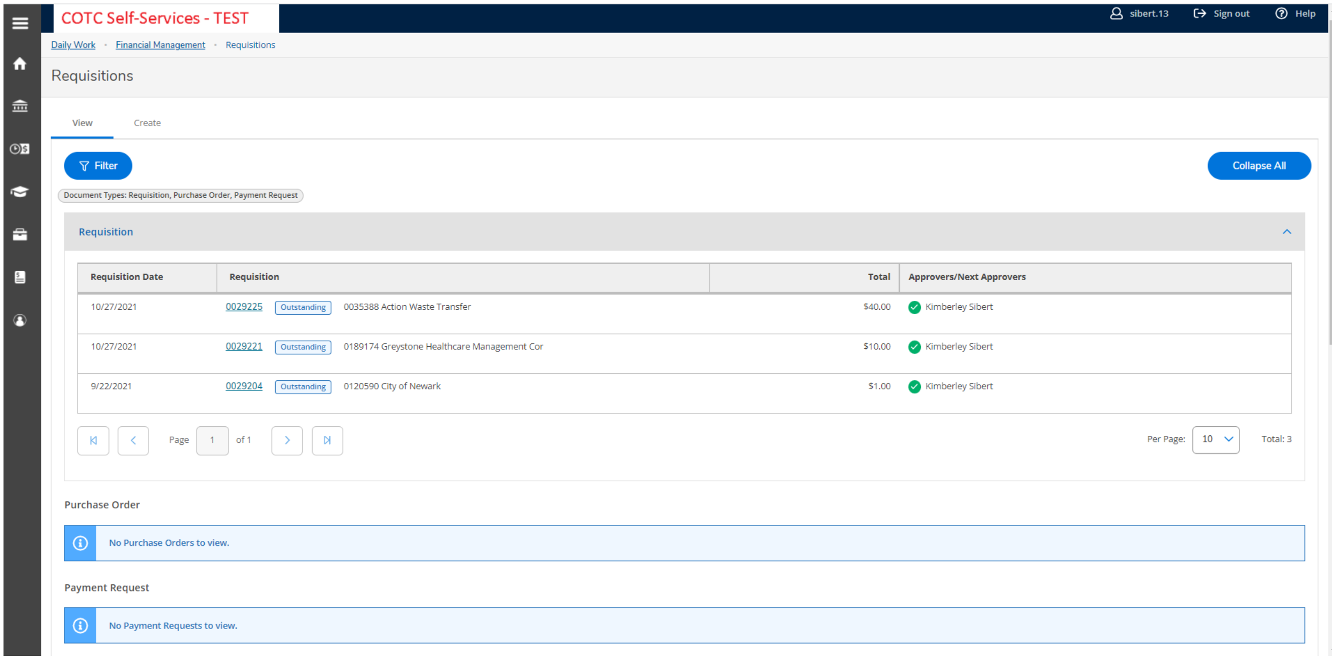


1. When the Financial Management page opens, select **Requisitions.**



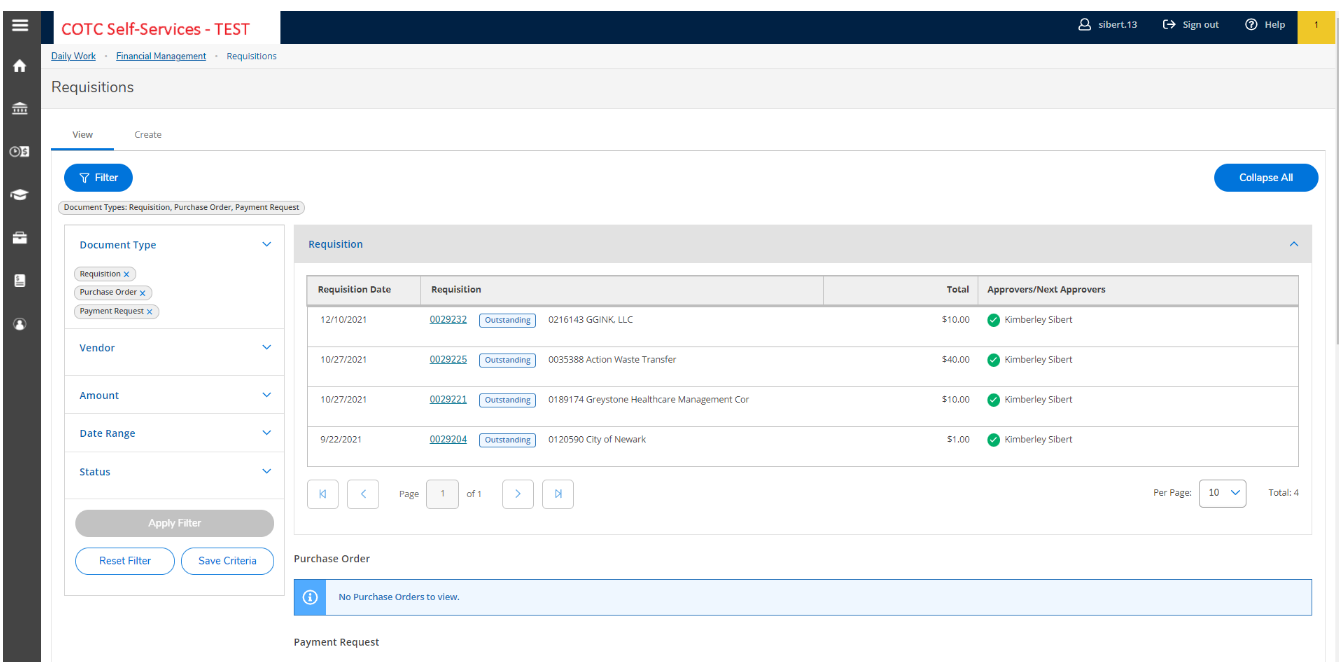
ENTERING A REQUISITION

1. Click the **Create** tab



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.



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.

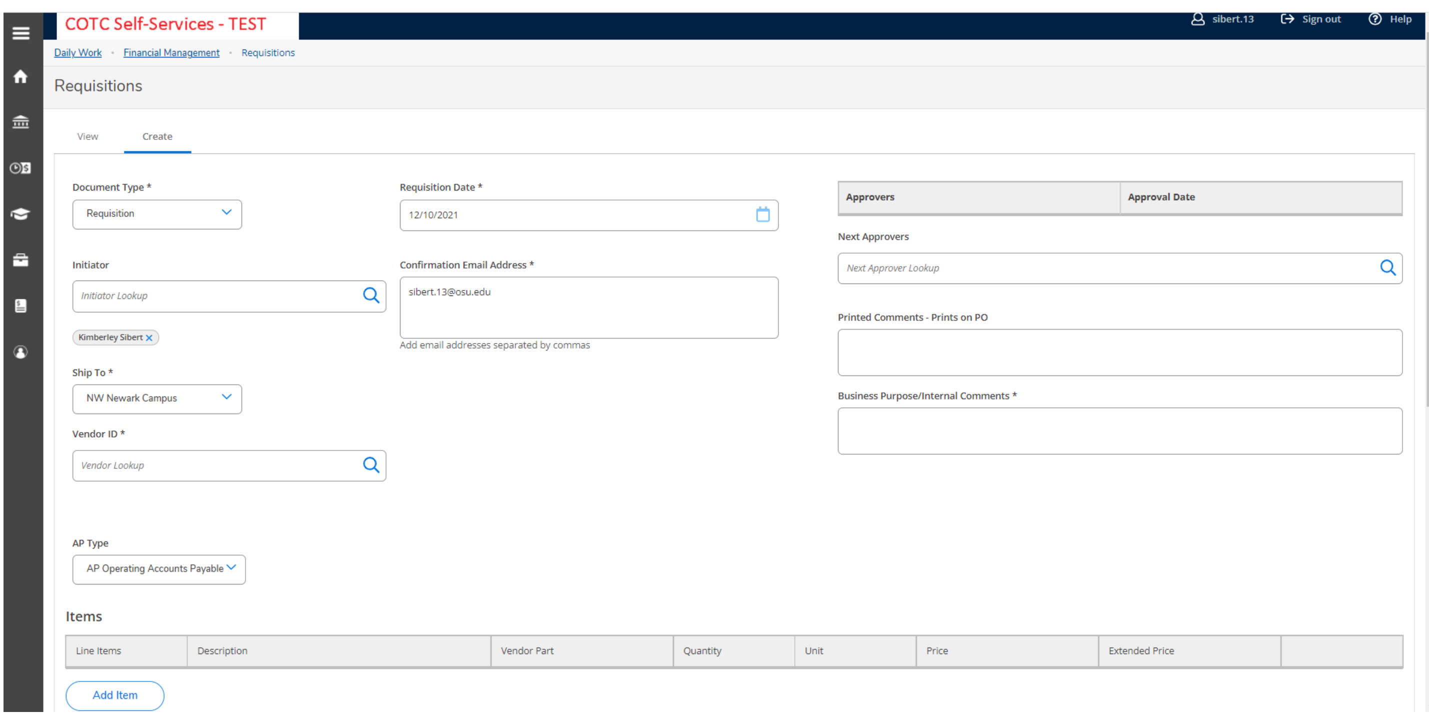
f. **Requisition Date** – This should be the date that you submit the requisition.

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.

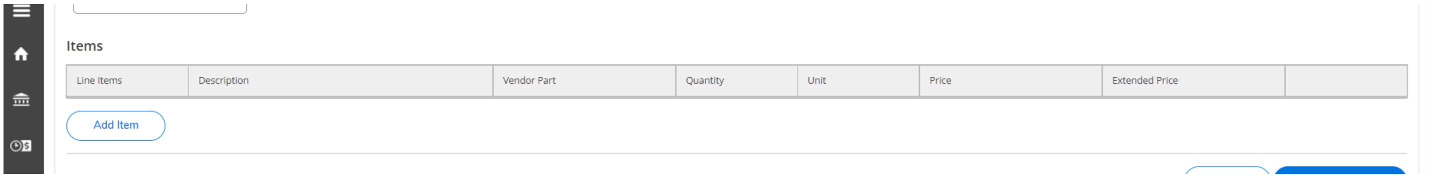
i. **Printed Comments** – This is an optional field. Anything you input in this field will print on the actual Purchase Order once approvals are all in place. Typically, POs are sent to vendors, and they will see anything you input in this field.

j. **Business Purpose** – THIS IS A REQUIRED FIELD. Please detail the reason for the expense.



3. Adding Expense lines

a. Click **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?

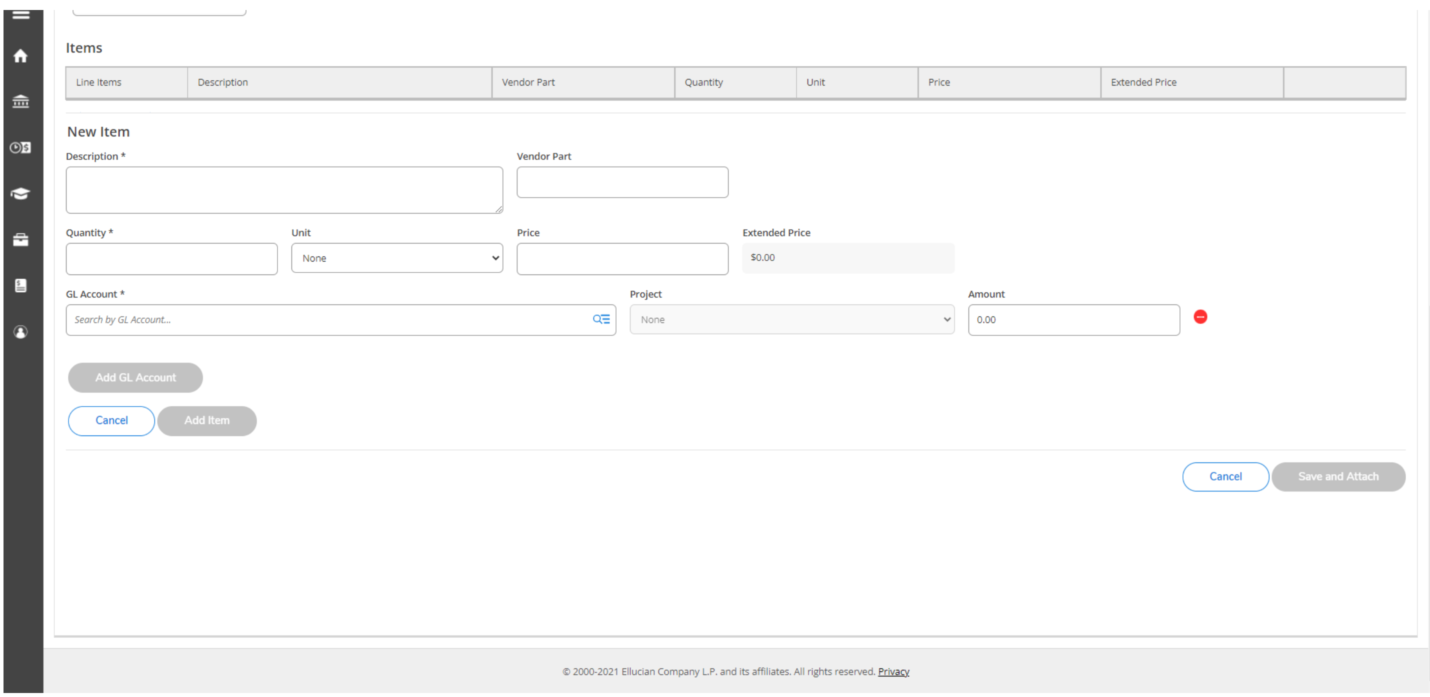
e. **Unit:** Scroll through the drop-down list for the appropriate selection.

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.**



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.

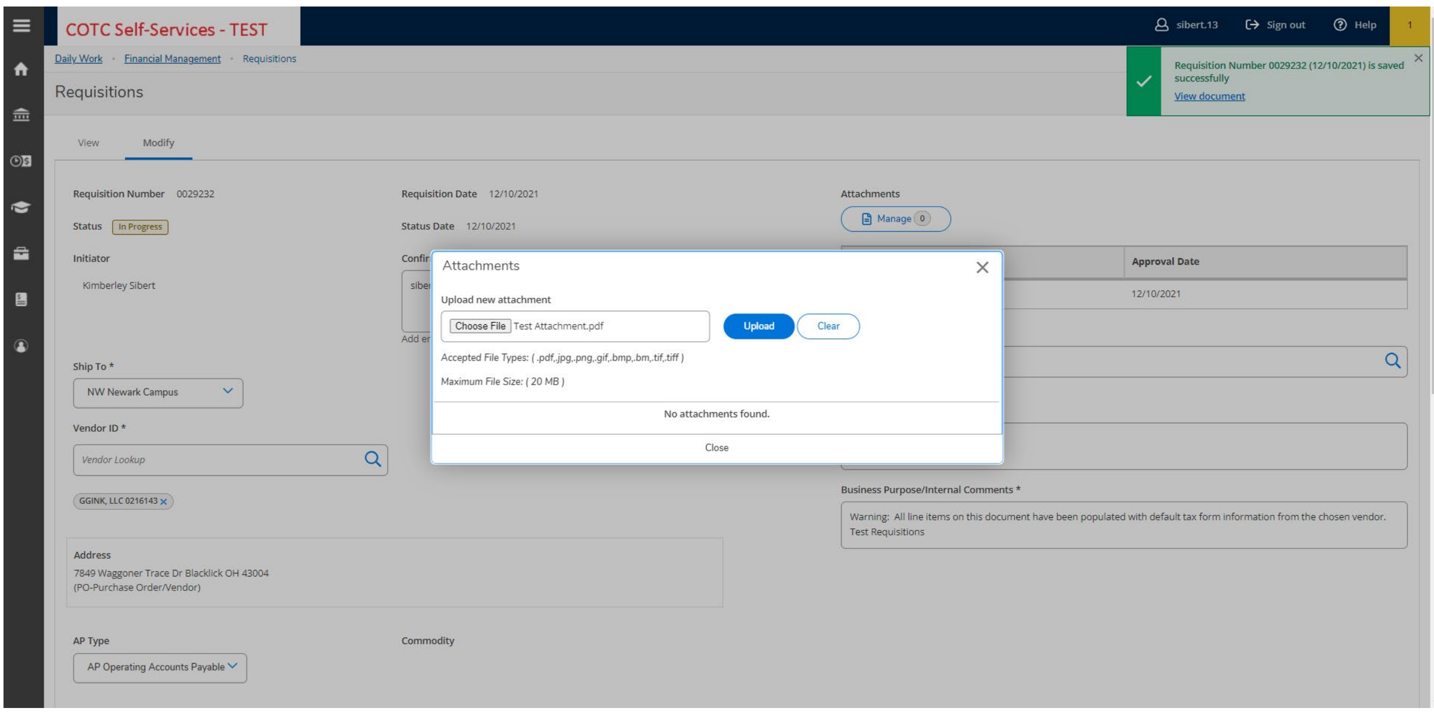
   Reminder: This should not typically be an invoice as no orders should be placed prior to all approvals being in place and a Purchase Order being created and issued.

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.

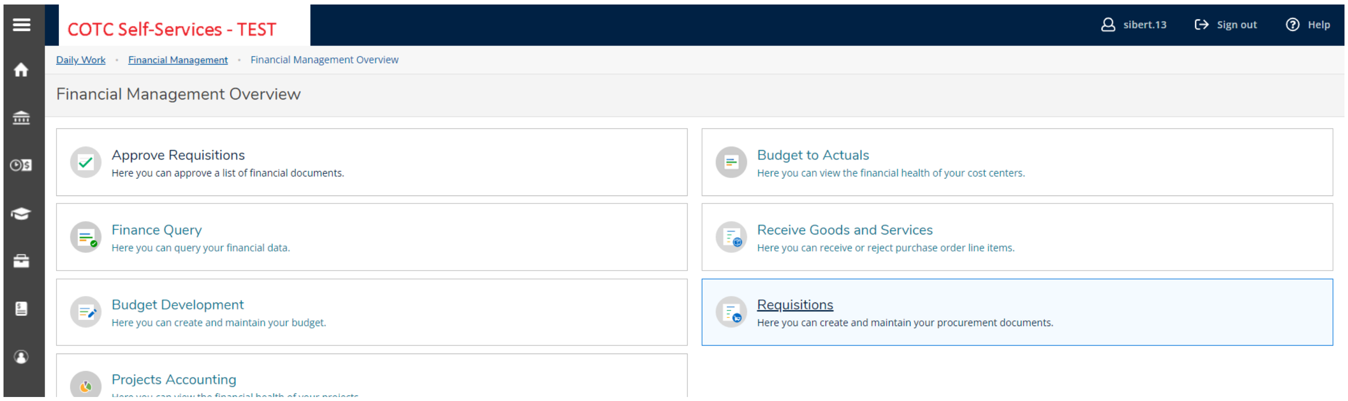


*For blanket requisitions in which a quote or estimate is not available, you may use the “COTC Blanket Purchase Order Backup Form” which will be available in the Forms Repository on the COTC Portal.

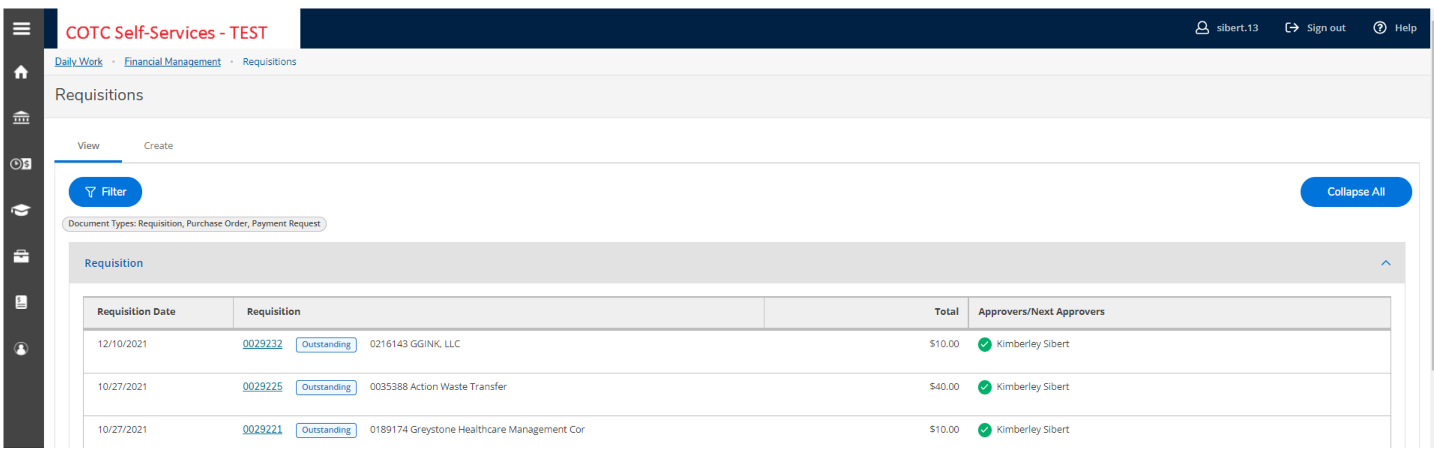
VIEW and MODIFY A REQUISITION*

*You can only modify prior to the requisition being approved.
*You must contact the Purchasing Office for assistance if a requisition requires complete cancellation.

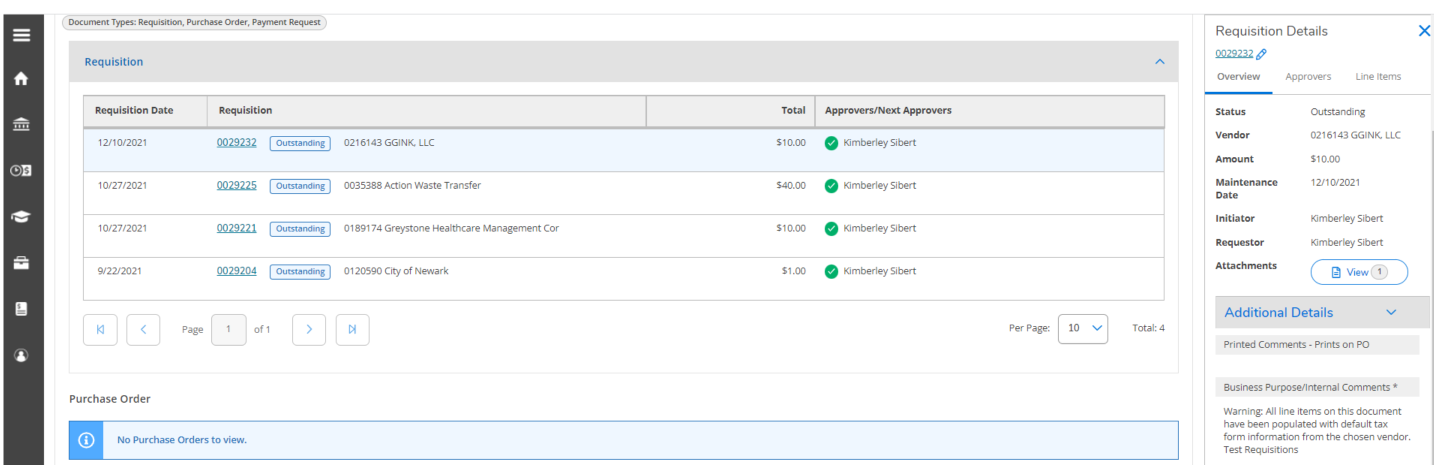
1. While in the Financial Management section, select **Requisitions.**



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

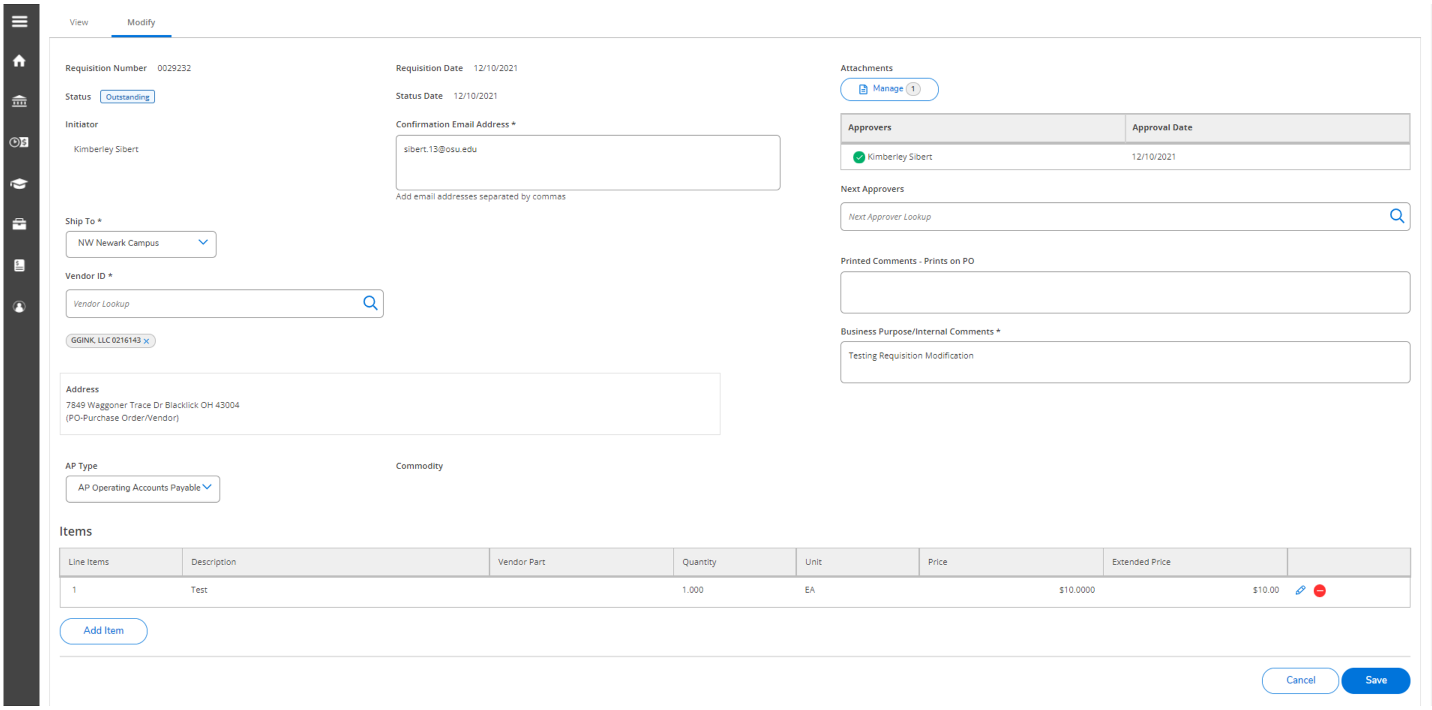


3. A side panel will open, allowing you to View, the requisition with tabs for Overview, Approvers, Line Items and Additional Details. Click on the Requisition Number within that side panel to Edit.



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

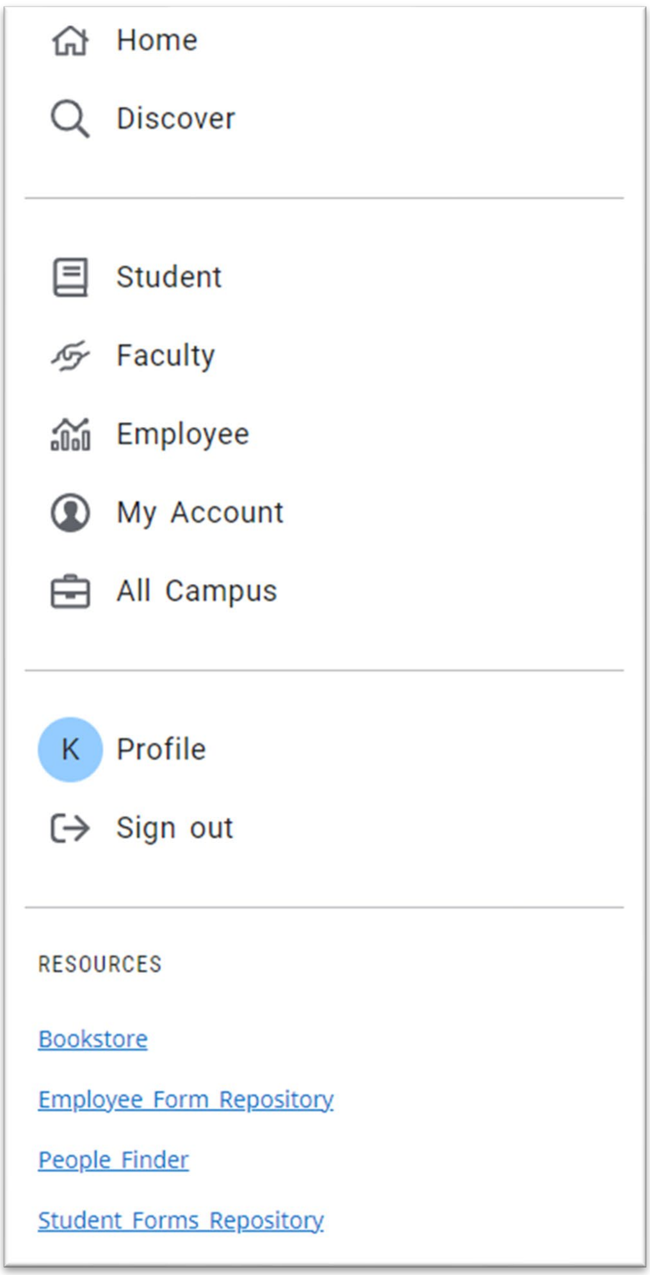
5. When modifications are complete click **Save**.



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