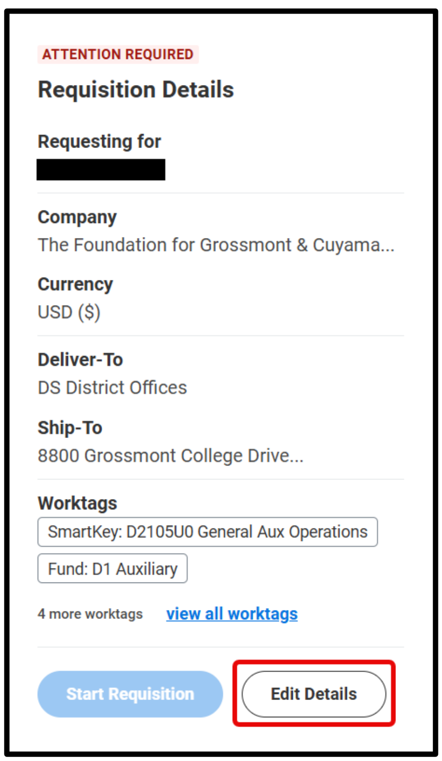
Create Purchase Requisition

This explains to employees and managers how to create Regular Requisitions and Service Requisitions from the Requisitions worklet. In addition to creating Requisitions, employees may check on the progress of their requests at any time.

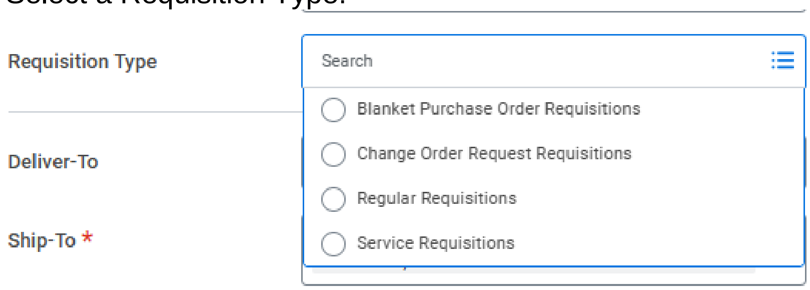
Detailed Instructions

1. Select the **Global Navigation Menu** icon at the top left corner and select **Requisitions** under the **Organizations** category.

2. The **Requisition Details** will be prepopulated. Select the **Edit Details** button to make changes, if needed. NOTE: Company may not default in correctly so please make sure the company is correct.



a. Select a Requisition Type:



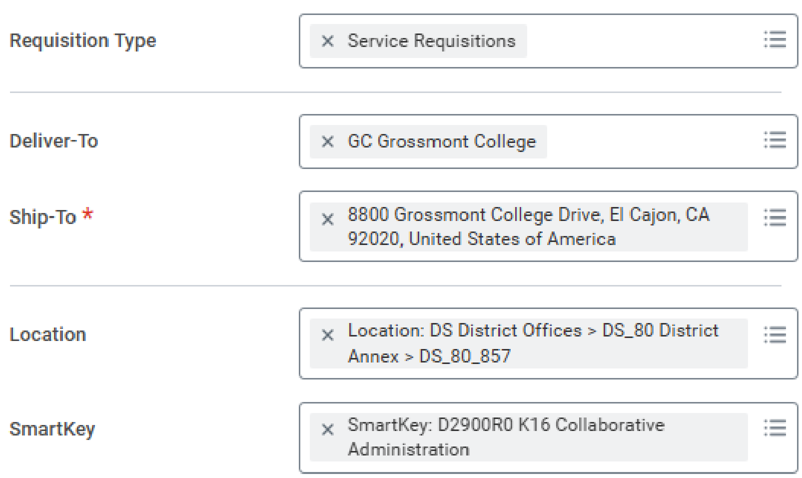
- **Blanket Purchase Order Requisition:** This is for a blanket purchase order used for goods and ordering supplies with the vendor throughout a fiscal year. We don’t use this very often.

- **Change Order Request Requisitions:** Select this requisition when you need to make a change to an existing purchase order. For example, add additional money, or extend the contract date to end later.

- **Regular Requisition:** Select this requisition when you want to purchase Goods (tangible items).

- **Service Requisition:** Select this requisition when contracting for professional services, or other miscellaneous services that require a signature from the FGCC.

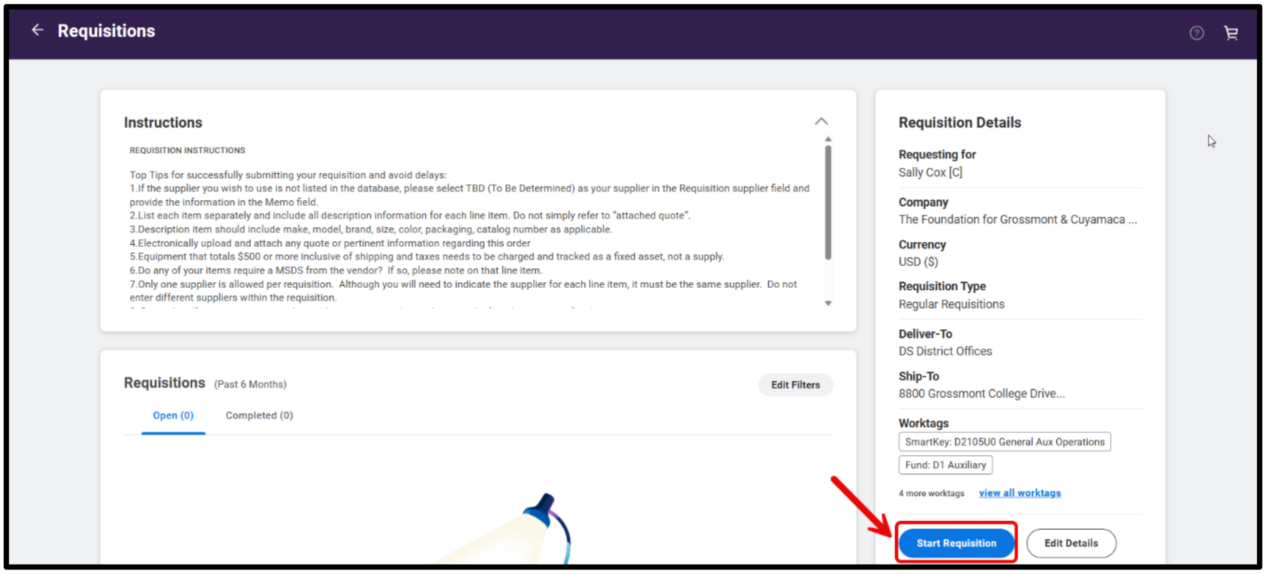
b. Add your Location: This is your building and room number. Add your Smartkey.



c. **Worktags**: Fund, Cost Center, Program, Business Unit and Additional Worktags are related to the smartkey and will automatically populate. Do not change these Worktags.

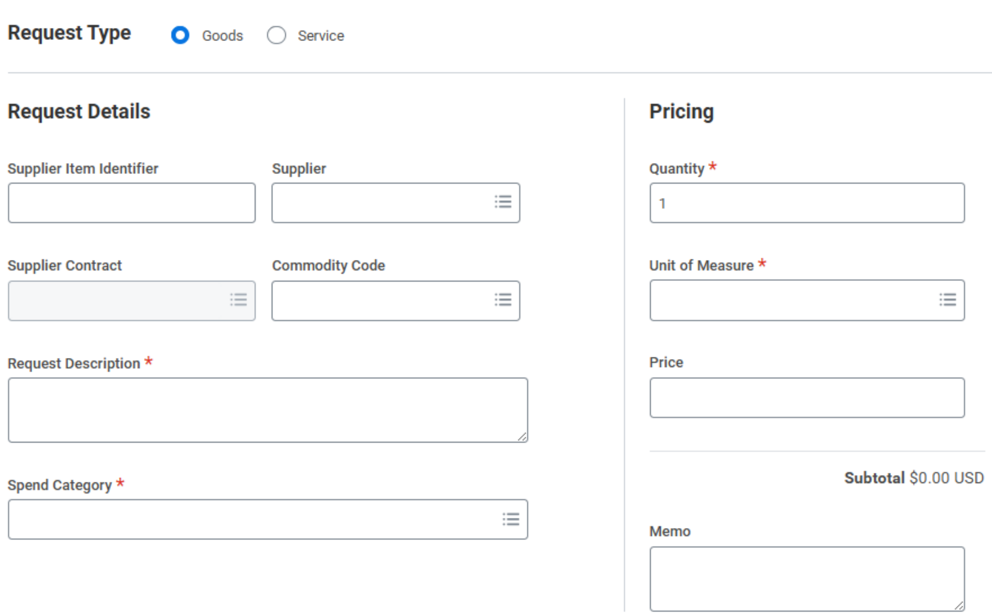
d. Select **Save Changes**.

Select the **Start Requisition** button within the **Requisition Details** section.



1. For **Request Type,** select **Blanket PO Requisitions, Change Order Requisitions, Regular Requisitions (for goods), or Service Requisitions (for services)**.

   This screen automatically defaults to Goods, which is a Regular Requisition. If you selected Service Requisition or Change Order Requisition when you edited the Requisition Details (previous step above), please select that option here.



   a. For requisitions for **Goods**, complete the **Request Details** section.

      i. **Supplier Item Identifier**: Enter the supplier quote number, if applicable.

The Foundation for Grossmont & Cuyamaca Colleges

ii. **Supplier**: [Required] - Enter the supplier's name and press enter or select the supplier from the Supplier by Supplier Category list. If the Supplier is new, type TBD and attach the W-9 or Payee Data Record Form later in the instructions. Add the Supplier's name in the Internal Memo section later.

iii. **Supplier Contract:**[Not Required]

iv. **Commodity Code:** [Not Required]

v. **Request Description**: [Required] - Enter a detailed description of the goods being purchased. This field is required.

vi. **Spend Category**: [Required] - Select the spend category using the prompt or search by entering text. This field is required.

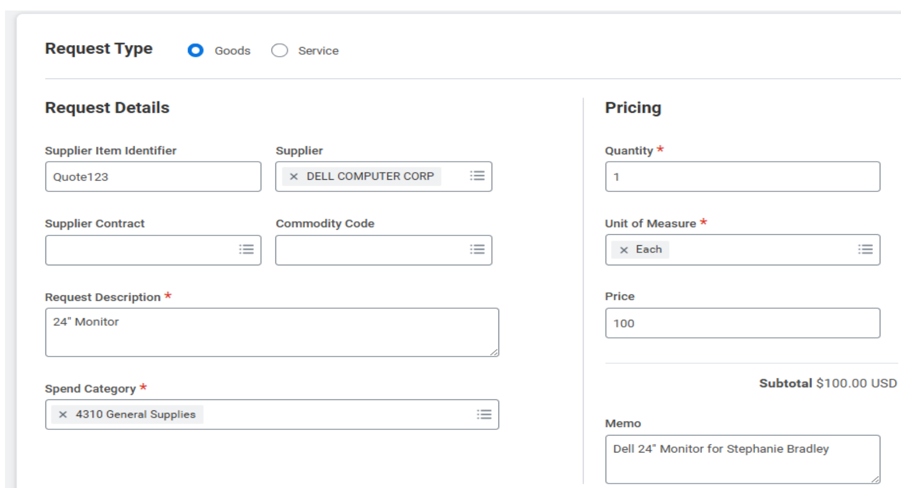
vii. Enter the **Pricing** details: [Required]

1. **Quantity**: Enter the quantity. This field is required.
2. **Unit of Measure**: Select the unit of measure using the prompt or search by entering text. This field is required.
3. **Price**: Enter the price per unit of measure.

viii. **Subtotal**: Automatically calculated based on pricing details. Shipping/Freight and Additional Charges are added at checkout.

ix. **Memo**: [Required] - Enter additional information about your request. This is an internal memo field.

1. Example: Dell 24" monitor for ____ [employee name]



b. For requisitions for **Services**, complete the **Request Details** section.

i. **Request Description**: [Required] Enter a detailed description for the request. This field is required.

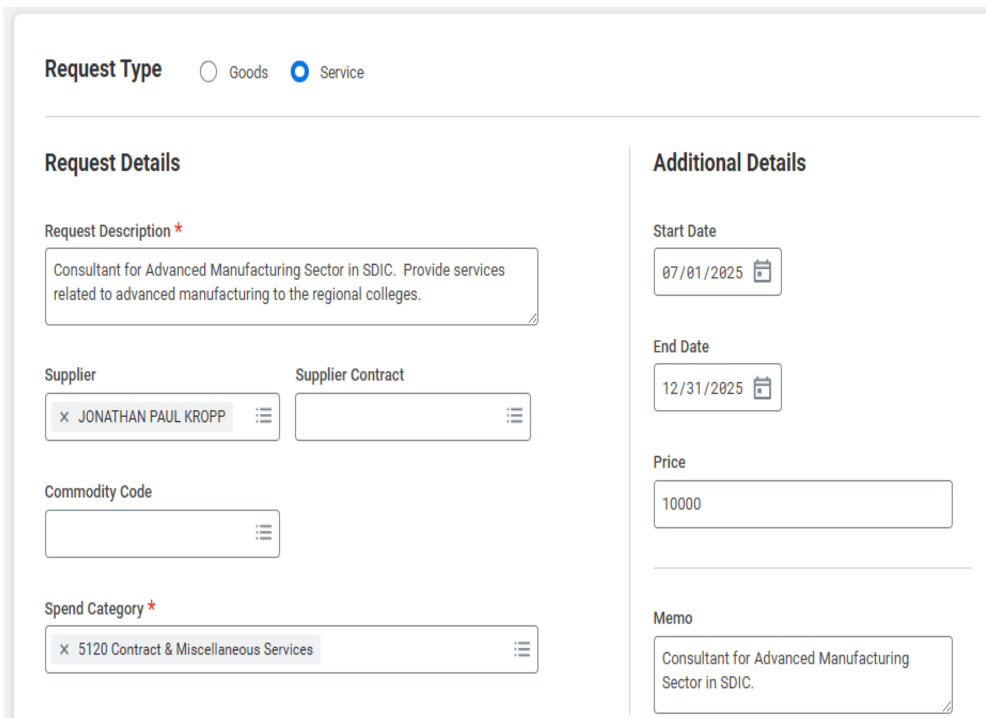
ii. **Supplier**: [Required] Enter the supplier's name and press enter or select the supplier from the Supplier by Supplier Category list. If the Supplier is new, type TBD and attach the W-9 or Payee Data Record Form later in the instructions. Add the Supplier's name in the Internal Memo section later.

iii. **Spend Category**: [Required] Select the spend category using the prompt or search by entering text. This field is required.

iv. Enter the **Additional Details** [Required]:

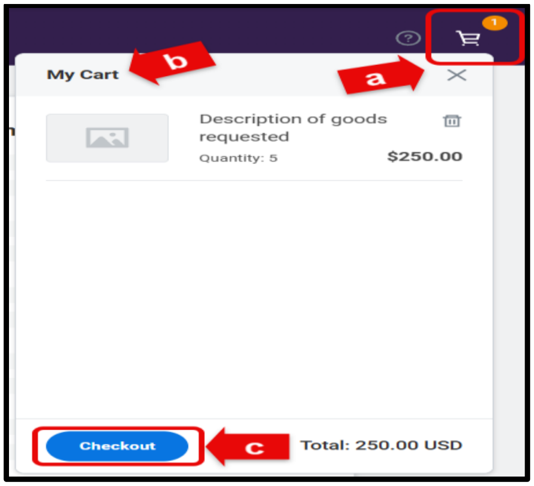
1. **Start Date:** Date services will begin
2. **End Date:** Date services are to be completed.
3. **Price**: Enter the amount of the contract.

v. **Memo**: [Required] Enter additional information about your request. This is an internal memo field.



2. Press the **Add to Cart** button to submit the request.

3. When you have completed shopping and are ready to check out, follow the steps below.

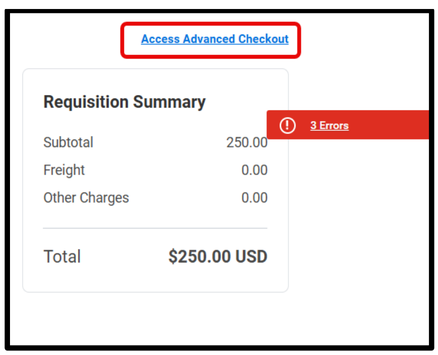


a. Select the cart icon to **View Cart**.

b. Review the items in **My Cart**.

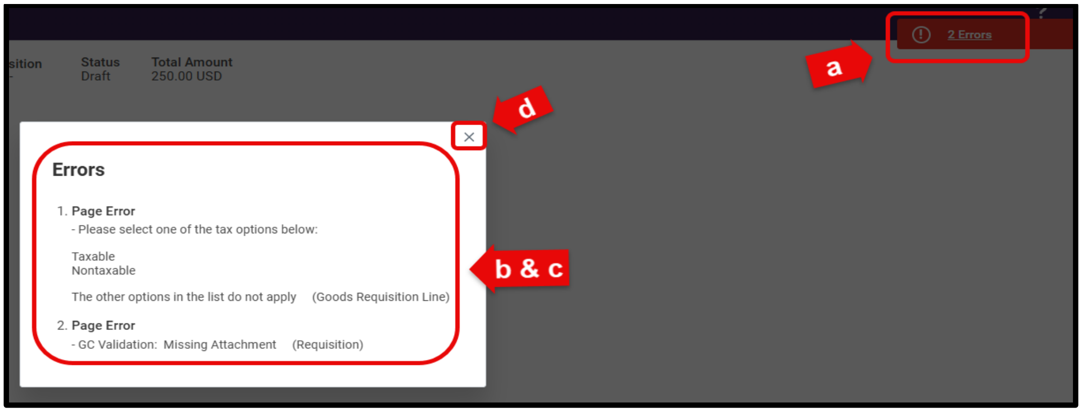
c. Select the **Checkout** button

4. On the **Checkout** page, select "**Access Advanced Checkout**" to review the **Requisition Information** for accuracy. Update, as needed. Note: You may add additional goods or services during checkout by clicking on the plus sign (+) above the goods or services line.



5. An **Error** (and alerts, if applicable) will display.

The Foundation for Grossmont & Cuyamaca Colleges



a. Select the **Error** message to display details.

b. Review the **Error** message(s).

   i. Possible Error Messages:

      1. Missing attachment

         a. Goods: attach a Quote

         b. Services: attach a Request for Contract, and Scope of Work or Proposal

      2. Requisition tax

         a. Goods: If taxable is chosen, use 8.25% as the tax code

         b. Services: Choose Non-Taxable

      3. Requisition total amount cannot be $0

      4. Requisition type is required

      5. Supplier is TBD, or is a new Supplier

         a. Add Supplier name in the Internal Memo section.

         b. Attach Payee Data Record for a new Supplier.

      6. Sourcing Buyer is required. Type one name in the field.

         a. Heba Almasraf, for all other grants not mentioned below and F smartkeys

         b. Mayra Chavez, for K16 Collaborative Grant

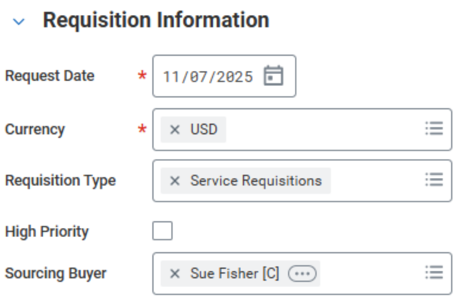
         c. Sue Fisher, for Regional Strong Workforce Program, K12 Strong Workforce Program, Regional Collaboration and Coordination Grants, K14 TAP and Pathway Coordinator Grant, Irvine Apprenticeship Grant

c. Review **Alerts** if applicable.

d. Select the **X** to close the screen.

e. The Error will remain on the page.

6. Verify the Requisition Type is correct:



Requisition Information

Request Date *	11/07/2025
Currency *	USD
Requisition Type	Service Requisitions
High Priority	
Sourcing Buyer	Sue Fisher [C]

7. Type the name of your Sourcing Buyer:

   a. **Heba Almasraf,** for all other grants not mentioned below and F smartkeys

   b. **Mayra Chavez**, for K16 Collaborative Grant

   c. **Sue Fisher**, for Regional Strong Workforce Program, K12 Strong Workforce Program, Regional Collaboration and Coordination Grants, K14 TAP and Pathway Coordinator Grant, Irvine Apprenticeship Grant

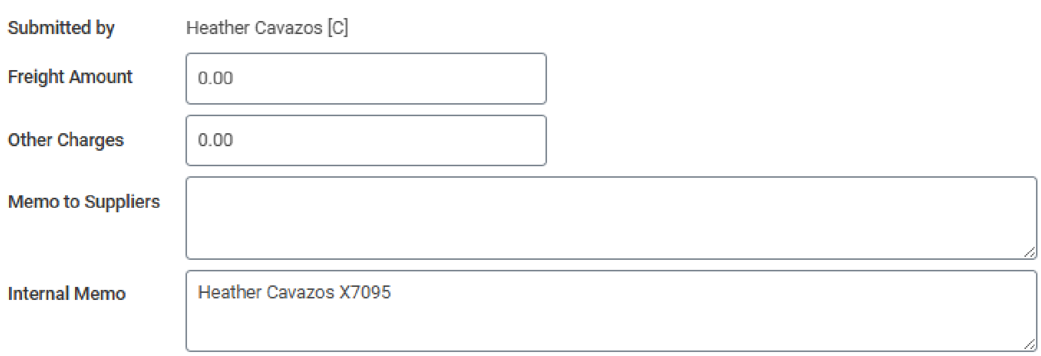
8. Freight Amount: Leave blank

9. Other Charges: Leave blank

10. Memo to Supplier and Internal Memo:

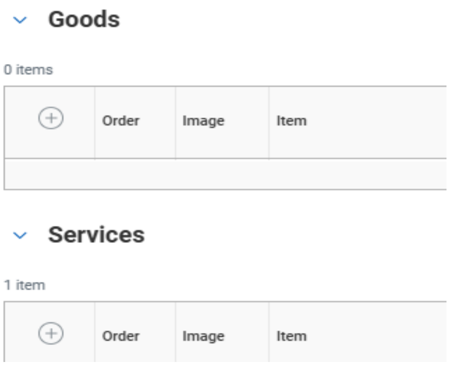
    a. Memo to Suppliers: leave this blank

    b. Internal Memo: Add your name and phone number. Add a contact number for the Buyer to reach you if there are questions regarding the request.



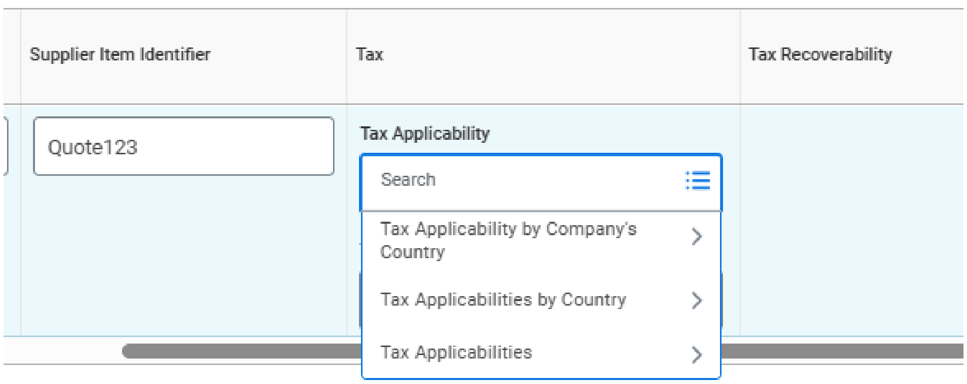
Submitted by	Heather Cavazos [C]
Freight Amount	0.00
Other Charges	0.00
Memo to Suppliers	
Internal Memo	Heather Cavazos X7095

11. Note: The requisition will have an option for Goods and Services. You cannot combine these services together in one requisition.



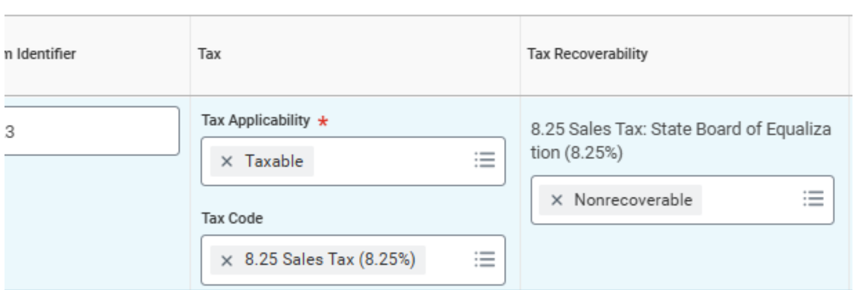
12. From the **Goods** line, move over to the **Tax** field. Select the tax options specified in the error message.

    a. Select **Tax Applicabilities**



    a. Select **Taxable**

    b. In the Tax Code field, select **Tax Codes** then select 8.25%. The Tax Recoverability will automatically populate.

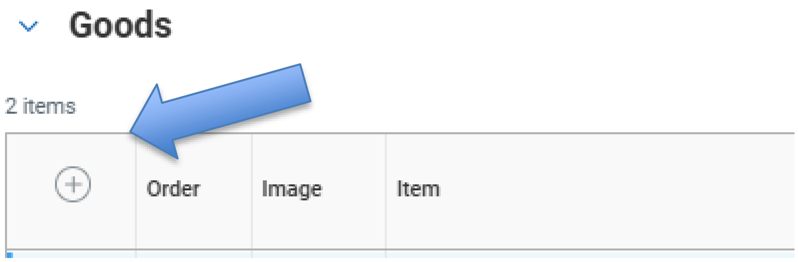


13. If the quote has a line item for **Environmental fees**, add a new line and enter the information. [Spend Category: 4310 / Non-Taxable]

The Foundation for Grossmont & Cuyamaca Colleges

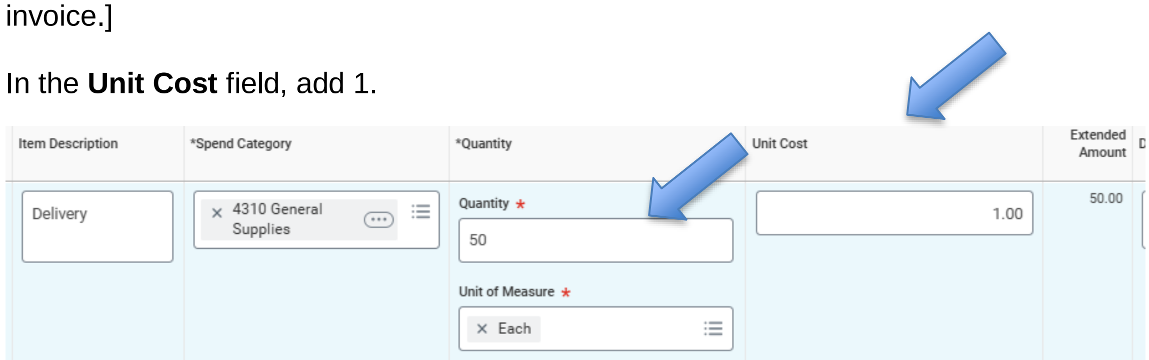
14. **Delivery Charges:** some quotes do not list a delivery amount. Please contact the vendor and ask them to revise the quote to include an estimated delivery amount. Add a new line and enter the information. [Spend Category: 4310 / Non Taxable

    a. **Add a line** to the requisition, by clicking on the +

    b. In the **Quantity** field, add the amount. [This gives the buyer the ability to change the amount in the purchase order to match the actual amount from the invoice.]

    c. In the **Unit Cost** field, add 1.

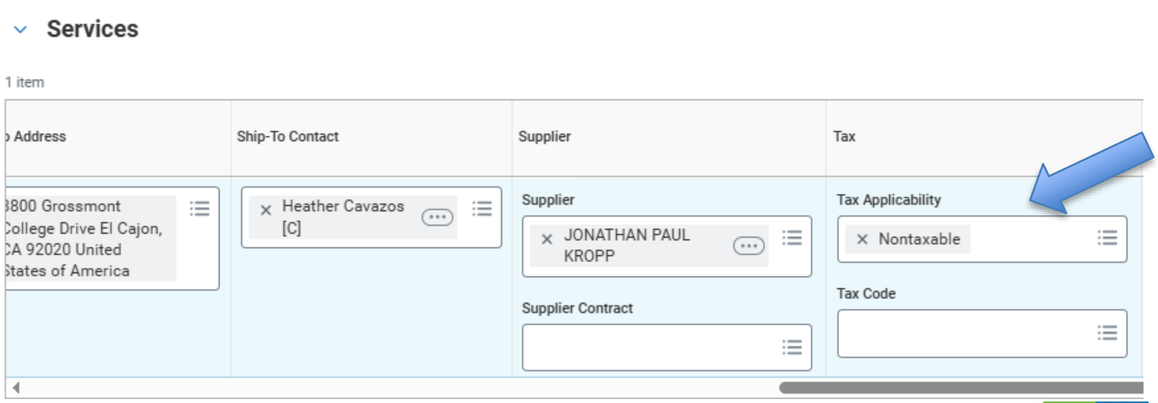
    

    d. Add the **Supplier** in the field.

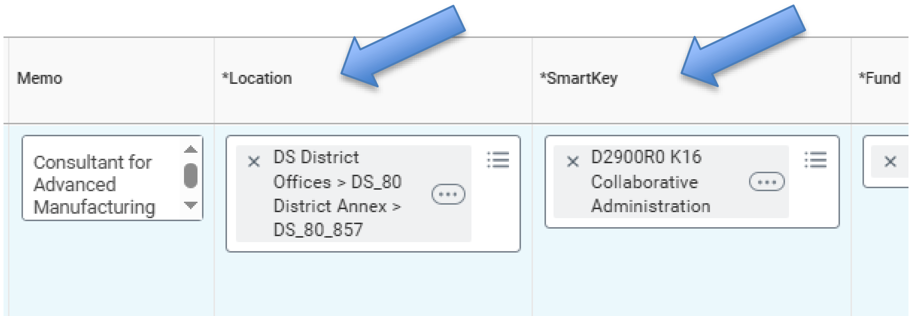
    e. The **Tax Applicability** is nontaxable for delivery/shipping costs.

    f. Add the **Smartkey**

15. From the **Services** line, scroll over to the Tax field. Professional services for consultants is not taxable, select the icon with the 3 lines and choose **Tax Applicabilities**, and then select **Nontaxable**.



16. Verify Location has your building and office number added in the field. Ensure the smartkey is correct.



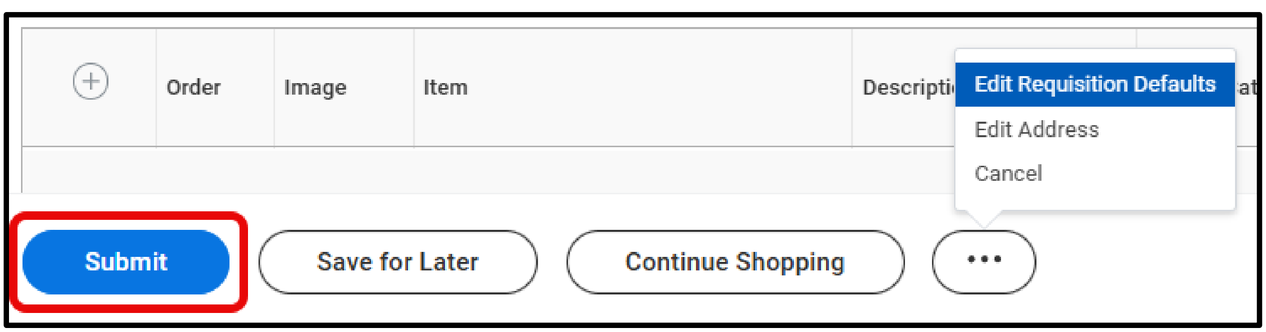
17. Upload an Attachment:

    a. Goods: Attach a quote from the vendor.

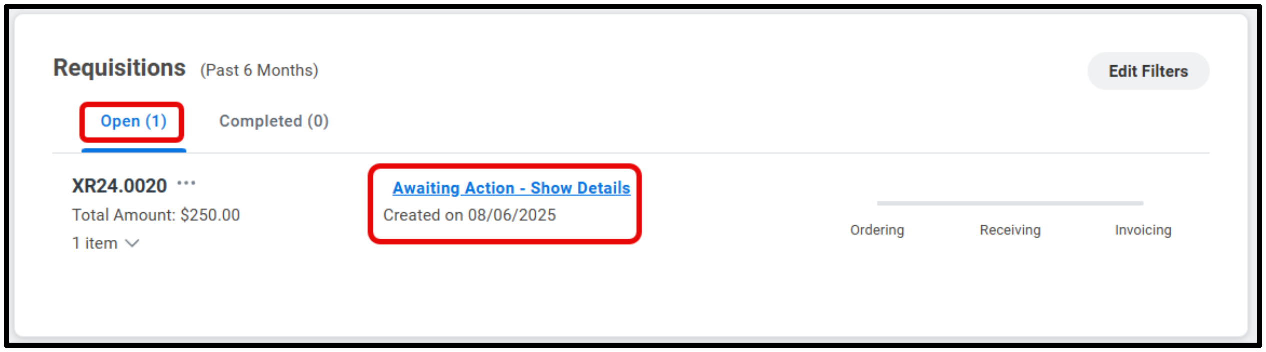
    b. Services: Request for Contract form, and Scope of Work (*proposal from the contractor, or something similar.)*

    c. Payee Data Record: Attach if the supplier is new or if a supplier information changed (*address, Tax I.D., status of entity, phone number, etc*.)

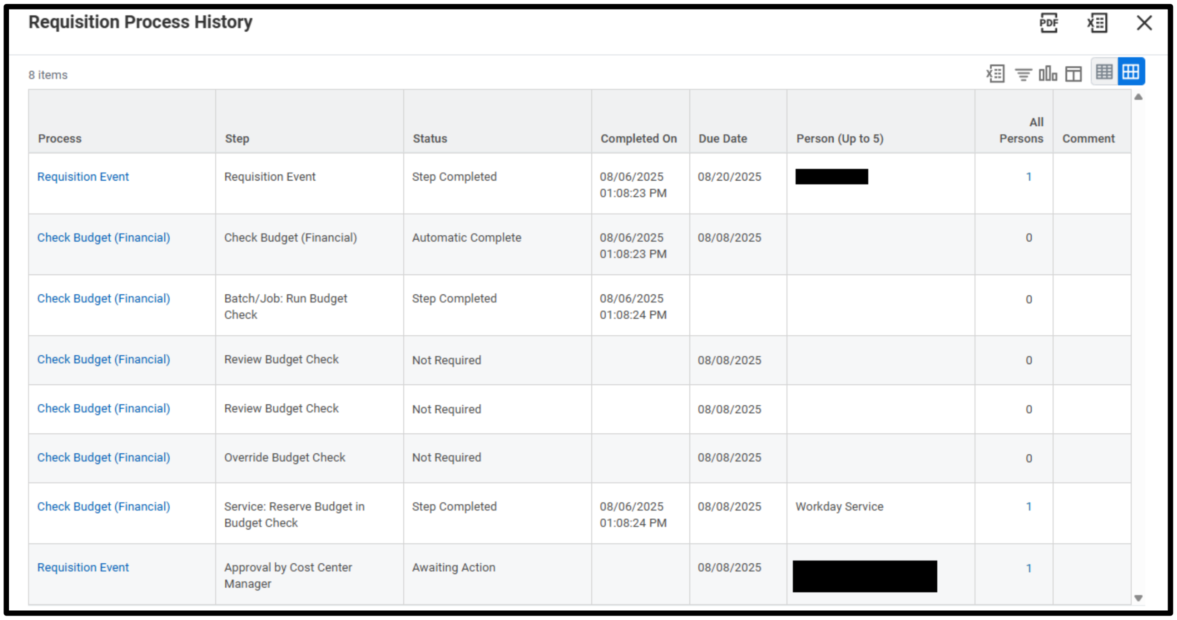
18. Select the **Submit** button when complete. Other options include: **Save for Later**, **Continue Shopping** as well as **Edit Requisition Defaults**, **Edit Address**, and **Cancel** from the more button.



19. Upon submission, you will be redirected to the **Requisitions** worklet. The newly created requisition will appear under **Requisitions** on the **Open** tab. Select the **Awaiting Action - Show Details** hyperlink to view the **Requisition Process History**.



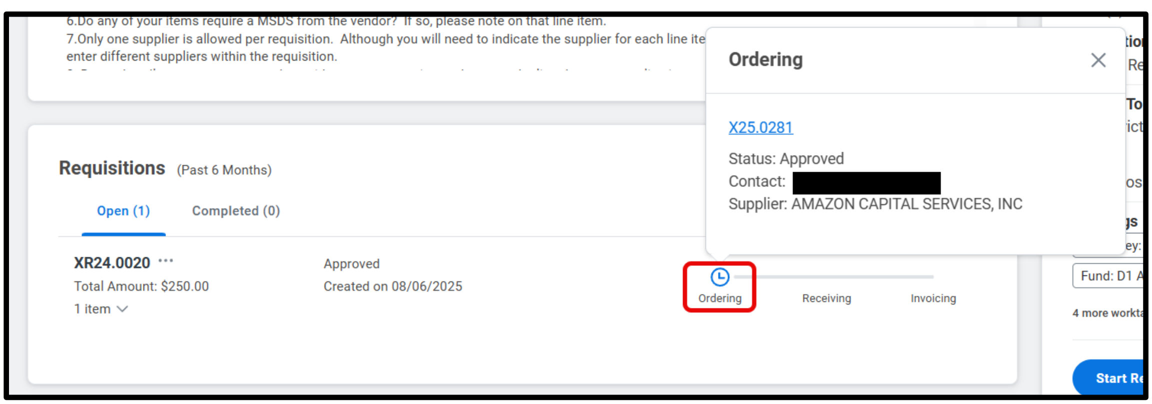
20. The **Requisition Process History** will display all the steps in the process.


Requisition Process History

8 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Requisition Event	Requisition Event	Step Completed	08/06/2025 01:08:23 PM	08/20/2025	[redacted]	1	
Check Budget (Financial)	Check Budget (Financial)	Automatic Complete	08/06/2025 01:08:23 PM	08/08/2025		0	
Check Budget (Financial)	Batch/Job: Run Budget Check	Step Completed	08/06/2025 01:08:24 PM			0	
Check Budget (Financial)	Review Budget Check	Not Required		08/08/2025		0	
Check Budget (Financial)	Review Budget Check	Not Required		08/08/2025		0	
Check Budget (Financial)	Override Budget Check	Not Required		08/08/2025		0	
Check Budget (Financial)	Service: Reserve Budget in Budget Check	Step Completed	08/06/2025 01:08:24 PM	08/08/2025	Workday Service	1	
Requisition Event	Approval by Cost Center Manager	Awaiting Action		08/08/2025	[redacted]	1	

21. Approval of the request will be displayed on the **Requisitions** worklet along with its progress. **Ordering** means the PO is approved but not issued. **Ordered** means the PO has been issued.



Have Questions?

For information please contact the sourcing buyer:

- Heba Almasraf, for all other grants not mentioned below and F smartkeys. Heba.almasraf@gcccd.edu
- Mayra Chavez, for K16 Collaborative Grant. Mayra.chavez@gcccd.edu
- Sue Fisher, for Regional Strong Workforce Program, K12 Strong Workforce Program, Regional Collaboration and Coordination Grants, K14 TAP and Pathway Coordinator Grant, Irvine Apprenticeship Grant. Sue.fisher@gcccd.edu

The Foundation for Grossmont & Cuyamaca Colleges