Requisition Requests

Requisition Requests are used to request creation of a requisition (RK) in the PASS system to initiate the process for issuance of a Purchase Order. Anyone from DGS can create and submit a Requisition Request from within a project in ProjectTeam. All Requisition Requests go to the listed EPM on the project via workflow for review and approval regardless of who the requestor is.

As there are multiple processes and multiple responsible parties for DGS CCSD Requisition Requests depending on specific things such as requestor status, Program, project, etc., the EPM who receives each Requisition Request via workflow is responsible for determining the next steps for processing, including the correct person to enter the request in PASS, and ensuring that the Requisition Request is properly reviewed, signed, processed, and sent where it needs to go.

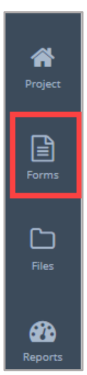
EPMs should use the Merge Template function in ProjectTeam to print, sign, and process completed, and approved Requisition Requests sent to them.

The BDI group will update the required requisition tracking fields on the form as the Requisition Request is entered and processed in PASS.

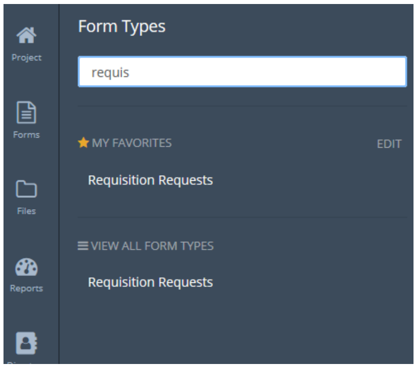
The DGS PM for the project is responsible for updating the *Status* and *Status Notes* fields, recording the associated in the *PO Number (PASS)* field, entering the *PO Vendor Name*, and checking the *PO Issued* box once the PO has been awarded for each Requisition Request. These fields shall be completed upon award of the PO when the Contract record is entered in ProjectTeam.

Creating a Requisition Request

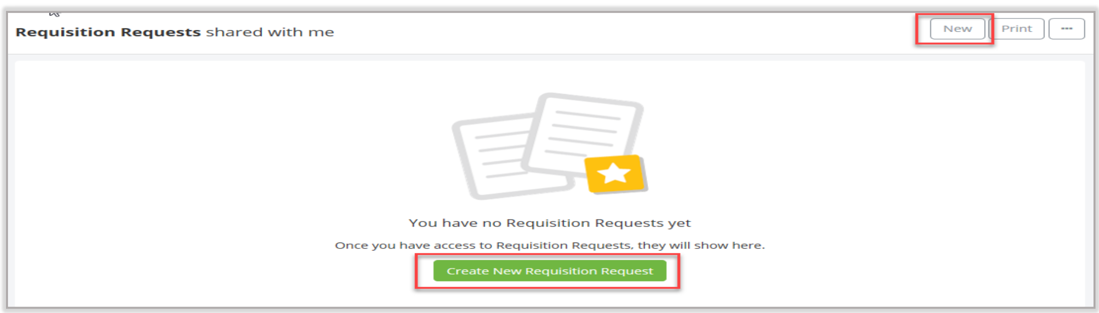
1. Within the project, click the **Forms** icon on the left navigation pane.



2. In the search field, begin typing **Requisition** and the form will appear in the forms list. Click **Requisition Request** to open.

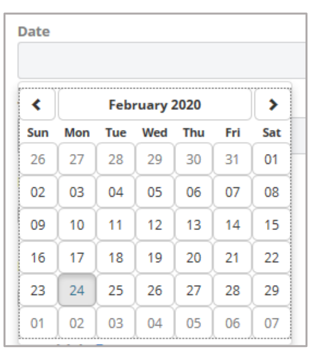


3. If this is the first change order for a project, click the **Create New Requisition Request** button located in the middle of the log or click the **New** button in the upper right corner.



4. Enter the title of the Requisition Request in the **Subject** field

5. Click in the **Date** field to bring up the calendar and select the date of your request (typically the day you create the request).



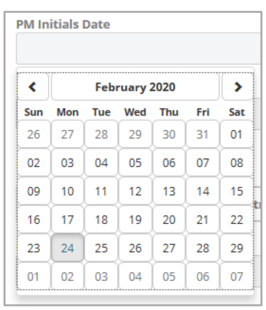
6. Click in the **Type of Request** data field and select New or Modification from the pick list. Select "New" for a request associated with a new Contract or Task Order or "Modification" for a request associated with a Change Order/Modification.

7. If applicable, click the checkbox for **Requires Council Approval**.

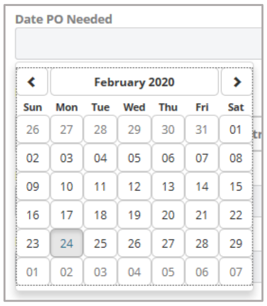
8. If applicable, click the checkbox for **Reviewed Capital Eligibility Guidelines**.

9. Click in the **PM Initials** field. This field is required if you have selected the **Capital Eligibility Guidelines** checkbox.

10. The **PM Initial Date** field is a date field required if the **Capital Eligibility Guidelines** checkbox is checked.



11. Click inside the **Date PO Needed** and select a date.



12. Enter an existing associated PO Number in the **Original PO** field if the request is for a Change Order requisition. Enter "N/A" if the request is associated with a new Contract/Task Order.

13. Enter the current amount (total revised amount) of the Original PO in the **Amount** field if there is an Original PO associated with the request. Enter "0" if the request is associated with a new Contract/Task Order.

14. Enter the request amount of additional or reduced funding in the **Modification Amt** field if the request is for a Change Order requisition.

15. Enter the **Building/Location Name**.

16. Add the **Building/Location Address**.

17. Enter the **Ward**.

18. Click inside the **Fund Type** field and select either Operating or Capital from the pick list depending on the type of funding requested.

19. Enter the **Capital Project Number**. This is the 6-digit funding code for for the project budget (i.e. YY107C)

20. Enter the cost of the requisition in the **Cost** field.

21. Add the **Vendor Name**.

22. Add the **Vendor Address**.

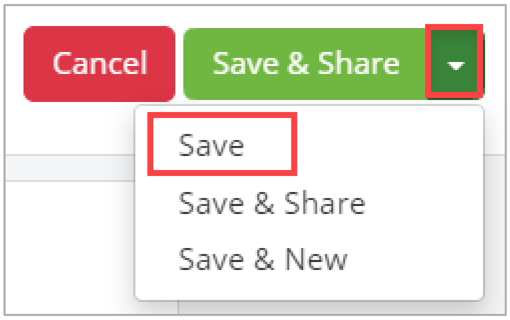
23. Add os description of the services that will be provided by the vendor when this request is processed (SOW) in the **Description** field.

24. Add a **Justification**.

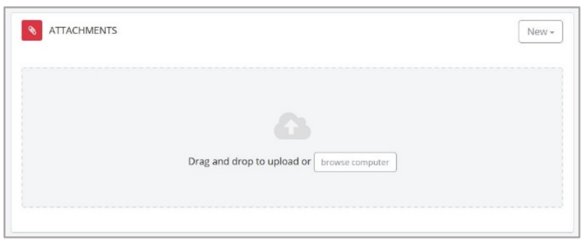
25. Click inside to add the name of the **Requestor**.

NOTE: You do not need to fill out any of the remaining budget-specific fields on the form. They are for future use.

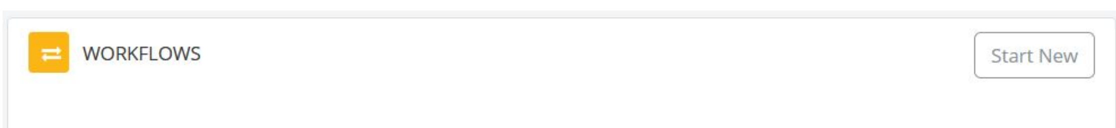
26. To save the **Requisition Request** document, click the dropdown arrow beside **Save & Share** and click the **Save** button. Autoshare and the workflow, once initiated, will enable all appropriate DGS users to see the record in the system.



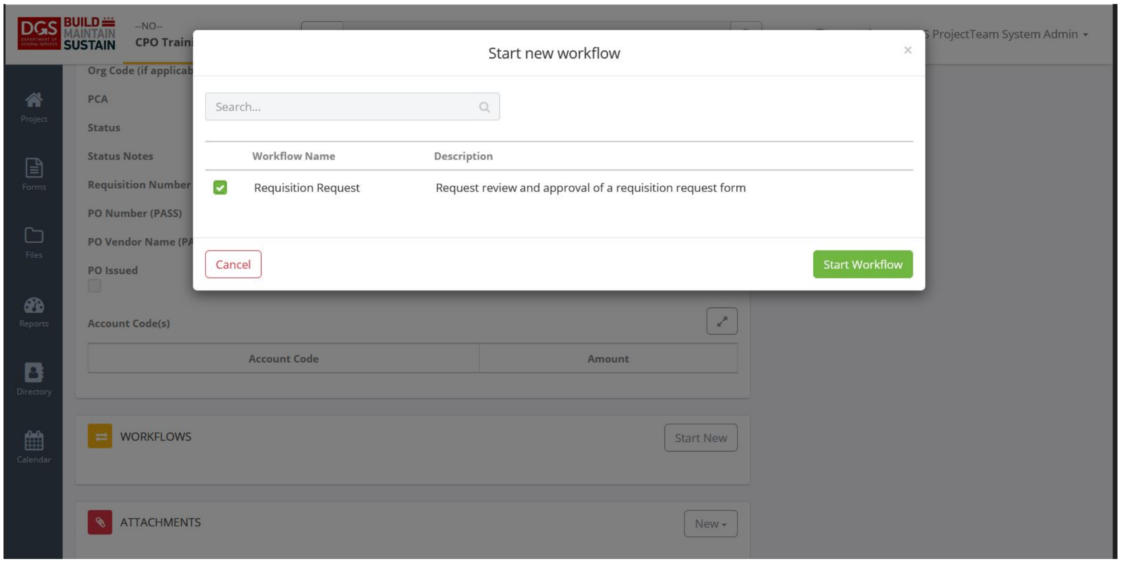
27. Scroll to the bottom of the Details section of the completed form and add any relevant attachments to the request in the **Attachments** section.



28. Submit your Requisition Request for approval and processing by initiating the Reqquisition Request workflow using the **Start New** button in the workflows section of the form.



29. Select the "*Requisition Request"* workflow using the checkbox and click **Start Workflow.**



30. NOTE: The workflow will notify the DGS PM for the project when the EPM has approved the request. The DGS PM should follow any instructions received when the workflow is returned by the EPM and Pass the workflow to complete the process when done.