Purchase Requisition Status report

Any requisitions with a status of *in-process*, *pre-approved* or *rejected* will show as commitments on the general ledger (and against a grant if the requisition has been checked out to a grant). These requisitions need to be processed appropriately (deleted, cancelled or completed) and this can only done by the person that created the requisition.

This report provides a mechanism for departments to routinely identify requisitions that require action and more importantly it can be used to identify all requisitions that are outstanding for staff that will be leaving the department.

Departments are unable to cancel/delete any requisitions created by a person who has since left the department. Instead these requisitions would have to be referred to the Finance Division for processing.

Step 1: Selecting the report

Navigate	Buyers Work Centre > Requests

1.1 Click in the **Program Name** field, and type in **Purchase** and then press tab. From the list of matching reports **Quick Select** the **Purchase Requisition Status Report**.

1.2 Now click **Next** to enter specific parameters.

Step 2: Entering parameters

You can enter any relevant parameters, such as a date range and importantly, specify a requester.

2.1 To constrain your report to a particular date range, use the **Creation Dates From** and **To** fields. You can click on the calendar icons beside each of these fields to select dates from the calendar.

2.2 In the Requester field, enter the requester's surname and press tab. If necessary, **Quick Select** the requester from the list of matches.

2.3 Now press **Submit** to skip ahead to step 7 and finalise your request.

Note: steps 3-5 in creating a request provide you with access to advanced features such as scheduling reports and automatically notifying users when reports are complete.

Step 7: Review and submitting the request

Information on this screen will summarise what you have entered on the previous steps.

If you have not progressed through each step, once at this screen we recommend that you click **Back** to go to step 6 and amend your copies from 1 to 0 to review the report on screen before printing.

7.1 Click **Submit** and an information message will display.

7.2 Click **OK** and your Request screen will display. Click **Refresh** to update the Phase and Status of the request.

Viewing the report

Click on **Output** and the report will display on your screen.

The report lists requisitions matching your search criteria. The details include:

- Requisition status
- Lines
- Purchase order numbers (where available)
- Purchase order statuses (where available)

Examples from this report are shown on the following page.

Examples from the Purchase Requisition Status Report

```
Requisition Number: 838241                              Preparer: Delegate289, Del
     Creation Date: 28-AUG-14                            Status: Approved
     Description: Cadbury Variety Treatsize Bag A06966


Line Category  Item                Rev Description                          Unit      Quantity       Unit Price
---- --------- ------------------- --- ------------------------------------ -------- -------------- --------------
                                       Quantity Deliver to    Need-By  On  From                                 PO
               Requester               Delivered Location     Date     RFQ Req Line PO Number   PO Status       Line
               ----------------------- --------------- ------- -------- --- -------- ----------- --------------- ----
  1 CER                                Cadbury Variety Treatsize Bag A06966          Each          10.00         5.54
               Delegate289, Del                     PD 04-SEP-14 No               1916556      Approved          1
  2 CER                                Quality Street 400G x 6                      Each           2.00         35.82
               Delegate289, Del                     PD 04-SEP-14 No               1916556      Approved          2
```

A complete requisition with approve purchase orders

```
Requisition Number: 838246                              Preparer: Delegate289, Del
     Creation Date: 28-AUG-14                            Status: Incomplete
     Description: Cadbury Variety Treatsize Bag A06966


Line Category  Item                Rev Description                          Unit      Quantity       Unit Price
---- --------- ------------------- --- ------------------------------------ -------- -------------- --------------
                                       Quantity Deliver to    Need-By  On  From                                 PO
               Requester               Delivered Location     Date     RFQ Req Line PO Number   PO Status       Line
               ----------------------- --------------- ------- -------- --- -------- ----------- --------------- ----
  1 CER                                Cadbury Variety Treatsize Bag A06966          Each          10.00         5.54
               Delegate289, Del               0.00 PD 04-SEP-14 No
  2 CER                                Quality Street 400G x 6                      Each           2.00         35.82
               Delegate289, Del               0.00 PD 04-SEP-14 No
```

An incomplete requisition