

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**.

	nd Select: Program	Name	C	an Se
Search				
To find	your item, select a fr	ilter item in the pulldown list and enter a value in the text field, then select the "Go" button.		
Search F	By Program Name	Rurchase Go		
Dearchie	y programmanic [
Results	5			
Results	5			
Results Select	s Quick Select	Program Name	Application Name	
Results	S Quick Select	Program Name Purchase Order Distribution Detail Report, with Grant (UFS)	Application Name CAP5A	
Select	Quick Select	Program Name Purchase Order Distribution Detail Report, with Grant (UFS) Purchase Order Detail Report	Application Name CAPSA Purchasing	
Select	Quick Select	Program Name Purchase Order Distribution Detail Report, with Grant (UFS) Purchase Order Detail Report Purchase Order Distribution Detail Report	Application Name CAPSA Purchasing Purchasing	

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.

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Name	Parameters	Schedule	e Layout	Notifica	tions	Delivery	More
Schedule Reques	t: Parameters						
* Indicates require	d field			Cancel	Sub <u>m</u> it	Back Step	2 of 7 Ne <u>x</u> t
Program I	Name Purchase Requ Report	iisition St	atus				
Request I	Name				_		
		Title					
	Requisition Numbe	ers From		ы Q			
		То		<u> </u>			
	Creation Dat	tes From					
		То					
	R	equester		ы Q			
		Location		<u>ы</u> 🔍			
	* Dynamic Precisio	n Option	2 🔍				
			-9,999,990.00				
				Cancel	Sub <u>m</u> it	Back Step	2 of 7 Ne <u>x</u> t

- 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.

Requests										
	Advanced Search Submit Reques									
Request Query	v Type All My Requests ▼	Go								
Requests Sur	nmary Table									
Refresh										
Request ID	Name	Phase	Status	Scheduled Date	Details	Output	Republish			
14679627	Purchase Requisition Status Report	Pending	Standby	25-Sep-2014 15:21:45	Ē		E DC			
14679554	Purchasing Activity Register (UFS)	Completed	Normal	25-Sep-2014 09:48:14	Ē	æ	B			

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

Requ	uisition Num Creation 1 Descrip	mber: 838241 Date: 28-AUG-14 tion: Cadbury Variety	Treatsize Bag A06966		Preparer: Status:	Delegate28 Approved	9, Del	
Line	Category	Item	Rev Description		Unit	:	Quantity	Unit Price
		Requester	Quantity Deliver to Delivered Location	Need-By C Date R	On From RFQ Req Line	PO Number	PO Status	PO Line
1 2	CER CER	Delegate289, Del	Cadbury Variety Treatsize Ba PD Quality Street 400G x 6	g A06966 04-SEP-14 N	Each Io Each	1916556	10.00 Approved 2.00	5.54 1 35.82
		Delegate289, Del	PD	04-SEP-14 N	10	1916556	Approved	2

A complete requisition with approve purchase orders

Requisition Number: 838246 Creation Date: 28-AUG-14 Description: Cadbury Variety Treatsize Bag A06966					Preparer: Delegate289, Del Status: Incomplete				
Line	Category	Item	Rev Description				Unit	Quantity	Unit Price
		Requester	Quantity Delivered	Deliver to Location	Need-By Date	On RFQ	From Reg Line PO Number	PO Status	PO Line
1	CER	Delegate289. Del	Cadbury Variet	y Treatsize Bag	A06966 04-SEP-14	No	Each	10.00	5.54
2	CER	Delegate289, Del	Quality Street 0.00	400G x 6 PD	04-SEP-14	No	Each	2.00	35.82

An incomplete requisition