



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 be 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**.

Search and Select: Program Name

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By **Program Name** **Go**

Results

Select	Quick Select	Program Name	Application Name
<input type="radio"/>		Purchase Order Distribution Detail Report, with Grant (UFS)	CAPSA
<input type="radio"/>		Purchase Order Detail Report	Purchasing
<input type="radio"/>		Purchase Order Distribution Detail Report	Purchasing
<input checked="" type="radio"/>		Purchase Requisition Status Report	Purchasing

Cancel **Select**

1.2 Use the **Parameters** tab to enter specific parameters.

Step 2: Entering parameters

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

Schedule Request: Define

* Indicates required field

New Request

Copy Request

Program Name

Request Name

The name can later be used to search for this request

* Operating Unit

NLS Settings

Parameters

Notification

Print Options

Delivery Options

ScheduleOptions

Title	<input type="text"/>
Requisition Numbers From	<input type="text"/>
To	<input type="text"/>
Creation Dates From	<input type="text"/>
To	<input type="text"/>
Requester	<input type="text"/>
Location	<input type="text"/>
* Dynamic Precision Option	<input type="text" value="2"/>
	-9,999,990.00

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 **Continue** to finalise your request.

Note: the other tabs provide you with access to advanced features such as scheduling reports and automatically notifying users when reports are complete.

Check the print option is set to noprint

Step 3: Review and submitting the request

Information on this screen will summarise what you have entered in the various tabs

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

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

Requests

Request Query Type: All My Requests

Requests Summary Table

Request ID	Name	Phase	Status	Scheduled to Run	Details	Output	Republish
30075222	Purchase Requisition Status Report	Pending	Normal	27-Oct-2021 10:03:04			

Step 4: Viewing the report

4.1 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: 2089440
Creation Date: 04-OCT-21
Description: Chair

Preparer: Delegates11, Del
Status: Approved

Line Category	Item	Rev Description	Unit	Quantity	Unit Price			
	Requester	Quantity Deliver to Delivered Location	Need-By Date	On RFQ	From Req Line	PO Number	PO Status	PO Line
1 FC	Delegates11, Del	Chair PD	11-OCT-21	No	EA	3414927	2.00 Approved	20.00 3
2 FC	Delegates11, Del	Table PD	11-OCT-21	No	EA	3414927	1.00 Approved	50.00 2

A complete requisition with approve purchase orders

Requisition Number: 2089519
Creation Date: 26-OCT-21
Description: test

Preparer: Delegate20, Del
Status: Pre-Approved

Line Category	Item	Rev Description	Unit	Quantity	Unit Price			
	Requester	Quantity Deliver to Delivered Location	Need-By Date	On RFQ	From Req Line	PO Number	PO Status	PO Line
1 FZ	Delegate22, Del	test 0.00 PD	02-NOV-21	No	EA		1.00	5000.00

A pre-approved requisition