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.

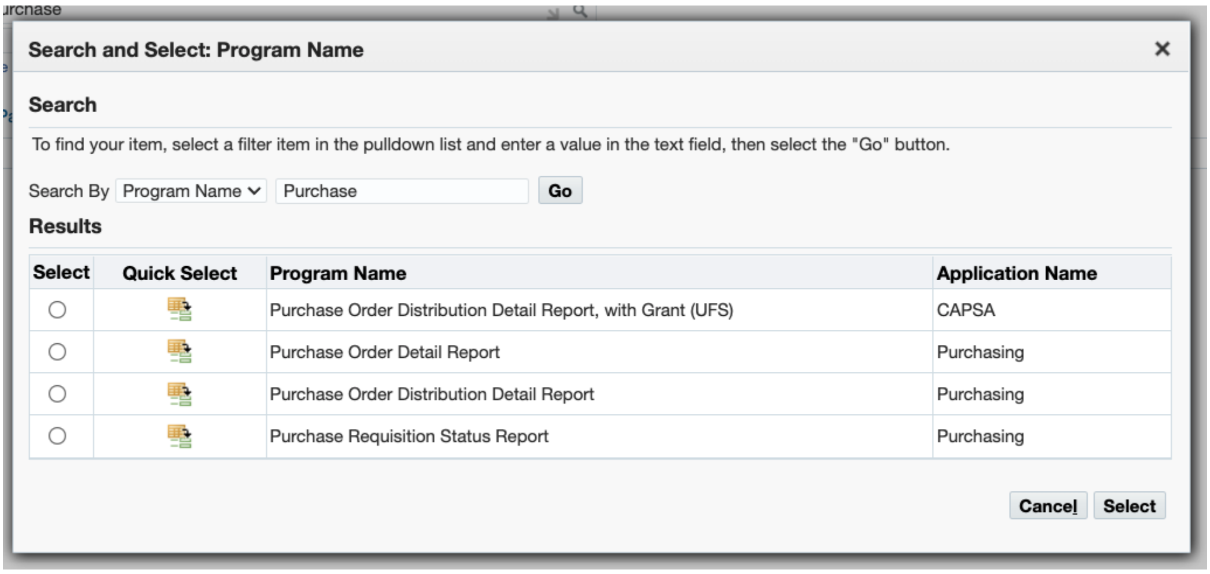
This report provides a mechanism for departments to routinely identify requisitions that require action and more importantly it can be used to identify all requisitions that are outstanding for staff that will be leaving the department.

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**

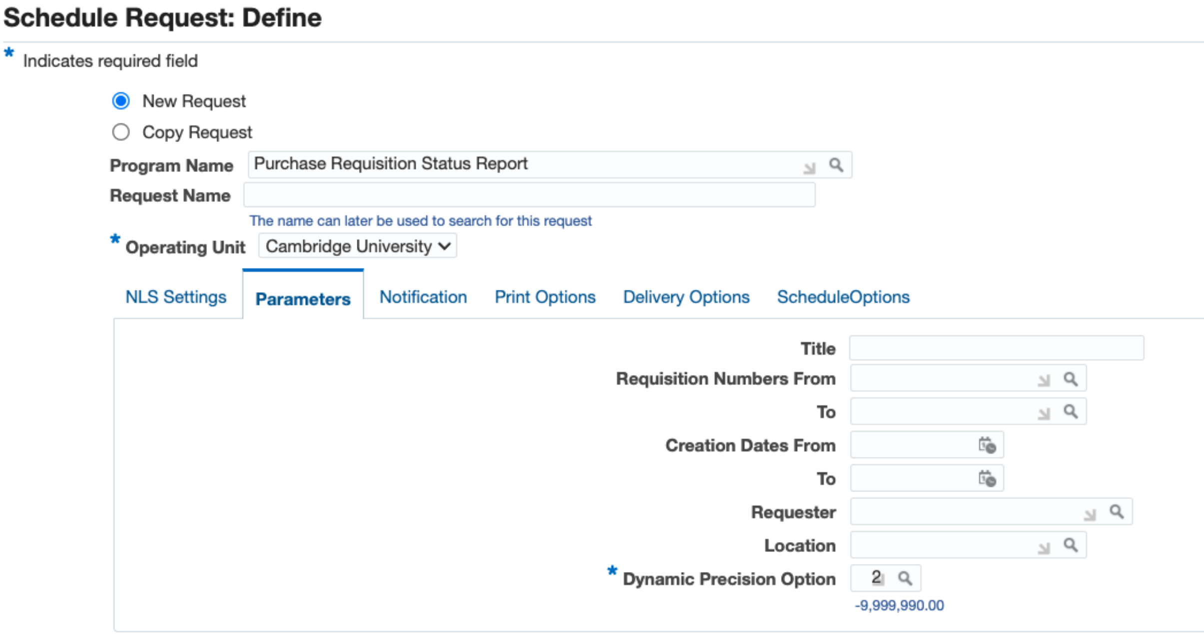
1.1 Click in the **Program Name** field, and type in **Purchase** and then press tab. From the list of matching reports **Quick Select** the **Purchase Requisition Status Report**.



1.2 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.



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.

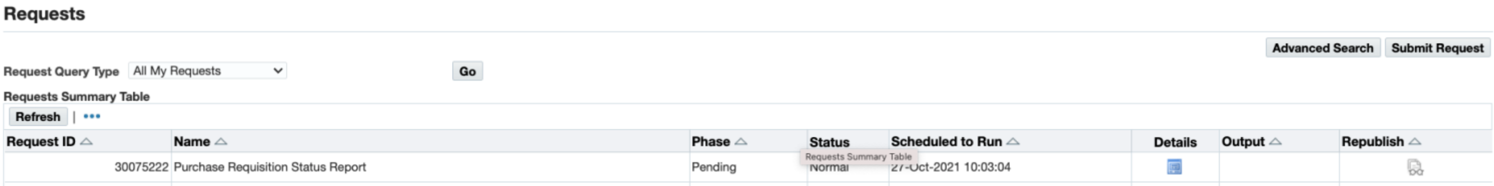
Check the print option is set to noprint

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.



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                                                         Preparer: Delegate11, Del
     Creation Date: 04-OCT-21                                                         Status: Approved
       Description: Chair

Line Category  Item                Rev Description                                       Unit         Quantity       Unit Price
---- ---------- ------------------- --- -------------------------------------------------- -------- -------------- --------------
                                              Quantity Deliver to     Need-By   On   From
               Requester                      Delivered Location      Date      RFQ  Req Line PO Number       PO Status        PO
                                                                                                                              Line
               ----------------------- --------------- --------------- --------- ---- -------- --------------- --------------- ----
   1 FC                                     Chair                                              EA              2.00             20.00
               Delegate11, Del                          PD             11-OCT-21 No               3414927         Approved            3
   2 FC                                     Table                                              EA              1.00             50.00
               Delegate11, Del                          PD             11-OCT-21 No               3414927         Approved            2
```

A complete requisition with approve purchase orders

```
Requisition Number: 2089519                                                         Preparer: Delegate20, Del
     Creation Date: 26-OCT-21                                                         Status: Pre-Approved
       Description: test

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

A pre-approved requisition