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# PURCHASING USER MANUAL

## THE REQUISITIONS STATUS SCREEN

### INTRODUCTION

The **Status** screen displays a list of requisitions that have been saved in the application and allows you to find requisitions by several criteria. A requester can check on the status of their requisition by viewing the **Status** column or by opening the specific requisition to view the status and/or **Receipt info** of each line item. NOTE: A requisition could have several line items each with a different status, so an individual line item status may not be reflected in the overall requisition status.

Figure 1 - Requisitions Status screen

Trk #	Req #	Requester	Req'd Date	Description	Status
<a href="#">Approve</a> 113	DSA07003	MERIDETH	12/13/2007	Employee Supplies	Awaiting Line Approval
<a href="#">Fiscal</a> 111	DSA07004	SUAMIE	12/04/2007	Office Awards Function	Awaiting Fiscal Coding
<a href="#">Edit</a> 115	DSA07005	TU AIH	03/20/2008	TEST PROCESS	Requisition Rejected
<a href="#">Approve</a> 128	DSA07007	TU AIH	12/14/2007	testing	Awaiting Line Approval
<a href="#">Authorize</a> 130	DSA08001	MERIDETH	01/28/2008	215 testing	Awaiting Authorization
<a href="#">Select</a> 204	DSA08002	DAH	03/13/2008		Ready for Purchasing

By default, the application displays requisitions that are **Active or Recently Received** and, if your agency has created Requisition Departments, are in the departments that you belong to (**My Departments**).

Purchaser can also view the same requisition status through the **Req Status** screen. The features and functionality is the same as it is for the Requisitions **Status** screen.

Figure 2 - Purchase Orders Req Status screen

Trk #	Req #	Requester	Req'd Date	Description	Status
<a href="#">Select</a> 252	D8000	JAMES	04/02/2008	Wheels	Ready for Purchasing
<a href="#">Select</a> 204	DSA08002	DAH	03/13/2008		Ready for Purchasing
<a href="#">Select</a> 235	DSA08015	MERIDETH	03/26/2008	Grant Busint 00	Ready for Purchasing

## LIST OF REQUISITIONS

The bottom section of the screen displays a list of requisitions. The list is organized by column headers to show the following information:

- **Trk #.** The number of a requisition that is in process but has not been completed. To identify requisitions that do not have requisition numbers.
- **Req #.** The requisition number (if the requisition has been completed).
- **Requester.** The name of the person who created and saved the requisition.
- **Req'D Date.** The date the requisition was created and saved.
- **Description.** The description of the requisition (if one was entered).
- **Status.** The status of the requisition, such as Awaiting Line Approval, Awaiting Fiscal Coding, Ready for Purchasing, Line Item Rejected, Awaiting Authorization, Itemize in Progress, All Items Received, Some Items Received, All items received or cancelled, or New Requisition. NOTE: A requisition could have several line items each with a different status, so an individual line item status may not be reflected in the overall requisition status.

1. To sort the requisition list, click a column header to sort by. For example, click Requester to sort by the requesters' names in alphabetical order.

Figure 3 - Column headers

Trk #	Req #	Requester	Req'd Date	Description	Status
Approve 126	DSA07000	TU ANH	12/14/2007	testing work ups and edits on TC210	Awaiting LI
Fiscal 131	DSA07009	JAMES	12/20/2007	notebooks	Awaiting FI
Approve 130	DSA08001	MERIDETH	01/28/2008	215 edit error	Awaiting Ai
Select 204	DSA08002	DAN	03/13/2008		Ready for P
Fiscal 207	DSA08003	SUANNE	03/13/2008	ITEMS	Awaiting FI

2. To open a requisition, click the **Select**, **Edit**, **Authorize**, **Fiscal**, or **Approve**, link next to it to complete the process as indicated in the **Status** column.

Figure 4 - Open a requisition

Trk #	Req #	Requester	Req'd Date	Description	Status
Approve 113	DSA07003	MERIDETH	12/13/2007	Employee Supplies	Awaiting Line Approval
Fiscal 111	DSA07004	SUANNE	12/04/2007	Office Awards Function	Awaiting Fiscal Coding
Edit 115	DSA07005	TU ANH	03/20/2008	TEST PROCESS	Requisition Rejected
Approve 128	DSA07007	TU ANH	12/14/2007	testing	Awaiting Line Approval
Authorize 130	DSA08001	MERIDETH	01/28/2008	215 edit error	Awaiting Authorization
Select 204	DSA08002	DAN	03/13/2008		Ready for Purchasing

## TO SEARCH FOR A REQUISITION

1. The first section of the Status screen contains search criteria to find requisitions. Select from the following:
  - **Req #.** The requisition number (if the requisition itemization has been completed).
  - **Tracking #.** The tracking number of a requisition that is in process (saved).
  - **Status.** The status of the requisition.
  - **Requisition Date Range.** The date range the requisition was created and saved.
  - **Departments.** Available only if your administrator has created Requisition Departments. Also, this menu will not be seen if a user is *only* a requester. A department is a group of users organized however an agency needs – e.g., by function or location, etc. A requisition or purchase order assigned to a Department can then be processed by the users in that department.
  - **My Requisitions.** Check this to find only those requisitions created and saved by you. (Not all users will have this option. It will not be seen if a user is *only* a requester.)
2. Click **Find**.
3. If desired, click **Reset** to reset the criteria to defaults and then click **Find**.

If you are having difficulty finding a requisition, try the following:

1. Uncheck **My Requisitions** (if applicable).
2. Change the **Departments** (if applicable) – try **All Departments**.
3. Change the Status – try **All Requisitions**.
4. Click **Find**.

## TO FIND A PURCHASE ORDER NUMBER OF A REQUISITION

Once a requisition has been saved to a purchase order (either ordered or in the process of being ordered), the status may be '**Ready for Purchasing**' or the line item status may be '**Assigned to PO**'. On the Requisition **Status** screen, you can check the purchase order number, the status of the items, the name of the purchaser, and if any of the items have been received.

1. From the **Requisitions** menu, click the **Status** tab.
2. Click **Select** next to a requisition with a status of **Ordered**.
3. Check the **Receiving info** check box.

Figure 5 - Requisition receipt info

Department: RAD: Research and Development  
Req #: 6546-S  
Tracking #: 298  
Need by: 04/25/2008  
Desc: Binoculars  
Status: Ordered  
Requested by: JAMES (04/18/2008)  
Edited by: JAMES (04/18/2008)  
Total: \$445.00  
Vendor Info:  Coding Info:  Receiving Info:

Notes	Atch	Status	Item #	Description	Purchaser	PO #	Receiver Rct Date
Menu	<input type="checkbox"/>	Ordered	333-ABC	Binoculars	PAM	6235-Sx	
Menu	<input type="checkbox"/>	Ordered	846AMC	Binoculars	PAM	6235-Sx	

The requisition items, the purchase order number, the name of the purchaser, etc. will be displayed.

You can also run a Purchase Order report and search by the requisition number. [See the Reports document for more details.](#) The report will display the purchase order number that the requisition items were added to.

\*Choose Report Criteria  
Purchasing Report  
Report Menu  
TC: [ ] Index: [ ] PCA: [ ] Encumb: [ ] Grant: [ ] Project: [ ] Fund: [ ]  
PO Status: [ ] Req Status: [ ] Item Status: [ ]  
PO Dept: [ ] WorkFlow: [ ] PO Create Date: [ ] Request Date: [ ]  
PO Create Range: [None] to [ ] Request Range: [None] to [ ]  
PO#: [ ] Invoice #: [ ] Searchable PO Fields Use "%" for wildcards  
Vendor #: [ ] Sfx: [ ] Name: [ ] Bus Name: [ ]  
Address: [ ] City: [ ] State: [ ]  
**Requisition #: [ ]** Searchable Item Fields Use "%" for wildcards  
Vendor #: [ ] Sfx: [ ] Name: [ ] Bus Name: [ ]  
Address: [ ] City: [ ] State: [ ] Doc: [ ]  
 PO Format (PDF only)  
Sort by:  PO#  PO Dept  PO Vendor  PO Status  State Contract  PO Create Date  PO Print Date  PO Order Date  
 Requisition Format (PDF only)  
Sort by:  Req#  Req Dept  Req Status  Req Create Date  
 Show All Detail (PDF only)  
 Show Requisition/PO Detail (PDF only)  
 Show Coding Detail (PDF only)  
 Show Receiving Detail (PDF only)  
PDF Report TXT Report CSV Report Reset