

TRACKING A REQUISITION

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 7



Bowie State University
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TRACKING A REQUISITION

Overview

Throughout the entire **Procurement Process**, from Requisition Entry to Payment of the invoice for goods and/or services received, you can view the **status** of the requisition using the *Manage Requisitions* page.

Objectives

By the end of this chapter, you will be able to:

- Successfully view the status of a requisition.
- Successfully obtain the PO number for the corresponding requisition.

-

Monitoring the Requisition Lifespan

You need to view the details of an older requisition that was cancelled after partial receipt. You will use the Manage Requisitions page to track all requisitions, even those that have been completed.

The Manage Requisitions page provides a place to search for requisitions that match specific criteria. When it is first displayed, by default it will list the requisitions that are in any status except complete that were created in the last seven days.

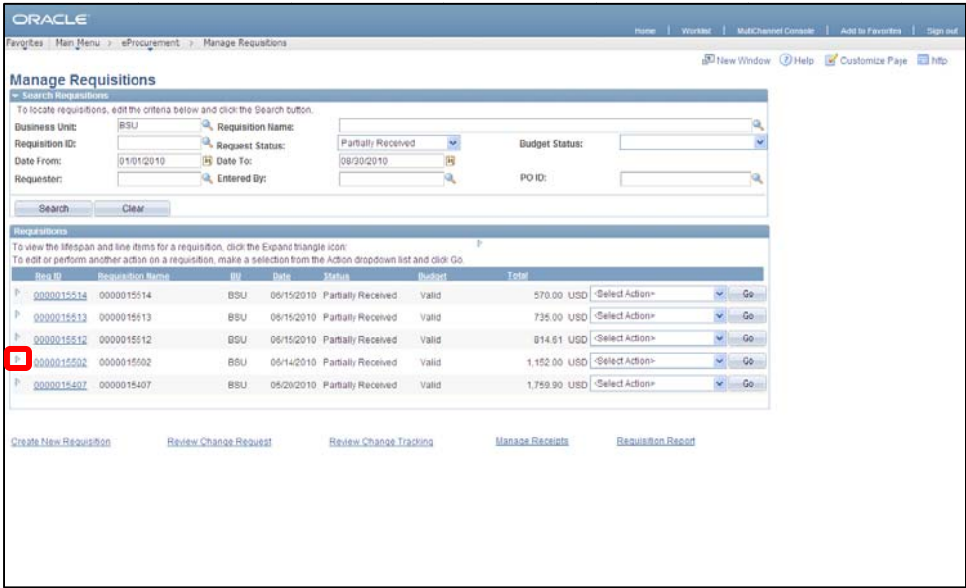
If the requisition you want to review does not appear, you can search for requisitions by entering data in any of the fields found in the *Search Requisition* section. These fields include the following:

<i>Business Unit</i>	Defaults to BSU , the only valid entry.
<i>Requisition Name</i>	The description you assigned when you created the requisition.
<i>Requisition ID</i>	The ID number assigned by the system.
<i>Request Status</i>	The default status is <i>All But Complete</i> . There are many other options you can select from the drop-down list.
<i>Budget Status</i>	The budget status of the requisition(s) you want to see.
<i>Date From</i>	The first requisition date to include in the search.
<i>Date To</i>	The last requisition date to include in the search.
<i>Requester</i>	The requester who submitted the requisition.
<i>Entered by</i>	The person who entered the requisition if not the Approved Requestor.
<i>PO ID</i>	The PO identifier assigned by the system, if the requisition has already been turned into a purchase order.

Click **Search**. The results that match the criteria you entered appear in the list shown below.

Navigation

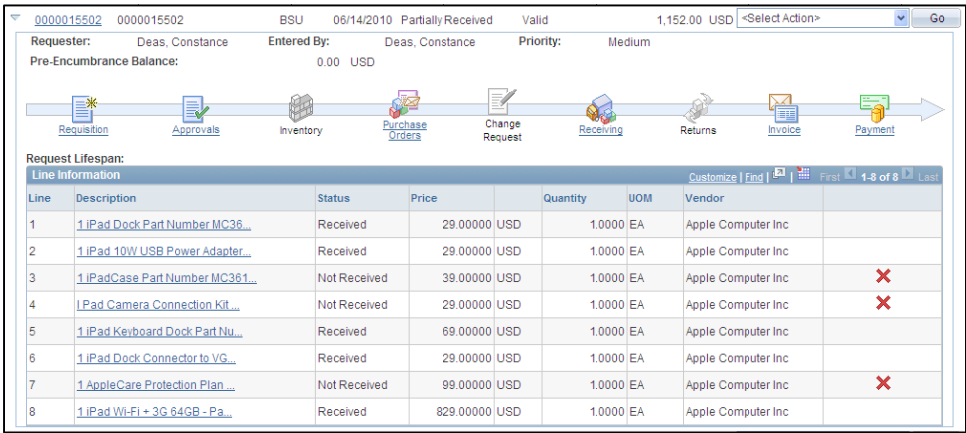
- eProcurement
- Manage Requisitions
- Enter criteria for search
- Click **Search**



Click the **Expand Section** icon on the row you want to review. The details on the requisition appear beneath the summary line in the expanded section know as the requisition cycle.

Navigation

- eProcurement
- Manage Requisitions
- Enter criteria for search
- Click **Search**
- Click the **Expand Section** icon



Information that appears in this section includes the following:

Requestor

The name of the authorized requestor.

Entered By

The name of the person who entered the requisition.

<i>Priority</i>	The priority assigned to the requisition.
<i>Pre-Encumbrance Balance</i>	The balance before the encumbrance was subtracted.
<i>Life Cycle graphic</i>	Displays the business process steps displays icons for each step in the requisition lifespan. These include: • Requisition • Approvals • Inventory • Purchase Orders • Change Request • Receiving • Returns • Invoice • Payment Each icon will be hyperlinked to other documents, when the requisition reaches that stage in the lifespan.
<i>Line Information</i>	The line information section lists each line in the requisition and provides information including: • Line (number) • Description • Status of PO line • Price • Currency Code • Quantity • UOM (unit of measure) • Vendor • Cancel icon (click to cancel the line)

Tracking the Requisition Information

Click the **Requisitions** link.

This displays the *Requisition Details* page that provides the requisition data.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Requisitions** hyperlink

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	3/4 Inch Black Split Ring L&L	Complete	N	100.0000	Each	2.50000 USD	250.00
2	Lantern Screen Print Charge	Complete	N	1.0000	Each	45.00000 USD	45.00
3	Lantern Shipping & Handling	Complete	N	1.0000	Each	20.00000 USD	20.00
4	Yellow Enbee Files	Complete	N	200.0000	Each	0.99000 USD	198.00
5	Enbee Screen Print Charge	Complete	N	1.0000	Each	50.00000 USD	50.00
6	Enbee Shipping & Handling	Complete	N	1.0000	Each	27.00000 USD	27.00

The requisition provides the following header information:

- Requisition Name
- Requisition ID
- Business Unit **BSU**
- Date
- Status (of requisition)
- Total (of requisition lines)
- Pre-encumbrance balance with currency code
- Header comments

Each line of the requisition displays the following:

- Line (number)
- Item Description
- Source Status
- Amount Only
- Qty (with unit of measure)
- Price (with currency code)

- Status (of line)
- Total (of line)
- Line Comments

Click the **Expand Section** icon to display information on the purchase order.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Requisitions** hyperlink
- Expand PO section

Requisition Name	Requisition ID	Unit	Date	Status	Total
0000015502	0000015502	BSU	05/14/2010	Partially Received	1,152.00

Pre-Encumbrance Balance: 0.00 USD

Header Comments: 1. Web Proposal #W70352954 Contact for this PO: Connie Deas - 301.950.3139 Dr. Marsha Mims - Word - 301.950.3412

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	1 iPad Case Part Number MC25...	Complete	0	1.0000 Each	29.00000 USD	approved	29.00

PO Information

PO No.	PO Status	Vendor	Receipt Status
0000015502	Dispatched	Apple Computer Inc	PO Partially Received

PO Line Information

PO Line	Sched #	Due Date	Ship To	PO Qty	Price
1	1	05/30/2010	BSU_RECV	1.0000	29.00000 USD

2 1 iPad 1500 USB Power Adapter Complete 0 1.0000 Each 29.00000 USD approved 29.00

3 1 iPad Case Part Number MC251... Complete 0 1.0000 Each 29.00000 USD approved 29.00

4 1 Pad Camera Connection Kit... Complete 0 1.0000 Each 29.00000 USD approved 29.00

The PO information includes the following:

- PO No.
- PO Status
- Vendor
- Receipt Status
- Receipt icon () to display receiver information
- PO Line (number)
- Sched #
- Due Date
- Ship to = **BSU_RECV**
- PO Qty
- Price of item and currency code

At the bottom of the *Requisition Details* page is a link to the **Requisition Schedule and Distribution**. Click the hyperlink to access the *Requisition Schedule and Distribution* page.

Navigation

- eProcurement
- Manage Requisitions
- Click **Requisitions** hyperlink
- Click **Requisition Schedule and Distribution** hyperlink

The screenshot displays the Oracle Requisition Schedule and Distribution page. At the top, there's a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below this, the page title is 'Requisition Schedule and Distribution'. The main content area shows details for a requisition with ID 0000015502. A red box highlights the 'Line' section, which includes a table with columns for Line, Status, Dist Type, Location, Req Qty, Merchandise Amt, Percent, GL Unit, Entry Event, Fund, Program, Dept, Project, Job ID, Class, Account, and AF. The table shows one line item with a status of 'Processed' and a quantity of 1,000.

The navigation controls for the *Line* section allow you to review the shipping schedules and the distribution lines for each line item. Navigate to the line you want to review.

The *Schedule* section on this page displays the following information for the selected line:

- Schedule (number)
- Ship To = **BSU_RECV**
- Due Date
- Attention To
- Quantity
- Item Price
- Merchandise Amount

The *Distribution* section on this page displays the following information for the selected line:

Details

- Dist #
- Status
- Dist Type

- Location
- Req Qty
- Merchandise Amt
- Percent (of line allocated to this financial distribution)
- GL Unit = **BSU**
- Entry Event
- Fund
- Program
- Dept
- Project
- Job ID
- Class
- Account
- Affiliate

More Details

- IN Unit

More Details 2

- Stat Code
- Open Amt
- Open Quantity
- Merch Amt Base
- Exchange Rate Detail icon () that accesses the Currency Information page

Asset Information

- Asset Mgmt Bus Unit = **BSU**
- Profile ID
- CAP #
- Sequence
- Tag Number
- EmplID
- Capitalize
- Cost Type

Budget Information

- Budget Status
- Budget Date
- Pre-Encumbrance Balance
- Currency
- Pre-Encumbrance Base Balance
- Base Currency
- Commitment Control Close Flag

The Return to **Manage Requisitions** hyperlink at the bottom of the page takes you back to the *Manage Requisitions* page.

Tracking Requisition Approvals

The easiest way to inquire on who approved the requisition and the status of that approval is to click the **Approval** hyperlink on the Lifespan graphic.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Approvals** hyperlink

Approval Status

Business Unit: BSU
 Requisition ID: 0000015502
 Requisition Name: [Deas_Constance](#)
 Requester: 06/14/2019
 Status: Approved
 Priority: Medium
 Budget Status: Valid
 Total Amount: 1,15200 USD
 Requester's Justification: No justification entered by requester.

[View portable version](#)

Line	Item Description	Vendor Name	Quantity	UOM	Price
1	1 iPad Dock Part Number MC35...	APPLECOMPU-001	1.0000	EA	29.00000 USD
2	1 iPad 10W USB Power Adapter...	APPLECOMPU-001	1.0000	EA	29.00000 USD
3	1 iPad Case Part Number MC351...	APPLECOMPU-001	1.0000	EA	39.00000 USD
4	1 iPad Camera Connection Kit...	APPLECOMPU-001	1.0000	EA	29.00000 USD
5	1 iPad Keyboard Dock Part No...	APPLECOMPU-001	1.0000	EA	69.00000 USD
6	1 iPad Dock Connector to VG...	APPLECOMPU-001	1.0000	EA	29.00000 USD
7	1 AppleCare Protection Plan...	APPLECOMPU-001	1.0000	EA	99.00000 USD
8	1 iPad 128GB + 16 GB - Pa...	APPLECOMPU-001	1.0000	EA	829.00000 USD

☐ Select All / Deselect All
[View Line Details](#)

Review/Edit Approvers

Requisition Line(s): To:

The header section of the *Approval Status* page contains the following information.

- Business Unit = **BSU**
- Requisition ID
- Requisition Name
- Requester

- Entered on
- Status
- Amount of requisition
- Priority
- Budget Status
- Requester's Justification comments

The line information section provides information for each line that includes the following:

- Line (number)
- Item Description
- Vendor Name
- Quantity (requested)
- Unit of Measure
- Price
- Currency Code
- Comments - If available, they will be indicated by this icon . Click the icon to review the comments.

Clicking in one of the checkboxes and clicking the **View Line Details** button gives additional information.

If there are many lines on the requisition, use the navigation controls in the *Line Information* section or you can use the *Requisition Lines* fields in the *Review Edit/Approvers* section to locate specific lines.

Tracking Purchase Orders Related to the Requisition

Once a requisition has been approved, it is turned into a purchase order. To see the purchase orders generated from your requisition, click the Purchase Orders hyperlink.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Purchase Orders** hyperlink

Purchase Order Inquiry

Business Unit: BSU

Requisition Information: Requisition ID: 0000015502 Line Number: 1

PO Information: PO Number: 0000012569 Buyer: DMARTINEZ Change Order: PO Date: 05/29/2010 Vendor ID: 0000000359 Terms: 30

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		1 iPad Dock Part Number MC3602MA	29.00 USD	EA	1.0000	Approved	

[Return to Manage Requisitions](#)

The navigation controls for the *Requisition Information* section allow you to review the purchase order data for each line item. Navigate to the line you want to review.

The *PO Information* header section for each line displays the following information:

- PO Number
- Buyer
- Change Order (identifier)
- PO Date
- Vendor ID
- Terms

In the Lines page, you can view the line-specific data including:

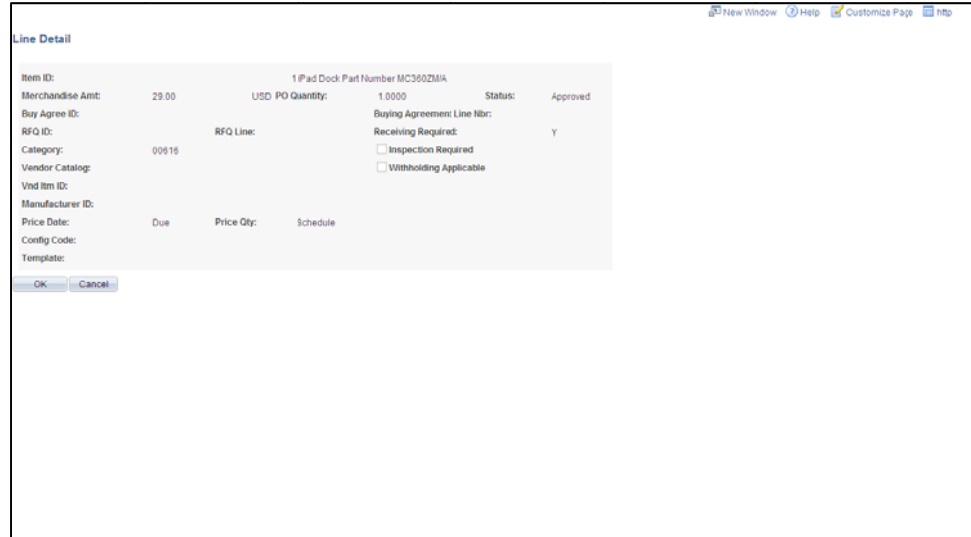
- Line (number)
- Item ID
- Description (of the item)

- Merchandise Amt
- Currency Code
- UOM
- PO Qty
- Status (for PO)

Click the *Line Details* icon () to see more detailed PO information for that line.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Purchase Orders** hyperlink
- Click **Line Details** icon



Line Detail

Item ID: 1 iPad Dock Part Number MC3602MIA

Merchandise Amt:	29.00	USD PO Quantity:	1.0000	Status:	Approved
Buy Agree ID:		RFQ Line:		Buying Agreement Line Nbr:	
RFQ ID:				Receiving Required:	Y
Category:	00616			☐ Inspection Required	
Vendor Catalog:				☐ Withholding Applicable	
Vnd Item ID:					
Manufacturer ID:					
Price Date:	Due	Price Qty:	Schedule		
Config Code:					
Template:					

OK Cancel

Additional PO information you can review includes the following:

- Item ID and Description
- Merchandise Amt and currency code
- PO Quantity
- Status (of the purchase order)
- Buy Agreement ID
- Buying Agreement Line Nbr
- RFQ ID
- RFQ Line

- Receiving Required indicator
- Category (of purchase)
- Inspection Required
- Withholding Applicable
- Vnd Itm ID
- Manufacture ID
- Price Date
- Price Qty
- Config Code
- Template

Click the **OK** button to return to the *Purchase Order Inquiry* page.

Click the **[Return to Manage Requisitions](#)** hyperlink to return to the search page.

Tracking Changes to Purchase Orders

If changes to the purchase order for the requested items have been made, you can review them by clicking the **Change Request** hyperlink. The details of any change orders will be available for review.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Purchase Orders** hyperlink

Purchase Order Inquiry

Business Unit: BSU

Requisition Information: Requisition ID: 0000015502 Line Number: 1

PO Information: PO Number: 0000012569 Buyer: DMARTINEZ Change Order: PO Date: 05/29/2010 Vendor ID: 0000000359 Terms: 30

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		1 iPad Dock Part Number MC360ZMA	29.00 USD	EA	1.0000	Approved	

[Return to Manage Requisitions](#)

Tracking Receipts Against Purchase Orders

If receipts from the purchase order generated by this requisition, you can review them by clicking the **Receipts** hyperlink.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Receipts** hyperlink

Manage Receipts

Search Criteria: Received Date From: To: Show Status: All Business Unit: PO Unit: Receipt ID: PO ID: Ship To: Search Clear

Business Unit	Receipt ID	Date	PO ID	Vendor	Status
BSU	0000004355	07/14/2010	0000013569	APPLECOMPU-001	Received
BSU	0000004363	07/12/2010	0000013569	APPLECOMPU-001	Received
BSU	0000004360	07/07/2010	0000013569	APPLECOMPU-001	Received

[Return to Manage Requisitions](#)

The Manage Receipts page provides additional search field to search for receipts. When you open this page from the Manage Requisitions page, you will see the receipts against the requisition you are reviewing.

Each line in the Receipts section offers the following information.

- Business Unit = **BSU**
- Receipt ID
- Date (of the receipt)
- PO ID
- Vendor
- Status of Receipt
-  - Accesses the Receiving page for the selected line
-  - Accesses the Maintain Activity and Comments page for the selected line
-  - Accesses the Delivery Location page for details on delivery
-  - Accesses the Maintain ChartFields page to review or update the Chartfields for the receipt.
-  - Access the Manual Cost Landed Close component

Tracking Returns to Vendor

If returns to vendor have been made as part of the receiving process, click the **Returns** hyperlink to access the Manage Returns to Vendor page.

Tracking Invoices

After the receipts have been made and the invoice has been entered into PeopleSoft, you can review the invoice numbers by clicking the Invoices hyperlink. The page that is displayed will relate the selected requisition lines to the purchase order number, the receipt number and the AP invoice number.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Invoices** hyperlink

The screenshot displays the Oracle eProcurement interface for managing requisitions. The top navigation bar includes links for Home, Worklist, Multichannel Console, Add to Favorites, and Sign out. The main content area is titled 'Manage Requisitions' and shows details for a specific requisition. The 'Business Unit' is BSU and the 'Requisition ID' is 000015502. Below this, the 'PO Line' section shows a single line with Line Number 1, Sched # 1, Item ID 1.0000, and Match Status PO: Matched. The 'PO Voucher Lines' section shows a table with columns AP Unit, Voucher, Line, Entry Status, Match Status, Amount, UOM, Quantity, Bill Recv, Receipt No, Receipt Line, and Finalized Distribution. The 'PO Receiver Lines' section shows a table with columns Bill Recv, Receipt No, Receipt Line, Match Status, Amount, UOM, Recv Qty, and Accept Qty.

The *Scroll Area* section is related to the purchase order. If more than one purchase order was generated for the requisition, use the navigation controls on the line to locate the correct purchase order. This section contains purchase order and matching information including the following:

- Business Unit = **BSU**
- PO Number
- Purchase Order Date
- Match Rule (that governs matching the invoice to PO and receipts)
- Vendor ID
- Vendor Location
- Vendor Name

The PO Line section allows you to scroll through each line of the PO using the navigation controls. Header information appears that includes the following:

- Line Number
- Sched #
- Item ID

- Merchandise Amount
- PO Quantity
- Match Status PO

For each PO line, you can find the invoice information in the *PO Voucher Lines* section. The information displayed here includes the following:

- AP Unit = **BSU**
- Voucher – the number of the voucher to be paid
- Line – the number on the voucher
- Entry Status – the status of the invoice entry
- Matched Status – the status of the matching process
- Amount – the dollar amount of the line
- UOM
- Quantity – the matched amount recorded
- BU Recv – the business unit who received
- Receipt No – the receipt number recorded
- Receipt Line – the line on the receipt that includes this item
- Finalized Distribution

You can also review the *PO Receiver Lines* section to see the receiver information.

- BU Recv = **BSU**
- Receipt No
- Receipt Line
- Match Status
- Amount (dollar)
- UOM
- Received Quantity
- Accept Qty

Click **[Return to Manage Requisitions](#)** to view other information.

Tracking Payments

You can review information to determine if an item from your requisition has been processed for payment by clicking the **Payment** hyperlink.

Navigation

- eProcurement
- Manage Requisitions
- Enter search criteria
- Click **Search**
- Click **Expand Section** icon
- Click **Payment** hyperlink

The screenshot displays the Oracle eProcurement interface for 'Manage Requisitions'. The top navigation bar includes links for Home, Worker, MultiChannel Console, Add to Favorites, and Sign out. The breadcrumb trail shows: Favorites > Main Menu > eProcurement > Manage Requisitions. The page title is 'Manage Requisitions'. Below the title, there are tabs for 'PO Voucher' and 'PO Payment'. The 'PO Voucher' tab is active, showing details for Business Unit: BSU, Requisition ID: 0000015502, PO Number: 0000013558, and Voucher ID: 00146861. The 'PO Payment' tab is also visible, showing details for Bank Name: All First, Bank Account #: 052000113, Pay Cycle: RSTARS Pay Cycle Seq #: 1514, Vendor Name: Apple Computer Inc, Address: P O Box 201877, City: Atlanta, GA, 30384-1877, USA, Payment Amount: 127.00 USD, and Payment Method: CHK. Below these tabs, there is a 'Review Payments' section with a table showing payment details. The table has columns for Business Unit, Voucher ID, Advice Sequence, Advice Date, Invoice Number, Gross Paid Amount, Paid Amount, and Payment Currency. The data row shows: BSU, 00146861, 1, 05/30/2010, 9842333268, 127.00, 127.00 USD. At the bottom, there is a 'Return to Manage Requisitions' link.

The payment page that is displayed has several sections.

The *PO Voucher* section identifies the different documents that are referenced on this payment. These fields are:

- Business Unit = **BSU**
- Requisition ID
- PO Number
- Voucher ID

The *PO Payment* section provides payment details. These fields include the following:

- Bank Name
- Bank Account #
- Pay Cycle (in which the payment was generated)
- Pay Cycle Seq #
- Payment Reference ID
- Accounting Date (used for processing)
- Payment Date

- Days Outstanding
- Payment Clear Date
- Reconcile Date
- Payment Date
- Vendor Name and Address info
- Payment Amount and Method
- Description

This section also includes the *Review Payments* section. The *Details* tab includes the following information:

- Business Unit = **BSU**
- Voucher ID
- Advice Sequence
- Advice Date
- Invoice Number
- Gross Paid Amount
- Paid Amount
- Payment Currency

Other Tracking Information

The *Manage Requisitions* page has several hyperlinks at the bottom that let you search and manage other processes in the procurement process.

These include the following:

Create New Requisition Accesses the *Create Requisition* page to create a new requisition.

Review Change Request Accesses the *Review Change Requests* page that allows you to search with PO and Change Order numbers.

Review Change Tracking Accesses the *Requisition Change Tracking History* page to review all changes to requisitions within the criteria specified.

Requisition Change Tracking History

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

*Business Unit:	BSU	Requisition Name:	
Requisition ID From:		Requisition ID To:	
Requester:		Modified By:	
Date From:	08/23/2010	Date To:	08/30/2010

Manage Receipts Accesses the *Manage Receipts* page that allows you to search for requisitions based on PO and Receipt IDs. Hyperlinks on this page allow you to perform additional activities related to receipt processing.

Manage Receipts

Search Criteria

Received Date From:		To:		Show Status:	All
Business Unit:		Receipt ID:		Ship To:	
PO Unit:		PO ID:		Search Clear	

[Add New Receipt](#) [Process Receipts](#) [Inspection](#) [Review ASN Receipt](#) [Manage Return to Vendors](#)

Requisition Report Accesses the *Requisition Print* page where you can create or use a prior **Run Control ID** to print Requisitions.

Print Requisition

Run Control ID: [Report Manager](#) [Process Monitor](#)

Language: ☒ Specified ☐ Recipient's

Report Request Parameters

Business Unit:		Statuses to Include ☐ Approved ☐ Canceled ☐ Completed ☐ Open ☐ Pending Select All NOT On Hold
Requisition ID:		
From Date:		
Through Date:		
Requester:		