



## FINANCIALS

# REQUISITION SUMMARY (REQUISITION DETAILS)

## User Tutorial

**Instructional Support Services  
Texas Woman's University**

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## Requisition Summary

The Requisition Summary form is used to view summary information about requisitions and to cancel requisitions. The Requisition Summary can be run on a specific requisition or all the requisitions that a user has created. Users will only be able to view requisitions that they have created or approved.

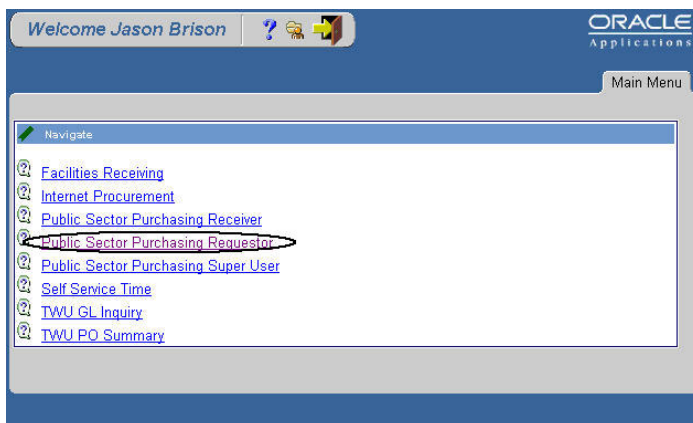
1. **Double Click** on the Phoenix icon on your desktop.



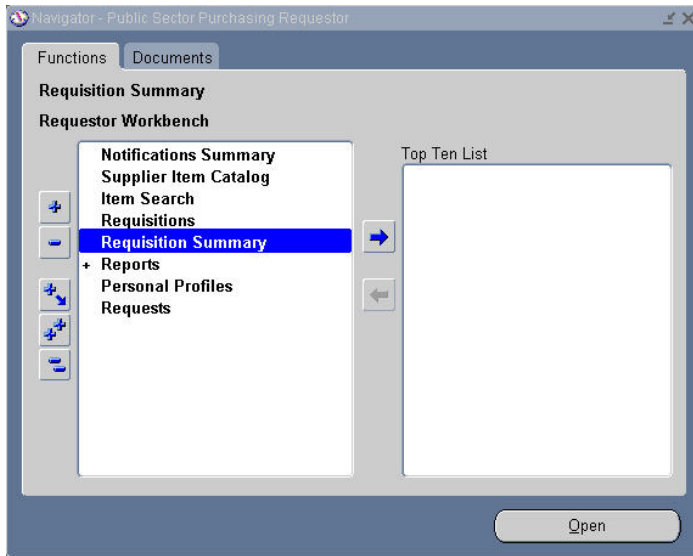
2. **Enter** your Portal username in the Username field.
3. **Enter** your Portal password in the Password field.
4. **Click** on the Connect button.



5. **Click** on Public Sector Purchasing Requestor responsibility.

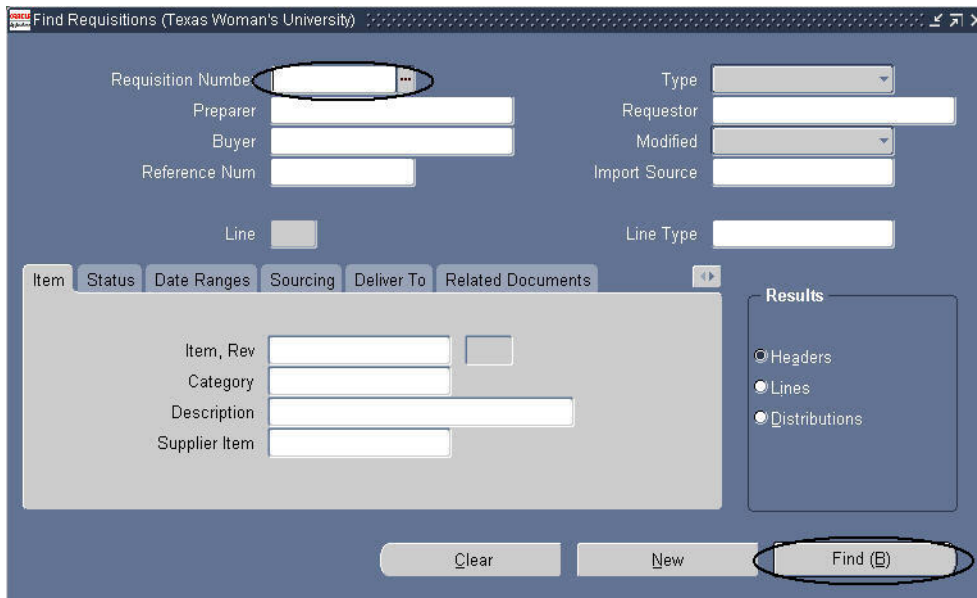


6. **Double click** on Requisition Summary. This will open the Find Requisitions form.

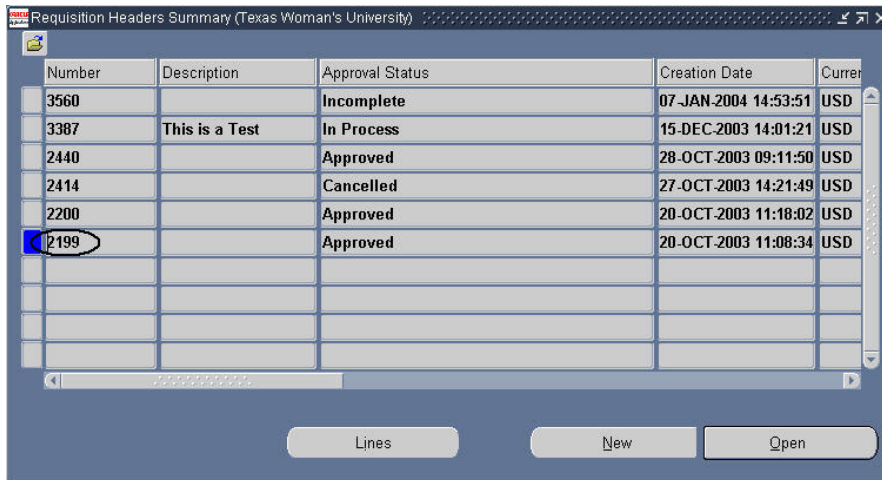


7. **Enter** a requisition number in the Requisition Number field to find data on a specific requisition, or **leave** the Requisition Number field blank to find data on all of the requisitions a user has created or approved.

8. **Click** on the Find button.



9. **Select** the requisition to be detailed by **clicking** on the requisition number in the Number field.



| Number | Description    | Approval Status | Creation Date        | Currency |
|--------|----------------|-----------------|----------------------|----------|
| 3560   |                | Incomplete      | 07-JAN-2004 14:53:51 | USD      |
| 3387   | This is a Test | In Process      | 15-DEC-2003 14:01:21 | USD      |
| 2440   |                | Approved        | 28-OCT-2003 09:11:50 | USD      |
| 2414   |                | Cancelled       | 27-OCT-2003 14:21:49 | USD      |
| 2200   |                | Approved        | 20-OCT-2003 11:18:02 | USD      |
| 2199   |                | Approved        | 20-OCT-2003 11:08:34 | USD      |

If a requisition that is In Process, Approved, or Canceled is selected the following note will appear. **Click** on the OK button in the lower right hand corner of the Note. Line item details may be viewed regardless of the status.



The Requisition Headers Summary form lists the current status of the requisition. Below is a list of the various statuses.

**Incomplete:** a requisition has been started and saved but has not been submitted for approval.

**In Process:** a requisition that has been submitted for approval and now is waiting to be approved.

**Approved:** a requisition that has been approved by the assigned approver.

**Cancelled:** a requisition that has been canceled by the requestor.

**Rejected:** a requisition that has been rejected by the assigned approver.

**Returned:** a requisition that that the Purchasing department has returned.



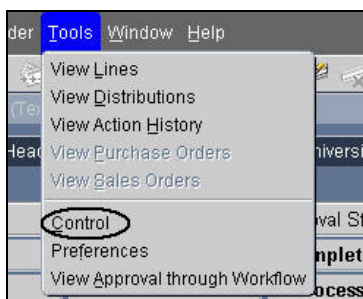


## Canceling a Requisition

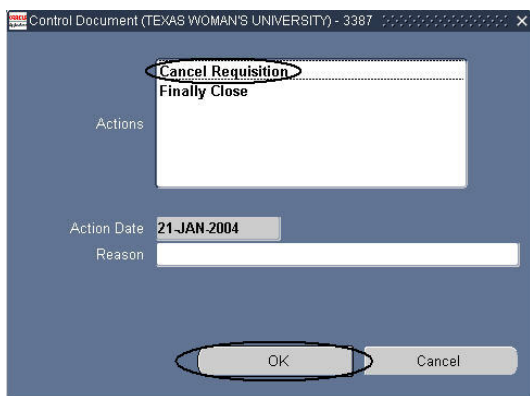
A requisition may be canceled from the Requisition Headers Summary form. The only requisitions that can be directly canceled by a requestor are requisitions that are In Process or that have been Approved but have not yet been converted into Purchase Orders.

To Cancel a requisition:

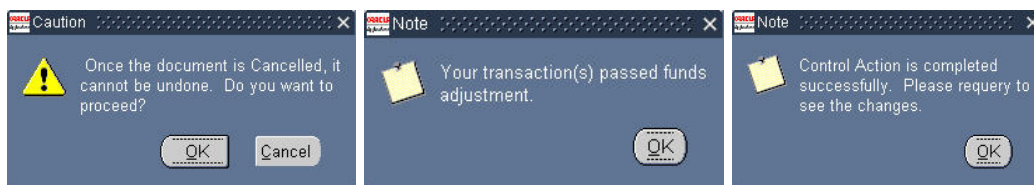
1. At the top of the screen is the Menu bar. **Click** on the Tools menu.
2. **Click** on Control.



3. **Click** on Cancel Requisition.
4. **Click** on the OK button at bottom of the Control Document form.

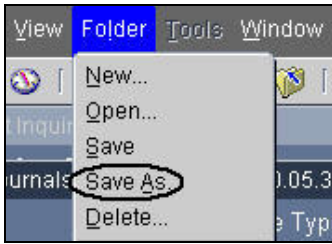


5. A series of three Notes will appear. **Click** on the OK button at the bottom of each note.





5. **Click** on the Folder menu.
6. **Click** on Save As.

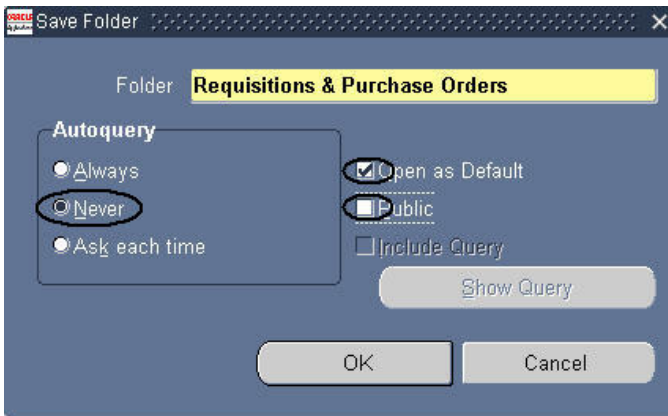


7. The Save Folder option will be displayed. **Click** in the white box to the left of Public. This should remove the checkmark.
8. **Click** in the white box to the left of Open as Default.
9. **Click** in the white box to the left of Public.

Autoquery section should have “Never” selected.

Below is an example of what the Save Folder setup should look like.

10. **Click** on the OK button.



From this point forward the custom view will be the new default view.