ASCENDER
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ASCENDER - Perform Requisition Maintenance

Table of Contents

ASCENDER - Perform Requisition Maintenance i
ASCENDER - Perform Requisition Maintenance 1

ASCENDER - Perform Requisition Maintenance

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Revised: 07/26/2022

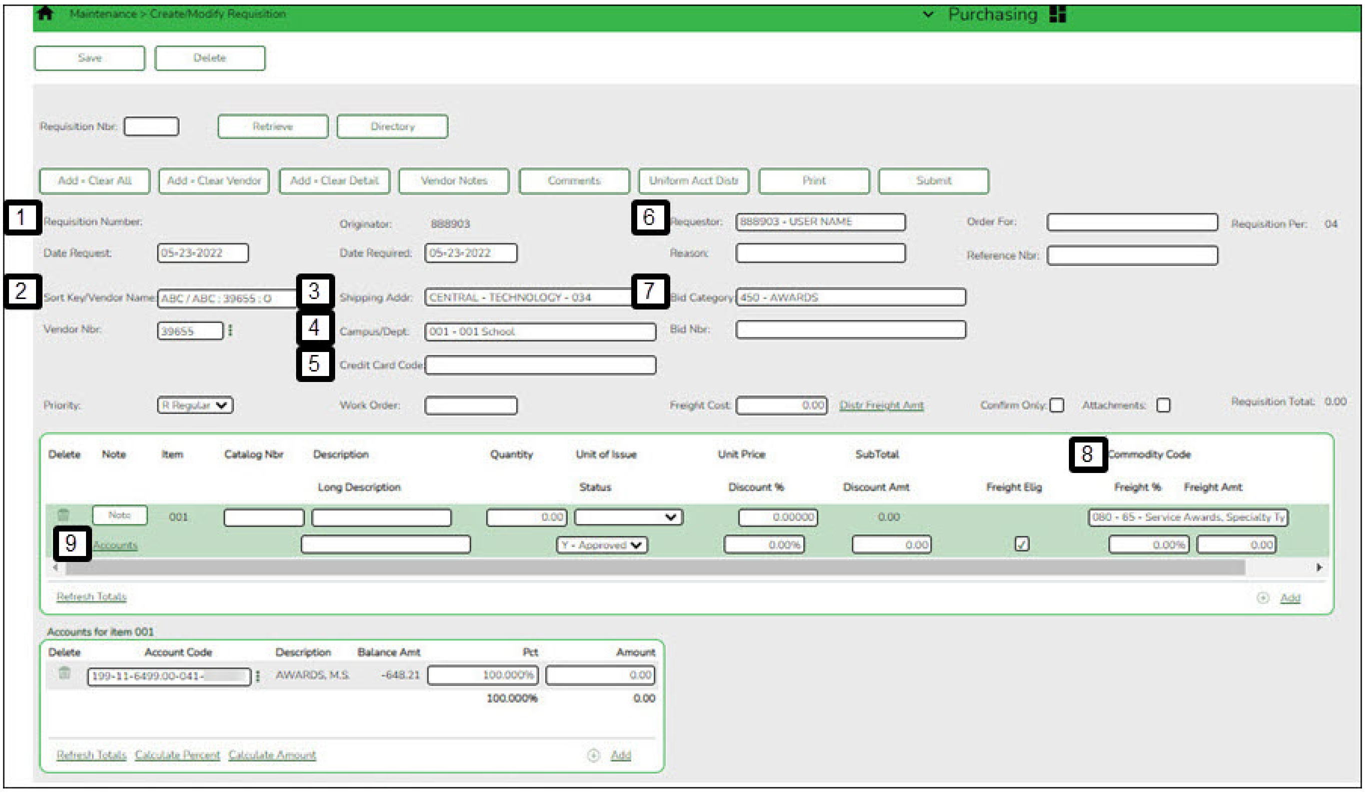
The purpose of this document is to guide you through performing requisition maintenance.

After the Set up Purchasing Options and Permissions and the Manage Purchasing Approval Workflows are addressed, use the following steps to create and submit requisitions, and perform requisition inquiries in Purchasing.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

Requisition fields in ASCENDER


Maintenance > Create/Modify Requisition
Purchasing
Save
Delete
Retrieve
Directory
Add - Clear All
Add - Clear Vendor
Add - Clear Detail
Vendor Notes
Comments
Uniform Acct Distr
Print
Submit
1
2
3
4
5
6
7
8
9
Distr Freight Amt
Note
Accounts
Refresh Totals
Add
Calculate Percent
Calculate Amount

Requisition Nbr:

Requisition Number:
Originator: 888903
Requestor: 888903 - USER NAME
Order For:
Requisition Per: 04
Date Request: 05-23-2022
Date Required: 05-23-2022
Reason:
Reference Nbr:
Sort Key/Vendor Name: ABC / ABC : 39655 : O
Shipping Addr: CENTRAL - TECHNOLOGY - 034
Bid Category: 450 - AWARDS
Vendor Nbr: 39655
Campus/Dept: 001 - 001 School
Bid Nbr:
Credit Card Code:
Priority: R Regular
Work Order:
Freight Cost: 0.00
Confirm Only: ☐
Attachments: ☐
Requisition Total: 0.00

Delete	Note	Item	Catalog Nbr	Description / Long Description	Quantity	Unit of Issue / Status	Unit Price / Discount %	SubTotal / Discount Amt	Freight Elig	Commodity Code / Freight %	Freight Amt
	Note	001			0.00		0.00000	0.00		080 - 65 - Service Awards, Specialty Ty	
	Accounts					Y - Approved	0.00%	0.00	☑	0.00%	0.00

Accounts for item 001

Delete	Account Code	Description	Balance Amt	Pct	Amount
	199-11-6499.00-041-[redacted]	AWARDS, M.S.	-648.21	100.000%	0.00
				100.000%	0.00

	Requisition Field	ASCENDER Page
1	**Requisition Number**	Finance > Tables > District Finance Options > Finance Options
2	**Sort Key/Vendor Name**	Finance > Maintenance > Vendor Information > Vendor Name/Address
3	**Shipping Addr**	District Administration > Maintenance > User Profiles > Purchasing Addresses
4	**Campus/Dept**	District Administration > Maintenance > User Profiles > Purchasing Restrict Campus/Dept **Note**: The **Campus/Dept** needs to be selected for the *Purchasing Requisition* workflow type on the District Administration > Workflow > First Approver page in order for the campus/dept information to be populated in the **Campus/Dept** field on the requisition. This campus/dept information is used when **Allow for Approval Process** is selected on the District Administration > Options > Accounts Receivable page.
5	**Credit Card Code**	District Administration > Maintenance > User Profiles > Purchasing Credit Cards
6	**Requestor**	District Administration > Maintenance > User Profiles > Purchasing Requestors
7	**Bid Category**	Finance > Tables > Vendor Categories and Finance > Maintenance > Vendor Information > Vendor Miscellaneous
8	**Commodity Code**	District Administration > Tables > Commodity Codes
9	**Accounts**	District Administration > Maintenance > User Profiles > Accounts

Create, Modify, or Delete a Requisition

1. Create a requisition.

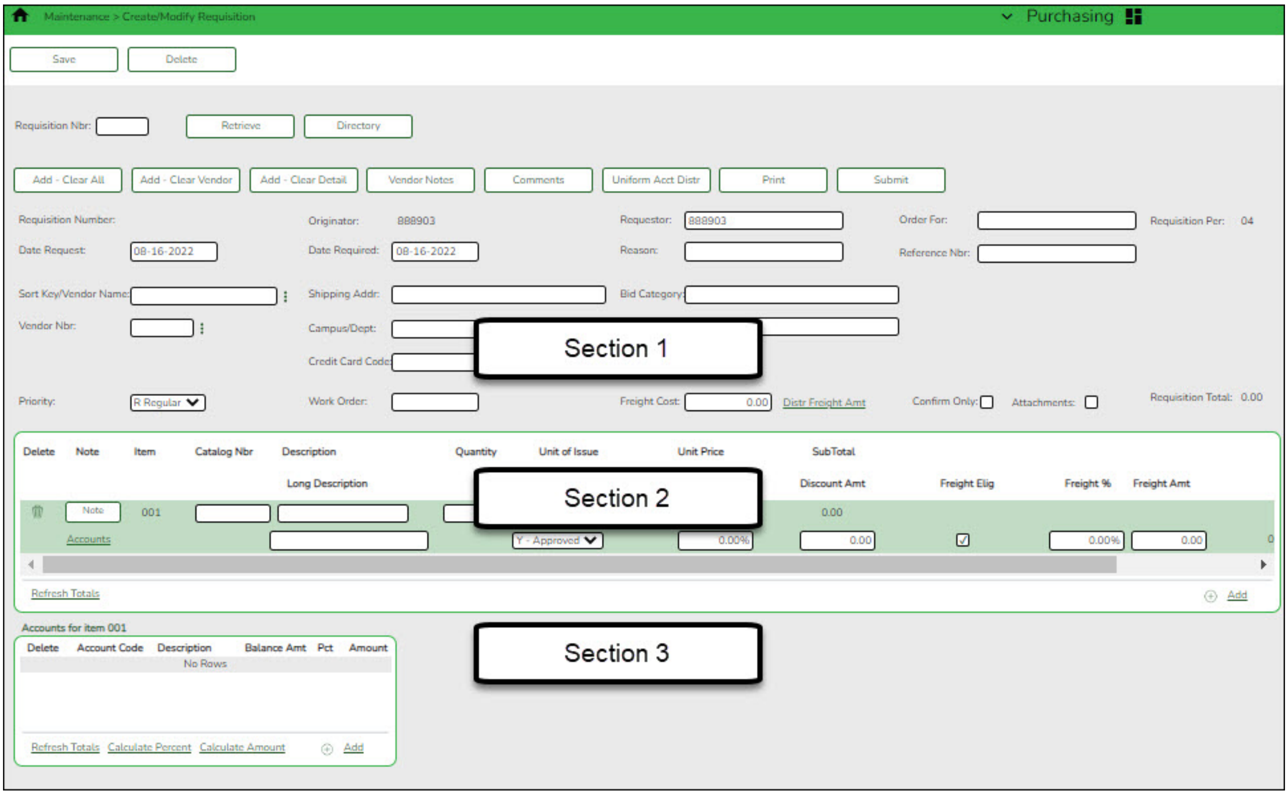
Create a requisition

Purchasing > Maintenance > Create/Modify Requisition

Use this page to create new requisitions.

- The logged-on user can only view their own requisitions.
- If an originator does not have an approval path and creates a requisition, the requisition is automatically approved when saved, and a purchase order is created if they are submitted.
- Requisitions cannot be created if the current date is greater than the cutoff date on the District Administration > Options > Purchasing/Warehouse > Current Year page.

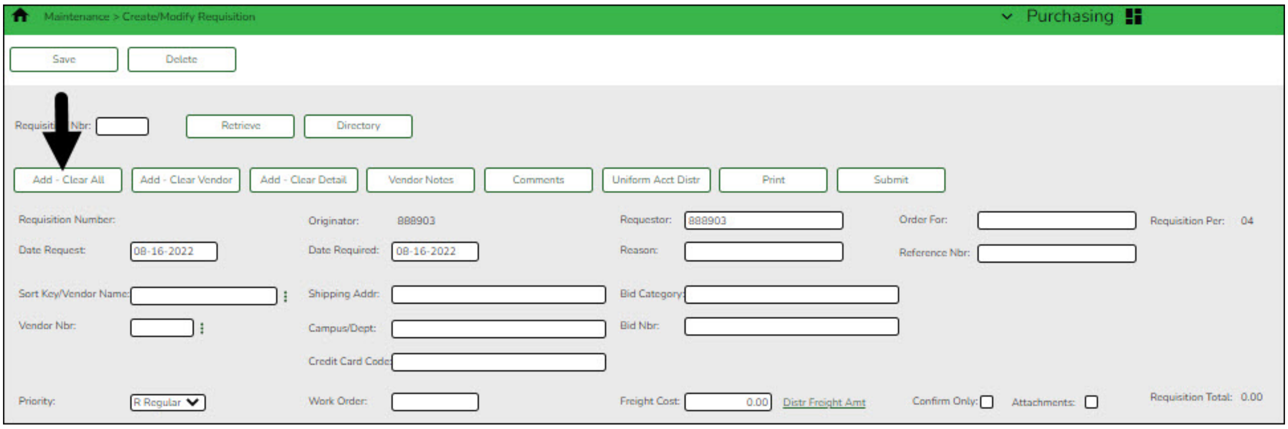
Use the following three-section process to guide you through creating and saving or submitting a requisition.


Maintenance > Create/Modify Requisition
Purchasing
Save
Delete
Requisition Nbr:
Retrieve
Directory
Add - Clear All
Add - Clear Vendor
Add - Clear Detail
Vendor Notes
Comments
Uniform Acct Distr
Print
Submit
Section 1
Section 2
Section 3
Delete
Note
Item
Catalog Nbr
Description
Quantity
Unit of Issue
Unit Price
SubTotal
Long Description
Discount Amt
Freight Elig
Freight %
Freight Amt
Accounts
Refresh Totals
Add
Accounts for item 001
Account Code
Balance Amt
Pct
Amount
No Rows
Calculate Percent
Calculate Amount

Requisition Number:
Originator: 888903
Requestor: 888903
Requisition Per: 04
Date Request: 08-16-2022
Date Required: 08-16-2022
Priority: R Regular
Freight Cost: 0.00
Confirm Only: ☐
Attachments: ☐
Requisition Total: 0.00
Item: 001
Unit of Issue: Y - Approved
0.00%
Freight Elig: ☑

☐ Click **Add - Clear All** to display a blank requisition page.

Section 1


Maintenance > Create/Modify Requisition
Purchasing
Save
Delete
Requisition Nbr:
Retrieve
Directory
Add - Clear All
Add - Clear Vendor
Add - Clear Detail
Vendor Notes
Comments
Uniform Acct Distr
Print
Submit
Sort Key/Vendor Name:
Vendor Nbr:
Shipping Addr:
Campus/Dept:
Credit Card Code:
Work Order:
Order For:
Reason:
Reference Nbr:
Bid Category:
Bid Nbr:
Distr Freight Amt

Requisition Number:
Originator: 888903
Requestor: 888903
Requisition Per: 04
Date Request: 08-16-2022
Date Required: 08-16-2022
Priority: R Regular
Freight Cost: 0.00
Confirm Only: ☐
Attachments: ☐
Requisition Total: 0.00

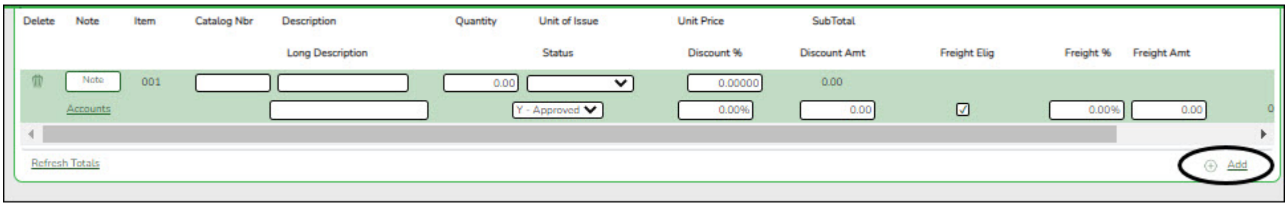
Complete the requisition data fields.

Field	**Description**
Originator	The name of the logged-on user is displayed.
Requestor	Type the name of the person or organization who is requesting the item(s). As you type the data, a drop-down list of corresponding data is displayed. Select the requestor. **Notes**: The requisition follows the requestor's approval path that is set up on the District Administration > Workflow > Approval Path page. If no requestors exist for the selected user on the District Administration > User Profiles > Purchasing Requestors tab, the originator is displayed in the requestor list. If requestors are added to the District Administration > User Profiles > Purchasing Requestors tab, the originator is limited to only those accounts that are associated with the requestor. The originator is also limited to the amounts entered in the **Req Max** and **YTD Max** fields on the District Administration > User Profiles > Purchasing Permissions tab for the specified requestor. The originator's account and amounts are not affected. If changing the requestor, a warning is displayed indicating that this action causes all accounts assigned to the items to be deleted. The accounts that the new requestor is authorized to use are charged with the item cost.
Requisition Nbr	The requisition number is populated when the requisition is saved if the **Use Automatic CYR Requisition Number Assignment** field is selected on the Finance > Tables > District Finance Options tab. Otherwise, you must enter a six-digit requisition number.
Date Request	Type the date of the requisition request. By default, the field is set to the current date; however, it can be changed.
Date Required	Type the date that the requisition is required. By default, the field is set to the current date; however, it can be changed.
Order For	Type the shipping contact name to be displayed on the purchase order. The field can be a maximum of 30 characters. If blank, the data from the **Requestor** field is displayed on the purchase order. **Note**: Data from the **Order For or Requestor** field is only displayed on the purchase order if a Y is entered in the **Include Requestor's Name in Shipping Address** parameter on the Print Purchase Orders or Reprint Purchase Orders report parameter page.
Requisition Per	The requisition period for this transaction is displayed. This field is the same as the accounting period and is set to the current or next period on the Finance > Tables > District Finance Options tab.
Shipping Addr	Type the address where the requisition is to be shipped. The shipping addresses are assigned on the District Administration > User Profiles > Purchasing Addresses tab.

Field	**Description**
Sort Key/Vendor Name	Type a valid vendor name, if known. The **Vendor Nbr** field is populated with the corresponding vendor number. If the vendor number is not known, click ⋮ to select a vendor from the Vendors Directory. The Vendor Directory is populated from the vendor records established on the Finance > Maintenance > Vendor Information > Vendor Name/Address tab.
Vendor Nbr	Populated with the vendor number based on the value entered in the **Sort Key/Vendor Name** field. Or, type a valid vendor number if known. The **Sort Key/Vendor Name** field is populated with the corresponding vendor name. If the vendor number is not known, click ⋮ to select a vendor from the Vendors Directory.
Reason	Type the reason for submitting the requisition or edit the current reason. The field can be a maximum of 30 characters. This information is displayed on various reports and on the general ledger.
Priority	Click ⌄ to select or change the requisition priority. By default, priority is set to *Regular*, but it can be changed to *Urgent*.
Reference Nbr	Type the identification number for this requisition. The field can be a maximum of 15 characters.
Work Order	Type a work order number. This field is only for informational purposes.
Bid Category	Type the category code to be used for the requisition. As you type the data, a drop-down list of corresponding data is displayed. Select a bid category code. Only category codes identified as a bid category on the Finance > Tables > Vendor Categories page and assigned to the selected vendor on the Finance > Maintenance > Vendor Information > Vendor Miscellaneous tab are displayed in the drop-down list.
Bid Nbr	If the bid process was used for this vendor and you are ordering based on a bid, type the bid number; otherwise, leave the field blank. This information is printed on the purchase order.
Confirm Only	Select if an order was sent via fax, email, or the Internet, and this purchase order only confirms that the order was already received by the vendor.
Attachments	Select if an attachment is included with the purchase order.
Freight Cost	Type a cost value, edit the current cost value, or leave the field blank if there are no charges. The freight cost is distributed to all line items when the **Freight Elig** field is selected. In addition, the **Freight %** field is populated based on the amount in the **Freight Amt** field divided by the subtotal of the line item.
Distr Freight Amt	Click to distribute the freight cost evenly among all line items in the requisition.

Field	Description
Credit Card Code	Type the credit card code to be used for the requisition. As you type the data, a drop-down list of corresponding data is displayed. Select a credit card code. Only active credit card codes that are assigned to the requestor on the District Administration > Maintenance > User Profiles > Purchasing Credit Cards tab are displayed in the drop-down list. After a requisition is submitted, only the originator can update the credit card code. The requisition must be returned to the originator to make any changes.
Campus/Dept	Type the name of the campus submitting the requisition. This field is also used to direct the requisition to the first approver. As you type the data, a drop-down list of corresponding data is displayed. Select a campus/department. **Notes**: This field is only displayed if the **Allow for Approval Process** is selected on the District Administration > Options > Purchasing/Warehouse tab. The **Campus/Dept** field is optional when the requisition is created and is required when the requisition is submitted. The **Campus/Dept** drop-down list includes the campus/department number, campus/department name, and the first approver.

Section 2


Delete
Note
Item
Catalog Nbr
Description
Quantity
Unit of Issue
Unit Price
SubTotal
Long Description
Status
Discount %
Discount Amt
Freight Elig
Freight %
Freight Amt
Note
001
0.00
0.00000
0.00
Accounts
Y - Approved
0.00%
0.00
0.00%
0.00
Refresh Totals
Add

Add requisition items.

❏ Click the **Accounts** link to select a line item. The line item is highlighted for editing and you can view or add accounts for the selected line item in the **Accounts** section at the bottom of the page.

Note	Click to add or read a note for the item. If a paper clip is displayed next to the **Note** button, an item note exists. In the note window, review the existing notes or type new or additional notes (justification or instructions) about the item. **This information is for internal use only**. Click **OK** to save the note and close the window. Otherwise, click **Cancel** to close the window.
Item	The sequential number of the row is automatically populated.
Catalog Nbr	Type an item catalog number. This field can be a maximum of 15 characters.

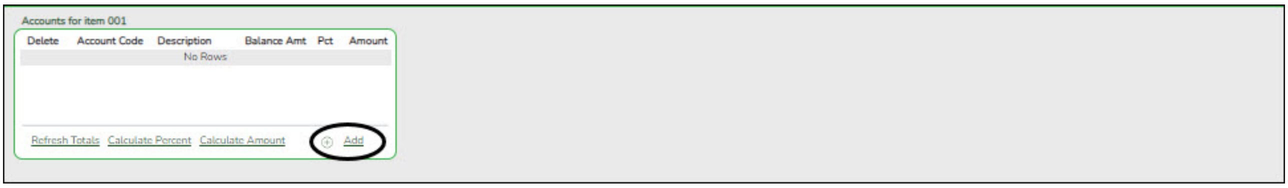
Description	Type a short description (e.g., computer, pens, books, etc.) of the item being ordered. This field is required and can be a maximum of 30 characters.
Unit of Issue	Click ⌄ to select a basic unit (e.g., EA (each), CA (case)) on which the price is based.
Quantity	Type the quantity in units of issue for the requested item.
Unit Price	Type the price per unit of issue for the requested item.
SubTotal	The subtotal is populated based on the **Quantity** and **Unit Price** fields.
Commodity Code	Begin typing a commodity code or description. As you type the data, a drop-down list of corresponding data is displayed. Select the applicable commodity code. The commodity codes are maintained on the District Administration > Tables > Commodity Codes page. The commodity code can be selected and changed on a saved requisition and also by an approver once submitted. **Note**: If **Restrict Commodity Codes to Buyer** is selected on the District Administration > Options > Purchasing/Warehouse page, only buyers (i.e., **Buyer** is selected on the District Administration > Maintenance > User Profiles > Purchasing Permissions tab) can view the **Commodity Code** field. If **Restrict Commodity Codes to Buyer** is not selected, then all users can view the **Commodity Code** field.
Discount %	If there is a discount on the line item, type the value (percent) to be reduced from the item price. The **Discount Amt** field is populated when another field is selected.
Discount Amt	Type a value of the discount amount. The **Discount %** field is recalculated when another field is selected.
Freight Elig	Select if the requisition item is eligible for transportation charges and you want to include the freight cost in the requisition total. If not selected, the **Freight %** and **Freight Amt** fields are disabled.
Freight %	Type the percentage value of the item's purchase price for the item's transportation charges. The **Freight Amt** field is calculated and the **Freight Cost** field is adjusted when another field is selected.
Freight Amt	Type the freight charge amount. The **Freight %** and **Freight Cost** fields are adjusted when another field is selected.
Totals	The total line item value is displayed. The discount and freight amounts are included in the calculation.
Status	By default, this field set to *Y - Approved*. Click ⌄ to select a different requisition item status. **Notes**: If *Y - Approved* is selected, a unit price other than $0 is required. If *F - Free* is selected for goods or services being requisitioned without charge, the account code must be blank.
Long Description	Type a detailed item description (e.g., training dates, etc.)
Requisition Total	The calculated total cost for each item in the requisition based on the quantity ordered and unit price per item is displayed.

☐ Click **Refresh Totals** to update the totals if any amounts are changed in the grid.

The last line of the requisition displays the requisition subtotal (quantity x unit price), discount amount, freight amount, and requisition total (the total calculated requisition amount including discounts and freight amounts).

❑ Click **+Add** to add additional line items.

Section 3



Assign account codes.

Add account code data for each line item:

If you add multiple account codes per line item, be sure that you accurately indicate the percent and amount for each account code. Review the example in the **Pct** field description.

Account Code	Type the account code to be charged. The account code must exist in the general ledger and in the user profile (the account code must be assigned to the Requestor's user profile in District Administration.). The account code is comprised of the fund, function, object, subobject, organization, and program codes, and are the individual components that uniquely identify a specific budget category. You can add multiple accounts for each item. Press the SPACEBAR to view a list of account codes associated with the requestor's user profile. If the account code is not known, click ⋮. The Accounts Codes lookup is displayed. • Type data in the individual account code component fields and click **Search**. • A list of account codes matching your search components is displayed. • Select the applicable account code from the list. Otherwise, click **Cancel** to close the Account Codes lookup. • The **Description** field is populated with the description of the account. **Note**: If an account code is added or changed, click **Approve** to save the account code and continue with the approval process.
Description	This field is populated with the account description from the Finance chart of accounts.
Balance	Displays the fund balance available in the account. A negative balance indicates that the fund has available funds.
Pct	Type the percent of that item to charge the selected fund. Each requisition line item must equal 100%. For example, the percent would be 100% if you paid from one account; however, if you paid from two accounts, you could split the amount 50/50, 75/25, or 60/40 for a total of 100%.
Amount	Type the amount to charge the selected fund. The amount that will be charged to that account according to the percent entered in the **Pct** field.

❑ Click **Refresh Totals** to update the totals if any amounts are changed in the grid.

❑ Click **Calculate Percent** to populate the **Percent** column based on the amount entered in the **Amount** column.

❑ Click **Calculate Amount** to populate the **Amount** column based on the amount entered in the **Percent** column.

```
OR
```

❑ Click **Uniform Acct Distr** to assign one or more account codes to the entire requisition. You can split all of the costs for a requisition item between two or more funds. The percentage split does not have to be the same for each fund, but the sum of all percentages must equal 100%.

The Uniform Account Distribution pop-up window is displayed.

❑ Complete the following fields:

Account Code	Type the account code to be charged. The account code must exist in the general ledger and in the user profile (the account code must be assigned to the Requestor's user profile in District Administration.). The account code is comprised of the fund, function, object, subobject, organization, and program codes, and are the individual components that uniquely identify a specific budget category. You can add multiple accounts for each item. Press the SPACEBAR to view a list of account codes associated with the requestor's user profile. If the account code is not known, click ⋮. The Accounts Codes lookup is displayed. • Type data in the individual account code component fields and click **Search**. • A list of account codes matching your search components is displayed. • Select the applicable account code from the list. Otherwise, click **Cancel** to close the Account Codes lookup. • The **Description** field is populated with the description of the account. **Note**: If an account code is added or changed, click **Approve** to save the account code and continue with the approval process.
Description	This field is populated with the account description from the Finance chart of accounts.
Balance	Displays the fund balance available in the account. A negative balance indicates that the fund has available funds.
Pct	Type the percent of that item to charge the selected fund. Each requisition must equal 100%. For example, the percent would be 100% if you paid from one account; however, if you paid from two accounts, you could split the amount 50/50, 75/25, or 60/40 for a total of 100%.
Amount	Type the amount to charge the selected fund. The amount that will be charged to that account according to the percent entered in the **Percent** Field.

☐ Click **Refresh Totals** to update the totals if any amounts are changed in the grid.

☐ Click **Calculate Percent** to populate the **Percent** column based on the amount entered in the **Amount** column.

☐ Click **Calculate Amount** to populate the **Amount** column based on the amount entered in the **Percent** column.

- Click **OK** to apply the amounts.
- Click **Cancel** to close the window without applying the amounts.

Additional options

Additional options

The following buttons are displayed at the top of the page.

Details	Click 🔍 to select or view the account code(s) for the selected item. The account code data is displayed in the lower grid.
Vendor Notes	Click to add or view vendor notes. A Vendor Notes window is displayed. If there is a paper clip next to the **Vendor Notes** button, a requisition vendor note exists. In the Vendor Notes window, type the note to be printed on the purchase order for the vendor to view. **Notes**: If you are using a preprinted purchase order form, the text displayed on the purchase order is limited to one line that is approximately three inches in length. If you are not using a preprinted purchase order form, the text displayed on the purchase order is limited to three lines that are approximately three inches in length. Use the scale above the text to measure the length of the note. Click **OK** to save the vendor note and close the window. Click **Cancel** to close the window without saving the note.
Comments	Click to add or view requisitions comments. These comments are displayed on the District copy of the purchase order. A Requisition Comments window is displayed. If there is a paper clip icon next to the **Comments** button, a requisition comment exists. In the Requisition Comments window, type comments about the requisition. Click **OK** to save the requisition comment and close the window. Click **Cancel** to close the window without saving the comment.

☐ Click **Print** to print the requisition for your records.

If the requisition is incomplete, you can save the requisition and retrieve it at a later time to continue modifying it.

☐ Click **Save**. If **Use Automatic CYR Requisition Number** is selected on the Finance > Tables > District Finance Options tab, the requisition number is assigned upon clicking **Save**.

If the requisition is complete, submit the requisition for approval.

❏ Click **Submit** to submit the requisition. A message with the requisition number is displayed indicating that the requisition process is completed. You are prompted to print the Purchasing Requisition Report.

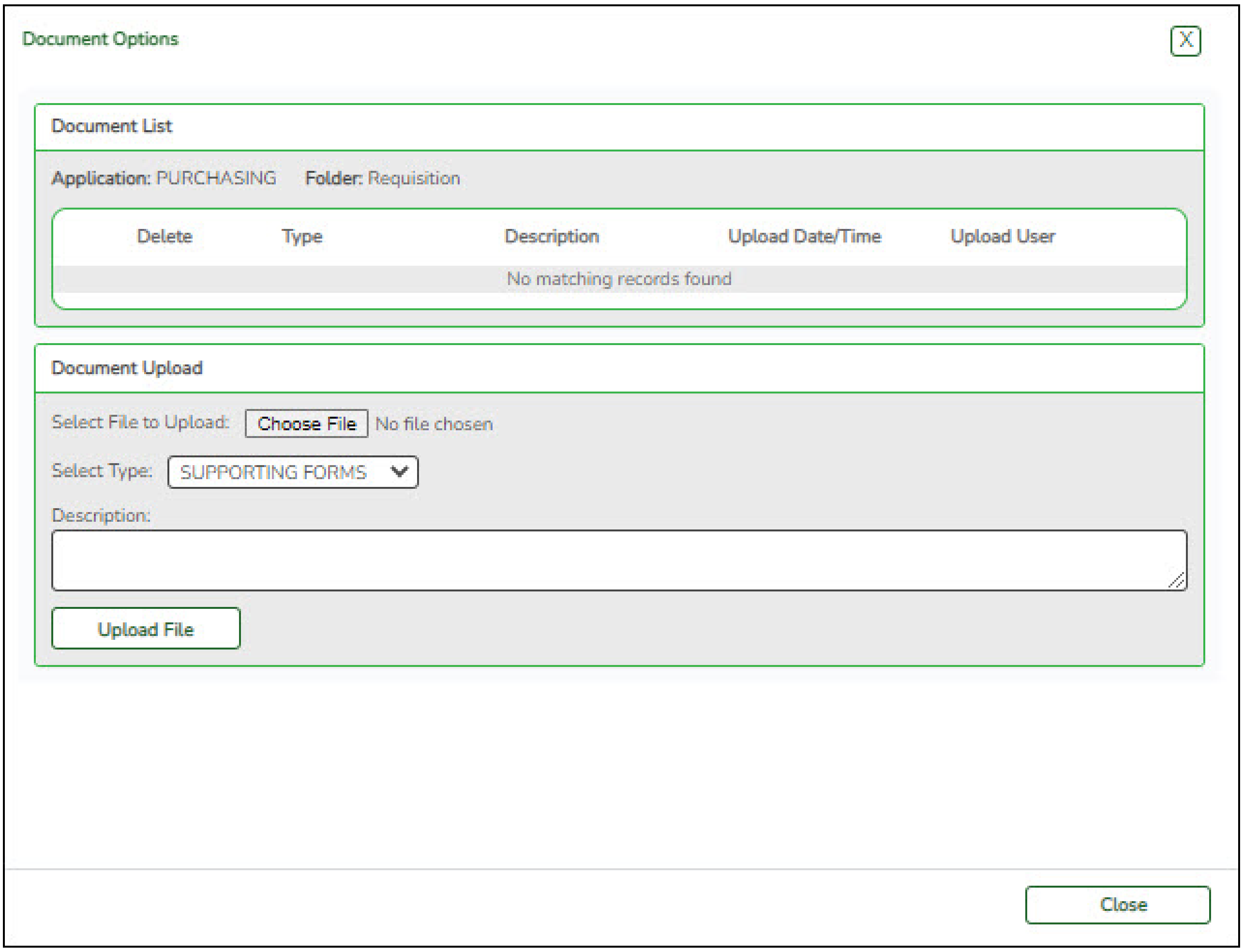
- Click **Yes** to continue and print the report.
- Click **No** to continue without printing the report.

The requisition is forwarded to the next approver in the approval path.

Note: Unless permission is granted, Purchasing will not allow users to go over budget. If a user attempts to submit a requisition for more than the available amount, a message is displayed informing them of the issue and the requisition is not submitted. You can save the requisition until a budget amendment is done to increase the account or a different account is used.

If your LEA uses the Document Attachments feature, the **Documents** button is displayed at the top of the page after the requisition is saved.

❏ Click **Documents** to upload supporting documents for the requisition. The Document Options pop-up window is displayed.


Document Options

Document List

Application: PURCHASING Folder: Requisition

Delete	Type	Description	Upload Date/Time	Upload User
		No matching records found		

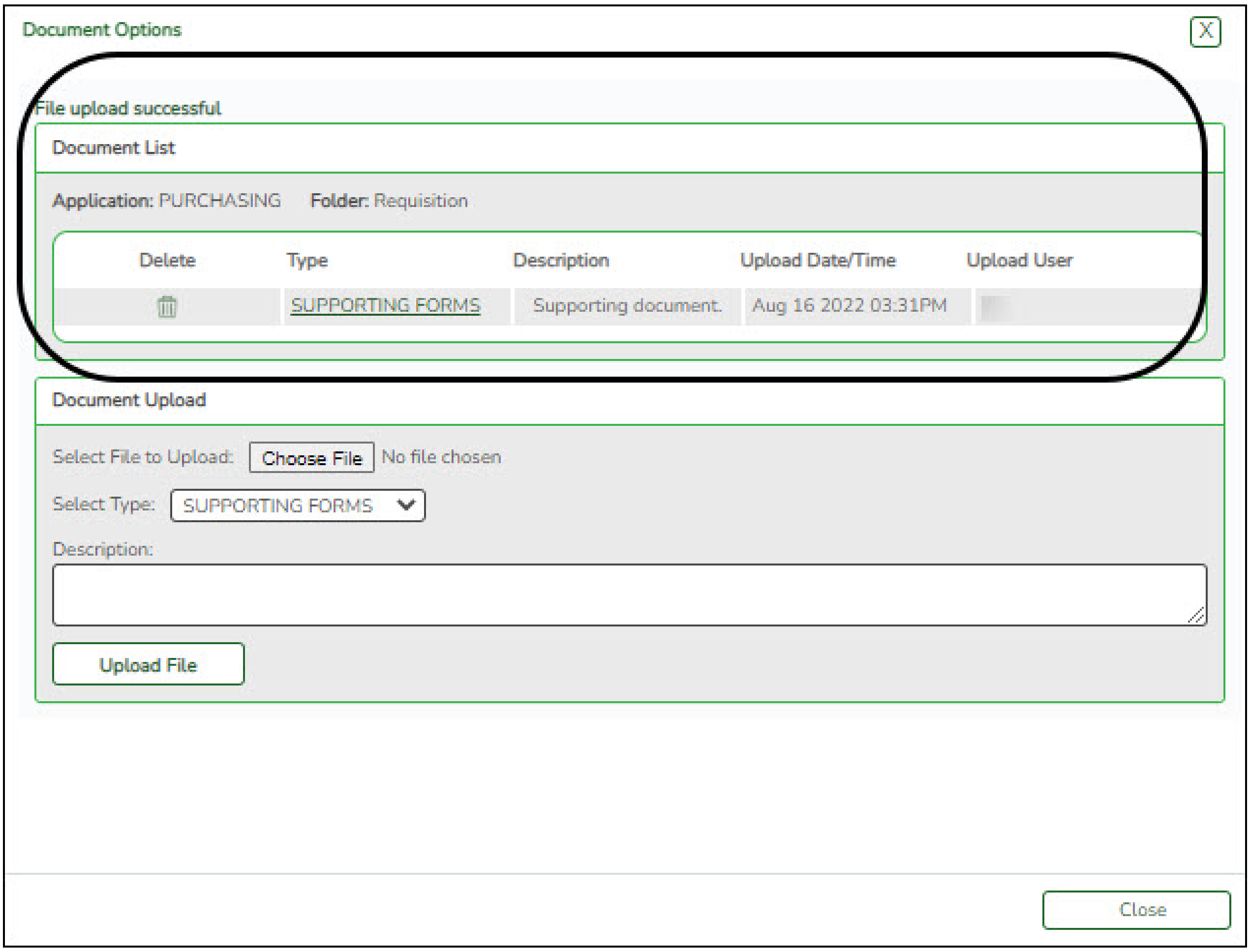
Document Upload

Select File to Upload: Choose File No file chosen

Select Type: SUPPORTING FORMS

Description:

  - Click **Choose File** to locate a file to be uploaded.
  - In the **Select Type** field, click ⌄ to select the type of document (**Supporting Forms** or **Vendor Documents**) to be uploaded.
  - In the **Description** text box, type a description for the document attachment.
  - Click **Upload File**. The file is uploaded and listed in the **Document List** section.



File upload successful

Application: PURCHASING Folder: Requisition

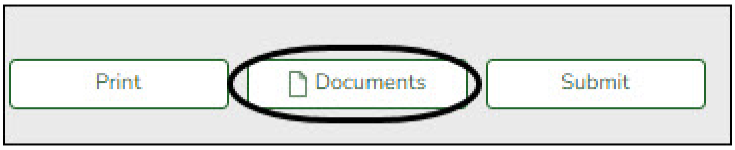
Delete	Type	Description	Upload Date/Time	Upload User
🗑	SUPPORTING FORMS	Supporting document.	Aug 16 2022 03:31PM	[redacted]

Select File to Upload: No file chosen

Select Type: SUPPORTING FORMS

Description:

☐ Click **Close** to close the pop-up window. The **Documents** button displays a note icon.



Documents	View or attach supporting documentation.

2. Modify a requisition.

Modify a requisition

Purchasing > Maintenance > Create/Modify Requisition

Use this page to modify saved requisitions (i.e., requisitions that have not been submitted).

☐ Retrieve the requisition to be modified.

  - Add items, delete items, change account codes, change vendor, or change requestors.

  - Click **Save** to save the requisition and modify it at a later time.

Or

❑ Click **Submit** to submit the requisition for approval. If you change the **Requestor**, a warning is displayed indicating that all accounts assigned to the items will be deleted. The accounts that the new requestor is authorized to use are charged with the item cost.

  - Click **Yes** to continue.
  - Otherwise, click **No**.

3. Delete a requisition.

Delete a requisition

Purchasing > Maintenance > Create/Modify Requisition

Use this page to delete a requisition. Only requisitions that are in a Not Submitted or Returned status can be deleted.

❑ Retrieve the requisition to be deleted.

❑ Click **Delete** to delete the requisition. A message is displayed asking you to confirm the deletion.

  - Click **Yes** to delete the requisition.
  - Otherwise, click **No** to not delete the requisition.

Notes:

  - A requisition cannot be deleted while it is being edited.
  - If you delete a requisition, click **Save** before editing or creating a new requisition.
  - Only the originator can delete the requisition.

Review Requisition Data

1. Perform a requisition inquiry.

Perform a requisition inquiry

Purchasing > Inquiry > Requisition Status Inquiry

Use this page to view the status of each item included on a specific requisition or purchase order without a contract. The Requisition Status Inquiry page can be accessed from two menus:

- For the current year, click Requisition Status Inquiry from the Inquiry menu.
- For next year, click Requisition Status Inquiry from the Next Year menu.

The page consists of the following three grids:

- The top grid displays requisitions or purchase orders.
- The middle grid displays items included in the requisition.
- The bottom grid displays a list of the approvers in the sequence of their approval.

Note: If **Global Access** is selected, the user can perform inquiries on the status of all requisition accounts.

<table>
<tr>
<td>Retrieve a record.</td>
<td>The From and To Date fields default to your current fiscal year.
TIP: Use the following fields to narrow your inquiry search. For example, you can perform a search on a specific requisition Status to only display a list of requisitions with the selected status. By narrowing your search parameters, you can avoid retrieving large amounts of data in a single instance.
<table>
<tr><td>Req Nbr</td><td>Type the requisition number to be retrieved.</td></tr>
<tr><td>PO Nbr</td><td>Type the purchase order number to be retrieved. Leading zeros are not required. However, if the purchase order number is alphanumeric, the field is not zero-filled.</td></tr>
<tr><td>Contr Type</td><td>Click ⌄ to select a contract type.</td></tr>
<tr><td>From Date</td><td>Type the beginning search date in the MMDDYYYY format.</td></tr>
<tr><td>To Date</td><td>Type the ending search date in the MMDDYYYY format.
Note: The Date Requested is the date considered when using the From Date and To Date parameters.</td></tr>
<tr><td>Status</td><td>Click ⌄ to select a status to be included in the search.</td></tr>
<tr><td>Vendor Number</td><td>Type the vendor number.</td></tr>
<tr><td>Vendor Name</td><td>Type the vendor name.</td></tr>
<tr><td>Requestor Name</td><td>Type the requestor name.</td></tr>
<tr><td>Bid Category</td><td>Type the bid category code.</td></tr>
</table>
Click Retrieve. Requisitions and purchase orders that you have submitted but that have not been received are displayed in the three grids.</td>
</tr>
</table>

In the top grid, click 🔍 to inquire about the selected requisition. The requisition information from the Create/Modify Requisition page is displayed.

Field	**Description**
Status	The current status of the requisition is displayed. If the status is **Pending to be approved**, the requisition is not yet a purchase order. If the status is **Approved**, the **PO Nbr** field is populated with the assigned purchase order number.

2. Generate and review requisition reports.

Generate and review requisition report

The following reports are available to assist you in tracking requisition and purchase order information.

Purchasing > Reports > Purchasing Reports > REQ1050 - Requisitions Pending Approval

This report provides a list of requisitions that have been submitted but are not yet approved. The report allows you to view pending requisitions by vendor number assignment or by account number assignment. The requisitions are totaled by the requisition number, originator, and organization. The requisitions can be sorted by the requestor, receiving location, vendor, or requisition number if the parameter is left blank.

Purchasing > Reports > Purchase Order Reports > REQ1350 - Outstanding Purchase Orders Report

This report provides a list of purchase orders with account codes created in Purchasing that have balance amounts greater than zero. (The requisition status must be A - Approved.) The report is summed by purchase order number.

Purchasing > Reports > Purchase Order Reports > REQ1400 - Open PO Report

This report provides a list of purchase orders with line items that have been placed but not liquidated when the **Create Receiving Payable** district option is selected. If **Create Receiving Payable** is not selected, all placed purchase orders with goods that have not been fully received and with requisition items that have not been disapproved or voided are listed. Information includes purchase order number, requisition number, vendor name, purchase order date, date required, the original amount (by PO for original encumbrance amount), and balance.