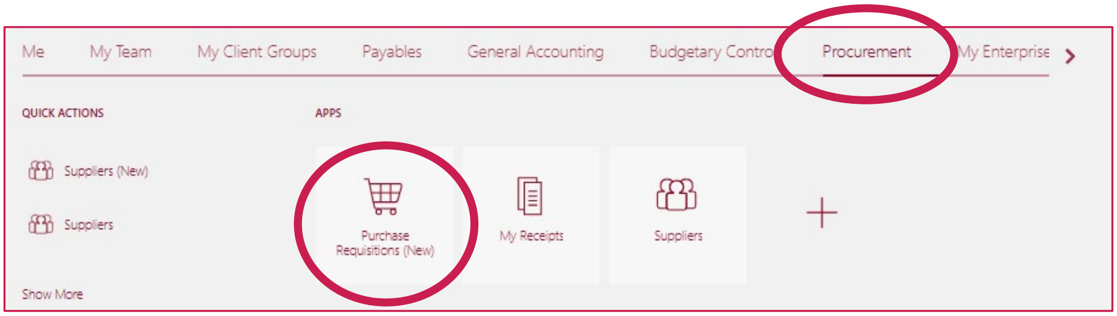
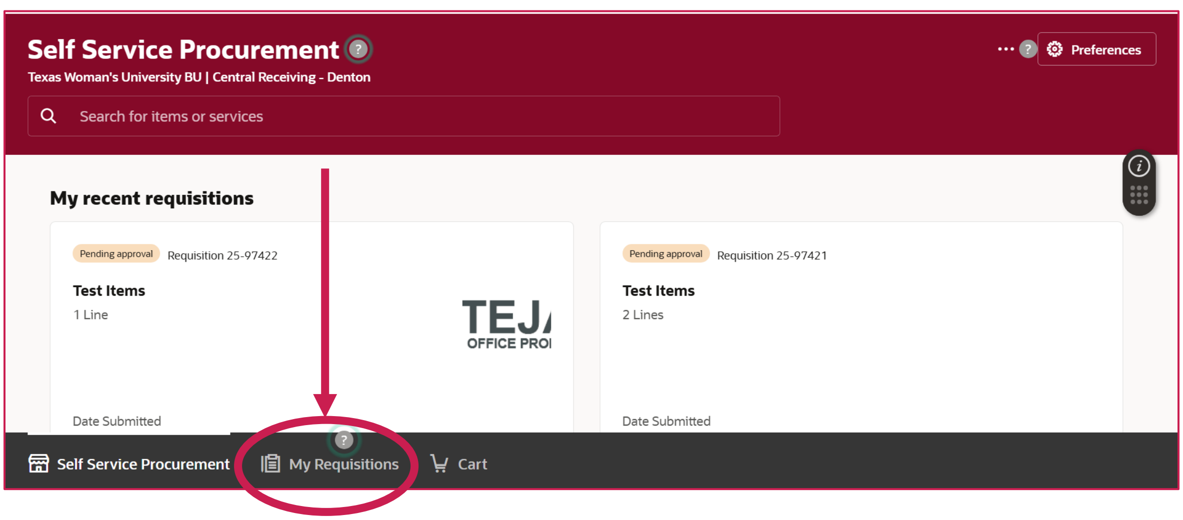
How to View and Manage Requisitions

Get Started

1. Navigate to **Procurement** > **Purchase Requisitions (New)**



2. Select **My Requisitions** at the bottom of the page.

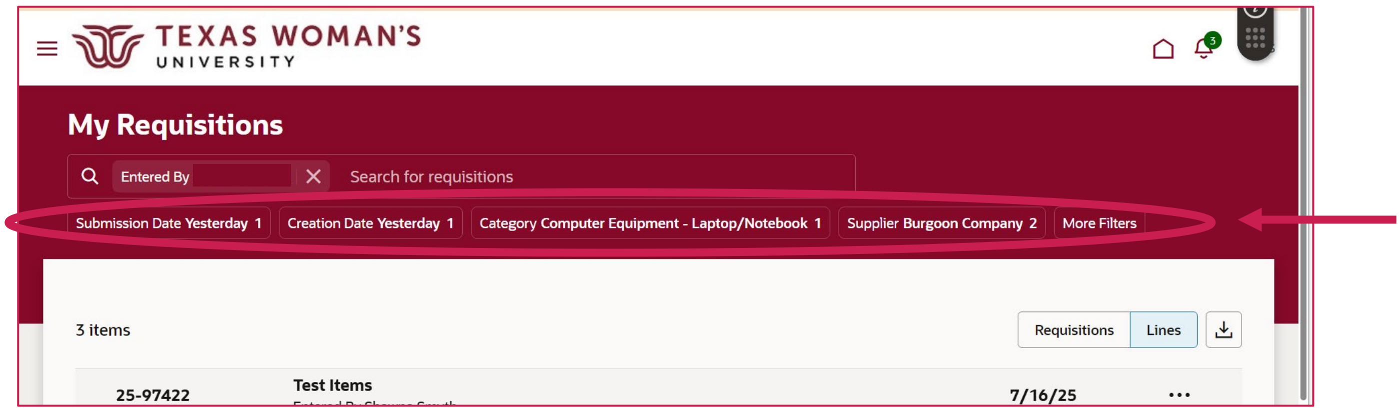


Note: If you're trying to view an order or requisition you didn't enter, you may need updated Oracle roles. Please submit an Oracle help ticket to request access.

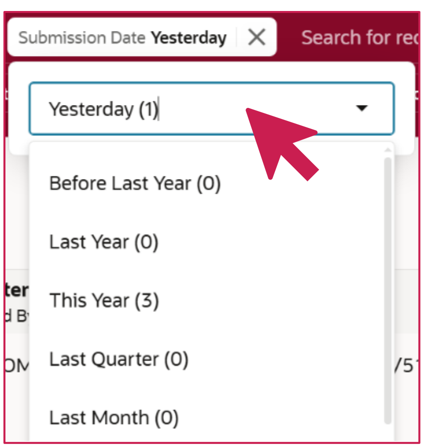
Find Your Requisition Using Search Filters

Utilize filters to search through your requisitions.

The search bar will be auto-populated with "Entered By [Your Name]" by default.



1. Choose your Search Filter, then single-click it once it's in your search bar.
2. Click the toggle arrow to reveal all options.
    - If no toggle arrow appears, single-click the option that appeared.
    - In parentheses next to each option, you can see how many requisitions fit that criteria.



Filter Options

Submission Date filters requisitions by the date they were submitted.
- Choose from options like: Yesterday, Last Month, Last Quarter, etc.

Creation Date filters requisitions by the date they were created.
- Choose from options like: This Year, Last Year, Last Week, etc.

Category filters requisitions by item category.

Supplier filters requisitions by supplier name.
- Choose from options like: Burgoon Company, Tejas Office Products Inc, etc.

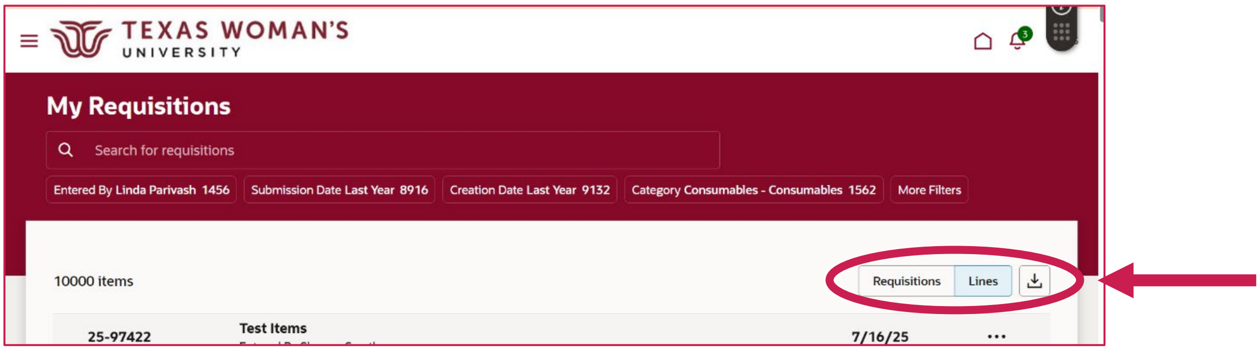
Requisition Status filters requisitions by status.
- Choose from options: Approved, Canceled, Draft, Pending approval, Rejected, and Returned.

Line Status filters requisitions by line status.
- Choose from options: Approved, Canceled, Draft, Pending approval, Rejected, and Returned.

Deliver-to Location filters requisitions by Deliver-to Location.
- Choose from options: Central Receiving – Denton, Central Receiving – Dallas, or Central Receiving – Houston.

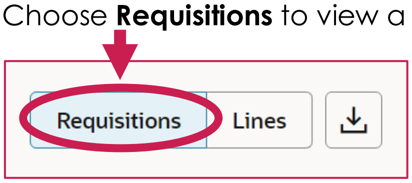
Action Required filters requisitions by action required.
- Choose from options: Create change order or Create receipt.

Choosing a View



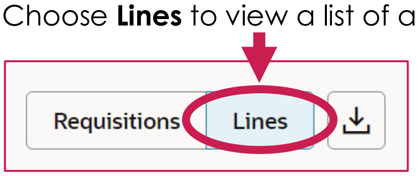
Requisitions

Choose **Requisitions** to view a list of your requisitions.



Lines

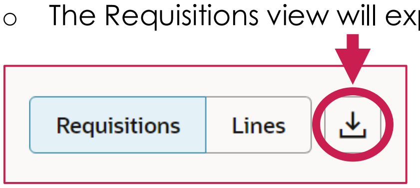
Choose **Lines** to view a list of all line items from your requisitions.



Export Spreadsheet

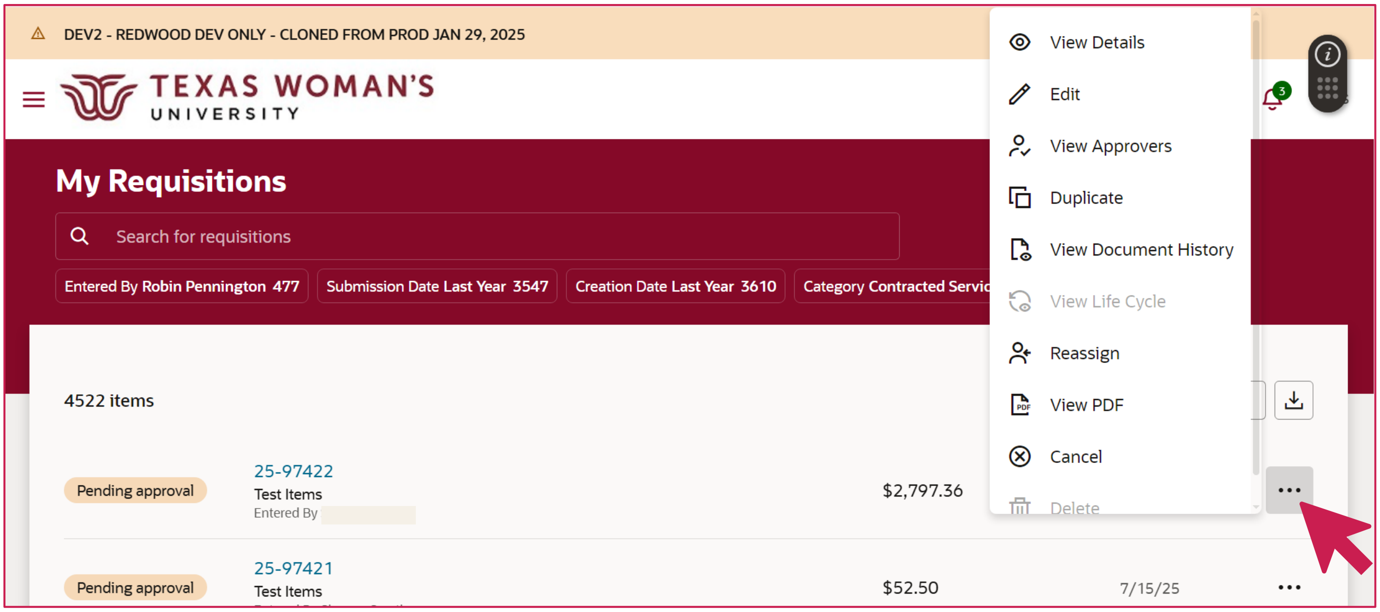
Choose the **Export icon**  to export an Excel spreadsheet of your requisitions.

- Make sure you have your preferred view chosen/toggled/highlighted before exporting.
- The Requisitions view will export with less details than the Lines view.



Requisition Actions

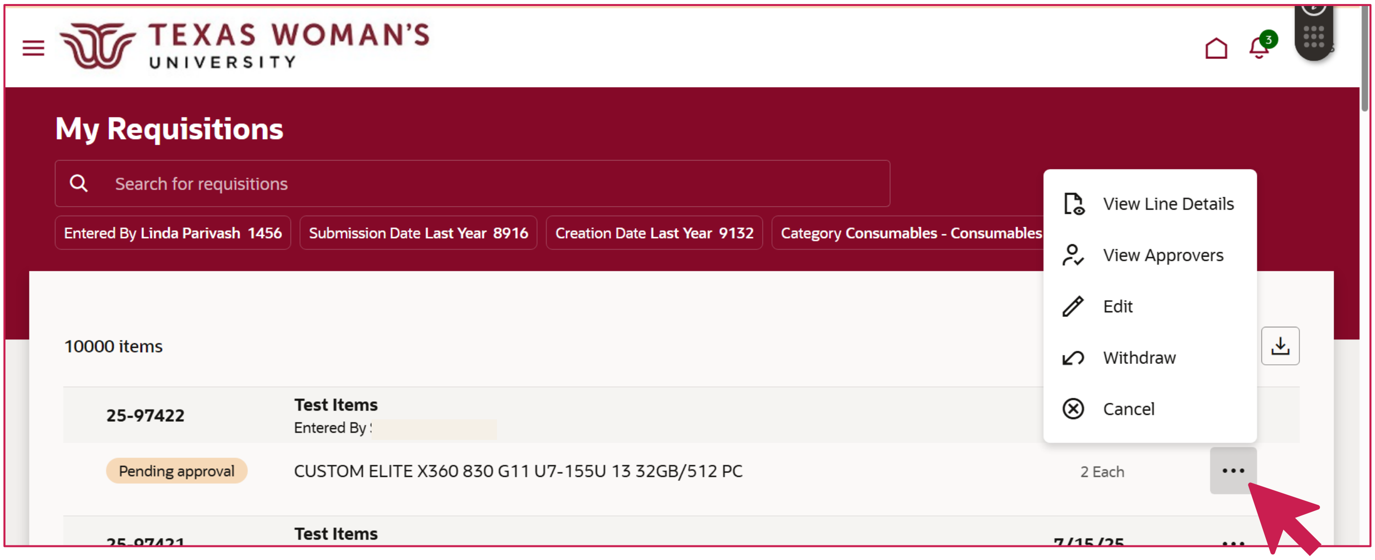
From Requisition View



1. Click the three dots  to the right of a requisition to perform one of the following actions:
   - **View Details** allows you to view details like: Description, Justification, Current Approver, Charge to Account, Requested Delivery Date, etc.
   - **Edit** allows you to edit the requisition.
   - **View Approvers** shows the approvers for this requisition.
   - **Duplicate** allows you to duplicate this requisition.
   - **View Document History** allows you to see the past actions taken on this requisition.
   - **View Life Cycle** shows when line items were in transit, in receiving, delivered and invoiced.
   - **Reassign**
   - **View PDF** downloads a pdf file of your requisition.
   - **Cancel** allows you to cancel a requisition and all its eligible lines.

Line Actions

From Lines View



1. Click the three dots  to the right of a line item to perform one of the following actions:
   - **View Line Details** allows you to view details like Status, Price, Manufacturer, Supplier, Deliver-to Location, Charge Account, etc.
   - **View Approvers** allows you to view the approvers for this line item.
   - **Edit** allows you to edit a line item that has not already entered the approval process.
   - **Withdraw** allows you to remove lines from the approval process.
   - **Cancel** allows you to cancel the line. You must provide a written reason when cancelling.