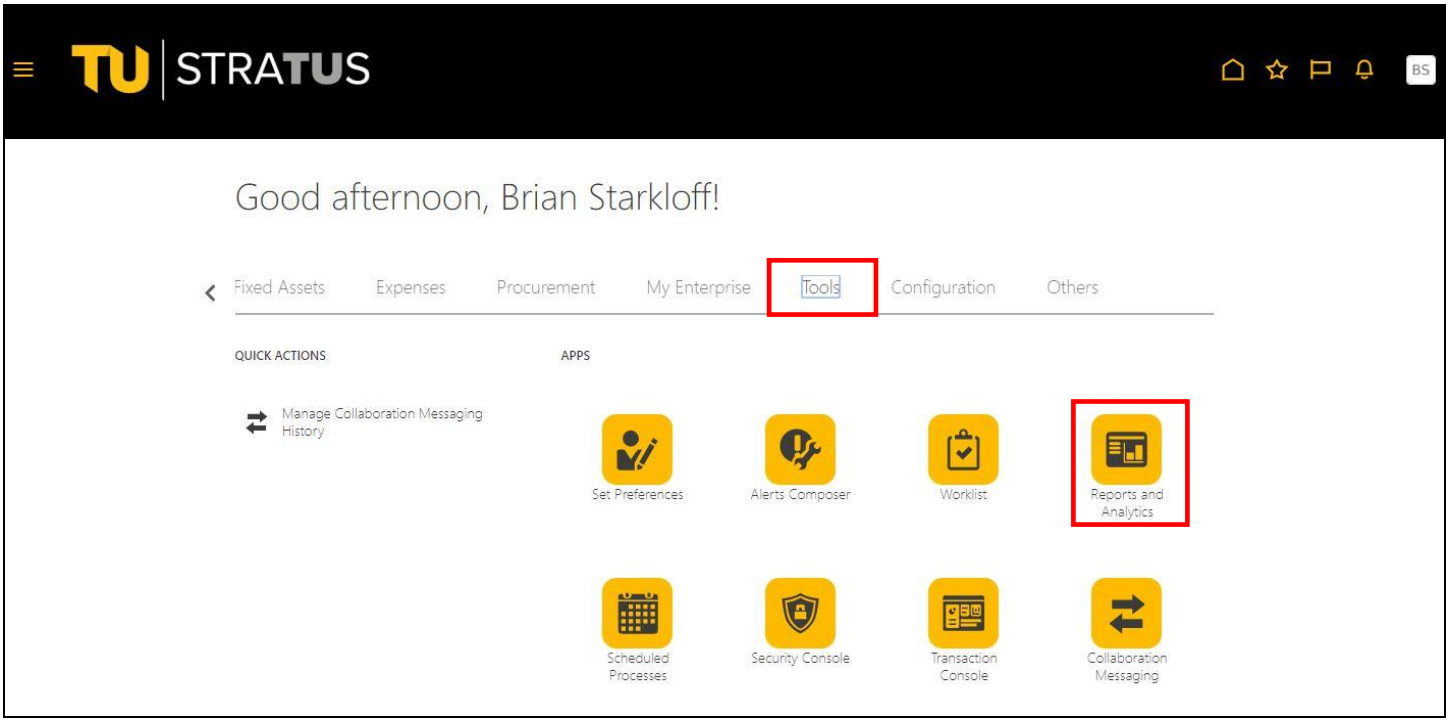
How to Run the Requisition Workflow report

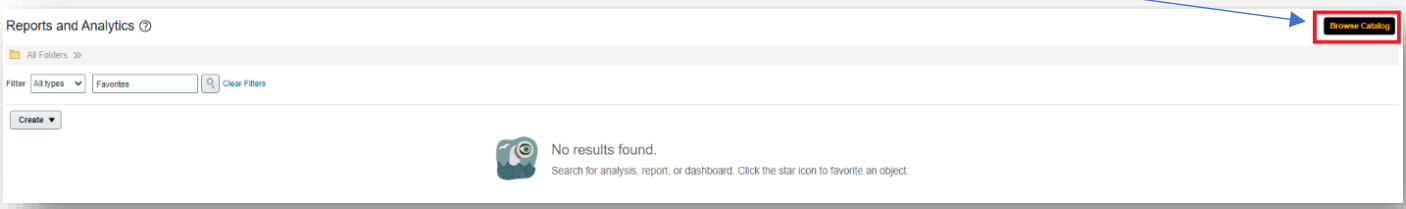
TU_REQ_Requisitions_not_on_PO_Workflow

Lists Purchase Requisitions for a selected budget year that are not on a Purchase Order (PO) and are unapproved. This report gives the workflow history of the requisition and the latest document status. Prompts include Cost Center, Account, Requestor, Requisition number, and more.

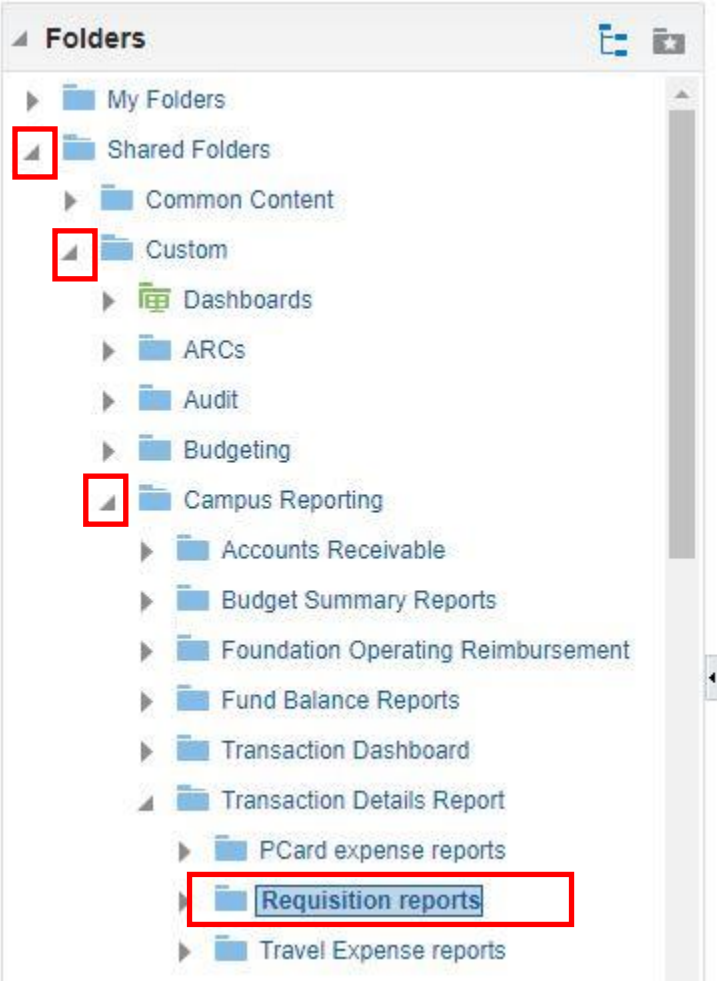
Log into Stratus. Go to Tools>Reports and Analytics.



Select Browse Catalog.



Select Shared Folders > Custom > Campus Reporting > Requisition reports

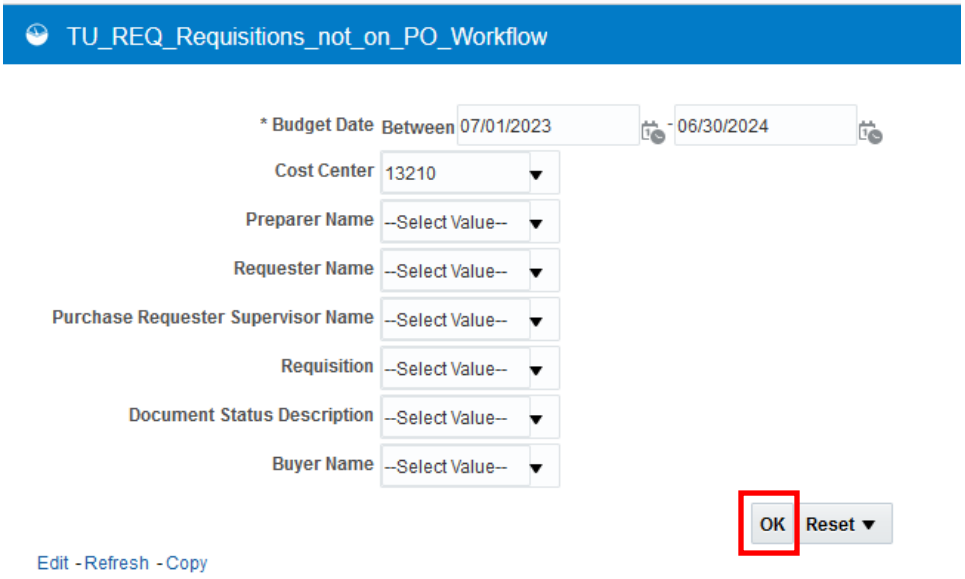


Select Open under the report name.

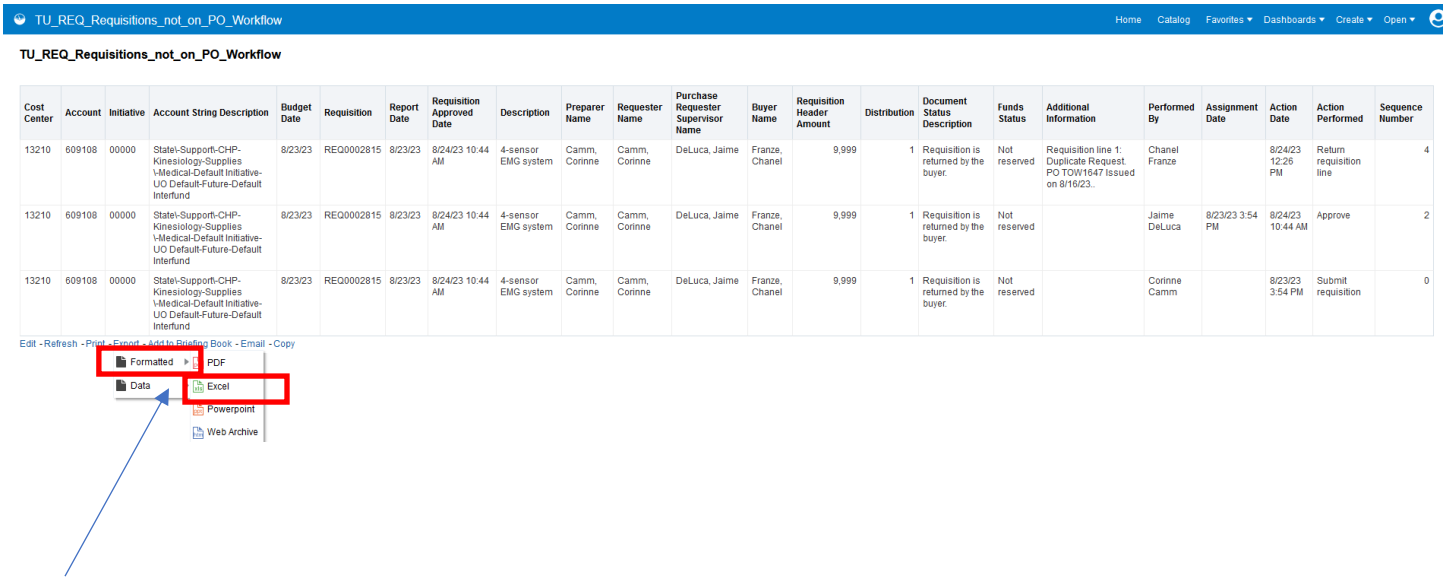
Here you will enter your parameters:

- The default budget date (Fiscal Year) will be selected. You can choose to run a previous year from the drop-down menu.
- You can type in your cost center or select from drop down. You can enter multiple Cost centers by separating them by a ; (i.e. 20830;18930)
- If you want to run the report by Preparer Name, Requester Name, Purchase Requester Supervisor Name, Requisition, Document Status Description, or Buyer Name, **leave cost center blank** and choose from the drop down menu(s).

When you are finished selecting your parameters, click OK



The report will generate:



Cost Center	Account	Initiative	Account String Description	Budget Date	Requisition	Report Date	Requisition Approved Date	Description	Preparer Name	Requester Name	Purchase Requester Supervisor Name	Buyer Name	Requisition Header Amount	Distribution	Document Status Description	Funds Status	Additional Information	Performed By	Assignment Date	Action Date	Action Performed	Sequence Number
13210	609108	00000	State\-Support\-CHP-Kinesiology-Supplies \-Medical-Default Initiative-UO Default-Future-Default Interfund	8/23/23	REQ0002815	8/23/23	8/24/23 10:44 AM	4-sensor EMG system	Camm, Corinne	Camm, Corinne	DeLuca, Jaime	Franze, Chanel	9,999	1	Requisition is returned by the buyer.	Not reserved	Requisition line 1: Duplicate Request. PO TOW1647 Issued on 8/16/23..	Chanel Franze		8/24/23 12:26 PM	Return requisition line	4
13210	609108	00000	State\-Support\-CHP-Kinesiology-Supplies \-Medical-Default Initiative-UO Default-Future-Default Interfund	8/23/23	REQ0002815	8/23/23	8/24/23 10:44 AM	4-sensor EMG system	Camm, Corinne	Camm, Corinne	DeLuca, Jaime	Franze, Chanel	9,999	1	Requisition is returned by the buyer.	Not reserved		Jaime DeLuca	8/23/23 3:54 PM	8/24/23 10:44 AM	Approve	2
13210	609108	00000	State\-Support\-CHP-Kinesiology-Supplies \-Medical-Default Initiative-UO Default-Future-Default Interfund	8/23/23	REQ0002815	8/23/23	8/24/23 10:44 AM	4-sensor EMG system	Camm, Corinne	Camm, Corinne	DeLuca, Jaime	Franze, Chanel	9,999	1	Requisition is returned by the buyer.	Not reserved		Corinne Camm		8/23/23 3:54 PM	Submit requisition	0

To download to Excel, scroll down to the bottom of the page and select Export, Formatted, Excel.

APPENDIX

- Budget date – Date in which the commitment/obligation will show in the budget.
- Document Status Description – Status of the Requisition in the workflow.
- Distribution – Cost center Distribution line number on the Requisition.
- Funds Status – Status of the impact to the budget.
    - Reserved: Funds are reserved and a commitment is created.
    - Liquidated: Commitment is reversed and the obligation is created for the Purchase Order associated with the Requisition.
- Assignment date – Date that task was created/submitted (i.e. Request for approval).