

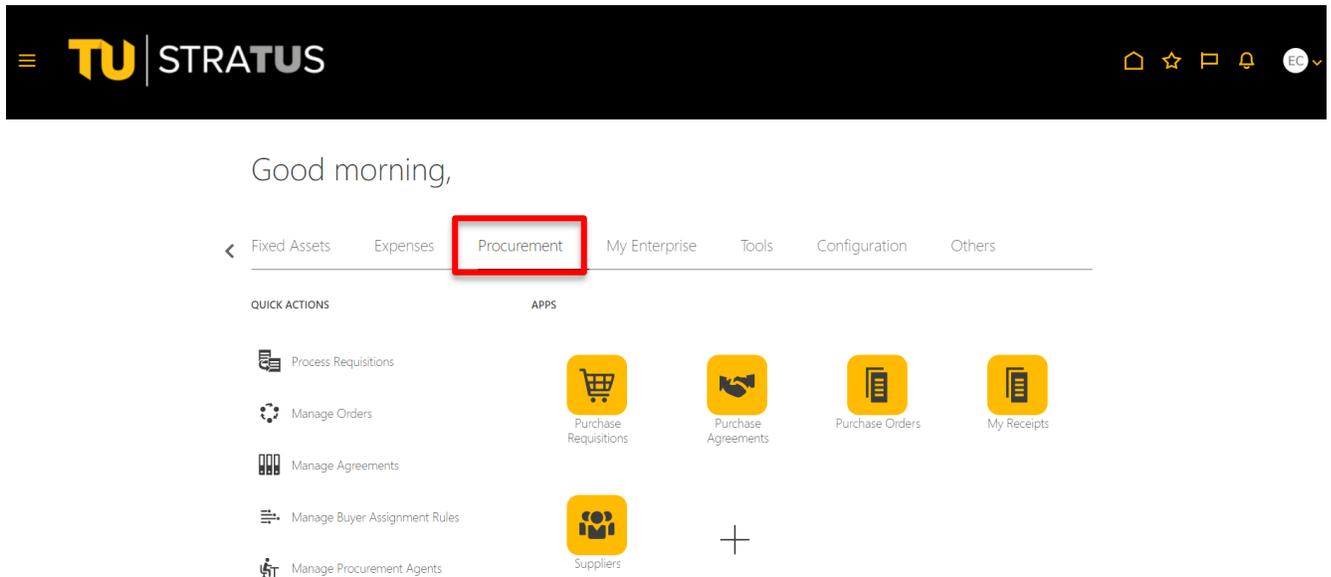
Purchasing – Managing a Requisition

For employees managing a purchase requisition.

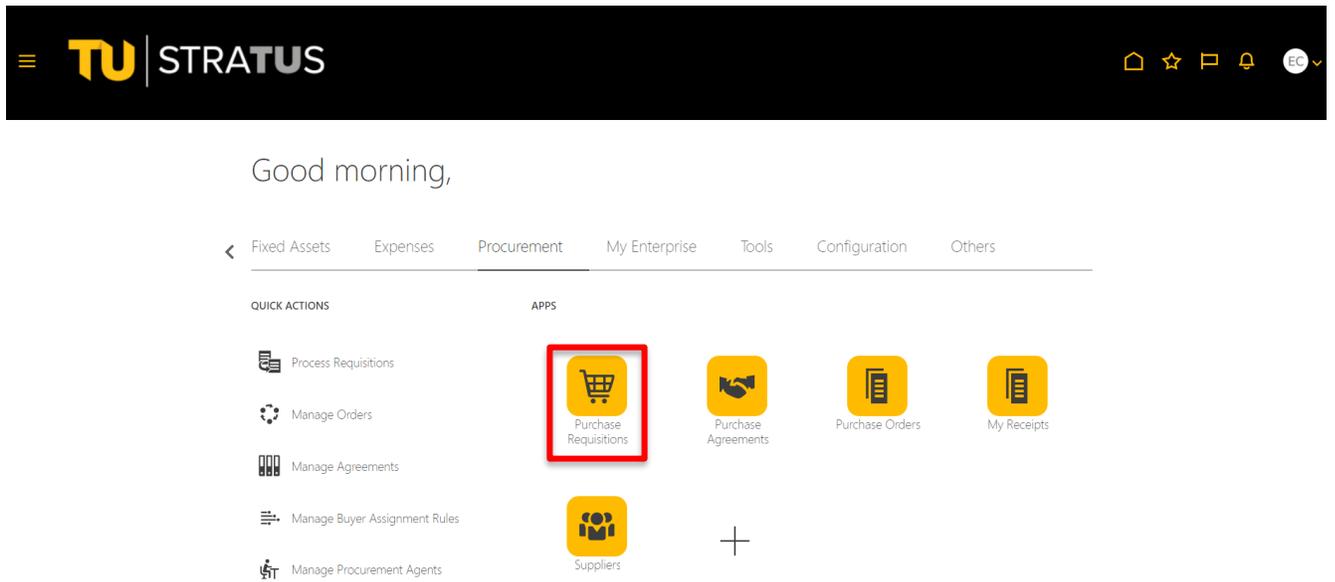
- Purpose:** Manage a purchase requisition.
- How to Access:** Log into the Stratus application. Select the **Procurement** task in the Navigator.
- Helpful Hints:** Be sure to keep in mind that...
 - The Advanced Search feature of Stratus is used across many of the system modules.
- Procedure:** Complete the following steps to manage a purchase requisition:

Note: You can use this method to see the requisitions for all your requesters, along with the associated purchase orders.

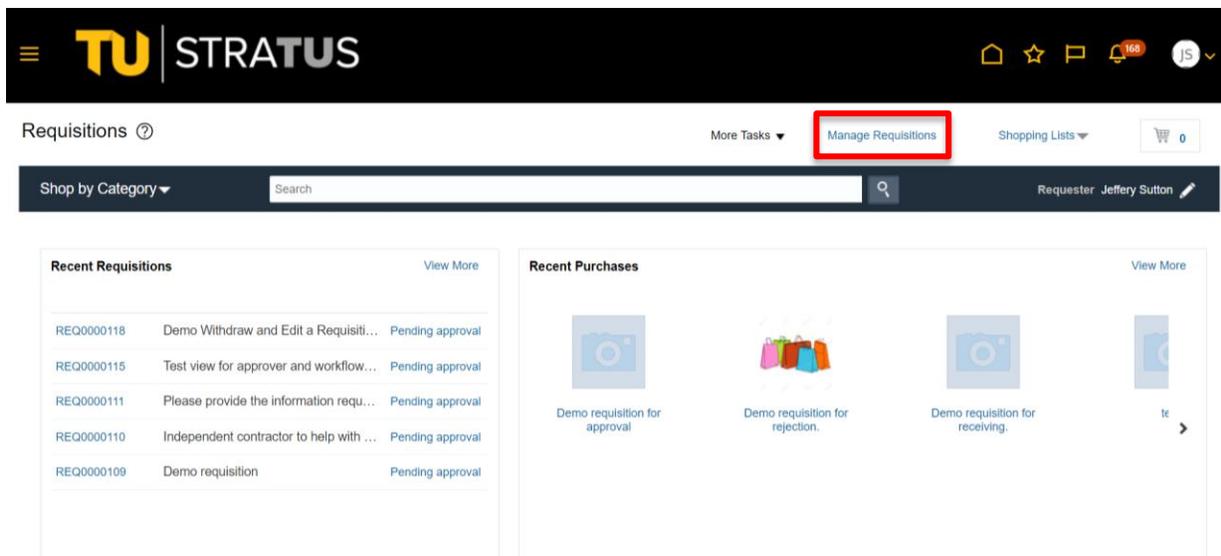
1. Select **Procurement Module** using the hamburger menu or the sliding task bar in the center of the screen.



2. Click on the **Purchase Requisitions** Icon.



3. On the Purchase Requisitions page, click on **Manage Requisitions**.



4. The system will return the Manage Requisitions search page and display all requisitions that meet the search criteria. In this example, the system will return all requisitions entered by Sutton, Jeffery. Now let us search for requisitions entered for a certain Requester. We will blank out the Entered By field and click on Advanced.

Manage Requisitions ⓘ Done

Search

Requisitioning BU

** Entered By

** Requisition

Description

Created

Status

Advanced **Manage Watchlist** Saved Search

** At least one is required

Requester

** Supplier

Order

** Item

Requisitions Requiring Attention

Search **Reset** **Save...**

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000231	Provide masonry services at General Services B...	Sutton, Jeffery	5/18/22	120.00 USD	Incomplete	Not reserved		
REQ0000230	Test - Input a requisition number 1020 and see what...	Sutton, Jeffery	5/18/22	10.00 USD	Incomplete	Not reserved		

5. The Advanced search allows us to use drop downs and more flexible criteria to conduct our search.

Manage Requisitions ⓘ Done

Advanced Search

Requisitioning BU

** Entered By

** Requisition

Description

Created

Status

Basic **Manage Watchlist** Saved Search

** At least one is required

Requester

** Supplier

Order

** Item

Requisitions Requiring Attention

Search **Reset** **Save...** **Add Fields** **Reorder**

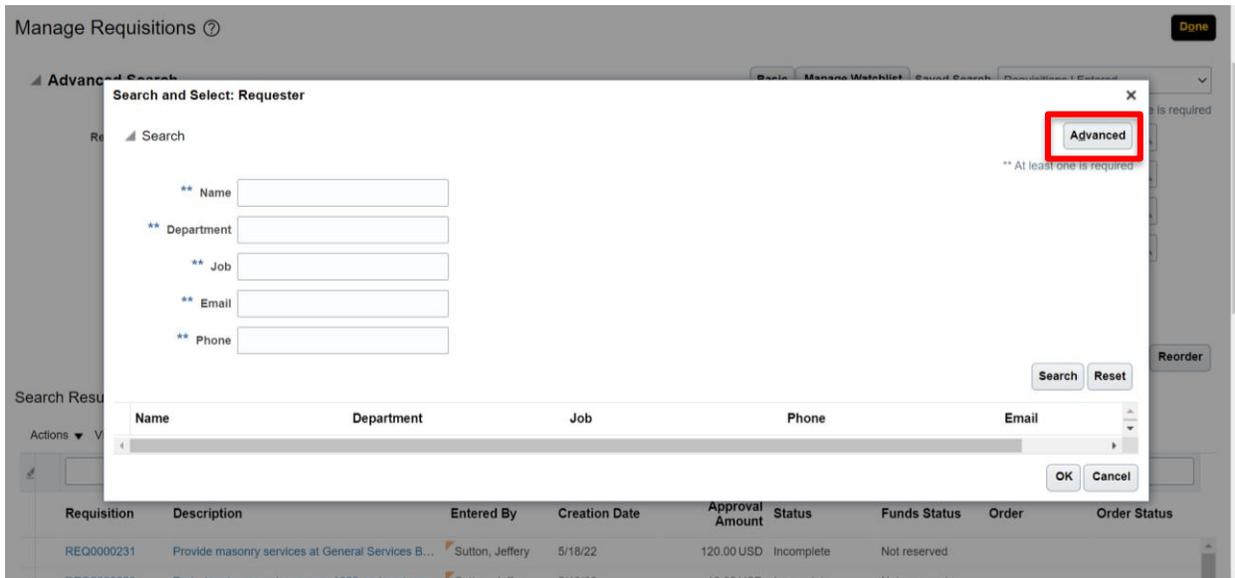
Search Results

Actions View Format Freeze Detach Wrap

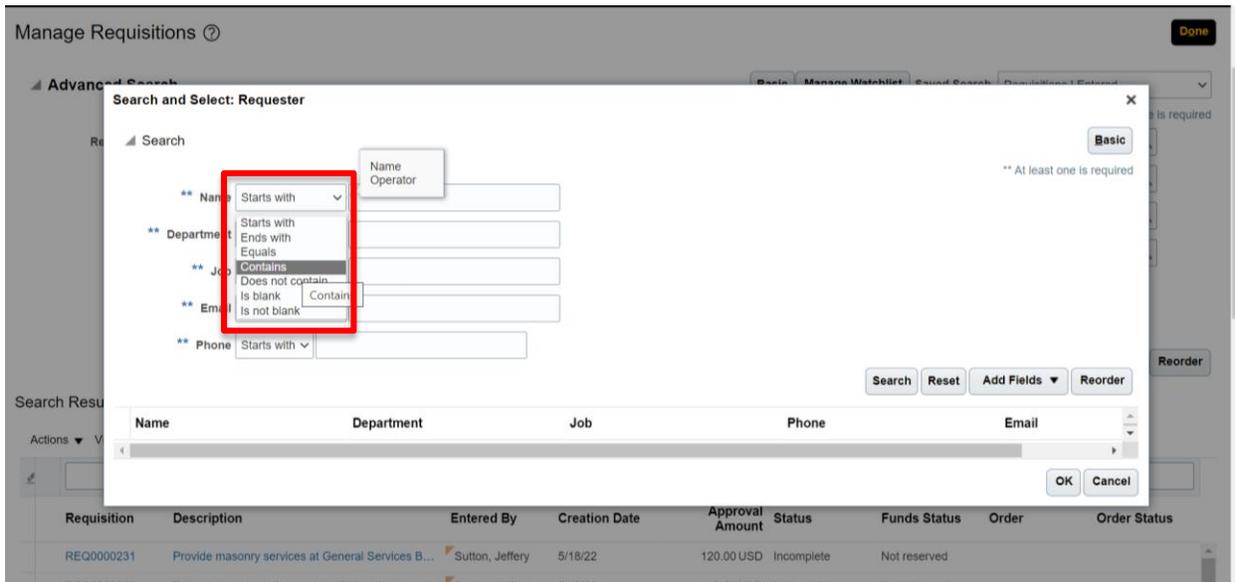
Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000231	Provide masonry services at General Services B...	Sutton, Jeffery	5/18/22	120.00 USD	Incomplete	Not reserved		
REQ0000230	Test - Input a requisition number 1020 and see what...	Sutton, Jeffery	5/18/22	10.00 USD	Incomplete	Not reserved		

6. First, we will use the Requester look up to find the Proper Requester. Click on the lookup and the system will return this screen. If you do not know the exact name format, click on Advanced.

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7. The Advanced search menu will now appear where I can use the drop-down to search using only part of the name. In this example, we will use Sutton.



8. Fill in part of the name and click Search.

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Manage Requisitions ② Done

Advanced Search

Search and Select: Requester

Search

** Name Contains

** Department Starts with

** Job Starts with

** Email Starts with

** Phone Starts with

Search Reset Add Fields Reorder

Name	Department	Job	Phone	Email
Sutton, Jeffery	20830-FST--GP Test Name change	Default Project Job		jsutton@towson.edu

OK Cancel

Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000231	Provide masonry services at General Services B...	Sutton, Jeffery	5/18/22	120.00 USD	Incomplete	Not reserved		
REQ0000232	Test how a requisition works 1000 and send con...	Sutton, Jeffery	5/18/22	10.00 USD	Incomplete	Not reserved		

9. The system has now returned a properly formatted name. Highlight the name and click OK.

Manage Requisitions ② Done

Advanced Search

Search and Select: Requester

Search

** Name Contains

** Department Starts with

** Job Starts with

** Email Starts with

** Phone Starts with

Search Reset Add Fields Reorder

Name	Department	Job	Phone	Email
Sutton, Jeffery	20830-FST--GP Test Name change	Default Project Job		jsutton@towson.edu

OK Cancel

Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000231	Provide masonry services at General Services B...	Sutton, Jeffery	5/18/22	120.00 USD	Incomplete	Not reserved		
REQ0000232	Test how a requisition works 1000 and send con...	Sutton, Jeffery	5/18/22	10.00 USD	Incomplete	Not reserved		

10. The system returns to the search screen and the name is now placed in the Requester box. (Note: At least one of the required fields must be filled out. Required fields are denoted by two stars.)

The screenshot shows the 'Manage Requisitions' interface. At the top right is a 'Done' button. Below it are tabs for 'Basic', 'Manage Watchlist', and 'Saved Search' (selected), with a dropdown menu showing 'Requisitions | Entered'. A note says '** At least one is required'. The search filters include: Requisitioning BU (dropdown), Entered By (text input), Requisition (Starts with dropdown, text input), Description (Starts with dropdown, text input), Created (dropdown), Status (dropdown, 'All'), Requester (dropdown, 'Sutton, Jeffery'), Supplier (dropdown), Order (dropdown), Item (dropdown), and Requisitions Requiring Attention (dropdown). At the bottom of the filters are buttons for 'Search', 'Reset', 'Save...', 'Add Fields', and 'Reorder'. Below the filters is the 'Search Results' section with a toolbar containing 'Actions', 'View', 'Format', 'Freeze', 'Detach', and 'Wrap'. A table displays the search results with columns: Requisition, Description, Entered By, Creation Date, Approval Amount, Status, Funds Status, Order, and Order Status. The first row shows: REQ0000231, Provide masonry services at General Services B..., Sutton, Jeffery, 5/18/22, 120.00 USD, Incomplete, Not reserved.

11. Requisition is one of the required fields, and since all requisitions start with REQ, I can enter REQ in the Requisition box. Using the "Starts with" logic, the system will now return all requisitions for the requester Sutton, Jeffery, when you click Search.

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Requisition' filter. The 'Starts with' dropdown is set to 'REQ', and the text input field contains 'REQ'. The search results table is visible below, showing the same data as in the previous screenshot.

12. Notice that as we scroll down, the Manage Requisitions screen displays the purchase order that is associated with each requisition. You can click on the purchase order number to see its details.

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Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000216	Test acknowledgement required.	Sutton, Jeffery	5/13/22	400.00 USD	Approved	Liquidated		
REQ0000215	CO#1 to PO TOW0000045, Add additional hours ...	Sutton, Jeffery	5/11/22	1,000.00 USD	Approved	Liquidated		
REQ0000210	Test - 4800-80314	Sutton, Jeffery	5/5/22	200.00 USD	Approved	Reserved		
REQ0000205	test - grant : 5100-ED014	Sutton, Jeffery	5/4/22	100.00 USD	Rejected	Not reserved		
REQ0000204	CO#1 to PO TOW0000044 to add more goods a...	Sutton, Jeffery	5/3/22	4.00 USD	Approved	Liquidated		
REQ0000203	sfghsfhsf	Sutton, Jeffery	5/3/22	20.00 USD	Approved	Reserved		
REQ0000202	Test print PO - Item description	Sutton, Jeffery	5/3/22	100.00 USD	Approved	Liquidated	TOW0000045	Open
REQ0000200	Test PO Print	Sutton, Jeffery	5/3/22	600.00 USD	Approved	Liquidated	TOW0000044	Open
REQ0000198	E2E test - Req/PO/Rec/AP/FA/GL/R-Stars- Failur...	Sutton, Jeffery	5/3/22	1,000.00 USD	Approved	Liquidated	TOW0000042	Closed
REQ0000197	E2E - Req/PO/Rec/AP/FA/GL/R-Stars Enter an I...	Sutton, Jeffery	5/2/22	10,000.00 USD	Approved	Liquidated	TOW0000043	Closed
REQ0000196	E2E Test - BC/REQ/PO Budget fail, then override...	Sutton, Jeffery	5/2/22	10,000,000.00 USD	Approved	Liquidated	TOW0000041	Closed for Rece...
REQ0000195	Test req passes budget check workflow.	Sutton, Jeffery	5/2/22	10.00 USD	Approved	Reserved		
REQ0000194	Test budget fail routing.	Sutton, Jeffery	5/2/22	10,000,000.00 USD	Approved	Reserved		
REQ0000175	Test Case - Purchase of Equipment- Plant Funds...	Sutton, Jeffery	4/29/22	12,000.00 USD	Approved	Liquidated	TOW0000039	Closed
REQ0000168	Test entering requisition for next fiscal year.	Sutton, Jeffery	4/28/22	100.00 USD	Approved	Liquidated	TOW0000046	Open
REQ0000167	test pass budget.	Sutton, Jeffery	4/28/22	10.00 USD	Approved	Reserved		