

PS Financials 9.2

Open Requisitions Report



1. Click the Requisition Inquiry.

The screenshot shows the "Financials & Annual Budget" interface. On the left is a navigation menu with items like "Chartfield Value Lookup", "Annual Budget", "Carryover Projects", "Grants and Projects", "Purchasing & Payables Inquiry", "My Requisitions", "Create Requisition", "Requisition Inquiry" (highlighted with a blue arrow), "Purchase Order Inquiry", "Temporary Requisition Approver", "Wells Fargo P-Card Portal", and "Forms". The main content area is titled "Requisition Inquiry" and shows "Results for: wvu". Below this is a "Search Criteria" form with fields for Requisition ID, Fund Code, Project, Vendor, Department, and Account, each with a search icon. There is also a "Fiscal Year" field. Below the search criteria are checkboxes for "Restrict to Created by Myself:" and "Show Open Only:". "Search" and "Clear" buttons are at the bottom right of the search criteria. A "PLEASE NOTE" message is displayed below the search criteria, stating that the "Show Open Only" checkbox limits results to requisitions with pre-encumbrance amounts but does not provide the actual amount. At the bottom of the page are "Save" and "Notify" buttons.

2. The Requisition Inquiry page provides quantity, pricing and description details for all requisitions charged to budget (no matter who created), along with capability to restrict results created by self and/or restrict to requisitions with existing pre-encumbrances. Please remember that requisition numbers have leading zeroes to make a 10-digit number (e.g. 0000003963).
3. Click in the Fiscal Year field and enter the desired information. For this example, please enter "2022".

Staff Homepage Financials & Annual Budget

- Chartfield Value Lookup
- Annual Budget
- Carryover Projects
- Grants and Projects
- Purchasing & Payables Inquiry
- My Requisitions
- Create Requisition
- Requisition Inquiry**
- Purchase Order Inquiry
- Temporary Requisition Approver
- Wells Fargo P-Card Portal
- Forms

Requisition Inquiry

Results for: wvu

Search Criteria

Requisition ID: Vendor:

Fund Code: Department:

Project: Account:

Fiscal Year:

Restrict to Created by Myself:

Show Open Only:

PLEASE NOTE: The "Show Open Only" checkbox limits the results to display requisitions where pre-encumbrance amounts exist but does not provide the actual pre-encumbrance amount at this time. Contact procurement@wvgsound.edu to determine the actual pre-encumbrance amounts.

4. Click in the Department field and enter the desired information. For this example, please enter "7101". This example uses department, however, you can also search by Project if that is more appropriate. If you are responsible for multiple departments and/or projects, you can leave this field blank and the tool will return results for all of the budgets in one list.

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- Chartfield Value Lookup
- Annual Budget
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Requisition Inquiry

Results for: wvu

Search Criteria

Requisition ID: Vendor:

Fund Code: Department:

Project: Account:

Fiscal Year:

Restrict to Created by Myself:

Show Open Only:

PLEASE NOTE: The "Show Open Only" checkbox limits the results to display requisitions where pre-encumbrance amounts exist but does not provide the actual pre-encumbrance amount at this time. Contact procurement@wvgsound.edu to determine the actual pre-encumbrance amounts.

5. Click the Show Open Only option and then click Search.

Staff Homepage Financials & Annual Budget

Chartfield Value Lookup
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Create Requisition
Requisition Inquiry
Purchase Order Inquiry
Temporary Requisition Approver
Wells Fargo P-Card Portal
Forms

Requisition Inquiry

Results for: wvu

Search Criteria

Requisition ID:
Fund Code:
Project:
Fiscal Year: 2022
Vendor:
Department: 7101
Account:
Restrict to Created by Myself:
Show Open Only:

Search Clear

PLEASE NOTE: The "Show Open Only" checkbox limits the results to display requisitions where pre-encumbrance amounts exist but does not provide the actual pre-encumbrance amount at this time. Contact procurement@wvgsound.edu to determine the actual pre-encumbrance amounts.

Save Notify

6. The following steps explain how to download a list to Microsoft Excel. This list can be sent to Procurement to assist with any needed clean-up. Click the Download to Excel graphic .
7. Click the OK button.
8. Click the Yes button.
9. Click File and Save As and browse to your desired location and enter a filename you will remember.
10. Click the Save button at the bottom of the page to keep your new document.
11. Click the Clear button. Congratulations! You have created an open requisitions report.