

## UAB FN Document Entry/Approval Purchasing: Requisitions Requisition Summary

The Requisition Summary function can assist you in finding requisitions that are both approved and in process, as well as those that are incomplete. Using Requisition Summary is also helpful with clearing any discrepancies that you may encounter with any future purchase orders. This function is **inquiry only** and is most useful when the requisition number, preparer's or the requestor's name is used to locate requisitions.

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**UAB FN Document Entry/Approval** → Purchasing → Requisitions → Requisition Summary

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1. After selecting Requisition Summary, the **FIND REQUISITIONS** window will appear. From this window you can search by: **Requisition Number, Preparer, Buyer, Item, Status and Date Ranges.**

The screenshot shows the 'Find Requisitions (UAB Operating Unit)' window. It features a search form with the following fields:

- Requisition Number
- Preparer
- Buyer
- Reference Num
- Type
- Requester
- Modified
- Import Source
- Line
- Line Type

Below the search fields are tabs for: Line, Status, Date Ran..., Sourcing, Deliver To, Related D..., Accounting, and Projects. The 'Line' tab is selected, showing fields for:

- Item, Rev
- Category
- Description
- Supplier Item

On the right side, there is a 'Results' panel with radio buttons for:

- Headers
- Lines
- Distributions

At the bottom of the window are three buttons: 'Clear', 'New', and 'Find (F)'.

**Note:** Remember that searches need to be specific. For example, if you ask for all of the requisitions between a certain time period without adding your name as the preparer, you will see every requisition created at UAB during that time period.

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2. Enter ***your last name%*** in the **PREPARER** field and press **TAB**. If there is more than one entry for your last name, a **PREPARERS** find window will appear. Choose your name from the list and press **OK**.

Preparer	Employee Number
Head, Constance	1026699
Head, Karen D	1018966
Head, Laneitria D	1007770
Head, Nikki A.	1030594
Head, Robert	1025445
Headen, Charie L	1004113
Headley, Patricia	1013864
Headley, Susan Reeves	1031431

3. Click on the **FIND** button.
4. The **REQUISITION HEADERS SUMMARY** window will appear with a list of your requisitions.

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Number	Description	Approval Status	Creation Date	Total
90608		Incomplete	26-OCT-2005 12:59:28	
90607		Incomplete	26-OCT-2005 12:12:11	
90605		Incomplete	25-OCT-2005 14:47:45	
90602		Incomplete	24-OCT-2005 17:49:21	
90600		In Process	24-OCT-2005 13:07:49	

5. Click on the word **NUMBER** above the column of requisition numbers to sort this list.
6. Click on the word **DESCRIPTION**.
7. Click on the word **APPROVAL**.

**Hint:** You can sort by any of the first three columns when you click on their title. This may help you in locating your requisitions.

8. Click on the **NUMBER** column to re-sort your list.
9. To reopen a requisition, click on the desired **requisition number**. A solid colored box should appear beside it.
10. Click on the **OPEN** button.

**Note:** You can open incomplete requisitions from this window and continue to work on them. Requisitions in other statuses **may not be opened**.

11. Your requisition is now open and ready for editing or approving.

## UAB FN Document Entry/Approval Purchasing: Requisitions Requisition Summary

Requisition Summary to Requisitions (UAB Operating Unit) - 90602

Number: 90602    Type: Purchase Reqt    Preparer: Head, Laneitria D  
 Description:    Status: Incomplete    Total: USD 1.36

Lines    Source Details    Details    Currency

Num	Type	Item	Rev	Category	Description	UOM	C	[ ]
1	Goods	STA.164590		Office.Supplies	12 FLAT WOOD RULE	Each	2	

Destination Type: Expense    Source: Supplier  
 Requester: Head, Laneitria D    Supplier: STAPLES  
 Organization: UAB Operating Unit    Site: A-ATLANTA  
 Location: UAB Receiving Dept    Contact: LUTZ, DORINDA  
 Subinventory:    Phone: 934-6918

Catalog...    Distributions    Approve...

12. **Close** this requisition by clicking on the **X** in the top right corner.
13. Click on the **LINES** button to open the **REQUISITION LINES SUMMARY** window. All of the items for this requisition will be displayed.



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Line	Status	Date Ran...	Sourcing	Deliver To	Related D...	Accounting	Projects
	Approval						
	Control						
	Reserved						

**Approved**  
**Incomplete**  
**In Process**  
**Pre-Approved**  
**Rejected**  
**Returned**

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