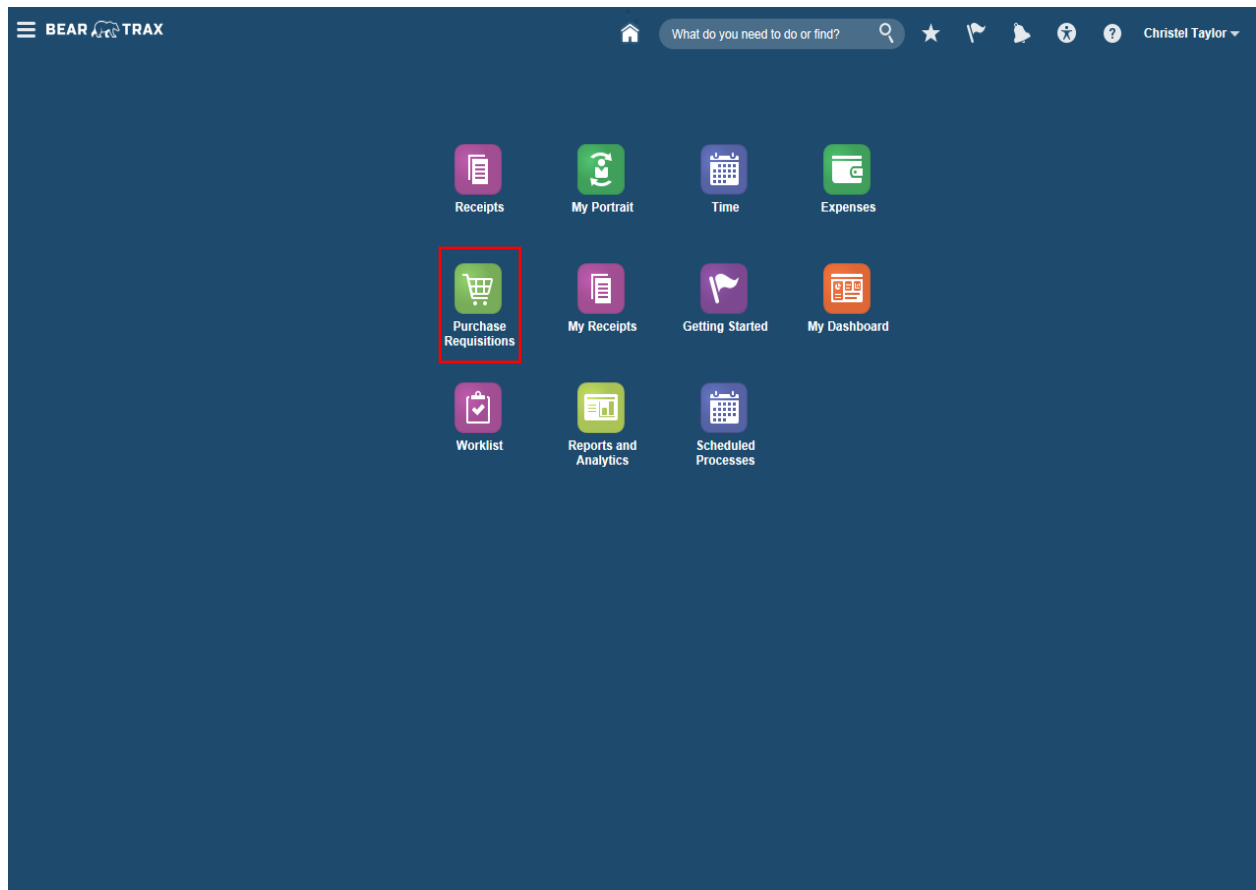


Procurement: View a Requisition

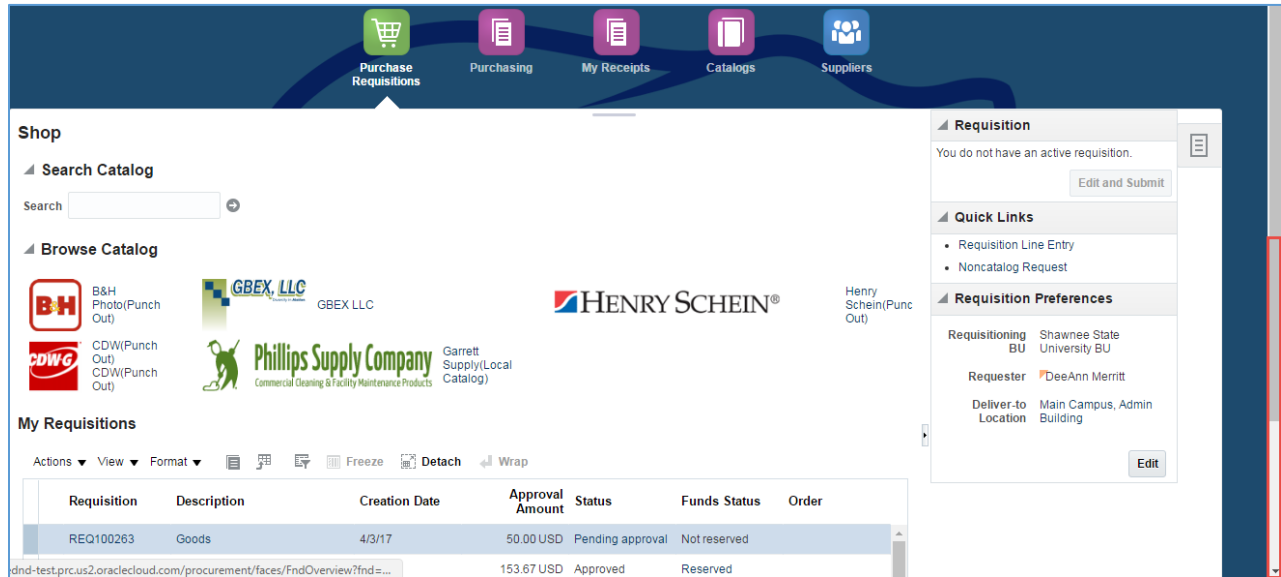
For employees viewing a requisition

Purpose:	To view an existing requisition.
How to Access:	Log into the Bear Trax application and select the Purchase Requisitions task in the Navigator.
Helpful Hints:	Be sure to keep in mind that... <ul style="list-style-type: none">• Can be used to review a requisition or see approval status• Any requisition at any approval status can be viewed
Procedure:	Complete the following steps to view a created requisition:

1. Click on the **Purchase Requisition** icon.



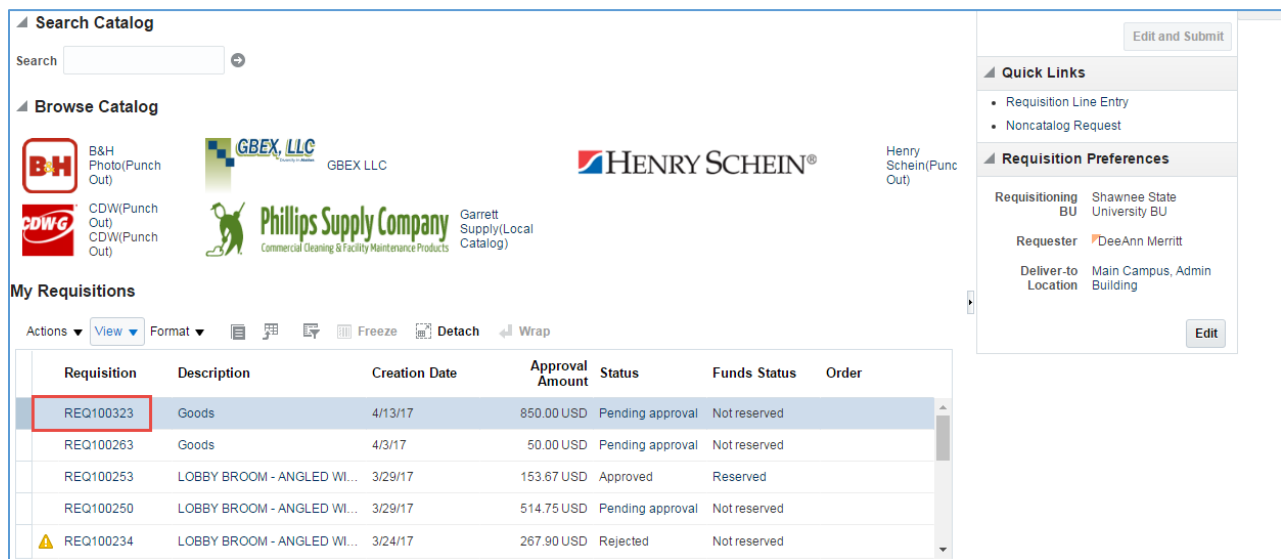
2. Scroll to the bottom of the page to select a requisition under **My Requisitions**.



The screenshot shows the 'My Requisitions' section of the procurement system. At the top, there are navigation icons for Purchase Requisitions, Purchasing, My Receipts, Catalogs, and Suppliers. Below this is a 'Shop' section with a search bar and a 'Browse Catalog' area featuring logos for B&H Photo, CDWG, GBEX, LLC, Phillips Supply Company, and HENRY SCHEIN. The 'My Requisitions' section includes a table with the following data:

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100263	Goods	4/3/17	50.00 USD	Pending approval	Not reserved	
			153.67 USD	Approved	Reserved	

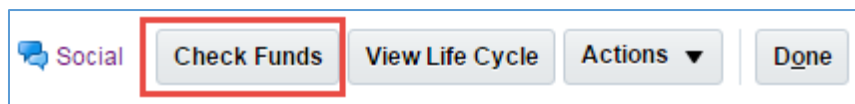
3. Click on the requisition number of the requisition [REQ100323](#) to view more details.



The screenshot shows the details of requisition REQ100323. The 'My Requisitions' table is expanded to show the following data:

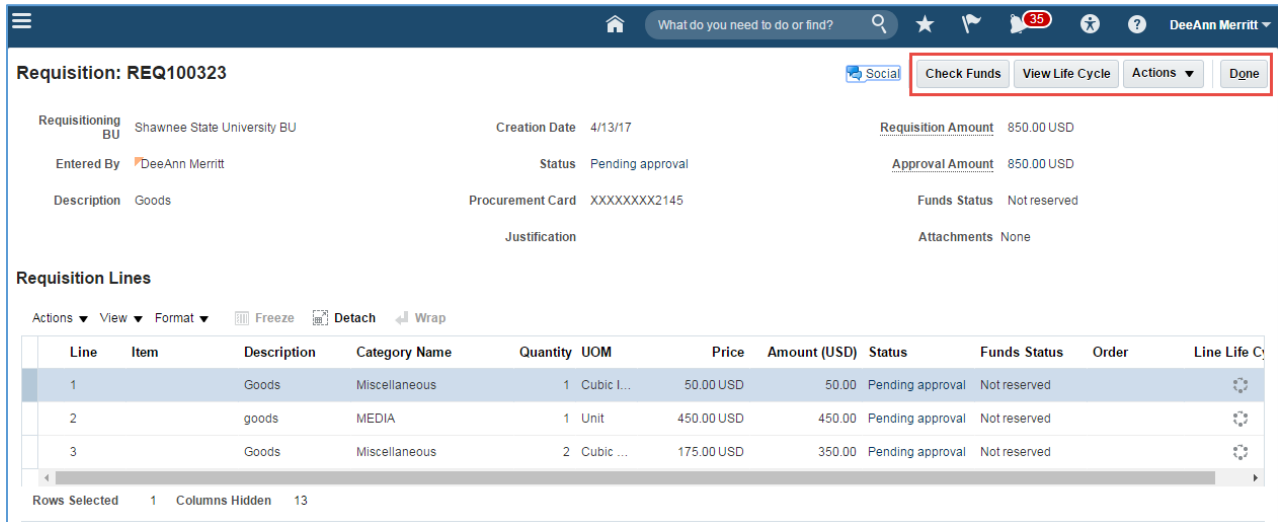
Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100323	Goods	4/13/17	850.00 USD	Pending approval	Not reserved	
REQ100263	Goods	4/3/17	50.00 USD	Pending approval	Not reserved	
REQ100253	LOBBY BROOM - ANGLED WL...	3/29/17	153.67 USD	Approved	Reserved	
REQ100250	LOBBY BROOM - ANGLED WL...	3/29/17	514.75 USD	Pending approval	Not reserved	
REQ100234	LOBBY BROOM - ANGLED WL...	3/24/17	267.90 USD	Rejected	Not reserved	

Note: Several action buttons appear in the upper right corner of the page. These are **OPTIONAL** to use.



The screenshot shows the action buttons in the upper right corner of the page. The buttons are: Social, Check Funds (highlighted with a red box), View Life Cycle, Actions (dropdown), and Done.

4. Click **Check Funds** to review available funds for this requisition.



Requisition: REQ100323

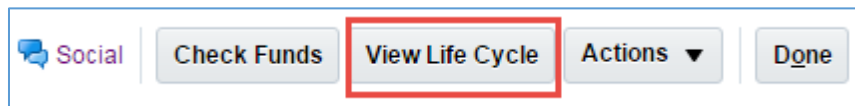
Requisitioning BU: Shawnee State University BU
 Entered By: DeeAnn Merritt
 Description: Goods
 Creation Date: 4/13/17
 Status: Pending approval
 Procurement Card: XXXXXXXX2145
 Justification:
 Requisition Amount: 850.00 USD
 Approval Amount: 850.00 USD
 Funds Status: Not reserved
 Attachments: None

Requisition Lines

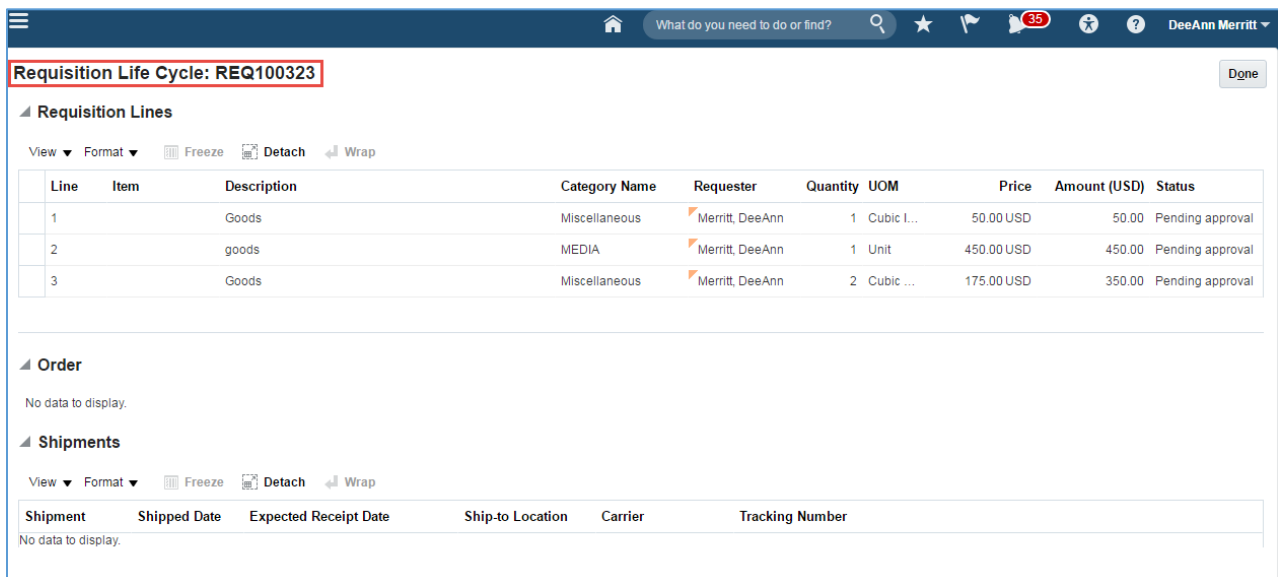
Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life C
1		Goods	Miscellaneous	1	Cubic L...	50.00 USD	50.00	Pending approval	Not reserved		
2		goods	MEDIA	1	Unit	450.00 USD	450.00	Pending approval	Not reserved		
3		Goods	Miscellaneous	2	Cubic ...	175.00 USD	350.00	Pending approval	Not reserved		

Rows Selected: 1 Columns Hidden: 13

5. Click **View Life Cycle**.



6. View the **Requisition Life Cycle** information page. Users can see Requisitions, Purchase Orders and Receipts associated with Requisitions.



Requisition Life Cycle: REQ100323

Requisition Lines

Line	Item	Description	Category Name	Requester	Quantity	UOM	Price	Amount (USD)	Status
1		Goods	Miscellaneous	Merritt, DeeAnn	1	Cubic L...	50.00 USD	50.00	Pending approval
2		goods	MEDIA	Merritt, DeeAnn	1	Unit	450.00 USD	450.00	Pending approval
3		Goods	Miscellaneous	Merritt, DeeAnn	2	Cubic ...	175.00 USD	350.00	Pending approval

Order
No data to display.

Shipments

Shipment	Shipped Date	Expected Receipt Date	Ship-to Location	Carrier	Tracking Number
No data to display.					

Receipts

View ▾ Format ▾ Freeze Detach Wrap

Receipt	Receipt Date	Received By	Shipment	Packing Slip	Waybill	Bill of Lading	Notes
No data to display.							

Invoices

View ▾ Format ▾ Freeze Detach Wrap

Invoice	Description	Invoice Date	Status	Invoice Total	Paid Amount	Unpaid Amount	Matched to Order Amount	Currency
No data to display.								

7. Click **Done** in the top right corner of the page when you have finished reviewing the requisition life cycle.

Requisition Life Cycle: REQ100263 Done

Requisition Line

View ▾ Format ▾ Freeze Detach Wrap

Line	Item	Description	Category Name	Requester	Quantity	UOM	Price	Amount (USD)	Status
1		Goods	Miscellaneous	Merritt, DeeAnn	1	Cubic I...	50.00 USD	50.00	Pending approval

Order

No data to display.

Shipments

View ▾ Format ▾ Freeze Detach Wrap

Shipment	Shipped Date	Expected Receipt Date	Ship-to Location	Carrier	Tracking Number
No data to display.					

Receipts

View ▾ Format ▾ Freeze Detach Wrap

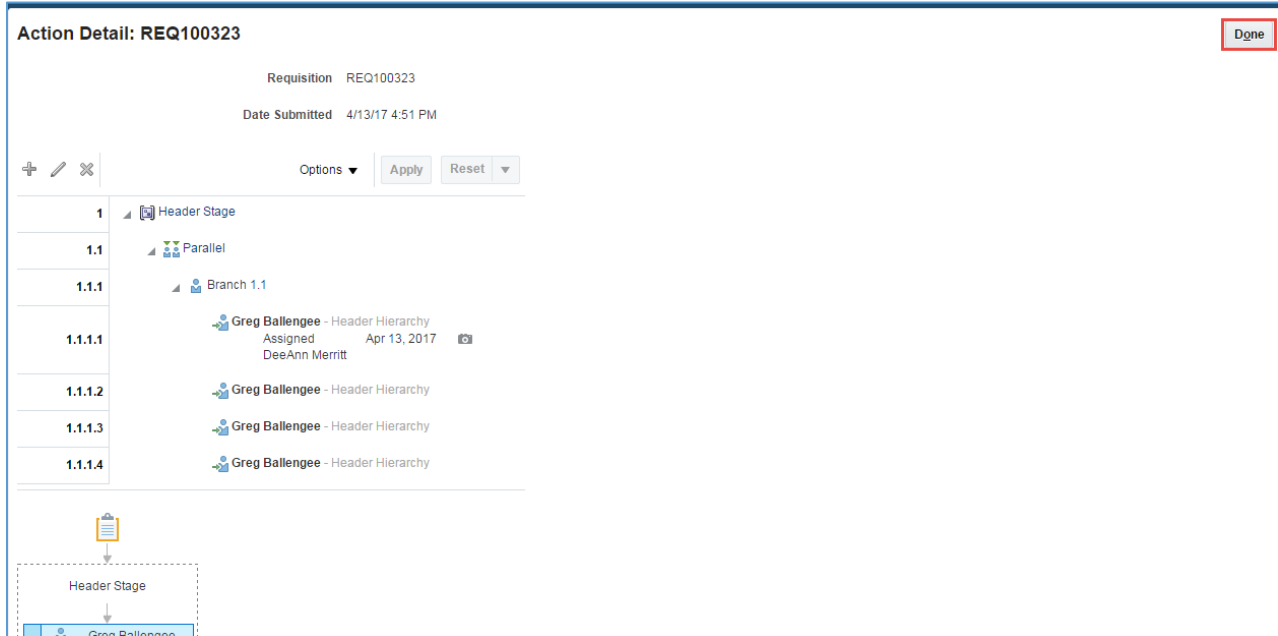
Receipt	Receipt Date	Received By	Shipment	Packing Slip	Waybill	Bill of Lading	Notes
No data to display.							

8. Click on the blue hyperlink next to **Status**, [Pending approval](#) to review the requisition's approval status.

Requisitioning BU	Shawnee State University BU	Creation Date	4/13/17
Entered By	DeeAnn Merritt	Status	Pending approval
Description	Goods	Procurement Card	XXXXXXXX2145
Justification			

Requisition Lines

9. Review the approval status. When finished, Click **Done** to exit the page.



Action Detail: REQ100323 Done

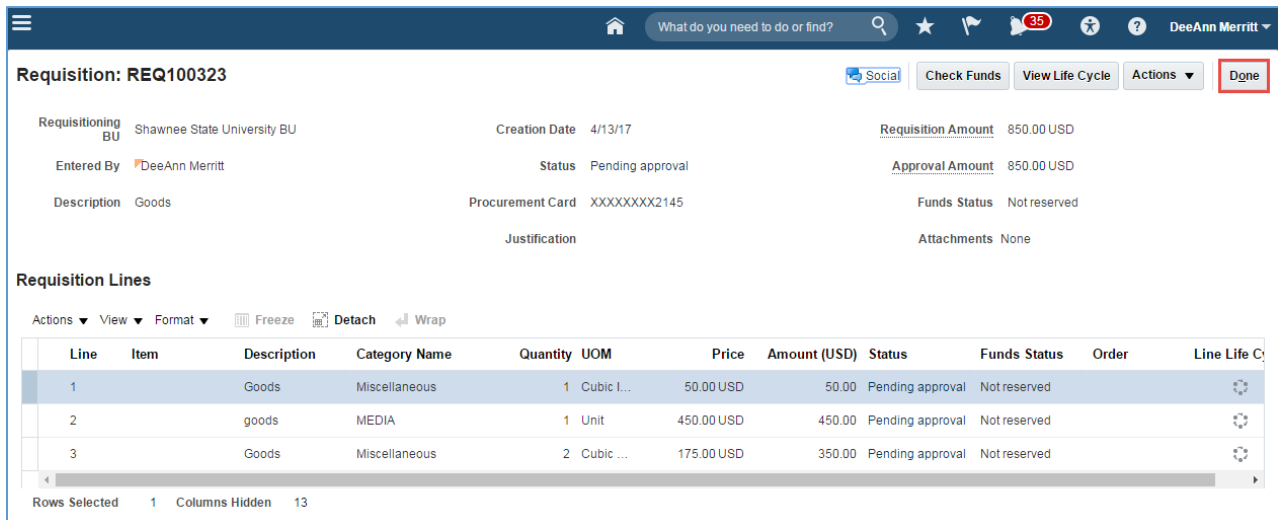
Requisition REQ100323
Date Submitted 4/13/17 4:51 PM

Options Apply Reset

- 1 Header Stage
 - 1.1 Parallel
 - 1.1.1 Branch 1.1
 - 1.1.1.1 Greg Ballengee - Header Hierarchy
Assigned Apr 13, 2017
DeeAnn Merritt
 - 1.1.1.2 Greg Ballengee - Header Hierarchy
 - 1.1.1.3 Greg Ballengee - Header Hierarchy
 - 1.1.1.4 Greg Ballengee - Header Hierarchy

Header Stage
Greg Ballengee

10. Click **Done** to exit the requisition.



Requisition: REQ100323 Social Check Funds View Life Cycle Actions Done

Requisitioning BU Shawnee State University BU Creation Date 4/13/17 Requisition Amount 850.00 USD
Entered By DeeAnn Merritt Status Pending approval Approval Amount 850.00 USD
Description Goods Procurement Card XXXXXXXX2145 Funds Status Not reserved
Justification Attachments None

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life C
1		Goods	Miscellaneous	1	Cubic ...	50.00 USD	50.00	Pending approval	Not reserved		
2		goods	MEDIA	1	Unit	450.00 USD	450.00	Pending approval	Not reserved		
3		Goods	Miscellaneous	2	Cubic ...	175.00 USD	350.00	Pending approval	Not reserved		

Rows Selected 1 Columns Hidden 13

Final Notes

By following these steps, you have successfully viewed an existing requisition, its approval status, and other details about the requisition.