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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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.**

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.

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**.

3. Click on the **FIND** button.

4. The **REQUISITION HEADERS SUMMARY** window will appear with a list of your requisitions.

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.

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.

14. Click on the **DISTRIBUTIONS** button to view the account distribution for this item.

> **Note:** The **NEW** button creates a new requisition form. This is **not** what you want to do at this time.

15. After viewing all of the information, close all of the windows by clicking on the *X* until you reach the **FIND REQUISITIONS** window.

16. Click on the **CLEAR** button.

17. To view requisitions by their status, click on the **STATUS** tab.

18. Click on the drop-down list arrow to view the choices.

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

Approval **Approved**
Control **Incomplete**
Reserved **In Process**
Pre-Approved
Rejected
Returned

[Return to Top](#)