

Pasadena ISD

ENTRY POINT: Requisition Search

DATE DEVELOPED: 07/27/2021 REVISED DATE:

SUBJECT: Requisition Search

Requisition Search

You can search for regular requisitions, not-to-exceed requisitions, and blanket/project requisitions.

The requisitions available depend upon your level of access and the configuration choices made by your district.

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Searching for Traditional Requisitions

• Click the Requisition Search link. The Requisition Search tab appears.

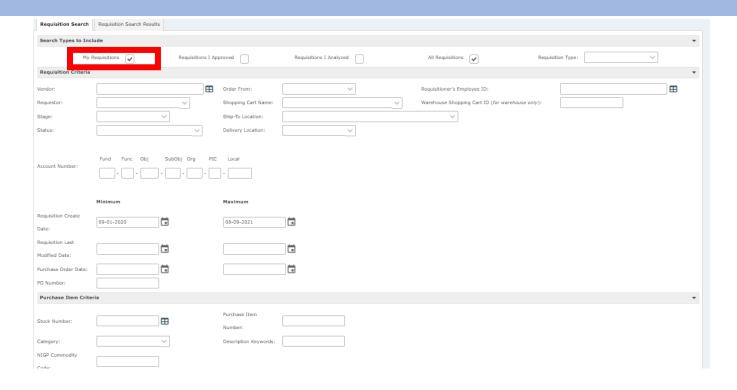


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- In the Search Types to Include panel, select at least one of the following options:
 - My Requisitions: Select to search for requisitions that you created.
 - Supported Requisitions: Select to search for requisitions where you have selected a different person as the requestor.
 - All Requisitions: Select to search for both requisitions that you created and requisitions that you approved.
- Enter information into at least one of these fields:



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Field	Description
Vendor	Enter the name of a Vendor or click the icon to select one from the Vendor Lookup tab. For more information about the Vendor Lookup tab, see Using the Vendor Lookup Tab.
Order From	Select the name of the person from whom the items on the requisition were ordered from the drop-down list.
Requisitioner's Employee ID	Enter the employee ID of the requisitioner or click the icon to select one from the Employee Lookup screen.
Requestor	Select an item from the drop-down list.
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.



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Field	Description
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Enter the account number that was used to pay for the requisition for which you are searching.
Requisition Create Date	Under the Minimum column, enter a date on or after which the requisition(s) for which you are searching were created. Enter a date in the Maximum column to search for requisitions that were created within a timeframe.
Requisition Last Modified Date	Enter a date on or after which the requisition for which you are searching was last modified or click the icon to select a date from the calendar. Enter a date in the Maximum column to search for a requisition that was last modified within a timeframe.
Purchase Order Date	Enter the purchase order date for the requisition for which you are searching. Enter a date in the Maximum column to search for a requisition's purchase order date within a timeframe.



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Field	Description
Stock Number	Click the icon to select a Stock Number from the Lookup Stock Number tab. In order to search for a stock number, you must first select a vendor. For more information about the Lookup Stock Number tab, see Using the Lookup Stock Number Tab.
Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Category	Select the requisition's category from the drop-down list.
Description Keywords	Enter words that would match the description of the items on the requisition.
Commodity Code	Enter the Commodity code of the item of the requisition.

• Click the Search button. The results of your search appear on the Requisition Search Results tab.



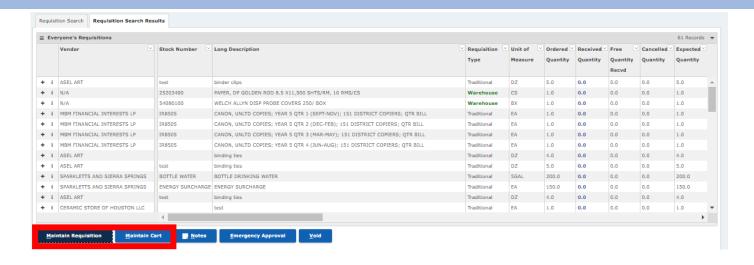
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Maintaining Requisitions

Highlight to select the requisition you want to edit and click the Maintain Requisitions or

Maintain Cart | button to edit the requisition or the cart, respectively. Both buttons open the Requisition Maintenance tab.

For more information, see Maintaining Requisitions.

Adding Notes to Requisitions

Highlight to select the requisition to which you want to add a note and click the button. Notes

For more information, see Adding Notes.



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Cancelling Requisitions

Highlight to select the requisition you want to cancel and click the Cancel button. A message tells you that the requisition was successfully canceled. A cancelled requisition will have its funds returned to the account numbers within the requisition.

Routing Requisitions for Approval

Highlight the requisition you want to route for approval and click the

Route for Approval button. The requisition is routed for approval.