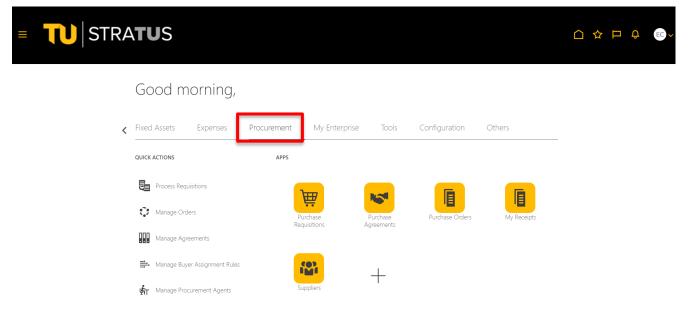
For employees creating a purchase requisition

Purpose:	Create a purchase requisition.
How to Access:	Log into the Stratus application. Select the Procurement task in the Navigator.
Helpful Hints:	 Be sure to keep in mind that Supporting documents and other necessary information can be attached. Advanced Search and View Option instructions can be found in the Appendix at the end of this document.
Procedure:	Complete the following steps to create a purchase requisition:

1. Select **Procurement Module** using the hamburger menu or the sliding task bar in the center of the screen.



2. Click on the **Purchase Requisitions** Icon.



■ TU STRA TU S						Û EC →
Good morni	ng,					
< Fixed Assets Exper	nses Procurement My En	terprise Tools	Configuration (Others	_	
QUICK ACTIONS	APPS					
Process Requisitions) \[\]	Kat				
Manage Orders	Purchase Requisitions	Purchase Agreements	Purchase Orders	My Receipts		
Manage Agreements						
Hanage Buyer Assignn	nent Rules	+				
🛵 Manage Procurement /	Agents Suppliers	·				

3. On the Purchase Requisitions page, under **Request Forms**, select the type of form you would like to create. (<u>Note</u>: for this example, we will select "Requisition for Fixed Price Services")

Purchasing News		
to the USM Procurement Policies and Procedures. Requisitions shall be su Representative assigned to the purchase to process in a timely manner. Pl	Imitted prior to the required dates for both goods and services. Please attach ease note, depending on the value and nature of the purchase, a competitive s versity's Procurement Card Program. For information on how to apply for a Pr	
Request Forms		
Independent Contractor Request Requisition for Fixed Price Goods	Requisition for Fixed Price Services Requisition for Goods by Quantity	Requisition for Rate Based Services
Recently Viewed		
Requisition for Fixed Price Services		

4. On the **Create Request** page, fill in the fields to complete your requisition.

NOTE: To use the Advanced Search feature to find a Category Name, refer to the appendix at the end of this document.

■ TU STRA	TUS					습 ☆	РÔ	EC
Create Request: Requisition	for Fixed Price Services ⑦				Add to Shopping List	Add to Cart	Done	`∰ 1
Request Type					· · •			
	or complete a project for a fixed price. The price w Fixed Price Services	nii be the lump sum or not to	exceed amount required to render the	Agreement		npletion dates.		
* Item Description					New supplier	_		
* Category Name	٩	li		Supplier	9			
* Amount				Supplier Site	Ŧ			
Currency	USD			Supplier Contact	~			
				Phone				
				Fax				
				Email				
				Supplier Item				
Attachments								
	File Name or URL	Title	Description	Attached By	Attached Date			

5. In addition to filling in the fields, you can also add supporting documents under **Attachments**. Use the **Category** box to route your attachment to the buyer.

Create Request: Requisition	for Fixed Price Services ⑦				Add to Shopping List	Add to Cart D	one 🕎 1
Pequest Tune	Requisition for Fixed Price Service: V						
	or complete a project for a fixed price. The price will be th	he lump sum or not to exceed	amount required to render the	service or complete th	ne project. Please include desired start and com	pletion dates.	
Line Type	Fixed Price Services			Agreement			
* Item Description	Maintenance Services for Grounds				New supplier		
**		11		Supplier	Brawner Builders, Inc Q		
	Maintenance Services Grounds			Supplier Site	000 🔻		
* Amount Currency				Supplier Contact	~		
,				Phone			
				Fax			
				Email			
				Supplier Item			
Attachments							
View 🔻 🕂 🗙							
Type Category *	^r File Name or URL	Title	Description	Attached By	Attached Date		
File V Internal to Rec V N	Vaintenance for Grounds Quote .docx Update	Maintenance for Grounds		Erin Cavrak	3/29/22 11:50 AM		

6. When you are finished filling in the fields for your requisition, click the **Add to Cart** button in the upper right corner. You will notice the shopping cart icon to the right of the "Done" button should now have a "1" next to it.

Create Request: Requisition	for Fixed Price Services ⑦				Add to Shopping Lit	st Add to Cart	t Don
Request Type	Requisition for Fixed Price Service: V						
Use this form when you want to order a service of	or complete a project for a fixed price. The price wil	I be the lump sum or not	to exceed amount required to render the servi	rice or complete the	e project. Please include desired start and o	completion dates.	
Line Type	Fixed Price Services			Agreement			
* Item Description					New supplier		
		h		Supplier		Q	
* Category Name	٩			Supplier Site	v		
* Amount			s	Supplier Contact	~		
Currency	USD			Phone			
				Fax			
				Email			
				Supplier Item			
Attachments							
View v + X							

■ TU STRA	TUS							П	Ĉ
Create Request: Requisition	for Fixed Price Services ③					Add to Shop	ping List Add to Ca Maintenance Services f Grounds \$200.00		one 📜
	or complete a project for a fixed price. The price will be the Fixed Price Services	he lump sum or not t	to exceed amount required to render the	service or complete th Agreement		-	Total \$200.00	nit	
* Category Name * Amount	Q.	4		Supplier Supplier Site		Ŧ	Q,		
Currency				Supplier Contact Phone Fax			×		
				Email Supplier Item					
Attachments									
Type Category *	File Name or URL	Title	Description	Attached By	Attached Date				

8. On the **Edit Requisition** page, you can edit your requisition and add additional information, such as charge account, split it between cost centers, etc.

9.

■ TU STRA TU S						ÞÔ	EC 🗸
Edit Requisition: REQ0000039 ⑦			Shop	eck Funds M	anage Approvals View PDF	Save V	Submit
Requisitioning BU Towson University * Description Maintenance Services for Grounds	Justification	Emergency purchase order number require	A		Requisition Amount 2 Approval Amount 2 Funds Status N Attachments No	00.00 USD lot reserved	
Requisition Lines Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line. Actions View Format							
Line Description	Category Name	* Quantity UOM Name	* Price	* Amount	Amount (USD) Funds Statu	is C	Delete
1 Maintenance Services for Grounds	Maintenance Service			200.00 Ut	200.00 Not reserved		×
Total					200.00		
Rows Selected 1 Columns Hidden 7							
✓ Line 1: Details✓ Delivery							
* Requester Cavrak, Erin Q		* Deliver-to Locati Deliver-to Addre			Q Ites. Towson. MD 21252. Baltimore		
When you are finished reviewing your requ	uisition, clicl	k the Submit button	in the	upper	right corner.		
= TU STRATUS						ЪÔ	EC 🗸
Edit Requisition: REQ0000039 ⑦			Shop Ch	eck Funds	lanage Approvals View PDF	Save	Sub <u>m</u> it

Requisitioning BU	Towson University		Justification				Requisition Amount	200.00 USD
* Description	Maintenance Services for G	Grounds			11		Approval Amount	200.00 USD
		h		Emergency purchase order number required			Funds Status	Not reserved
							Attachments	None 🕂
Requisition Lines	s							
Use Shift or Control H	Key to select multiple rows an	nd click Edit Multiple Lines to edit mor	e than one line.					
Actions v View	🔹 Format 👻 📋 🧪	🗙 🔲 Freeze 📓 Detach	d Wrap					
Line Desc	cription		Category Name	* Quantity UOM Name *	Price	* Amount	Amount (USD) Funds Sta	tus Delete
1 Maint	tenance Services for Grounds	S	Maintenance Service			200.00 Uf	200.00 Not reserve	d 🗙
Total							200.00	
Rows Selected 1	Columns Hidden 7							
▲ Line 1: Detail	ls							
Delivery								
	* Requester	Cavrak, Erin	Q	* Deliver-to Location	Towson Unive	rsity	٩	
		N		Deliver-to Address	8000 York R	oad, United Stat	es, Towson, MD 21252, Baltimo	re

NOTE: If you are not ready to Submit your requisition, you can click the arrow next to **Save** to **Save and Close** and return to the requisition at another time to complete and submit.

■ TU STRA TU S						EC	~
Edit Requisition: REQ0000039 ⑦			Shop	Check Funds M	anage Approvals View PDF	Save Subm	nit
Requisitioning BU Towson University	Justification				Requisition Amount 200	0.00 USD	
* Description Maintenance Services for Grounds				4	Approval Amount 200	0.00 USD	
h		 Emergency purchase order number requi 	ired		Funds Status Not	reserved	
					Attachments None	• +	
Requisition Lines Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line. Actions View Format							
Line Description	Category Name	* Quantity UOM Name	* Price	* Amount	Amount (USD) Funds Status	Delete	
1 Maintenance Services for Grounds	Maintenance Service			200.00 Ut	200.00 Not reserved	×	
Total					200.00		
Rows Selected 1 Columns Hidden 7							
 ✓ Line 1: Details ✓ Delivery 							
* Requester Cavrak, Erin Q		* Deliver-to Locat	tion Tows	on University	٩		
1		Deliver-to Addr	ess 7800	0 York Road, United Sta	ates, Towson, MD 21252, Baltimore		

10. You will then be routed back to the Purchase Requisition page, where you can review your recent requisitions using either **Recent Requisitions** or **Manage Requisitions**. Under the **Recent Requisitions** section, you can monitor where your requisition is at in the approval process by clicking "Pending approval" next to the requisition you would like to view. (NOTE: Refer to the appendix at the end of this document for options on customizing your screen display in Stratus.)

isitions ⑦			More Tasks 🔻 Manage Requisitions						
hu Categony-		९	Requester	Erin Cavral					
cent Requisitions	View More	Recent Purchases							
EQ0000039 Maintenance Services for Grounds	Pending approval	No data to							

11. <u>NOTE:</u> Also using **Recent Requisitions** or **Manage Requisitions**, you will find any incomplete requisitions. To continue editing a requisition in progress, click the requisition number. Use the drop-down labeled **Actions** and select **Edit**. Make the necessary changes and when you are finished, click **Submit**.

≡ TU S	TRATU	IS					△ ☆	þ ý	JS 🗸
Requisition: REQ000	0103 ⑦					Check Funds	View Life C	Actions	• D <u>o</u> ne
Requisitioning Towson Univ But Towson Univ Description Latex Gloves Requisition Lines	on	vetach 🚽 Wrap	Creation Date Status Justification	Incomplete	st another 3	Requisition Amount Approval Amount Funds Status Attachments	7 Delete N Edit No Reassign	Requisition	
Line Item	Description	Category Name	Quantity	UOM Pric	e Amount (USD)	Status Fun	ds Status	Drder	Line Life Cy
1	Latex Gloves	Supplies Medical	20	Each 35.00 US	700.00	Incomplete Not r	reserved		0
Rows Selected 1 Columns	Hidden 13								•

12. This will take you to a page where you can view the approval workflow for a specific requisition.

	Opti	ons 🖲
Section	Stage or Participant	
1	🙀 🔯 Header Preapproval Stage	
1.1	6⊕ Erin Cavrak - Requester FYI Assigned 3/29/22 11:55 AM I© Erin Cavrak	
2	A 🔯 Header Stage	
2.1	 Parallel System Update 3/29/22 11:55 AM ID Erin Cavrak 	
2.2	A Parallel	
2.2.1	🖌 🏰 Branch 2.2	
2.2.1.1	 Cost Center Approval System Update 3/29/22 11:55 AM ID Erin Cavrak 	
2.2.1.2	Cost Center Approval	
2.2.1.2.1	Regina Carlow - Cost Center Approval Assigned 3/29/22 11:55 AM ID Erin Cavrak	

NOTE: If there are no funds available for the requisition you submit, a box will indicate that, and you will have the option to request an override.

Appendix – Using View to Customize What Your Screen Displays

This section will show how to use the View dropdown to customize what you see on your screen

1. On the Manage Requisitions page, use the search to display the requisitions you want to review.

■ TU STRA TU	IS			
Requisitions ⑦			More Tasks 🔻	Manage Requisitions
Shop by Category - Search			৭	Requester Joselyn Johnson 🎤
Recent Requisitions	View More	Recent Purchases		
REQ0000126 Test approval e-mail	Incomplete	No data to display.		

2. The system returns your list of requisitions displaying the Requisition Number, Description, Creation Date, and so forth displaying the information from left to right. Now we will use the View dropdown to customize the screen to our needs. Click on View.

age Requisi	tions ⑦			
Search		Advanced	Manage Watchlist Saved Sear	ch Requisitions I Entered
h Results ns 🗸 View 🖌 F	rmat 🕶 📑 📴 🖙 🗑 Freeze 🛒 Detach 📣 Wrap			
Requisition	Description	Creation Date	Approval Amount Status	Funds Status Order
REQ0000232	test	5/18/22	10.00 USD Incomplete	Not reserved
REQ0000231	Provide masonry services at General Services Building.	5/18/22	120.00 USD Incomplete	Not reserved
REQ0000230	Test - Input a req using source 1020 and cost center 20830 (Removed the CCM/FS)	5/18/22	10.00 USD Incomplete	Not reserved
REQ0000229	Test -Input a req using source 5015 and cost center SM068 (not defined as an HR departm	5/18/22	10.00 USD Incomplete	Not reserved
REQ0000225	Training Requisition - Goods - Joselyn Johnson	5/16/22	800.00 USD Approved	Reserved
REQ0000224	Training requisition - Services - Joselyn Johnson	5/16/22	100.00 USD Approved	Reserved
REQ0000223	Training Requisition - Goods - Wendy Childs.	5/16/22	1,200.00 USD Approved	Reserved
REQ0000222	Training requisition for Wendy Childs - Service	5/16/22	1,000.00 USD Approved	Reserved
REQ0000221	Training requisition - Destiny Young - Goods	5/16/22	600.00 USD Approved	Reserved
	Destiny Young - training regulsition - Services.	5/16/22	100.00 USD Approved	Reserved

3. The system will display this drop down. We will then click on Columns to see what other information is available.

Search	n			Advance	Manage Watch	ist Saved Search	Requisitions I E	Entered	`
ch Res	ults								
ons 🗸	View 👻 Forma	at 🕶 🔲	Freeze 🔐 Detach 🚽 Wrap						
Req	About This	Record		Creation Date	Approval Amount	itatus	Funds Status	Order	
REC	Columns	+	J	5/18/22	10.00 USD Ir	ncomplete	Not reserved		
REQ	Freeze		v services at General Services Building.	5/18/22	120.00 USD Ir	ncomplete	Not reserved		
REQ	Detach		a using source 1020 and cost center 20830 (Removed the CCM/FS)	5/18/22	10.00 USD Ir	ncomplete	Not reserved		
REQ	Sort	*	using source 5015 and cost center SM068 (not defined as an HR departm	5/18/22	10.00 USD Ir	ncomplete	Not reserved		
REQ	Reorder C	denne a factoria	tion - Goods - Joselyn Johnson	5/16/22	800.00 USD A	pproved	Reserved		
REQ	Query By E	Example	on - Services - Joselyn Johnson	5/16/22	100.00 USD A	pproved	Reserved		
REQO	0000223 1	Training Requi	sition - Goods - Wendy Childs.	5/16/22	1,200.00 USD A	pproved	Reserved		
REQO	0000222 1	Training requis	ition for Wendy Childs - Service	5/16/22	1,000.00 USD A	pproved	Reserved		
REQO	0000221 1	Training requis	ition - Destiny Young - Goods	5/16/22	600.00 USD A	pproved	Reserved		
REQO	0000220	Destiny Young	- training requisition - Services.	5/16/22	100.00 USD A	pproved	Reserved		
	0000218 F	Re-test confirm	lan order	5/13/22	200.00 USD A	an and a second	Liquidated	TOW0000049	

4. The system will now display all the information that is available with this view. A blue check indicates the column is being displayed. A gray box indicates the information is available but is not being displayed. For example, Order Status is currently not displayed. To view it, click the gray box to enter a check.

h Resul	ts								
ons 🔻 🔽	w 🔻 Format 👻	The second se	Freeze 📄 Detac	h 🚚 Wrap					
Req	About This Reco	rd			Creation Date	Approval Amount	Status	Funds Status	Order
REQ	Columns	-	Show All		5/18/22	10.00 USD	Incomplete	Not reserved	
REQ	Freeze	- I	Emergency Purchase Order		5/18/22	120.00 USD	Incomplete	Not reserved	
REQ	Detach	_	Order Status	330 (Removed the CCM/FS)	5/18/22	10.00 USD	Incomplete	Not reserved	
REQ	Sort	- P -	 Order 	068 (not defined as an HR departm…	5/18/22	10.00 USD	Incomplete	Not reserved	
REQ	Reorder Column	s	Procurement Card		5/16/22	800.00 USD	Approved	Reserved	
REQ	Query By Examp		 Funds Status 		5/16/22	100.00 USD	Approved	Reserved	
REQ000	0223 Trainin	g Requi:	Status		5/16/22	1,200.00 USD	Approved	Reserved	
REQ000	0222 Trainin	g requis	Approval Amount		5/16/22	1,000.00 USD	Approved	Reserved	
REQ000	0221 Trainin	g requis	Creation Date		5/16/22	600.00 USD	Approved	Reserved	
REQ000	0220 Destin	y Young	Entered By Description		5/16/22	100.00 USD	Approved	Reserved	
REQ000	0218 Re-tes	t confirm	 Requisition 		5/13/22	200.00 USD	Approved	Liquidated	TOW0000049
REQ000	0216 Test ad	knowled	Requisitioning BU		5/13/22	400.00 USD	Approved	Liquidated	
REQ000	0215 CO#1			uate requested design changes.	5/11/22	1.000.00 USD	Approved	Liquidated	TOW0000045

5. Order Status now has a blue check and is being displayed on the far right of the screen.

earch				Advanced Manage	Vatchlist Saved Search R	equisitions I Entered
n Results						
ns 👻 View 👻 Format 👻	🗐 📴 🐨 Freeze 📄 Detad	:h 剩 Wrap				
Req About This Record		_	Creation Date	Approval Amount Status	Funds Status Ord	er Order Status
Columns	▶ Show All	_	5/18/22	10.00 USD Incomplete	Not reserved	
Freeze	Emergency Purchase Order		5/18/22	120.00 USD Incomplete	Not reserved	
Detach	 Order Status 	30 (Remove	5/18/22	10.00 USD Incomplete	Not reserved	
REQ	Order	068 (not defin	5/18/22	10.00 USD Incomplete	Not reserved	
Reorder Columns	Procurement Card		5/16/22	800.00 USD Approved	Reserved	
REQ Query By Example	 Funds Status 		5/16/22	100.00 USD Approved	Reserved	
REQ0000223 Training F	Status Approval Amount		5/16/22	1,200.00 USD Approved	Reserved	
REQ0000222 Training r			5/16/22	1,000.00 USD Approved	Reserved	
REQ0000221 Training r			5/16/22	600.00 USD Approved	Reserved	
REQ0000220 Destiny Ye			5/16/22	100.00 USD Approved	Reserved	
REQ0000218 Re-test co			5/13/22	200.00 USD Approved	Liquidated TOV	V0000049 Closed for Rece
REQ0000216 Test ackn			5/13/22	400.00 USD Approved	Liquidated	
REQ0000215 CO#1 to F		luate requeste	5/11/22	1,000.00 USD Approved	Liquidated TOV	V0000045 Open
REQ0000210 Test - 480	0		5/5/22	200.00 USD Approved	Reserved	

6. You also have the option to reorder columns. To do so, select View and on the drop-down menu, select Reorder Columns.

ago P	equisitions ⑦						De la compañía
Search			Advanced	Manage Watchl	st Saved Search	Requisitions I E	intered
ch Resul	Its			<u>^</u>			
ions 👻 🔽	ew 🔻 Format 👻 📗	Freeze Detach 🚽 Wrap					
Req	About This Record		Creation Date	Approval Amount S	tatus	Funds Status	Order
REQ.	Columns	•	5/18/22	10.00 USD In	complete	Not reserved	
REQ	Freeze	y services at General Services Building.	5/18/22	120.00 USD In	complete	Not reserved	
REQ	Detach	using source 1020 and cost center 20830 (Removed the CCM/FS)	5/18/22	10.00 USD In	complete	Not reserved	
RE	Sort	using source 5015 and cost center SM068 (not defined as an HR departm	5/18/22	10.00 USD In	complete	Not reserved	
RE	Reorder Columns	on - Goods - Joselyn Johnson	5/16/22	800.00 USD A	pproved	Reserved	
REQ	Query By Example	on - Services - Joselyn Johnson	5/16/22	100.00 USD A	pproved	Reserved	
REQ000	00223 Training Re	quisition - Goods - Wendy Childs.	5/16/22	1,200.00 USD A	pproved	Reserved	
REQ000	00222 Training red	uisition for Wendy Childs - Service	5/16/22	1,000.00 USD A	pproved	Reserved	
REQ000	00221 Training red	uisition - Destiny Young - Goods	5/16/22	600.00 USD A	pproved	Reserved	
REQ000	00220 Destiny You	ing - training requisition - Services.	5/16/22	100.00 USD A	pproved	Reserved	
	00218 Re-test con	firming order.	5/13/22	200.00 USD A		Liquidated	TOW0000049

7. The system will return the Reorder Columns screen. Use the scroll bar to locate the columns you'd like to move. In this example, we will use Order Status.

bearch					Vatchlist Saved Sea		
ons v View v F	format 👻 📋 🎵 📭 🔐 Freeze 🔐 Detach 🚚 Wr	ар					
Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000232	test	Reorder Columns	× Þ	Incomplete	Not reserved		
REQ0000231	Provide masonry services at General Services Building.	Visible Columns	D	Incomplete	Not reserved		
REQ0000230	Test - Input a req using source 1020 and cost center 20830 (\ensuremath{Re}	Requisition	D	Incomplete	Not reserved		
REQ0000229	Test -Input a req using source 5015 and cost center SM068 (no	Description Creation Date		Incomplete	Not reserved		
REQ0000225	Training Requisition - Goods - Joselyn Johnson	Approval Amount		Approved	Reserved		
REQ0000224	Training requisition - Services - Joselyn Johnson	Status		Approved	Reserved		
REQ0000223	Training Requisition - Goods - Wendy Childs.	Funds Status		Approved	Reserved		
REQ0000222	Training requisition for Wendy Childs - Service	Order		Approved	Reserved		
REQ0000221	Training requisition - Destiny Young - Goods	C		Approved	Reserved		
REQ0000220	Destiny Young - training requisition - Services.	5/16/22	100.00 USD	Approved	Reserved		
REQ0000218	Re-test confirming order.	5/13/22	200.00 USD	Approved	Liquidated	TOW0000049	Closed for Rece.
REQ0000216	Test acknowledgement required.	5/13/22	400.00 USD	Approved	Liquidated		
REQ0000215	CO#1 to PO TOW0000045. Add additional hours to evaluate requ	este 5/11/22	1,000.00 USD	Approved	Liquidated	TOW0000045	Open
REQ0000210	Test - 4800-80314	5/5/22	200.00 USD	Approved	Reserved		

8. When you click on Order Status the system will display arrows that allow you to change its order on your display.

ons 🔻 View 👻 F	Format 👻 🔲 🛱 🐺 Freeze 😭 Detach 🚽 Wra						
Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000232	test	eorder Columns	×P	Incomplete	Not reserved		
REQ0000231	Provide masonry services at General Services Building.	Visible Columns	D	Incomplete	Not reserved		
REQ0000230	Test - Input a req using source 1020 and cost center 20830 (Re	Description	^ <u>_</u> D	Incomplete	Not reserved		
REQ0000229	Test -Input a req using source 5015 and cost center SM068 (no	Creation Date Approval Amount		Incomplete	Not reserved		
REQ0000225	Training Requisition - Goods - Joselyn Johnson	Status	Þ	Approved	Reserved		
REQ0000224	Training requisition - Services - Joselyn Johnson	Funds Status	Þ	Approved	Reserved		
REQ0000223	Training Requisition - Goods - Wendy Childs.	Order Order Status	- ^с Р	Approved	Reserved		
REQ0000222	Training requisition for Wendy Childs - Service			Approved	Reserved		
REQ0000221	Training requisition - Destiny Young - Goods	OK	Cancel	Approved	Reserved		
REQ0000220	Destiny Young - training requisition - Services.	5/16/22	100.00 USD	Approved	Reserved		
REQ0000218	Re-test confirming order.	5/13/22	200.00 USD	Approved	Liquidated	TOW0000049	Closed for Rece
REQ0000216	Test acknowledgement required.	5/13/22	400.00 USD	Approved	Liquidated		
REQ0000215	CO#1 to PO TOW0000045. Add additional hours to evaluate reque	ste 5/11/22	1,000.00 USD	Approved	Liquidated	TOW0000045	Open

9. If you click the arrow with the line above it, the column will move to first on the display. We want the Order Status column to display second so we will use the plain arrow to move it to the left. Each click of the up arrow moves the column one space to the left (down arrow moves it to the right). Once the column is moved to the desired position, click OK.

Search			Advar	Manage	Vatchlist Saved Sear	requisitions 1	Lintered
h Results							
ons 🔻 View 👻 F	ormat 👻 📰 🛱 🔛 Freeze 📰 Detach 📣 V	Vrap					
Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order	Order Status
REQ0000232	test	Reorder Columns	×Þ	Incomplete	Not reserved		
REQ0000231	Provide masonry services at General Services Building.	Visible Columns	D	Incomplete	Not reserved		
REQ0000230	Test - Input a req using source 1020 and cost center 20830 (Re	Requisition	Ĩ	Incomplete	Not reserved		
REQ0000229	Test -Input a req using source 5015 and cost center SM068 (no	Order Status Description		Incomplete	Not reserved		
REQ0000225	Training Requisition - Goods - Joselyn Johnson	Creation Date		Approved	Reserved		
REQ0000224	Training requisition - Services - Joselyn Johnson	Approval Amount	Þ	Approved	Reserved		
REQ0000223	Training Requisition - Goods - Wendy Childs.	Status Funds Status	, È	Approved	Reserved		
REQ0000222	Training requisition for Wendy Childs - Service	(K Cancel D	Approved	Reserved		
REQ0000221	Training requisition - Destiny Young - Goods			Approved	Reserved		
REQ0000220	Destiny Young - training requisition - Services.	5/16/22	100.00 USD	Approved	Reserved		
REQ0000218	Re-test confirming order.	5/13/22	200.00 USD	Approved	Liquidated	TOW0000049	Closed for Rece.
REQ0000216	Test acknowledgement required.	5/13/22	400.00 USD	Approved	Liquidated		
REQ0000215	CO#1 to PO TOW0000045, Add additional hours to evaluate rec	E(11)00	1,000.00 USD	Anneniori	Liquidated	TOW0000045	Open

10. You can now see that Order Status is the second column displayed on the screen. The new order is automatically saved.

Search				A <u>d</u> vanced	Manage Watchlist	Saved Search	Requisitions I Er	itered
rch Results								
tions 🔻 View 🔻 Fo	ormat 👻 📄 ቻ	🔄 🏢 Freeze 📓 Detach 斗 Wrap						
Requisition	Order Status	Description	Creation D	ate	Approval Amount Sta	tus F	unds Status	Order
REQ0000232		test	5/18/22		10.00 USD Inco	omplete N	lot reserved	
REQ0000231		Provide masonry services at General Services Building.	5/18/22		120.00 USD Inco	omplete N	lot reserved	
REQ0000230		Test - Input a req using source 1020 and cost center 20830 (Remove	5/18/22		10.00 USD Inco	omplete N	lot reserved	
REQ0000229		Test -Input a req using source 5015 and cost center SM068 (not defin	5/18/22		10.00 USD Inco	omplete N	lot reserved	
REQ0000225		Training Requisition - Goods - Joselyn Johnson	5/16/22		800.00 USD App	roved F	Reserved	
REQ0000224		Training requisition - Services - Joselyn Johnson	5/16/22		100.00 USD App	roved F	Reserved	
REQ0000223		Training Requisition - Goods - Wendy Childs.	5/16/22		1,200.00 USD App	roved F	Reserved	
REQ0000222		Training requisition for Wendy Childs - Service	5/16/22		1,000.00 USD App	roved F	Reserved	
REQ0000221		Training requisition - Destiny Young - Goods	5/16/22		600.00 USD App	roved F	Reserved	
REQ0000220		Destiny Young - training requisition - Services.	5/16/22		100.00 USD App	roved F	Reserved	
REQ0000218	Closed for Rece	Re-test confirming order.	5/13/22		200.00 USD App	roved L	iquidated	TOW0000049
REQ0000216		Test acknowledgement required.	5/13/22		400.00 USD App	roved L	iquidated	
REQ0000215	Open	CO#1 to PO TOW0000045. Add additional hours to evaluate requeste	5/11/22		1,000.00 USD App	roved L	iquidated	TOW000045
REQ0000210		Test - 4800-80314	5/5/22		200.00 USD App	roved F	Reserved	

Appendix – Using Advanced Search to find a Category Name

For employees creating a purchase requisition

1. On the Create Request page, when filling in the **Category Name** field, if a message returns "No results found", use the Advanced Search feature by clicking the **magnifying glass icon** next to the Category Name box.

	RATUS		۵	☆ 🏳 û (Is								
Create Request: Requis	ition for Goods by Quantity ⑦		Add to Shopping List Add to C	art Done 🐺 0								
Request Type	Requisition for Goods by Quantity \checkmark											
Use this form to order goods that will be	Use this form to order goods that will be invoiced based on a unit price and the quantity delivered. Please include a desired delivery date in the description.											
Line Type	Goods	Agreement										
* Item Description	Building supplies.	(New supplier									
		// Supplier	Q									
* Category Name		Supplier Site	v									
* Quantity UOM Name	No results found.	Supplier Contact	~									
* Price	Each	Phone										
Currency	USD	Fax										
· · · · · · · · · · · · · · · · · · ·		Email										
		Supplier Item										

2. This will bring up a "Search and Select" popup window. Click **Advanced** to bring up the Advanced Search screen.

Line Typ	e Goods			Agreement		
* Item Descriptic	Search and Select: Cat	egory Name	2	- N	au cundiar X	
* Category Nan	Search				Advanced	۹
* Quanti	Category Name					
UOM Nan	Description					
* Pric Currens					Search Reset	j
	Category Name	Description				1
	No rows to display					Ĩ
chments					OK Cancel	
ew + ×						

3. Use the dropdown next to Category Name to select the type of search you want to conduct. In this example, we will use "Contains".

	n for Goods by Quantity 🗸	desired delivery date in the description.	
Line Type Goods		Agreement	
* Item Description Building e Search an	unnilee d Select: Category Name	New euphlier	×
* Category Nan 🛛 🖌 Searc	h	B	asic
* Quanti Categ	gory Nam Contains Vouilding		
UOM Nan D	escription Starts with ~		
* Pric Currenc		Search Reset Add Fields	der
	ry Name Description		
No rows to o	lisplay		
Attachments		ОКСа	ncel
View 🔻 🕂 🗙			
Type Category * Fil No data to display.	le Name or URL Title	Description Attached By	Attached Date

4. Type a portion of the category's description in the Category Name field. When you click search the system will return all Category Names that contain the information entered anywhere in the description (in this example, "building").

Use this form to order goods that will b	Requisition for Goods by Quantity re invoiced based on a unit price and the quantity delivered.		
Line Type		Agree	ement
* Item Description	Search and Select: Category Name		New supplier X
* Category Nan	⊿ Search		Basic
* Quanti	Category Name Contains V buildi	ng	
UOM Nan	Description Starts with V		
* Pric		Search	th Reset Add Fields ▼ Reorder
Current	Category Name Description		
	No rows to display		
			OK Cancel
Attachments			
View 🔻 🛨 🗙			
Type Category	* File Name or URL	Title Descriptio	on Attached By Attached Date
No data to display.			

5. Highlight the line of the category you wish to select and click OK.

	Search and Select: Category Name	9	×
Request Ty;	Search		Basic
Jse this form to order goods that will Line Tyr	Category Name Contains	✓ building	
* Item Descriptio	Description Starts with	~	
		Search Reset Add Fields V Re	eorder
* Category Nan	Category Name	Description	
* Quanti	Construction Repair or Maintenance	. 614145 - Major repairs or improvements to complete building exterior	
UOM Nan	Construction Repair or Maintenance	. 614150 - Major repairs or improvements to complete building interior, including painting, new office	e cons
* Prie	Construction of Building Additions or I.	614110 - New building construction or a new addition to a building	
Current	Equipment - Fixed for Buildings	614020 - Major Equipment fixed to a structure; ie chillers, telecom equipment etc	
	Equipment Maintenance & Building N.	611135 - New equipment used to maintain the proper condition of a building, i.e. plumbing, electric	al, m
	Equipment Maintenance & Building R.	610135 - Equipment purchased for replacement of already existing maintenance equipment. i.e. re	eplaci
achments	Maintenance & Repair Building Non	608160 - non-routine repairs such as be repairing doors, repairing HVAC systems, $\mbox{etc}_{\mathcal{L}}$	
lacriments	Maintenance & Repair Building Routin	e 608157 - For general building maintenance such as replacing filters, cleaning ducts, etc	
View 🕶 🕂 🗙	Supplies for Buildings janitorial	609012 - Misc. Items purchased that are considered lanitorial	
Type Category	Supplies for Buildings non janitorial	609009 - Misc, items purchased such as light bulbs that are considered non-janitorial	

6. The system will return to the requisition page and automatically fill the Category Name field with your selection.

Request Type	Requisition for Goods by Quantity $$		
Use this form to order goods that will be	invoiced based on a unit price and the qua	antity delivered. Please include a desired delivery date in the description.	
Line Type	Goods	Agreement	
* Item Description	Building supplies.		New supplier
		Supplier	Q,
	Supplies for Buildings non janitorial	Supplier Site	w.
* Quantity		Supplier Contact	~
UOM Name	Each	Phone	
* Price Currency	1100	Fax	
currency	030	Email	
		Supplier Item	
		Supplier Relit	
Attachments			
View 👻 🛨 🗙			
Type Category	* File Name or URL	Title Description	Attached By Attached Date
No data to display.			