CAPPS Desk Aid

Locating Requisitions Available to Source

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Locating Requisitions Available to Source

Summary

A requisition becomes available to source when the REQUISITION STATUS is *Approved* and the BUDGET STATUS is *Valid*.

A requisition line is no longer available to source when it was fully sourced to a purchase order (PO) or when it was finalized from the PO (see the *Finalizing a Purchase Requisition or Purchase Order* desk aid).

There are two methods for finding requisitions that are available to source to a PO:

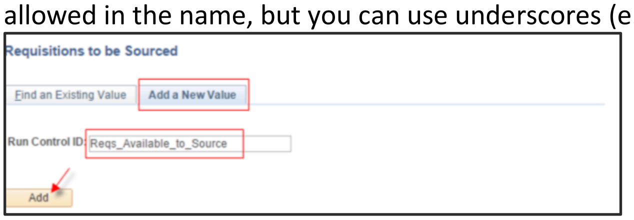
- *Requisitions to be Sourced* report
- *Requisition Selection Criteria* page (inside a PO)

Running the *Requisitions to be Sourced* Report

Users must add a *Run Control* page as the one-time setup the first time the user runs the *Requisitions to be Sourced* report. The *Run Control* page is a page from which the user can run the report over and over again.

Navigation
Dashboard: Purchasing; **Tile:** Buyer Workcenter

From the **Reports/Processes** tab:

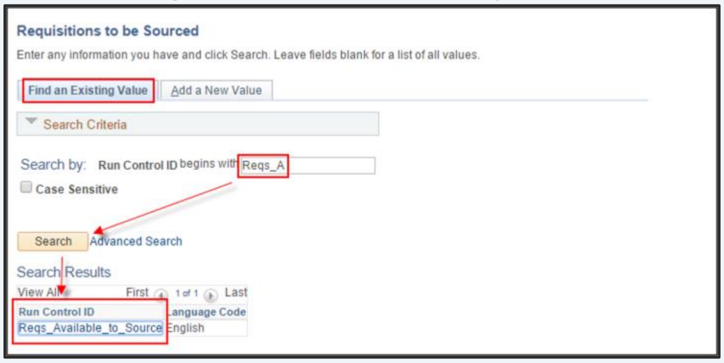
1. Select the ***Requisitions to be Sourced*** page.
2. Select **Add a New Value** tab.
3. Enter a RUN CONTROL ID.
   This run control is only available to you, so you can name whatever you'd like. No spacebars are allowed in the name, but you can use underscores (e.g., Reqs_Available_to_Source).
   

4. Select **Add** to save the RUN CONTROL ID.
5. Enter the BUSINESS UNIT field and the associated date fields.
   

   Now you have a run control that you can use from now on to run this report.
6. Select **Save**.

Note:

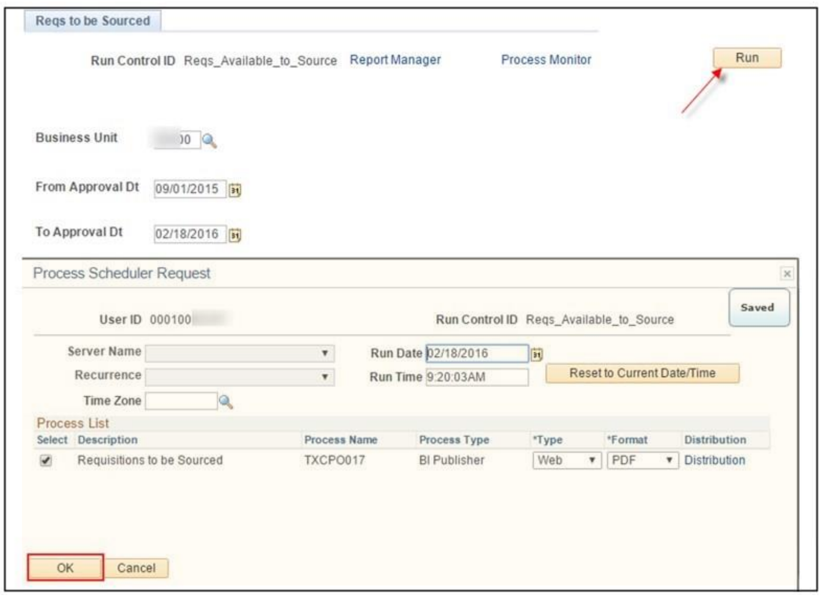
The next time you run the report (and every time thereafter), use the same navigation, but choose the ***Find an Existing Value*** tab and search for **your** run control that already exists.



When you run this report, it is going to look for requisition lines that are available (*Approved* and *Valid*), and approved sometime between the dates you entered on the run control page.

The wider the date range, the larger the quantity of lines in the report.

7. Select **Run** when you are ready to execute the search.



8. Select **OK** on the *Process Scheduler Request*.

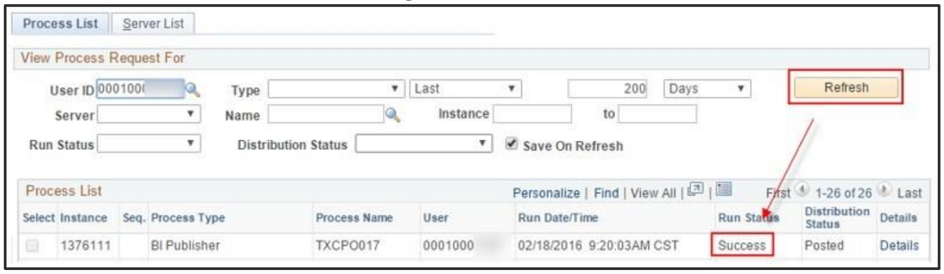
Note: The report process takes a minute or so to run. You can select either:

Process Monitor to check the status of the process

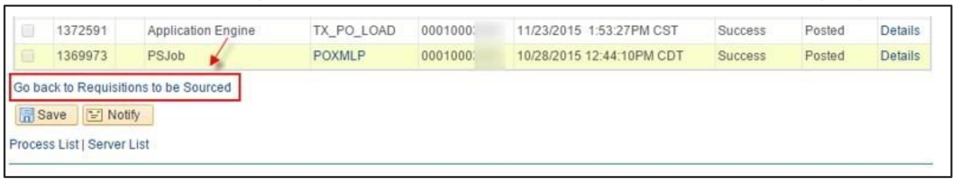
–or–

Report Manager and just wait on the report.

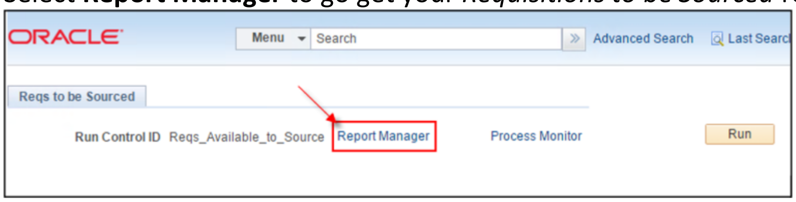
9. Watch for the **Run Status** to change to *Success*.



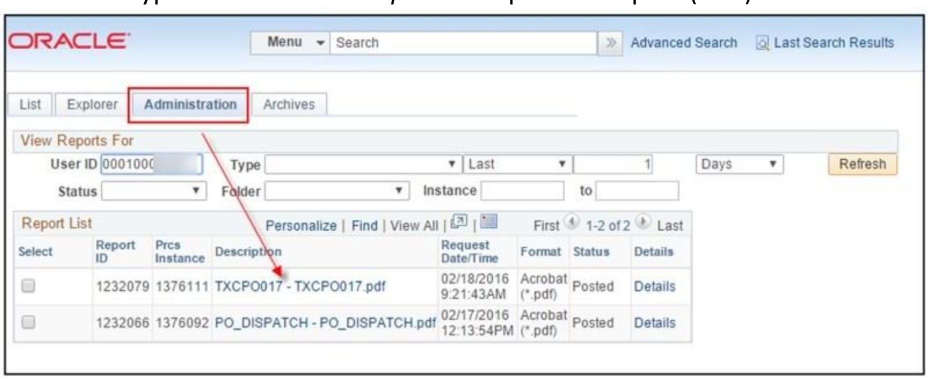
10. Select **Go back to Requisitions to be Sourced** after the run status displays *Success*.



11. Select **Report Manager** to go get your *Requisitions to be Sourced* report.



12. Select the **Administration** tab on the *Report Manager* page.
13. Select the hyperlink under *Description* to open the report (PDF).



The report groups requisition lines by *Buyer*.

Reminder: There is no overnight delay, this is real time data.

- If a requisition was approved and successfully budget checked one minute ago, it pulls into this report.
- If a requisition line was fully sourced one minute ago, it no longer pulls into this report.

Requisition Selection Criteria Inside a PO

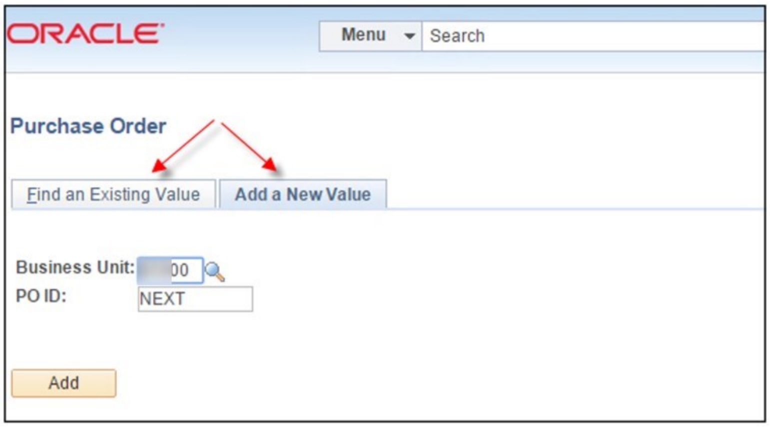
This method is for used to search for requisition lines available to source from inside the PO.

Navigation

Dashboard: Purchasing; **Tile:** Purchase Order

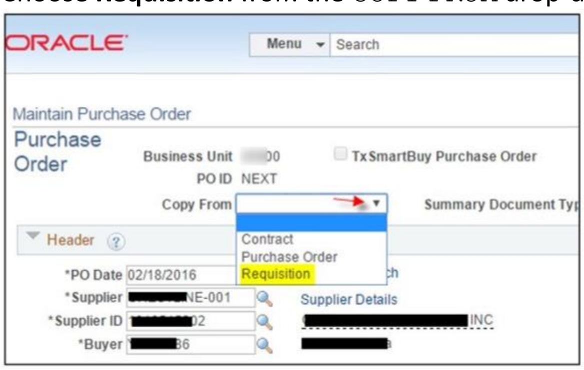
On the **Add/Update POs** page:

1. Create a new value or find an existing PO value.



Note: A supplier is required to search for requisitions from inside the purchase order. The supplier you enter does not have to match the suggested supplier that may or may not have been entered on the requisition(s).

2. Choose **Requisition** from the `COPY FROM` drop-down menu.

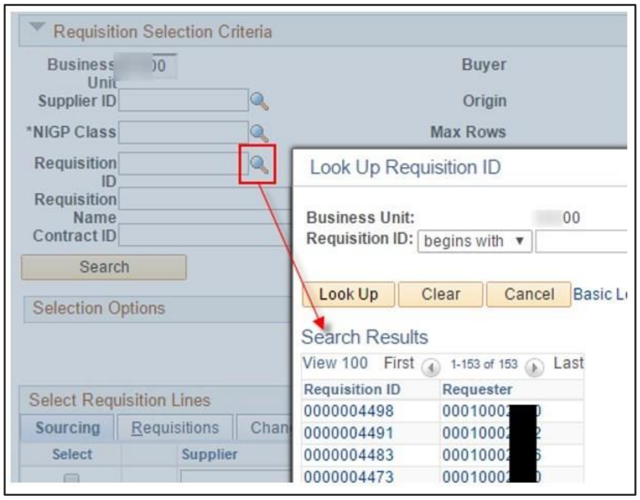


3. Enter data in the various criteria fields (as necessary) Requisition Selection Criteria section.

You can search for requisitions by an single criterion or by multiple criteria. The less criteria you enter, the more requisition lines display in the search results. If you're not finding what you expected to find, use less criteria to broaden the scope of the search.

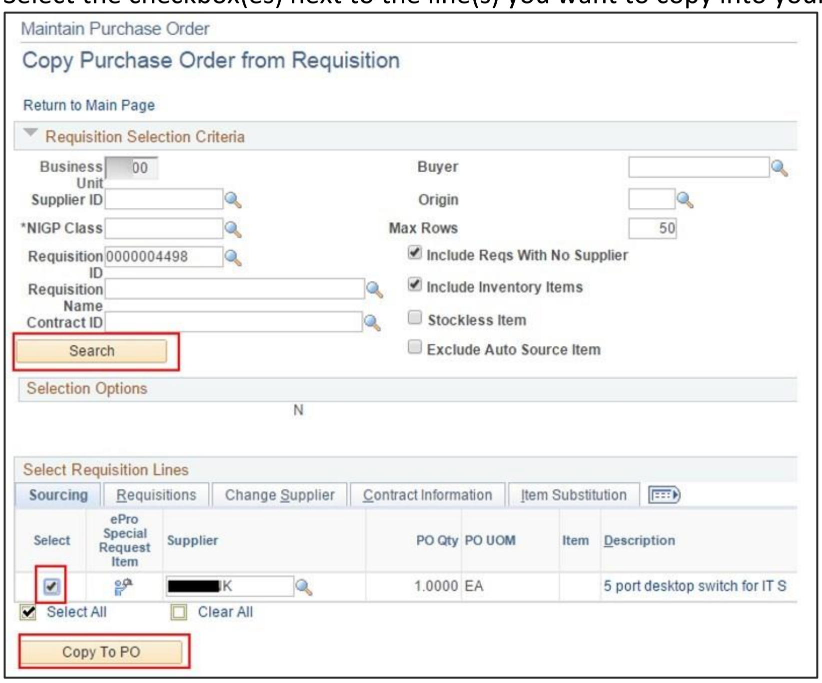
Using the Search All Option

A common search is to select the **Search** (magnifying glass icon) next to the `REQUISITION ID` field. Doing so produces a list of **all** requisitions that have lines available to source, which displays each `REQUISITION ID` and each requester's `USER ID`.



To Search All:

1. Choose a requisition from the search list.
2. Select **Search** to bring the lines into the ***Select Requisition Lines*** section of the page.
3. Select the checkbox(es) next to the line(s) you want to copy into your PO.



4. Select **Copy to PO**.

Revision History

Date	Description of Change	Changed By
Jan. 10, 2025	Initial release.	J. Goodman