Occasionally it is necessary for PeopleSoft Financial users to see requisition details for other requisitioners. This can be done via the Data Review tile on the PeopleSoft Financials User Homepage.

Finding Requisition Details using the Data Review Tile

1. From the PeopleSoft Financials User Homepage, click on the Data Review tile, the Review Procurement Information

∼User Hor	nepage	
Approvals	Cashiering	Data Review
	\checkmark	
69		
Procurement	Online Security	External Links
= 0	Č.	
		_
	Data R	Review
Review Procurement Information	Review Accounts Payable	Review Chartfield Data
	Ť.	\sim

2. Open the Requisition Section and click on Requisitions. From here, you can search by various filters such a s Requestor, Date, Supplier, and/or Department. It is recommended at this step to use the date filters along with any other filters. The click OK.

C Data Review							Re	view Pro	ocuremen
📕 Requisitions 🔷	Requisition In	quiry							
Requisitions	Business	CASE1 Q							
Document Status	Requisition			Q		To Req		Q	
Change History	Requisition Name				Q]			
Purchase Orders ~	Req Status	۹				Origin	Q		
📑 Receipts 🗸 🗸	Requester Requester	rtn9			م م]			
	Name Requisition Date Supplier	01/01/2022 CASE1		Supplier Looku	p	То	02/02/2022		
	SetID Supplier ID		Q	Supplier Detail	S	Supplier Name			٩
	Item SetID	CASE1				Item ID			Q
	Description)E4 obaracta		vising	//				
	Department	204 Characte	Q	aming]		Direct	Ship		
	ОК	Cancel							

3. When the results come up, you will be able to see a list of requisitions with details as to their status, amount, date, etc. If you click on the requisition number, you will get more details.

Req Inquiry							
■ Q					N	1-6 of 10 🗸	View All
Details	<u>S</u> tatus II▶						
Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
CASE1	1000793492	OD Supplies 02012022	Approved	Noscal,Ray-Albert T	02/01/2022	19.58	USD
CASE1	1000793067	Upfund PO 5000706975	Pending Approval	Noscal,Ray-Albert T	01/28/2022	1,465.16	USD
CASE1	1000792745	KN95 01262022	Approved	Noscal,Ray-Albert T	01/26/2022	11,390.00	USD
CASE1	1000792071	Shrink wrap for Shredlt pickup	Approved	Noscal,Ray-Albert T	01/21/2022	103.04	USD
CASE1	1000791515	KN95	Approved	Noscal,Ray-Albert T	01/19/2022	23,000.00	USD
CASE1	1000790943	KN95 fac/staff distributiion	Approved	Noscal,Ray-Albert T	01/13/2022	42,330.00	USD

Requisitions

Finding details about PO and voucher/payment information related to a requisition

1. From the same Requisition section of the Review Procurement Information tile, click the Document Status link. Enter the requisition number that you want more information on and click search.

A Data Review		R
Requisitions	^	Requisition Document Status
Requisitions		Enter any information you have and click Search. Leave fields blank for a list of all values
Document Status		Find an Existing Value
Change History		▼ Search Criteria
Purchase Orders	~	*Business Unit = 🗸 CASE1 Q
Receipts	~	Requisition ID begins with V 1000793492
		Requisition Status = 🗸
		Requisition Date = 🗸
		Origin begins with 🗸
		I Requester begins with 🗸 🔍
		Description begins with v
		□ Case Sensitive
		Search Clear Basic Search 🖾 Save Search Criteria

2. All documents (PO, Voucher, Payment) that are related to the requisition will show here. Click on a document ID to see more information.

	Document Sta	itus										
		Business	Unit CASE1			Rec	1000790943 ID					
		Document	Date 01/13/2022			Sta	tus Approved					
		Curr	ency USD			Document Ty	ype Requisition	Requisition				
		Reque	ster Noscal,Ray-A	Albert T		Merchandise A	Amt 42,330.00					
	Requisitions In Show All	ventory Sour	cing nts Procuremen Contracts	Purchase Orders(1)	Service Work Orders	eceipts Return	s Vouchers(1)	Payments				
•	Associated Docu	ment										
	E Q							I	2 🗸 🕨 🕨 View All			
	Documents	Related Info	IIÞ									
	Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry			
	▼Actions	CASE1	Purchase Order	5000759251	Dispatched	01/13/2022	0000096865	REMIT				
	▼Actions	CASE1	Voucher	07028763	Posted	01/14/2022	0000096865	REMIT				

As an example, if you click on the voucher ID, you can see the invoice number, invoice date, amount, and the scheduled payment date (due date)



Voucher Inquiry

 Search Criteria Sort Criteria Display Curt Voucher Inquir Youcher Det 	rency Criteria y Results ails Amo	unts Mo	re Details	Supplier Det	tails •						14	This	has no out	ot been paid : yet
Actions	Business Unit	Vouch	er ID Tr Ci	ansaction urrency	Gross Ir Ai	nvoice mount	Voucher Unpaid Balance	Unappl Prepayme	ed To hts	tal Non- Merch	Entered Gr VAT	oss Amount Paid	Ň	et Amount Paid
▼Actions	CASE1	070287	763 U	SD	42	2,330.00	330.00 42,330.00 0.00		0.00	0.00	0.00	0.00	0.00	
Voucher Inqui > Search Criteri > Sort Criteria > Display Curren Voucher Inquiry F () Q	oucher Inquiry													
Voucher Details	Amounts	More Details	<u>S</u> upplie	er Details III									1-1011 +	P P I VIEW All
Actions	Business Unit	Voucher ID	Voucher Style	Supplier Loc	Post Status	Approval Status	Close Status	Origin	Due Date	Basis Date	Acctg Date	Entered on	Budget Header Status	Budget Misc Status
▼Actions	CASE1	07028763	Regular Voucher	REMIT	Posted	Approved	Open	SCI	02/13/2022	01/14/2022	01/18/2022	01/18/2022	Valid	Valid Budget Check

If you have further questions about the status of a requisition, PO, or payment, please contact customercareteam-pds@case.edu.

END