

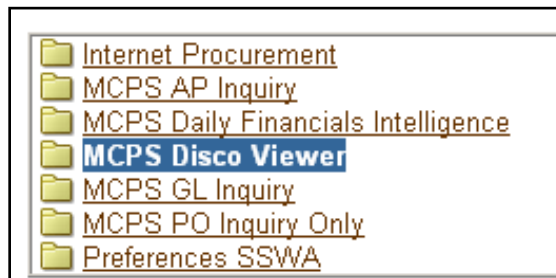
MCPS Requisition Status Report

MCPS Requisition Status Report

The *MCPS Requisition Status Report* will display information summarized and associated by requisition number over a specified period of time. This report will display all requisitions charged to a schools' or departments' accounts. For each requisition listed in the report, additionally the date the requisition was created, the status of its approval, the name of the requisition requestor, the deliver to location of each line item in the requisition, the description name and quantity of each line item and the total requisition amount, is displayed. The main difference between this report and the *School Requisition Status Report* is first, the *MCPS Requisition Status Report* is intended for school and department use and second, the *MCPS Requisition Status Report* shows information and descriptions for all line items associated with a requisition and not just a summary of the requisition total amount, as what is only done in the *School Requisition Status Report*.

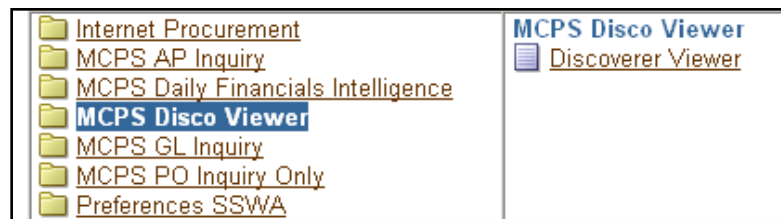
► To run the MCPS Requisition Status Report:

1. Log on to the FMS and navigate to the E-business Suite home page.
2. In the Navigator region, click the **MCPS Disco Viewer** link.



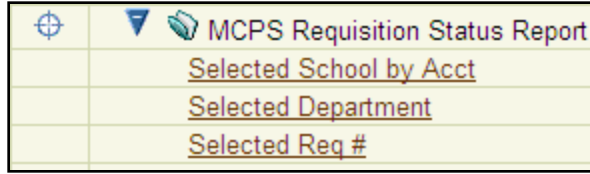
MCPS Disco Viewer link

3. The MCPS Disco Viewer menu will display in the column to the right. Click the **Discoverer Viewer** link. The Discoverer Viewer will open in a new window.



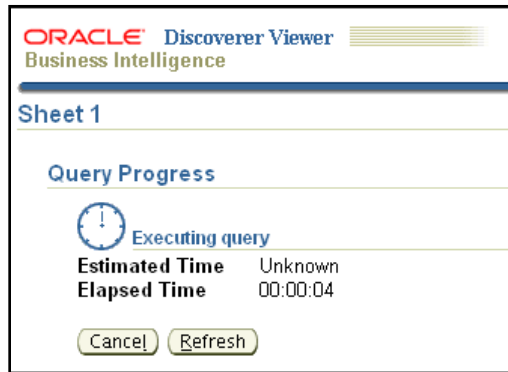
Discoverer Viewer link

4. In the list of worksheets, find the **MCPS Requisition Status Report** name.
5. Click the **blue arrow** to the left to expand the list of available report links. Click on the link that will generate the type of report desired.



MCPS Requisition Status Report links

6. Each report type will use different information fields to generate the report. To run a report, enter the requested information into the fields shown and click the **Go** button.
 - *Selected Req #-* This report type will generate information on a specific requisition identified. Enter in the requisition number you wish to view a report for in the *Enter Req #* field. Then click the **Go** button.
 - *Selected School by Acct-* This report type is for schools' use only. It will generate information for a specific school between a requisition creation start and end date specified. Enter in a 3-digit school number in the *School Number* field and a specific date in the *Beginning Req Creation Date* and *Ending Req Creation Date* fields. Then click the **Go** button.
 - *Selected Department-* This report is for departments' use only. It will generate information for a specific department between a requisition creation start and end date specified. Enter in a 5-digit department number in the *Pick Dept #* field and a specific date in the *Beginning Req Creation Date* and *Ending Req Creation Date* fields. Then click the **Go** button.
7. The Query Progress window will display while the report is running.



Query Progress window

 **NOTE:** If the report is going to take longer than one minute, you will be asked if you want to continue to run the report. Click **Yes**.

8. The MCPS Requisition Status Report will display.

| | ▶ Department | ▶ Charge Account Num | ▶ Req # | ▶ Created Date | ▶ Status | ▶ Preparer Name | ▶ Deliver To Location | ▶ Line Number | ▶ Item Description | ▶ Unit Of Measure | ▶ Unit Price | ▶ Requested Quantity | ▶ Allocation Value | ▶ Amount |
|---|---------------|-------------------------------|---------|----------------|----------|------------------|---------------------------|---------------|--------------------------------------|-------------------|--------------|----------------------|--------------------|---------------|
| 1 | 01.020000.135 | 04.503003.000000.0000.0000.00 | 132750 | 08/04/2009 | Approved | Shirley, Maria M | Location 01 - 1000 - 1000 | 1 | Judy Geared MiniClock Classroom Pack | Pack | \$22.91 | 15.00 | 100.0% | \$343.65 |
| 2 | | | | | | | | 2 | Mummy Math An Adventure in Geometry | Each | \$12.71 | 2.00 | 100.0% | \$25.42 |
| 3 | | | | | | | | 3 | Family Math | Each | \$14.71 | 7.00 | 100.0% | \$102.97 |
| 4 | | | | | | | | 4 | Family Math The Middle School Years | Each | \$15.73 | 3.00 | 100.0% | \$47.19 |
| 5 | | | | | | | | 5 | I Have, Who Has? Grades 34 | Each | \$14.41 | 4.00 | 100.0% | \$57.64 |
| 6 | | | | | | | | 6 | I Have, Who Has? Grades 56 | Each | \$14.41 | 4.00 | 100.0% | \$57.64 |
| 7 | | | | | | | | | | | | | | Sum: \$634.51 |

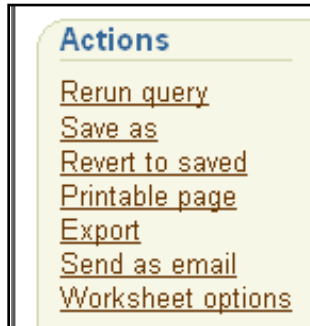
MCPS Requisition Status Report

The following table explains the meaning of information displayed in each column of this report.

| Column Name | Description |
|---------------------|--|
| Dept | The department number of the department or school used to generate the report. |
| Charge Account Num | The FMS account number charged in the creation of a requisition. |
| Req# | The number assigned to a requisition during its creation in iProcurement. |
| Created Date | The date the requisition was created in iProcurement. |
| Status | A statement identifying if a requisition was approved for purchase by its account owner. |
| Preparer Name | The name of the person that created the requisition in iProcurement. |
| Deliver to Location | The name of the location selected in the Check Out process of iProcurement for requisition line items to be delivered. |
| Line Number | The order of items in the same requisition. |
| Item Description | The description name of the item purchased in a requisition. |
| Unit of Measure | How an item is packaged for purchase. Ex: each, pkg |
| Unit Price | The cost for unit of an item. |
| Requested Quantity | The number of each item ordered. |
| Allocation Value | The percent of cost for each line item to the charge account. |
| Amount | The cost to pay for the quantity of each item ordered. |

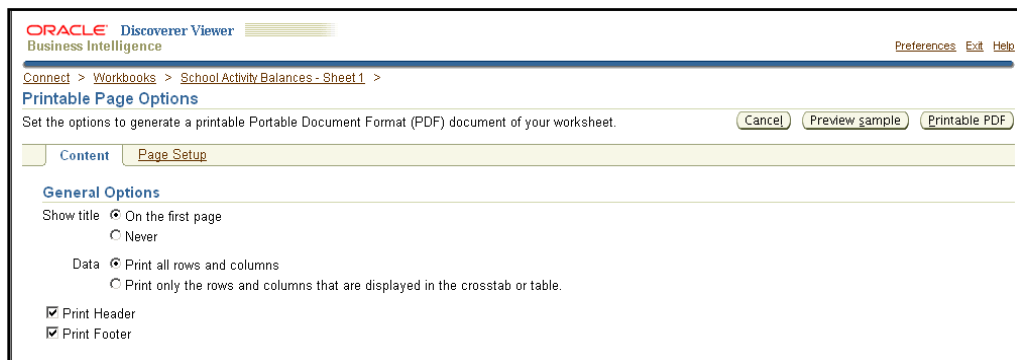
► **To Save and/or Print a MCPS Requisition Status Report:**

1. Run the MCPS Requisition Status Report.
2. In the Actions region on the left side of the page, click the **Printable Page** link.



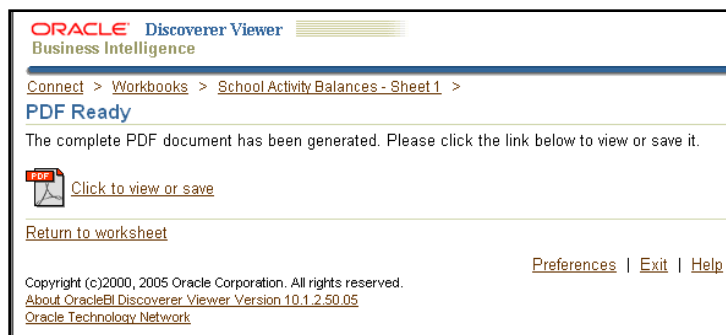
Actions region

3. The **Printable Page Options** form will display.



Printable pages options form

4. Click the **Printable PDF** button in the upper right hand corner.
5. The PDF file will generate and the **PDF Ready** window will display.



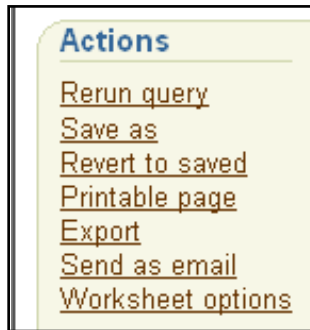
PDF ready window

6. Click the **Click to view or save** link to open the PDF file.
7. The PDF file will open and you can choose to save or print the document.

► **How to Export the MCPS Requisition Status Report**

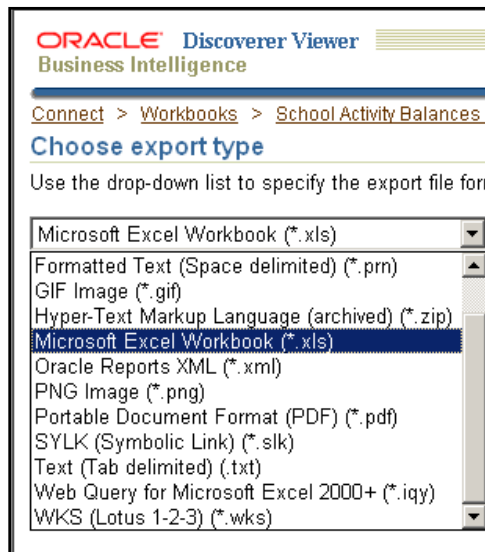
1. Run the MCPS Requisition Status Report.

2. In the Actions region on the left side of the page, click the **Export** link.



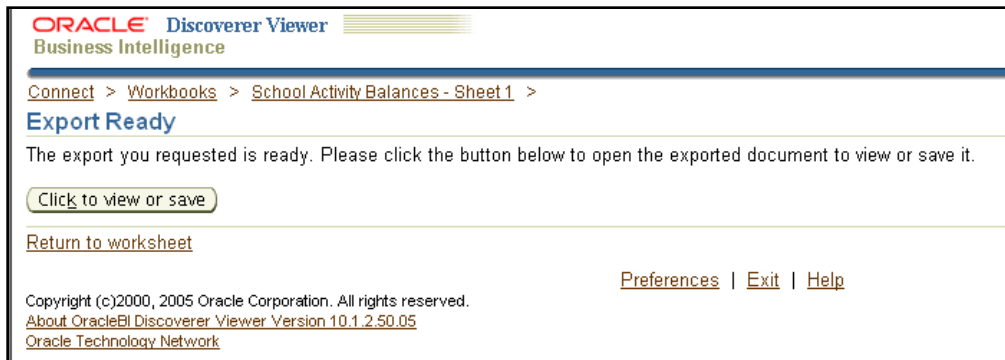
Actions region

3. The *Choose Export Type* form will display.
4. Choose **Microsoft Excel Workbook** from the drop-down list.



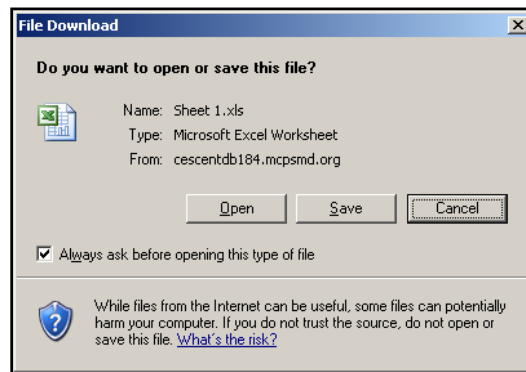
Export type drop down list

5. Click the **Export** button in the upper right hand corner.
6. The *Export Ready* page will display. Click the **Click to view or save** button.



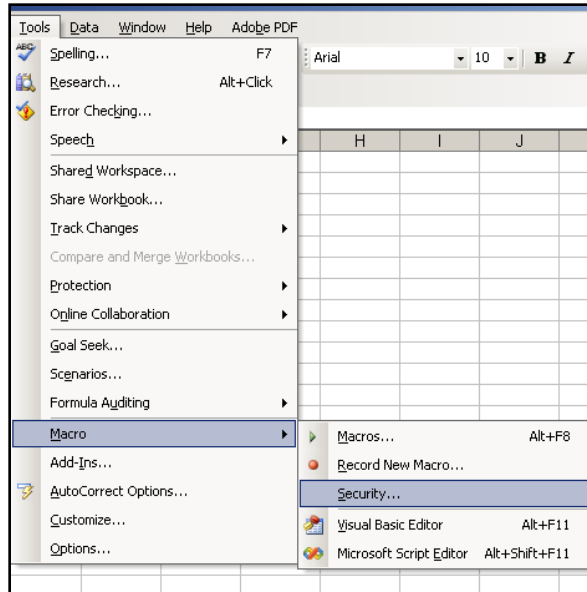
Export ready page

7. The *File Download* window will display. Click the **Save** button and save the file to a desired location.



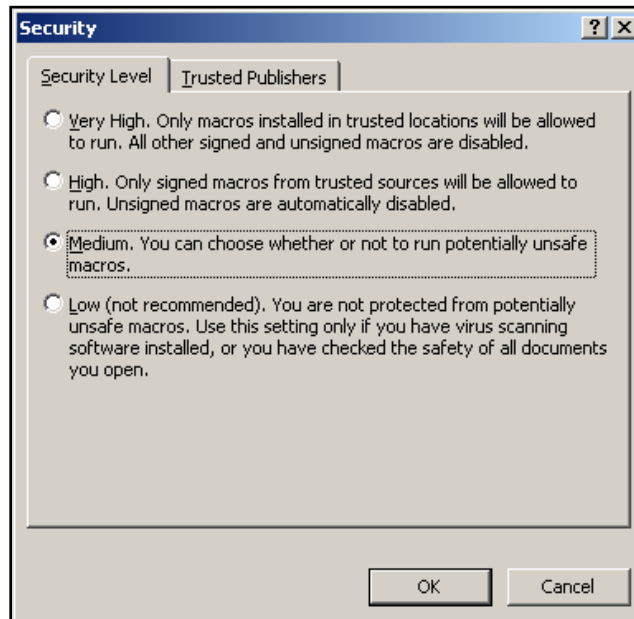
File download window

8. Open up **Microsoft Excel** from your programs menu on your computer.
9. Click **Tools** on the toolbar at the top of the screen. Select **Macro** from the drop down list. The Macro menu will display to the right. Select **Security** from the menu on the right.




Tools drop down menu

10. A *Security* form will display. Select **Medium**.



Security Form

11. Click the **OK** button.

 **NOTE:** Adjusting the macro security setting to medium is a procedure that only needs to be performed once in the Excel application. So the next time a report from the FMS is exported into an Excel file the macro settings will be remembered and not need to be changed.

12. From the Excel tool bar choose **File** and then **Open** from the drop down list.

13. Navigate to where the file is saved and open it.

