

EP.020.540 – MANAGING REQUISITIONS

Purpose	To understand what actions users can perform from the Manage Requisitions page.
Description	<p>Users can navigate to the Manage Requisitions page to review or modify existing requisitions. A variety of information regarding requisitions is available from the Manage Requisitions page including the requisition lifecycle, line items, details, requisition status (request state), and distribution information.</p> <p>From this page, you can access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, view approval information, etc.</p>
Security Role	BOR_EP_MAINT_REQ
Dependencies/ Constraints	The viewable information available to each user is based on the user's security role and user preferences.
Additional Information	None

Procedure

Below are step by step instructions on how to manage requisitions.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the eProcurement link
4.	Click the Manage Requisitions link.
5.	<p>To search requisitions, enter criteria into the Search Requisitions section. Enter as much criteria as possible to narrow the search results. Users can specify search criteria based on the following:</p> <ul style="list-style-type: none"> • Business Unit • Requisition Name • Requisition ID • Request State • Budget Status • Date From/To • Origin • Requester • Entered By • PO ID
6.	Click the Search button.
7.	<p>To view the requisition lifecycle and line items for a requisition, click the Expand triangle icon to the left of the Req ID number. Users can review the requisition's progress through the requisition lifecycle as well as line information such as item description, status, price, currency, quantity, UOM, and supplier. Additionally, as the requisition moves through the cycle, the icons become active links where users can view information related to each step.</p>
8.	To view the Requisition Details page, click on the Req ID number.

Step	Action
9.	<p>The system navigates to the Requisition Details page for the requisition chosen in the step above. The Requisition Details page includes the following sections for users to review:</p> <ul style="list-style-type: none"> • Requisition Summary: Provides Business Unit, Date, Request State, Requested For, Requisition Name, Requisition ID, Total Amount, and Pre-Encumbrance balance. • Requisition Lines: Includes Line Number, Item Description, Source Status, Amount Only, Quantity, Price, Status, and Total. This section also allows the user to drill down further into the requisition line details.
10.	To view the Shipping Line and Accounting Line information, click the Expand triangle beside the line number.
11.	To view more details about the accounting and distribution status, click the Expand triangle beside Accounting Lines .
12.	<p>The system expands and displays details below the Requisition Lines section, including an Accounting Lines box. The Accounting Lines box includes five tabs with information for users to review. The applicable information on the tabs are as follows:</p> <ul style="list-style-type: none"> • Details: Shows Distribution Line #, Status, Location, Req Qty, Merchandise Amt, Percent, GL Unit, and Account information. • More Details: Shows Fund, Dept, Program, Class, Bud Ref, Project • More Details 2: Shows Open Amt, Open Quantity, Merch Amt Base information • Asset Information: Shows Asset Mgmt Bus. Unit and Profile ID information • Budget Information: Shows Budget Status and Budget Date
13.	<p>To edit a requisition from the Requisition Details page, scroll to the bottom of the page and click the Edit Requisition button.</p> <p>Note: Only Open and Pending requisitions can be edited from this page.</p>
14.	Click the Return to Manage Requisitions link. The system navigates back to the Manage Requisition page.

Step	Action
15.	<p>To edit or perform another action on a requisition, such as Cancel, Check Budget, Copy, Edit, View Cycle, and View Print, select from the Action dropdown list located to the right of the requisition line.</p> <p>For more information on editing a requisition, see EP.020.550 – Editing, Saving, and Submitting an ePro Req. For more information on canceling ePro Reqs, see EP.020.560 – Canceling ePro Reqs and Deleting Req Lines.</p> <p>Note: Available actions differ depending on the status and origin of the Requisition. For example, Cancel is not an option on requisitions for which a purchase order has been created.</p>
16.	<p>Once an action is selected, click the GO button.</p> <p>Action options include:</p> <p>Approvals: Opens the Approval Status page to view approval details for the requisition</p> <p>Cancel: Opens the Requisition Cancellation page where cancel action can be taken</p> <p>Copy: Copies the requisition information to a new requisition</p> <p>Budget Check: Initiates the Budget Check process</p> <p>Edit: Opens the Edit Requisition – Review and Submit page for updates/changes</p> <p>View Cycle: Opens the Requisition Cycle page (different view of the requisition lifecycle)</p> <p>View Print: Printable version of the requisition details</p>
17.	<p>To perform additional actions, scroll to the bottom of the Manage Requisitions page. Additional actions include:</p> <ul style="list-style-type: none"> • Create New Requisition: Opens the Create Requisition page. • Review Change Request: Opens the Review Change Requests page. • Review Change Tracking: Opens the Requisition Change Tracking History page. • Manage Receipts: Opens a Receipt Inquiry page where users can review receipt information. • Requisition Report: Opens the Requisition Print page.