

## EP.020.560 - Canceling ePro Reqs and Deleting Req Lines

<b>Purpose</b>	To cancel a requisition or delete/cancel individual requisition lines.
<b>Description</b>	Users can cancel entire ePro requisitions and/or individual requisition lines if these are no longer needed.
<b>Security Role</b>	<b>BOR_EP_MAINT_REQ</b>
<b>Dependencies/ Constraints</b>	<ul style="list-style-type: none"> <li>• Users must have the appropriate User Preferences to perform these actions. For more information, see <a href="#">9.2 Security Roles &amp; User Preferences: ePro &amp; Purchasing.</a></li> <li>• If a requisition or a requisition line item is sourced to a purchase order, it cannot be edited or deleted.</li> </ul>
<b>Additional Information</b>	From the Manage Requisitions page, users can access other pages to perform tasks such as review requisition details and edit or cancel requisitions. For more information, see <a href="#">EP.020.540 - Managing Requisitions.</a>

## Procedure

Below are step by step procedures on how to cancel an ePro requisition.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>eProcurement</b> link.
4.	Click the <b>Manage Requisitions</b> link. The system navigates to the Manage Requisitions page.
5.	Enter or search for the requisition(s) to cancel. Requisitions can be searched for by entering the Requisition ID, Request State, Origin, specific dates, the Requester, etc.  <i><b>Note:</b> To view details about a requisition, click on the Req ID link to access the Requisition Details page for that requisition.</i>
6.	In the Requisitions section, choose “ <b>Cancel</b> ” from the <b>Select Action</b> dropdown menu.
7.	Click the <b>Go</b> button. The system navigates to the Requisition Details page.  <i><b>Note:</b> This page is accessible only for open requisitions. If one or more lines have been sourced to a purchase order, an error message will appear.</i>
8.	Click the <b>Cancel Requisition</b> button.  <i>The system navigates back to the Manage Requisition page.</i>
9.	Verify the requisition <b>Request State</b> changed to “Canceled” and the total is \$0.00.  <i><b>Note:</b> All requisitions must be Closed to be considered complete. Additionally, the requisition may need to be budget checked prior to being closed. For more information, see either <a href="#">EP.020.650 – Using the Requester’s Workbench</a> or <a href="#">EP.020.710 – Running Requisition Closing Process</a>.</i>

Below are step by step instructions on how to cancel a requisition line.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Navigator</b> icon.
3.	Click the <b>Purchasing</b> link.
4.	Click the <b>Requisitions</b> link.
5.	Click the <b>Requester's Workbench</b> link.
6.	Enter or add a <b>Workbench ID</b> .
7.	Enter or search for the Requisition ID in the <b>Requisition</b> field.
8.	Select the <b>Search</b> button.
9.	Enter a description for the workbench in the <b>Description</b> field.
10.	Select the checkbox for the requisition to modify.
11.	Click on the <b>Lines</b> icon to view all the lines for the requisition.
12.	Select the line(s) to be cancelled.
13.	Click the <b>Return to Requester's Workbench</b> link.
14.	Select " <b>Cancel</b> " from the <b>Action</b> section.

Step	Action
15.	<p>Review the <b>Requester's Workbench – Processing Results</b> page.</p> <p>A Requisition will be marked as either:</p> <ul style="list-style-type: none"> <li>• <b>Qualified:</b> means this item meets all the criteria to process for the above-mentioned actions. These items will show in the qualified section of the page.</li> <li>• <b>Non-Qualified:</b> A non-qualified requisition does not meet all the criteria to process and will be displayed in the non-qualified section of the page. If the selected requisitions are not qualified for the action, click the Log button to access the log. The log states why the purchase order was not qualified for the previous processing action.</li> </ul> <p>After reviewing the log, Requesters should determine if additional steps are needed before proceeding. Once the Requester reviews the log and determines no further action is needed on the requisitions, they can override the status to qualify for action if their user preference allows.</p> <p>Please be aware that a Requisition with an unchecked budget status or budget error should <b>not</b> be overridden or "forced to close". The budget issues should be addressed before proceeding.</p> <p>To override, select the requisitions and the  icon between the lists to override the status and qualify them for the action.</p> <p><b>Note:</b> <i>Some requisitions cannot be overridden and will require additional processing.</i></p>
16.	Select the <b>Yes</b> button to Proceed canceling the selected requisition line(s).
17.	Select the <b>Yes</b> button to continue. The system returns users to the Requester's Workbench page.

Below are step by step instructions on how to delete a req line.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>eProcurement</b> link.
4.	Click the <b>Manage Requisitions</b> link.
5.	<p>Enter or search for the requisition to delete the line(s). Requisitions can be searched for by entering the Requisition ID, Request State, Origin, specific dates, the Requester, etc.</p> <p><b>Note:</b> To view details about a requisition, click on the <b>Req ID</b> link to access the Requisition Details page for that requisition.</p>
6.	In the Requisitions section, choose “ <b>Edit</b> ” from the <b>Select Action</b> dropdown menu.
7.	<p>Click the <b>Go</b> button. The system navigates to the Requisition Details page.</p> <p><b>Note:</b> This page is accessible only for open requisitions. If one or more lines have been sourced to a purchase order, an error message will appear.</p>
8.	<p>Users may receive the following message:</p> <p>“This requisition is pending approval. Editing this requisition may reinitialize the approval process.”</p> <p>Select <b>OK</b> to continue or <b>Cancel</b> to cancel the action.</p>
9.	<p>Users can delete the line(s) by using one of the following options:</p> <ul style="list-style-type: none"> <li>Option 1: To delete a single line, click the trash can icon at the far right of the requisition line.</li> <li>Option 2: To delete multiple lines, select the checkbox next to all the lines to delete. Then click the <b>Delete Selected</b> link.</li> </ul> <p><b>Note:</b> users cannot delete all requisition lines. In this case, users will need to cancel the entire requisition. For more information, see <i>Canceling a Requisition procedure above</i>.</p>
10.	Click the <b>Yes</b> button to confirm.
11.	Once all edits have been made, click the <b>Save &amp; Submit</b> button. If the user is not ready to submit the requisition, click the <b>Save For Later</b> button.