



# Managing Requisitions



# Managing Requisitions

- ▶ Under eProcurement menu
- ▶ Review Requisition Information
- ▶ Edit a Requisition
- ▶ Delete a Requisition
- ▶ Cancel a Requisition
- ▶ Will be able to see requisitions for all requesters you have authority for

# Request States

- ▶ Open
- ▶ Pending
- ▶ Approved
- ▶ Denied
- ▶ Canceled
- ▶ PO(s) Created
- ▶ PO(s) Dispatched
- ▶ PO(s) Canceled
- ▶ Received
- ▶ Complete

# Requisition Budget Checking Statuses

- ▶ After being fully approved, Requisition must be budget checked
- ▶ Budget Checking Process occurs automatically at 10:00 am, 12:00 pm, 2:00 pm, 4:00 pm, and 6:00 pm each weekday
- ▶ Budget Checking Statuses:
  - ▶ Not Chk'd
  - ▶ Error
  - ▶ Valid

# Searching for Requisitions

Favorites ▾ Main Menu ▾ > eProcurement ▾ > Manage Requisitions

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## Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text" value="40000"/>	Requisition Name	<input type="text"/>
Requisition ID	<input type="text"/>	Request State	All but Complete ▾
Date From	<input type="text" value="03/02/2015"/>	Date To	<input type="text" value="03/09/2015"/>
Requester	<input type="text" value="ITSREQUESTER35"/>	Budget Status	<input type="text"/>
		Origin	<input type="text"/>
		Entered By	<input type="text"/>
		PO ID	<input type="text"/>

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# Reviewing Requisitions and Their Life Cycle

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## Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit <input type="text" value="40000"/>	Requestion Name <input type="text"/>	Request State <input type="text" value="All but Complete"/>	Budget Status <input type="text"/>
Requestion ID <input type="text"/>	Date From <input type="text" value="03/02/2015"/>	Date To <input type="text" value="03/09/2015"/>	Origin <input type="text"/>
Requester <input type="text" value="ITSREQUESTER35"/>	Entered By <input type="text"/>	PO ID <input type="text"/>	

Show Advanced Search

**Requisitions** ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000500089	0000500089	40000	03/09/2015	Pending	Not Chk'd	950.00 USD	[Select Action]	Go
▶ 0000500088	0000500088	40000	03/09/2015	Pending	Not Chk'd	363.87 USD	[Select Action]	Go
▶ 0000500053	35BUY04 Equipment	40000	03/07/2015	PO(s) Dispatched	Valid	6,114.84 USD	[Select Action]	Go
▶ 0000500021	35ACT11 Supplies	40000	03/06/2015	PO(s) Dispatched	Valid	510.00 USD	[Select Action]	Go

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[Review Change Request](#)
[Review Change Tracking](#)
[Manage Receipts](#)
[Requisition Report](#)

# Reviewing Requisitions and Their Life Cycle

0000500053 35BUY04 Equipment 40000 03/07/2015 PO(s) Dispatched Valid 6,114.84 USD [Select Action] Go

Requester Requester 35 Entered By Requester 35 Priority Medium  
Pre-Encumbrance Balance 0.00 USD

Request Lifespan:

Line Information Personalize | Find | First 1-2 of 2 Last

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	Server Cabinet With Fan and ...	PO Dispatched	5938.00000 USD	1.0000 EA	Graybar, Inc.		✘
2	Server Bracket, Type Server ...	PO Dispatched	176.84000 USD	1.0000 EA	Graybar, Inc.		✘

# Edit a Requisition

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## Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text" value="40000"/>	Requisition Name	<input type="text"/>	Budget Status	<input type="text"/>
Requisition ID	<input type="text"/>	Request State	<input type="text" value="All but Complete"/>	Origin	<input type="text"/>
Date From	<input type="text" value="03/02/2015"/>	Date To	<input type="text" value="03/09/2015"/>	PO ID	<input type="text"/>
Requester	<input type="text" value="ITSREQUESTER35"/>	Entered By	<input type="text"/>		

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**Requisitions** [?](#)

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000500089	0000500089	40000	03/09/2015	Pending	Not Chk'd	950.00 USD	<input type="text" value="Edit"/> <input type="button" value="Go"/>
▶ 0000500088	0000500088	40000	03/09/2015	Pending	Not Chk'd	363.87 USD	<input type="text" value="[Select Action]"/> <input type="button" value="Go"/>
▶ 0000500053	35BUY04 Equipment	40000	03/07/2015	PO(s) Dispatched	Valid	6,114.84 USD	<input type="text" value="[Select Action]"/> <input type="button" value="Go"/>
▶ 0000500021	35ACT11 Supplies	40000	03/06/2015	PO(s) Dispatched	Valid	510.00 USD	<input type="text" value="[Select Action]"/> <input type="button" value="Go"/>

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# Delete a Requisition Line

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## Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

### Requisition Summary

Business Unit	40000	Georgia Gwinnett College	Requisition Name	0000500089
Requester	ITSREQUESTER35	Requester 35	Requisition ID	0000500089
*Currency	USD		Priority	Medium

### Cart Summary: Total Amount 950.00 USD

Expand lines to review shipping and accounting details [Add More Items](#)

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
<input checked="" type="checkbox"/>	Rounded Memo Holder White		STG MARKETING	100.0000	Each	9.5000	950.00		E

Select All / Deselect All      Select lines to:      [Add to Favorites](#)      [Add to Template\(s\)](#)      [Delete Selected](#)      [Mass Change](#)

**Total Amount**      950.00 USD

# Cancel a Requisition

- ▶ May need to cancel because items were no longer needed
- ▶ May need to cancel because Requisition was denied, with instructions not to resubmit
- ▶ Verify status is not PO Created or PO Dispatched
- ▶ Select Cancel Requisition from Action drop down menu on Manage Requisitions page