



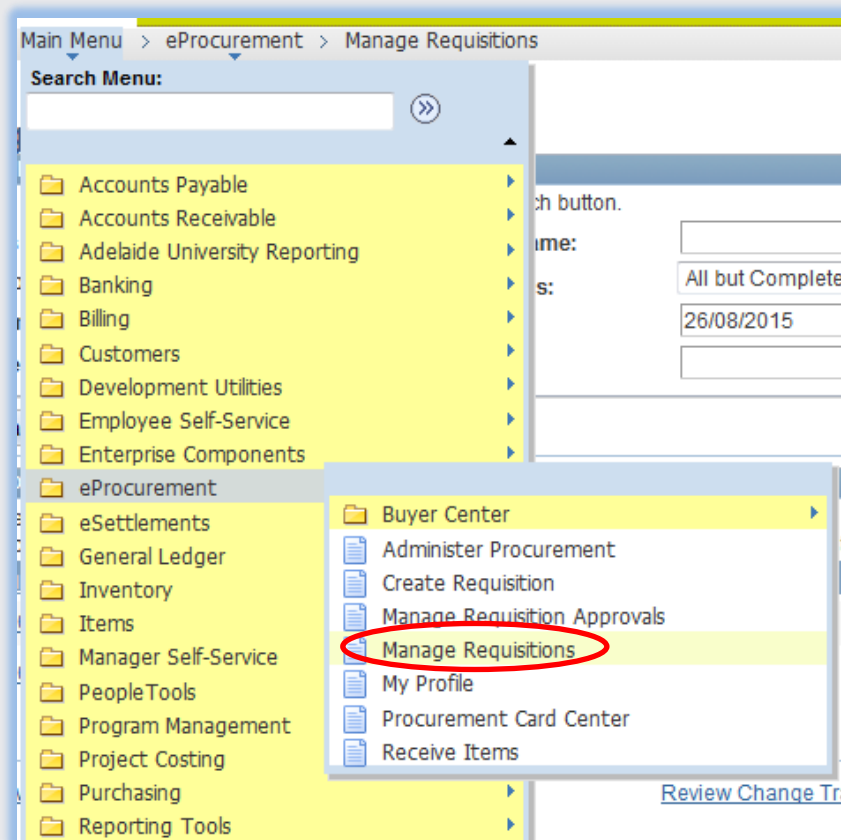
Finance and Procurement ePro – Edit or Cancel Requisitions

Introduction

This guide will assist you in using the Manage Requisition function in eProcurement and steps through the process to edit a requisition, to copy a requisition and cancel a requisition.

Overview of Procedure

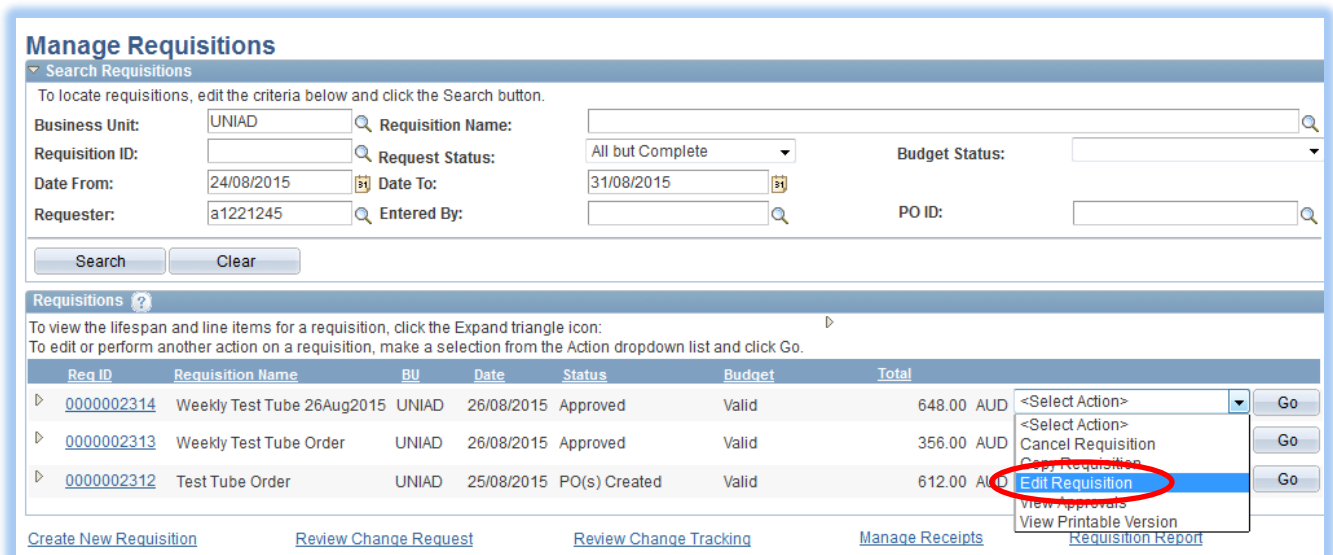
From the Main Menu, select eProcurement > Manage Requisitions.



Edit a Requisition

This option can be used to add additional information or amend information within a requisition and should only be used when the Requisition has a status of “Approved” or “Open” (this is prior to the purchase order being issued to the supplier, if status is at PO(s) Created please contact your buyer to ensure they are aware of the changed information).

Find the required requisition and under action field select Edit Requisition and click on Go.



Manage Requisitions

Search Requisitions

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

Business Unit: UNIAD Requisition Name: Requestion ID: Request Status: All but Complete Budget Status: Date From: 24/08/2015 Date To: 31/08/2015 Requirer: a1221245 Entered By: PO ID:

Search Clear

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	Status	Budget	Total	
0000002314	Weekly Test Tube 26Aug2015	UNIAD	26/08/2015	Approved	Valid	648.00 AUD	<Select Action> Go
0000002313	Weekly Test Tube Order	UNIAD	26/08/2015	Approved	Valid	356.00 AUD	<Select Action> Go
0000002312	Test Tube Order	UNIAD	25/08/2015	PO(s) Created	Valid	612.00 AUD	Cancel Requisition Edit Requisition Copy Requisition View Approvals View Printable Version Requisition Report Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

You now have all functions available that would have been available under “Create Requisition” ie. Documents can be attached, comments, project codes, add/delete item lines.

Copy a Requisition

Warning – when using this function if a catalogue pricing update has been applied since the original requisition was created the copied requisition will not have updated pricing applied. A good business practice would be to only copy requisitions with current dates.

Select the requisition number which you would like to copy by clicking on drop down arrow in the “Select Action” field and selecting “Copy Requisition” and then ”Go”.

Manage Requisitions

Search Requisitions

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

Business Unit: UNIAD Requisition Name: Request Status: All but Complete Budget Status: Date From: 19/08/2015 Date To: 26/08/2015 Requester: a1221245 Entered By: PO ID:

Search Clear

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	Status	Budget	Total		
000002313	Weekly Test Tube Order	UNIAD	26/08/2015	Approved	Valid	356.00 AUD	<Select Action>	Go
000002312	Test Tube Order	UNIAD	25/08/2015	PO(s) Created	Valid	612.00 AUD	<Select Action> Cancel Requisition Copy Requisition Edit Requisition View Approvals View Printable Version	Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts

The screen will now update and take you to the add item and services screen from here you can add additional catalogue items if required or select review and submit to show previous requisition items.

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UNIAD Adelaide University *Currency: AUD
Requester: a1221245 Doherty,Clare Priority: Medium
Requisition Name:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Test tubes, borosilicate glass	Adelab Scientific	3.0000	Box	104.00000	312.00
2	Test tubes, borosilicate glass	Adelab Scientific	1.0000	Box	44.00000	44.00

Select All / Deselect All Total Amount: 356.00 AUD

Add to Favorites Add to Template **Modify Line / Shipping / Accounting** Delete

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification More Comments

Save & submit Save and Submit Later Cancel requisition Find More Items

You are now able to amend quantities, delete lines, add additional special lines or Modify Line / Shipping/Accounting. Enter "Requisition Name" and your contact details in shipping information and when complete "Save & Submit".

Cancel a Requisition

This option can be used to add additional information or amend information within a requisition and should only be used when the Requisition has a status of "Approved" or "Open" - prior to Purchase Order being issued to Supplier. If status is PO(s) Created, please contact Buyer to action the cancellation.(In the example shown below, both requisitions 2314 & 2313 are available to delete if required but requisition 2313 has progressed to a purchase order and action would be to contact Buyer).

Select the requisition number which you would like to cancel by clicking on drop down arrow in the "Select Action" field and selecting "Cancel Requisition" and then "Go".

Req ID	Requisition Name	BU	Date	Status	Budget	Total		
000002314	Weekly Test Tube 26Aug2015	UNIAD	26/08/2015	Approved	Valid	648.00 AUD	<Select Action>	Go
000002313	Weekly Test Tube Order	UNIAD	26/08/2015	Approved	Valid	356.00 AUD	Cancel Requisition	Go
000002312	Test Tube Order	UNIAD	25/08/2015	PO(s) Created	Valid	612.00 AUD		Go

Last step is to select "Cancel Requisition" button.

Business Unit:	UNIAD	Date:	26/08/2015
Requisition Name:	Weekly Test Tube 26Aug2015	Status:	Approved
Requisition ID:	0000002314	Total:	648.00 AUD

Line Details						
Line	Item Description	Status	Price		Qty	Total
1	Test tubes, borosilicate glass, rimmed, 12 ...	Approved	104.00000	Box	2.0000	208.00
2	Test tubes, borosilicate glass, rimmed, 16 ...	Approved	44.00000	Box	10.0000	440.00

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Contact Us

For further support or questions, please contact the Finance and Procurement Support Team:

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