



9.2.38 eProcurement:

Cancel Entire Requisition or Individual Requisition Lines Using the

Use this guide to assist with canceling either an entire requisition or individual requisition lines that are no longer needed or intended for sourcing.

Step	Description																																
1.	<p>Analyze all active Requisitions/Requisition lines using the OEPO020_REQ_RECONCILIATION query to determine eligibility for either:</p> <ul style="list-style-type: none"> ○ Canceling an entire requisition (all lines and header), OR ○ Canceling individual requisition lines <p><i>** A requisition must be budget checked to a 'Valid' status to be eligible for ANY cancel action.</i></p>																																
2.	<p>Canceling an entire requisition OR individual requisition lines can be performed using either the:</p> <ul style="list-style-type: none"> ○ Home Page > Procurement Tile > Manage Requisition page <p><i>** reference "Using the Requester's Workbench to Analyze and Reconcile ePro Requisitions" quick reference guide for detailed instruction if the Requester's Workbench option is chosen.</i></p>																																
3.	<p>Search, Select and Cancel entire requisition using the Manage Requisition page</p> <ul style="list-style-type: none"> ○ Navigate to Procurement tile > Manage Requisitions ○ Search for the Requisition ID for you wish to take the cancel action on ○ Select 'Cancel Requisition' from the drop-down menu ○ Click 'Go' <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Manage Requisitions</p> <p><small>Search Requisitions</small></p> <p><small>To locate requisitions, edit the criteria below and click the Search button.</small></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Business Unit: 40300</td> <td style="width: 25%;">Requestion Name:</td> <td style="width: 25%;">Request Status:</td> <td style="width: 25%;">Budget Status:</td> </tr> <tr> <td>Requisition ID: 0000002032</td> <td></td> <td>Pending</td> <td></td> </tr> <tr> <td>Date From:</td> <td>Date To:</td> <td>10/15/2017</td> <td>PO ID:</td> </tr> <tr> <td>Requester:</td> <td>Entered By:</td> <td></td> <td></td> </tr> </table> <p style="text-align: center;"> <input type="button" value="Search"/> <input type="button" value="Clear"/> </p> <p><small>Requisitions</small></p> <p><small>To view the lifespan and line items for a requisition, click the Expand triangle icon:</small></p> <p><small>To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.</small></p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Req ID</th> <th>Requisition Name</th> <th>BU</th> <th>Date</th> <th>Status</th> <th>Budget</th> <th>Total</th> <th></th> </tr> </thead> <tbody> <tr> <td>0000002032</td> <td>211-CON-DesignedLearnin...</td> <td>40300</td> <td>07/28/2017</td> <td>Pending</td> <td>Valid</td> <td>24,840.00 USD</td> <td> <input type="button" value="Cancel Requisition"/> <input type="button" value="Go"/> </td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> ○ Click 'Cancel Requisition pushbutton on the Requisition Details page 	Business Unit: 40300	Requestion Name:	Request Status:	Budget Status:	Requisition ID: 0000002032		Pending		Date From:	Date To:	10/15/2017	PO ID:	Requester:	Entered By:			Req ID	Requisition Name	BU	Date	Status	Budget	Total		0000002032	211-CON-DesignedLearnin...	40300	07/28/2017	Pending	Valid	24,840.00 USD	<input type="button" value="Cancel Requisition"/> <input type="button" value="Go"/>
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If you wish to cancel all lines, simply cancel the entire requisition (refer to Step #3)</i></p> <ul style="list-style-type: none"> ○ Click 'OK' on the pop up message if you are sure you wish to cancel the requisition line <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Manage Requisitions</p> <p>Search Requisitions</p> <p>To locate requisitions, edit the criteria below and click the Search button.</p> <p>Business Unit: 40300 Requisition Name: <input type="text"/></p> <p>Requisition ID: 0000002169 Request Status: All but Complete Budget Status: <input type="text"/></p> <p>Date From: <input type="text"/> Date To: 10/15/2017</p> <p>Requester: <input type="text"/> Entered By: <input type="text"/> PO ID: <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> <hr/> <p>Requisitions</p> <p>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.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Req ID</th> <th>Requisition Name</th> <th>BU</th> <th>Date</th> <th>Status</th> <th>Budget</th> <th>Total</th> <th></th> </tr> </thead> <tbody> <tr> <td>0000002169</td> <td>211-OMP-Big Stock-Video...</td> <td>40300</td> <td>10/03/2017</td> <td>Approved</td> <td>Valid</td> <td>158.00 USD</td> <td><Select Action> <input type="button" value="Go"/></td> </tr> </tbody> </table> <p>Requester: Lenora Harris 404/657-7901 Entered By: Lenora Harris 404/657-7901 Priority: Medium</p> <p>Pre-Encumbrance Balance: 0.00 USD</p> <div style="text-align: center;"> </div> <p>Request Lifespan:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Status</th> <th>Price</th> <th>Quantity</th> <th>UOM</th> <th>Vendor</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Monthly Video Subscription f...</td> <td>Approved</td> <td>79.00000 USD</td> <td>1.0000</td> <td>EA</td> <td>BIGSTOCK PHOTO COM</td> <td></td> </tr> </tbody> </table> </div> <p>Message</p> <p>Are you sure you want to cancel 0000002169 requisition line 1 ? 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	<p><i>Note: The red 'X' also disappeared from line #2. This is because when line #1 was canceled, the requisition header budget status changed to 'Not Chk'd'. Therefore, this requisition won't be eligible for further cancel action until the requisition has been re-budget checked.</i></p>																																					