

Steps for Clearing Requisitions

July 2, 2020

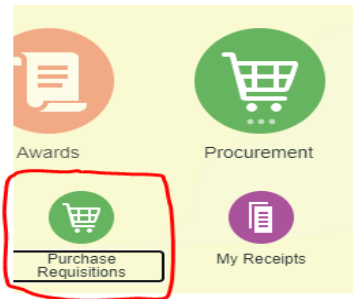
Any Requisitions in your workflow list which:

- a. you do not need
- b. have an Approval Amount > \$0, and
- c. are not in Approved Status (e.g., Returned, Rejected),

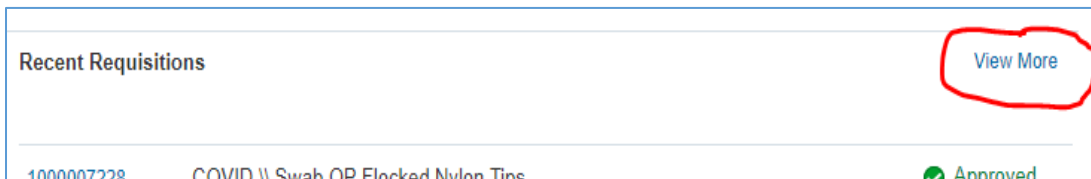
must be edited to delete all lines so that the Requisition can be canceled.

The steps to complete this task are:

1. Navigate to Quantum Financials > Procurement > Purchase Requisitions



2. When your Requisition workflow list appears, click View More to see all Requisitions in your list



3. When your entire list appears, sort the Status column to bring all non-approved Requisitions to the top of your list. Work each one to change their Status to Canceled with \$0 Approval Amount.

Manage Requisitions

Search

Requisitioning BU: [Dropdown]
Entered By: [Text]
Requisition: [Text]
Description: [Text]
Created: [Dropdown]
Status: All [Dropdown]

Requester: [Text]
Supplier: [Text]
Order: [Text]
Item: [Text]
Requisitions Requiring Attention: [Dropdown]

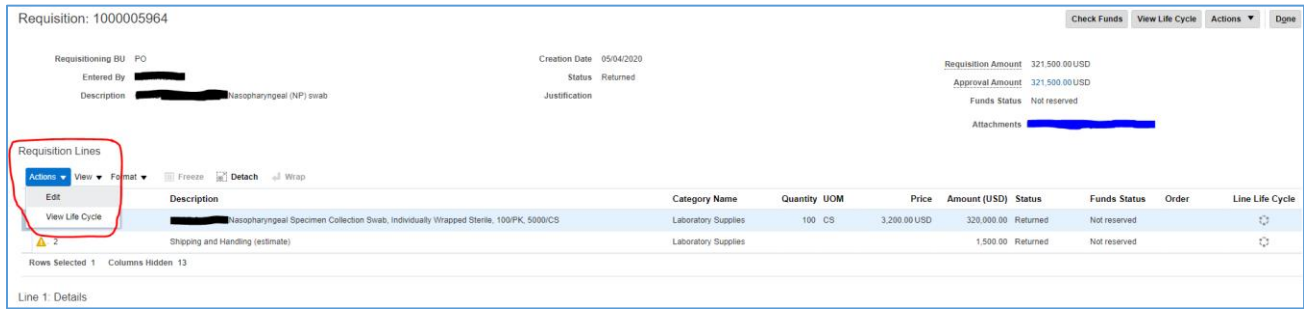
Search Results

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status
1000001946	Extend and increase sub-recipient agree...	11/14/2019	90,125.00 USD	Returned	Not reserved
1000002626	Change Order Line	12/10/2019	0.00 USD	Returned	Not reserved
1000004856	CHANGE ORDER - increase and extend	03/06/2020	37,894.00 USD	Returned	Not reserved
1000004902	CHANGE ORDER - increase and extend	03/06/2020	44,471.00 USD	Returned	Not reserved
1000004906	CHANGE ORDER - increase and exten	03/09/2020	93,889.00 USD	Returned	Not reserved
1000004908	CHANGE ORDER - extend and incre	03/09/2020	358,064.00 USD	Returned	Not reserved
1000000071	FastSelect Bacteria / 384 Reactions	10/02/2019	16,128.00 USD	Returned	Not reserved

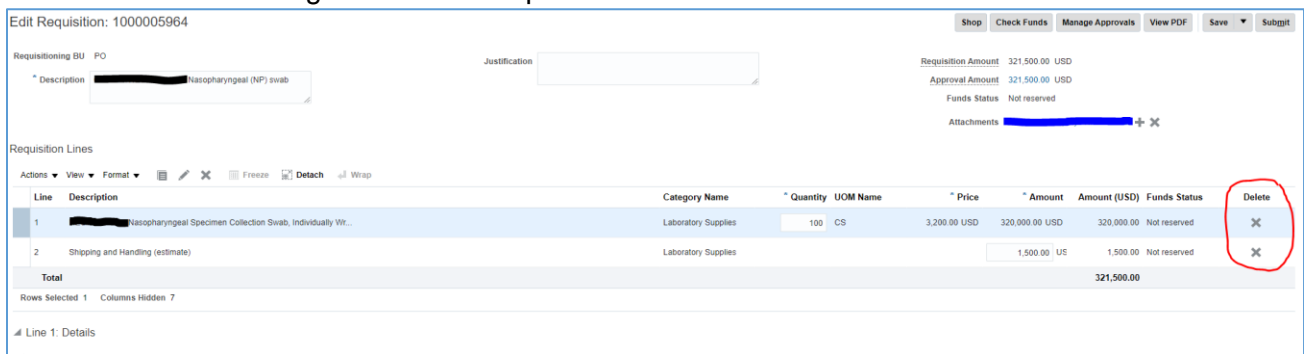
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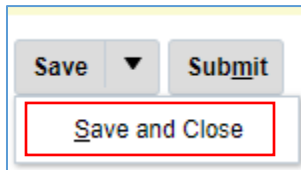
4. Click on each Requisition number to open the Requisition Lines. Click the Actions dropdown arrow (far left, middle of the screen) and select Edit.



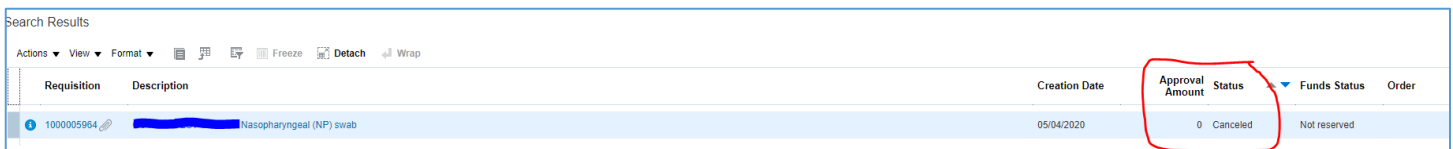
5. You will now be able to delete each line by clicking the Delete X to the far right. You can also make changes to the Description and/or Justification.



6. Click Save and Close.



The Requisition will now appear in your list as Canceled with \$0 Approval Amount.



Note:

You should only have Requisitions in your workflow list that you need (i.e., they have already been sourced to a Purchase Order or you are waiting for them to be sourced). If there are any Requisitions that you know you do not need (e.g., those that have been Returned or Rejected), you should regularly perform these steps to delete the commitments associated with the Requisitions so that your commitments are not overstated.