



Copy, Cancel, and Delete Requisitions

This guide outlines the process to Copy, Cancel, or Delete an existing requisition entered into the system. The Copy From function is an easy way to duplicate an order that is placed regularly. Canceling and Deleting a requisition can only be done if the requisition is still in Open status. Once the requisition is in Approved status, Canceling can only be done by Procurement.

Purchasing > Requisition > Add/Update Requisitions

Requisitions

[Find an Existing Value](#) [Add a New Value](#)

Business Unit:

Requisition ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

1. Select the appropriate Business Unit
2. Click the Add button

Maintain Requisitions

Requisition

Business Unit: STCMP
Requisition ID: NEXT
Requisition Name: [Copy From](#) Status: Open
Business Status: Not Chkd
 Hold From Further Processing



[Header](#)
*Requester:
*Requisition Date: 04/08/2014 Requester Info
Origin: ONL Online Entry
*Currency Code: USD Dollar
Accounting Date: 04/08/2014

[Requisition Defaults](#) [Add Comments](#)
[Requisition Activities](#)

[Amount Summary](#)
Total Amount: 0.00 USD

[Add Items From](#)
[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Personalize | Find | View All | | First | 1 of 1 | Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status		
1			0.0000			0	0.00	Open		

[View Printable Version](#)

*Go to [More...](#)

[Save](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)

3. Select the Copy From link



Maintain Requisitions

Copy Requisition

Header

Business Unit

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID [Supplier Lookup](#)

Supplier ID [Supplier Details](#)

Item SetID

Item Description

Department

Origin

Card Number

To

Supplier Name

Item ID

Direct Ship

4. Enter the Requisition ID in which you want to copy

Or

Enter the Requestor in the Requester field

5. Click the Search button

Requisition

Personalize | Find | View All | First | 1-3 of 13 | Last

Sel	Req ID	Requisition Name	Status	Origin	Requester
<input type="checkbox"/>	0000002452		Open	ONL	Requester
<input checked="" type="checkbox"/>	0000002411		Open	ONL	Requester
<input type="checkbox"/>	0000001986		Approved	ONL	Requester

6. Select the appropriate Requisition by checking the box

7. Click OK button

Message

The source requester (90000003952) is different from the target requester (), copy? (10150,186)

All copied defaults will remain unchanged. Do you want to copy?

8. Click Yes to the message



Maintain Requisitions

Requisition

Business Unit: STCMP Status: Open ✖
Requisition ID: 0000002512 Budget Status: Not Chkd
Requisition Name: 0000002512 Hold From Further Processing

Header

*Requester: 9000000999 Requester
*Requisition Date: 04/07/2014 Requester Info
Origin: ONL Online Entry
*Currency Code: USD Dollar
Accounting Date: 04/07/2014

Requisition Defaults Edit Comments Amount Summary
Requisition Activities Document Status Total Amount: 950.00 USD

Add Items From **Select Lines To Display**

Purchasing Kit Catalog Search for Lines
Item Search Requester Items Line: To: Retrieve

Line Personalize Find View All First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

View Printable Version Delete Requisition *Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh Add Update

9. All information from original requisition will populate, change information as needed



CANCEL A REQUISITION

Requisitions

Use the following search to look for an existing Requisition.

[Basic Search](#)

Search Criteria

Business Unit: = STCMP

Requisition ID: begins with

Requisition Name: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

- 10. Use the Find an Existing Value tab
- 11. Enter the search criteria
- 12. Click the Search Button

Search Results

View All First 1-3 of 3 Last

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
STCMP	0000002452	(blank)	Open	ONL	90000000999	Requester	Y
STCMP	0000002411	(blank)	Open	ONL	90000000999	Requester	Y
STCMP	0000001986	(blank)	Approved	ONL	90000000999	Requester	N

Find an Existing Value | Add a New Value

- 13. Select the requisition from the Search Results



Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002452
Requisition Name 0000002452

Status Open
Budget Status Not Chkd
 Hold From Further Processing

Header

*Requester 9000000999
*Requisition Date 01/23/2014
Origin ONL
*Currency Code USD
Accounting Date 02/05/2014

Requester
Requester Info
Online Entry
Dollar

Requisition Defaults
Requisition Activities
Document Status

Amount Summary
Total Amount 6,150.00 USD

Add Items From
Purchasing Kit
Item Search
Catalog
Requester Items

Select Lines To Display
Search for Lines
Line To Retrieve

Line	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	Guest Speaker	1.0000	LOT	94876	5,350.00000	5,350.00	Open
2	Travel expenses	1.0000	LOT	96217	800.00000	800.00	Open

View Printable Version
*Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh Add

- 14. Uncheck the Hold From Further Processing box
- 15. Click the Save button

Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002452
Requisition Name 0000002452

Status Open
Budget Status Not Chkd
 Hold From Further Processing

Header

*Requester 9000000999
*Requisition Date 01/23/2014
Origin ONL
*Currency Code USD
Accounting Date 02/05/2014

Requester
Requester Info
Online Entry
Dollar

Requisition Defaults
Requisition Activities
Document Status

Amount Summary
Total Amount 6,150.00 USD

Add Items From
Purchasing Kit
Item Search
Catalog
Requester Items

Select Lines To Display
Search for Lines
Line To Retrieve

- 16. Select the Red X

Message

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

Yes No

- 17. Click the Yes button to the message

NOTE: PeopleSoft will go back to the Find an Existing Value page. Requisition information for a cancelled requisition can be looked up under Purchasing > Requisitions > Review Requisition Information > Requisitions



DELETE A REQUISITION

Requisitions

Use the following search to look for an existing Requisition.

[Basic Search](#)

Business Unit: =

Requisition ID: begins with

Requisition Name: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

- 18. Use the Find an Existing Value tab
- 19. Enter the search criteria
- 20. Click the Search Button

Search Results

View All First 1-3 of 3 Last

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
STCMP	0000002452	(blank)	Open	ONL	90000000999	Requester	Y
STCMP	0000002411	(blank)	Open	ONL	90000000999	Requester	Y
STCMP	0000001986	(blank)	Approved	ONL	90000000999	Requester	N

[Find an Existing Value](#) | [Add a New Value](#)

- 21. Select the requisition from the Search Results



Maintain Requisitions

Requisition

Business Unit: STCMP
Requisition ID: 0000002512
Requisition Name: 0000002512

Status: Open
Budget Status: Not Ck'd
 Hold From Further Processing

Header

*Requester: 9000000999
*Requisition Date: 04/07/2014
Origin: ONL
*Currency Code: USD
Accounting Date: 04/07/2014

Amount Summary
Total Amount: 950.00 USD

Select Lines To Display
Search for Lines
Line: [] To: [] Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

View Printable Version
Delete Requisition
*Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Dis

22. Uncheck the Hold From Further Processing box

23. Click the Save button

24. Click the Delete Requisition button

Message

This action will delete the entire Requisition and do an automatic Save. Continue? (10100,117)

The action that you are taking will delete the entire Requisition. An automatic Save will be done and you will be returned to the Search page.

Yes No

25. Click the Yes button to the message

NOTE: PeopleSoft will go back to the Find an Existing Value page. There will be no record of the requisition existing.