

Copy & Cancel Requisitions

This guide outlines the process to Copy and Cancel an existing requisition entered into the system. The Copy From function is an easy way to duplicate an order that is placed regularly. Canceling 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 Status: Open

Requisition ID: NEXT Date Status: Not Chkd

Requisition Name: Copy From Hold From Further Processing

Header

*Requester: Requester Info

*Requisition Date: 04/08/2014 Origin: ONL Online Entry

*Currency Code: USD Accounting Date: 04/08/2014 Dollar

Requisition Defaults Add Comments Amount Summary

Total Amount: 0.00 USD

Add Items From

Purchasing Kit Catalog

Item Search Requester Items

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

View Printable Version *Go to:

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

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

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
 Requisition ID: 0000002512
 Requisition Name: 0000002512

Status: Open
 Budget Status: Not Chkd

Header

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

Requester Info: Online Entry, Dollar

Amount Summary: Total Amount 950.00 USD

Select Lines To Display: Search for Lines

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

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.

Find an Existing Value | Add a New Value

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

Search | Clear | Basic Search | Save Search Criteria

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 Checked
 Hold From Further Processing

Header

*Requester: 90000000999
 *Requisition Date: 01/23/2014
 Origin: ONL
 *Currency Code: USD
 Accounting Date: 02/05/2014

Requisition Defaults | Edit Comments
 Requisition Activities | Document Status

Amount Summary

Total Amount: 6,150.00 USD

Add Items From

Purchasing Kit | Catalog
 Item Search | Requisition Items

Select Lines To Display

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

Line

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 Status Open ✖

Requisition ID 0000002452 Budget Status Not Chk'd 🔍

Requisition Name 0000002452 Hold From Further Processing

▼ Header ?

*Requester 9000000999 🔍 Requester

*Requisition Date 01/23/2014 📅 Requester Info

Origin ONL 🔍 Online Entry

*Currency Code USD Dollar

Accounting Date 02/05/2014 📅

Requisition Defaults Edit Comments

Requisition Activities

Document Status

Amount Summary ?

Total Amount 6,150.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search 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.

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