Requisition Maintenance

Financial Systems Support
EAS Help Desk: (202) 994-5530, option 4
Purpose

Help users understand the requisition Status and learn how to “remove” (liquidate) or “edit and resubmit” requisitions with a status of incomplete, rejected or returned.
Requisition Status Definitions

- **In Process**
  - Approved by the Requestor and additional approval needed
    - Must reject requisition to allow edit

- **Approved**
  - Requisition fully approved
    - The Requestor can not change the requisition, if no PO exists Procurement can “Return” requisition to Requestor for changes, if a PO exists the Requestor must create a new requisition with the changes

- **Incomplete**
  - Created but not approved by the Requestor
    - Incomplete requisitions can be deleted in there entirety

- **Rejected**
  - Rejected by one of the approvers
  - Requestor can update and resubmit rejected requisitions
    - Requisition has approval history so it must be cancelled not be deleted

- **Returned**
  - Returned by Procurement to be edited or cancelled
Contents

- Identify Requisition Status

- Remove / Liquidate Requisitions
  - Delete “Incomplete” Requisitions
  - Cancel “Rejected” or “Returned” Requisitions

- Edit & Approve Incomplete, Rejected or Returned Requisitions
Identify Requisition Status
Identify Requisitions

- Log in to EAS
- Connect to Oracle
- Choose the “GW SC Departmental User” responsibility
- Go to Requisition Summary and Find your requisitions
  - Requisitions > Requisition Summary

Quick reference guides are located on EAS website under Training & Support, Documentation http://eas.gwu.edu/home/support/documentation/documentation.cfm
Requisition Summary

1. Path: Requisitions > Requisition Summary
2. Enter the Requisition Number if it is known, leave blank and move to step 3
3. Click: Find
4. The requisition entered is shown, if no requisition was entered all requisitions for user are listed, scroll Requisition summary to Locate the requisition.
Delete Incomplete Requisitions
Incomplete Requisitions - Delete

Incomplete requisitions are deleted from Oracle

1. Scroll to the desired incomplete requisition and press Open
Incomplete Requisitions – Delete (cont.)

2. Click Edit then choose Delete
3. Caution box opens to verify that you want to delete the record. Click **OK** to delete the record.

**IMPORTANT:** Proceed to Next step
4. A blank “Requisition Summary to Requisitions” form is displayed, Press the diskette icon or File > Save to FINALIZE the requisition deletion.

Optional: To verify requisition is deleted return to Requisition Summary form and press Find to re-query.

“Incomplete” Requisition Successfully Deleted.
Cancel Rejected or Returned Requisitions
Rejected / Returned Requisition - Cancellation

1. Scroll to the Rejected requisition, on the toolbar click Tools and select Control

Rejected or Returned requisitions have approval history therefore they can not be deleted from Oracle – they are Cancelled.
2. Control Document form opens, highlight Cancel Requisition, enter Reason for cancellation and press OK
3. Caution form opens asking if you want to proceed, Press OK to cancel this requisition.
4. Note form opens and confirms cancellation action, to verify requisition is cancelled return to Requisition Summary form and press Find to requery.
Edit & Approve an Incomplete, Rejected or Returned Requisition
Identify the Desired Requisition

1. Scroll to the desired requisition and press Open

Rejected, Returned and Incomplete requisitions can be edited & Approved

Last revised: 10/6/08 by FSS/KP
2. UPDATE THE “GL DATE” IF THE MONTH HAS CHANGED – the GL DATE IS LOCATED ON THE “DISTRIBUTIONS” FORM
Press “Distributions”
Update GL Date

3. Change GL Date to today using DD-MMM-YYYY format
Other Updates

4. You can edit the Type, Category, Description, Price or other fields.
Approve Requisition

5. Make your changes then press “Approve” the rejected or returned requisition has been edited and resubmitted for approval.

You are finished …
Complete! How to Liquidate or Remove Incomplete or Rejected Requisitions