

myFinance User Guide

Re-open a requisition

060-02-14

The following topic demonstrates the steps required to re-open a requisition that has been cancelled.

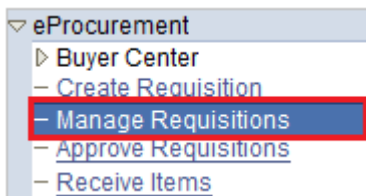
Learning Objectives

Upon completion of this lesson, learners will be able to:

- Re-open a cancelled requisition
- Edit the requisition Chartfields
- Edit the requisition item details
- Resubmit the requisition

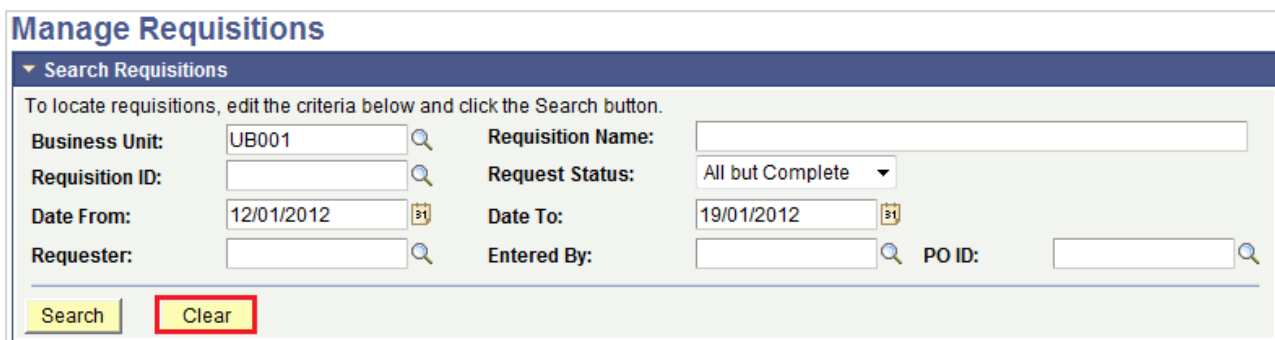
Procedure

1. In the **Menu**, click the **eProcurement** link.
2. Click the **Manage Requisitions** link.



Hint: By default, the system displays only requisitions created in the previous 7 days.

3. To search for the requisition, first click the **Clear** button.



A screenshot of the 'Manage Requisitions' search interface. The title 'Manage Requisitions' is at the top. Below it is a section titled 'Search Requisitions' with a dropdown arrow. The instructions read: 'To locate requisitions, edit the criteria below and click the Search button.' There are several search criteria fields: 'Business Unit' (with 'UB001' entered), 'Requisition ID', 'Date From' (with '12/01/2012' entered), 'Requester', 'Requisition Name', 'Request Status' (with a dropdown menu set to 'All but Complete'), 'Date To' (with '19/01/2012' entered), 'Entered By', and 'PO ID'. At the bottom of the search area, there are two buttons: 'Search' and 'Clear'. The 'Clear' button is highlighted with a red rectangular box.


4. Enter "**UB001**" into the **Business Unit** field.
5. Enter the requisition number into the **Requisition ID** field.



6. Click the **Search** button.



Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:

Requisition ID:  Request Status: All but Complete ▾

Date From:  Date To: 

Requester:  Entered By:  PO ID: 

Search

7. Click the **Select Action** drop-down list.

8. Select **Re-Open Requisition**.

9. Click the **Go** button.

Requisitions

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.

Req ID	Requisition Name	BU	Date	Status	Total	
▸ 0000026909	The Ansonia on Lydiard	UB001	18/11/2011	Cancelled	0.00AUD	<Select Action... ▾ Go <Select Action...> Copy Requisition Re-Open Requisition


10. Click the **Re-Open Requisition** button to open the requisition.

Business Unit: UB001 **Date:** 18/11/2011

Requisition Name: The Ansonia on Lydiard **Status:** Cancelled

Requisition ID: 0000026909 **Total:** 0.00

Line	Item Description	Status	Price		Qty	Total
1	Accommodation for October VET facilitator	Cancelled	352.27000	Each	1.0000	\$352.27

 If you would like to Resubmit this Requisition first click the "Reopen Requisition" button and then select the "Edit Requisition" from the Manage Requisitions page and click Go. Once you are at the Requisition Summary page click the "Save and Submit" button.

[Return to Manage Requisitions](#)

*Hint: The status of the requisition will revert to **Open**. This means the requisition can now be edited and resubmitted.*

11. Click the **Select Action** drop-down list.

12. Select **Edit Requisition**.

13. Click the **Go** button.

Requisitions

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.

Req ID	Requisition Name	BU	Date	Status	Total	
▾ 0000026909	The Ansonia on Lydiard	UB001	18/11/2011	Open	387.50AUD	<Select Action...> Go <Select Action...> Cancel Requisition Copy Requisition Edit Requisition

*Hint: There are two ways to **Edit a Requisition**: you can edit the Chartfield distribution (i.e. changing the Account, Dept or Project codes); or you can edit the item details i.e. changing the price or quantity of an item.*

Decision: What do you want to do?

- I want to edit the Chartfield distribution on the requisition
Continue to 'Option 1' step 14
- I want to edit the item details on the requisition (e.g. Quantity, Amount, etc.)
Go to 'Option 2' step 19 on page 4

Option 1

14. Click the **Expand Section** button for the line you would like to update the Chartfield distribution on.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
▾ 1	Accommodation for October/VET fa	QUEST ANSONIA BALLARAT	1.0000	Each	352.27000	352.27

Select All / Deselect All

Total Amount: 352.27 AUD
VAT Amount: 35.23 AUD
Requisition Amount: 387.50 AUD

15. Use the **Account, Dept** and **Project** fields to make the necessary changes.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
▾ 1	Accommodation for October/VET fa	QUEST ANSONIA BALLARAT	1.0000	Each	352.27000	352.27

Consolidate with other Reqs
 Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000
 Status: Active *Ship To: MTH_T_2.1 [Modify Shipping Address](#)
 Attention: Rachael Smart [Shipping VAT](#)

*Distribute by: Qty SpeedChart:

Accounting Lines Customize | Find | View All | First 1 of 1 | Last

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account	Dept	Project
1	Open		MTH_T_	1.0000	100.0000	352.27	UB001	5327	10230	

16. Click the **Save & preview approvals** button.
17. Click the **Submit** button.
18. The system will display a message advising that the approval process will re-start. Click the **OK** button.

End of procedure. Remaining steps apply to other paths.

Option 2

19. Click the **Description** link for the item you wish to update. This will take you back to the **Add Items** page for that line.

Requisition Lines						
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Accomodation for OctoberVET fa	QUEST ANSONIA BALLARAT	1.0000	Each	352.27000	352.27
<input type="checkbox"/> Select All / Deselect All <input type="button" value="Add to Favorites"/> <input type="button" value="Add to Template(s)"/> <input type="button" value="Modify Line / Shipping / Accounting"/> <input type="button" value="Delete"/>						Total Amount: 352.27 AUD VAT Amount: 35.23 AUD Requisition Amount: 387.50 AUD

20. Enter your changes into the **Item Description**, **Price**, **Quantity**, **Category** or **Vendor ID** fields.
21. Click the **OK** button.
22. Click the **Recalculate Gross** button.

Requisition Lines						
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Accomodation for OctoberVET fa	QUEST ANSONIA BALLARAT	1.0000	Each	352.27000	352.27
<input type="checkbox"/> Select All / Deselect All <input type="button" value="Add to Favorites"/> <input type="button" value="Add to Template(s)"/> <input type="button" value="Modify Line / Shipping / Accounting"/> <input type="button" value="Delete"/>						Total Amount: 352.27 AUD VAT Amount: 35.23 AUD Requisition Amount: 387.50 AUD

23. Click the **Save & preview approvals** button.
24. Click the **Submit** button.
25. Click the **OK** button.

End of procedure.