



PeopleSoft Implementation Project



Business Process Documentation eProcurement Requester

Requisition Entry, Manage Requisitions, Copy Requisitions, Cancel a Requisition, and New Year Instructions

PeopleSoft Version: 9.1 Financials/Supply Chain

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Revision Control

VERSION	DATE	NAME	COMMENTS
1.0	12/5/2016	Aaron Dise	UAT
1.1	2/7/2017	Denise McDonald	Updated Per Training Feedback
1.2	10/10/2017	Denise McDonald	Updated Per Training Feedback



Steps for the System

Log into SFS to Create Requisition

eProcurement Requisitions are created in SFS. Most people use SFS to enter and/or approve Expense reports. This is the same system. If you are not a current SFS user, go to the below link to access SFS.

<https://portal.sfs.wisconsin.edu>

If you have trouble logging in, please reach out to your Business Unit Admin or contact Security using the below link.

<https://www.wisconsin.edu/sfs/security/>

Create a Requisition

You can create a requisition using the below steps or you can use the copy function for faster entry. Using the copy function allows you to take an existing requisition, copy to a completely new requisition identified by a new requisition ID, and modify it as needed. The end result is the same however, the primary advantage with copying is the chart fields from the previous requisition will automatically be populated on the new requisition.

IF YOU WOULD LIKE TO CREATE A REQUISITION USING THE COPY FUNCTION, GO TO COPY REQUISITION SECTION OF THESE PROCEDURES, OTHERWISE PLEASE PROCEED WITH STEP 1.

1. Follow the below navigation to create a requisition. Enter a Requisition Name. Use a name that is descriptive and meaningful.

Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition	2. Add Items and Services	3. Review and Submit
------------------------------	----------------------------------	-----------------------------

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UW System Administration

Requester: DISE, AARON - CONSULTANT *Currency:

Requisition Name: Priority:

Line Defaults



2. Click  **2. Add Items and Services** to select items. Select Special Request.

Create Requisition

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#) [Search Results](#)

Select a Request Type

- [Special Item](#) Request an item that is not listed in the Catalog.
- [Fixed Cost Service](#) Request a one-time service for a flat fee.
- [Variable Cost Service](#) Request a service for which the fee is based on the time worked.
- [Time and Materials](#) Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

3. Click the [Special Item](#) link.



Create Requisition

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#)

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category:

Vendor ID: [Request New Vendor](#)

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

Additional Information

Request New Item

Request New Item

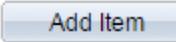
Send to Vendor Show at Receipt Show at Voucher

4. From the Special Requests page, enter the following Information. Please note, the fields marked with an "*" are required inputs.
 - a. * Item Description.
Please insert as much information as you can about the product/service you are requesting. For example the model #, terms, contract information, and any other pertinent information.
 - b. * Price



- c. * Quantity
- d. * Category – defaults to 0000. It can be updated or will be updated by Purchasing. Use the magnifying glass if not using the default.
- e. Currency – defaults to USD and cannot be updated.
- f. * Unit of Measure – defaults to EA can be updated or will be updated by Purchasing as needed. Use the magnifying glass if not using the default.
- g. Use the magnifying glass to enter in the Vendor ID or Vendor Name if you have it. Otherwise, this will be added by the Buyer. This is not a required input by the requester.

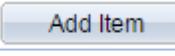
5. You can also enter comments in the box under “Additional Information.” Please use this space for any information you may typically write on paper requisitions today.

6. After entering in the information, click . The below shopping cart should display the order as requested.

Some browser versions may not allow this to display. You can still proceed. Just make sure you see your items on the Review and Submit page.



Requisition Summary		
Description	Qty	UOM
Special Item	3	EA
Total Lines:		1
Total Amount (USD):		300.00

To add additional items, click  again.

7. When you are done adding items, click [3. Review and Submit](#)

Click quote to add comments and attachments

8. Click  to add Attachments and Line Comments. You can upload multiple attachments. Select Add Attachment for each attachment. Click  once all documents and commentary have been attached. This will return you to the submit page. If you have issues uploading the attachment, make sure the name on the attachment is not too long.



Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Dell Dimension 4300	2.0000	EACH	750.00000 USD

Send to Vendor Show at Receipt Show at Voucher

Attached File	User/Date Time	View	Send to Vendor
1 TEST6_Attachment.xlsx	008568552016-12-09-14.15.51.843	<input type="button" value="View"/>	<input type="checkbox"/>
2 TEST2_Attachment.xlsx	008568552016-12-09-14.17.27.784	<input type="button" value="View"/>	<input type="checkbox"/>

Requisition Summary		
Description	Qty	UOM
Dell Dimension 4300 Series PC	2	EA
Total Lines:		1
Total Amount (USD):		1,500.00

9. Select  to add the appropriate Ship To, Location, and chartfield combo information.

Create Requisition

[1. Define Requisition](#) [2. Add Items and Services](#) [3. Review and Submit](#)

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UWADM UW System Administration *Currency: USD
Requester: 00856855 MCDONALD, DENISE Priority: Medium

Requisition Name: UWADM Test Requisition 1

Description	Vendor Name	Quantity	UOM	Price	Total
Dell Dimension 4300 Series PC	DELL COMPUTERS	2.0000	EACH	750.00000	1,500.00
				Total Amount:	1,500.00 USD

Select All / Deselect All

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

 [Find more items](#)

10. If this is your first time entering a requisition, go to step 11. If this is not your first time and you have already personalized your view, go to step 13. THIS STEP IS OPTIONAL.

11. Click the carrot to expand and display the below.



Business Unit: UWADM UW System Administration *Currency: USD
Requester: adise DISE, AARON - CONSULTANT Priority: Medium
Requisition Name:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Special Item	CDW-G	3.0000	EACH	100.00000	300.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 3.0000 Price: 100.00000
Status: Active *Ship To: DISE, AARON - CONSULTANT
Attention To: DISE, AARON - CONSULTANT
*Distribute By: Qty SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open			3.0000	100.0000	300.00	UWADM

Total Amount: 300.00 USD

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

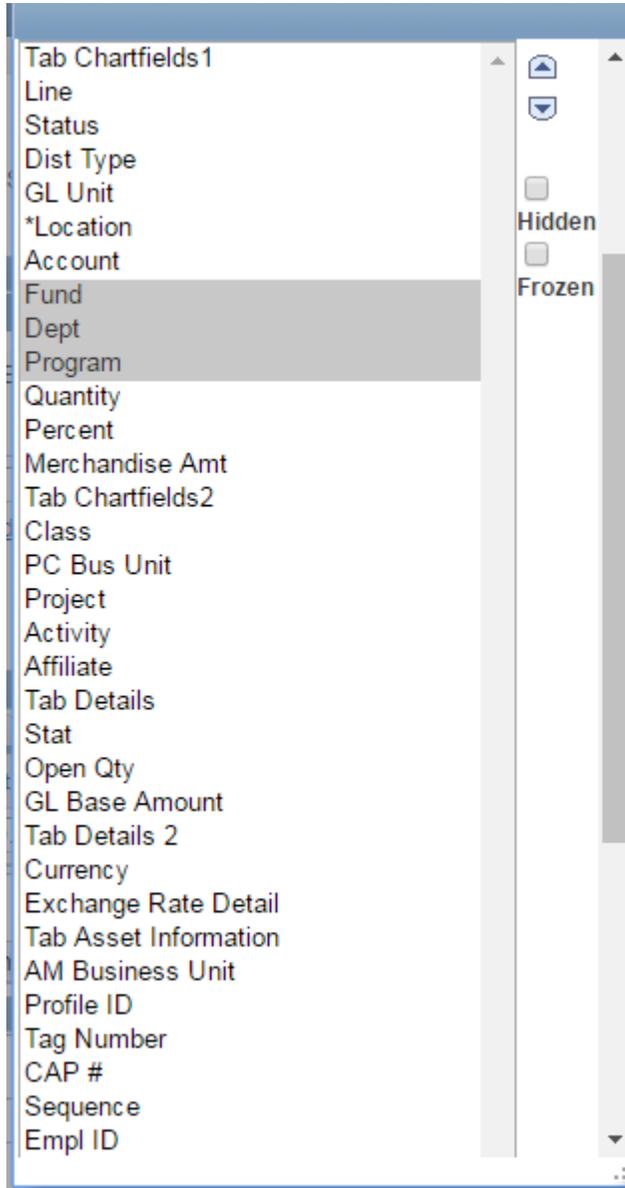
Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget



12. Select Personalize as highlighted above to add all chartfields on one page. Adjust the fields as shown below. Click OK.



13. Enter the following chartfields. The magnifying glass allows you to select from a list of available variables.

- Ship To
- Location
- Account
- Fund
- Dept
- Program



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UWADM UW System Administration *Currency: USD
 Requester: 00856855 MCDONALD, DENISE Priority: Medium
 Requisition Name: UWADM Test Requisition 1

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Dell Dimension 4300 Series PC	DELL COMPUTERS	2.0000	EACH	750.00000	1,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: [] Quantity: 2.0000 Price: 750.00000
 Status: Active *Ship To: [] Modify Onetime Address
 Attention To: MCDONALD, DENISE
 *Distribute By: Qty SpeedChart: []

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		[]	2.0000	100.0000	1,500.00	UWADM

Total Amount: 1,500.00 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget

Save & submit | Save & preview approvals | Cancel requisition | Find more items

14. Under the Accounting Lines Section, select the second tab “Chartfields2.” The below will display. Enter a valid chartfield combination. If you need assistance finding a valid chartfield combination go to the link in step 16. *If you enter in a Project number you have to enter in Business Unit in the PC Business Unit field. It will just be your SetID, i.e. UWADM or UWSYS.*

Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UWSYS UW Systemwide *Currency: USD
 Requester: 00856855 MCDONALD, DENISE Priority: Medium
 Requisition Name: sample 3

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	sample 3		2.0000	EACH	500.00000	1,000.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: [] Quantity: 2.0000 Price: 500.00000
 Status: Active *Ship To: BOR Modify Onetime Address
 Attention To: MCDONALD, DENISE
 *Distribute By: Qty SpeedChart: []

Accounting Lines

Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Acti
3702	136	400960	6				

Total Amount: 1,000.00 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget Budget Checking Status: Not Checked

Save & submit | Save & preview approvals | Cancel Changes | Find more items



15. Look over the requisition one more time. If you are OK with all the inputs, you are ready to submit.

16. Click . If you receive an error message on the chart field combinations, please find an accurate combination and re-submit. Go to the department manager or your Accounts Payable Group to find a valid chartfield combination. If you still have issues, go into WISDM (Main Menu/Other/Funding Validation/Inquiry) for chartfield assistance. <https://wisdm2.doit.wisc.edu/wisdm2/EditQuery/EditQuery.aspx>

17. Once the requisition is successfully submitted, the required approvals prior to Purchase Order creation will be displayed. You are done.

Each Approver will receive an automated email indicating they need to approve a requisition. Once all the Approvals are received, you will receive an email indicating the requisition has been fully approved.

Department Approval

Line 1: Pending
DRAWER DIMDERS

Department Approval

Pending

 [Employee_EXMRG74](#)
UW ePro Level 1 approver

Controller

Line 1: Awaiting Further Approvals
DRAWER DIMDERS

Controller

Not Routed

 [Employee_EXMRG60](#)
UW ePro Level 2 approver

Buyer

Line 1: Awaiting Further Approvals
DRAWER DIMDERS

Buyer

Not Routed

 [Auditor_EXAUD60](#)
UW ePro Level 3 approver

If you would like to view the progress of the requisition, go to the Manage Requisitions page. The instructions are listed on the next page.



Steps for the System

Manage Requisitions (View Status, Lifespan, and Perform Actions on the Requisitions)

The below navigation will allow you to view the status and the lifespan of the requisition. You can also perform actions on the requisition(s).

Main Menu > eProcurement > Manage Requisitions

View Status of Requisition

1. Enter in criteria to select the requisition(s) you want to review. You can search by:

Business Unit	Requisition Name
Requisition ID	Requests Status (i.e. Approved, Completed, etc.)
Date From	Date To
Requester (Employee ID)	PO ID

2. Once you click Search, the requisitions will appear. The Status column provides the status of the requisition.

Manage Requisitions

Search Requisitions

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

Business Unit: Requisition Name:

Requisition ID: Request Status:

Date From: Date To:

Requester: Entered By: PO ID:

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	
0000000017	0000000017	UWMIL	06/20/2016	PO Partially Created	2,075.00 USD	<Select Action> Go
0000000016	0000000016	UWMIL	06/20/2016	Pending	500.00 USD	<Select Action> Go
0000000015	0000000015	UWMIL	06/20/2016	Pending	500.00 USD	<Select Action> Go
0000000014	0000000014	UWMIL	06/20/2016	Pending	500.00 USD	<Select Action> Go
0000000013	0000000013	UWMIL	06/20/2016	Open	4,500.00 USD	<Select Action> Go
0000000012	0000000012	UWMIL	06/20/2016	Open	50,500.00 USD	<Select Action> Go
0000000011	0000000011	UWMIL	06/20/2016	Open	5,175.00 USD	<Select Action> Go
0000000010	0000000010	UWMIL	06/20/2016	Open	50.00 USD	<Select Action> Go
0000000009	0000000009	UWMIL	06/20/2016	Pending	4,500.00 USD	<Select Action> Go
0000000008	0000000008	UWMIL	06/20/2016	Pending	5,625.00 USD	<Select Action> Go
0000000007	0000000007	UWMIL	06/15/2016	Pending	4,500.00 USD	<Select Action> Go
0000000006	0000000006	UWMIL	06/15/2016	Pending	500.00 USD	<Select Action> Go
0000000005	0000000005	UWMIL	06/15/2016	Pending	1,000.00 USD	<Select Action> Go
0000000004	0000000004	UWMIL	06/15/2016	Approved	125.00 USD	<Select Action> Go
0000000003	0000000003	UWMIL	06/15/2016	Approved	125.00 USD	<Select Action> Go
0000000002	0000000002	UWMIL	06/15/2016	Approved	50.00 USD	<Select Action> Go
0000000001	0000000001	UWMIL	06/14/2016	Pending	500.00 USD	<Select Action> Go



Type of Status

- Pending – Waiting on Approvals
- Approved – Requisition has been approved, but purchase order has not been created
- Open – Saved, but not submitted
- PO Created – Purchase Order has been created
- PO Dispatched – Purchase Order has been dispatched

View Lifespan of the Requisition

3. Click  to view the Lifespan of the requisition. You can click on any highlighted icon to get more details on the stage. For example you can see the Approvals by clicking the Approval icon. You can click on Purchase Orders to get more details on the Purchase Order. Once the purchase order is paid, you can click on the Invoice or Payment icon to get payment and invoice details.



The screenshot shows the 'Requisitions' interface. At the top, there is a header with 'Requisitions' and a help icon. Below the header, there is a table with columns: Req ID, Requisition Name, BU, Date, Status, and Total. The first row shows a requisition with ID 0000000017, name 0000000017, BU UWMIL, Date 06/20/2016, Status PO Partially Created, and Total 2,075.00 USD. Below the table, there is a 'Requester' field with 'DISE, AARON - CONSULTANT' and an 'Entered By' field with 'DISE, AARON - CONSULTANT'. A 'Priority' field shows 'Medium'. Below this, there is a 'Request Lifespan' diagram with icons for Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. The 'Purchase Orders' icon is highlighted. Below the diagram, there is a table with columns: Line, Description, Status, Price, Quantity, UOM, and Vendor. The table has three rows of data.

Line	Description	Status	Price	Quantity	UOM	Vendor
1	Software Installation Serv...	PO Created	75.00000	1.0000	EA	UNIVERSITY BOOKSTORE
2	Adobe Acrobat	Approved	500.00000	3.0000	EA	ADOBE SYSTEMS INC
3	2-tier Software Installation...	PO Created	100.00000	5.0000	EA	CDW GOVERNMENT

Once the requisition moves through entire “Lifespan” the link(s) all icons will be available for review.

Perform Actions on a requisition

4. The following actions are available.
 - a. Copy Requisition
 - b. Edit Requisition
 - c. View Approvals
 - d. View Printable Version
 - e. Cancel Requisition



5. Select the Action and Click “Go” to trigger the action.

The screenshot shows a requisition system interface. At the top, there is a header with fields for Reg ID, Requisition Name, BU, Date, Status, and Total. Below this is a summary section with fields for Requester, Entered By, and Priority. A process flow diagram is visible, showing steps from Requisition to Payment. A dropdown menu is open, showing options: <Select Action>, Copy Requisition, Edit Requisition, View Approvals, and View Printable Version. A 'Go' button is located in the top right corner of the interface.

Copy Requisition

Allows you to take an existing requisition and copy it for the creation of a new requisition. **If a requisition is DENIED you cannot make updates to the requisition and re-submit it. You have to create another requisition. The copy function gives you an easy way to do this. You can copy the denied requisition, make the appropriate corrections/updates and re-submit.**

Edit Requisition

Allows you to edit an existing requisition. Once you edit it, the approval process starts all over.

View Approvals – Displays the approvers on the requisition

View Printable Version



System Steps

Copy Requisition (Used to create a NEW requisition and can be used to resubmit a DENIED requisition)

The copy function is an efficient way to create new requisitions when some or all of the required fields are the same as existing requisitions. This is also an efficient way to handle denied requisitions.

1. Follow the below navigation to get to the Manage Requisition Screen

Main Menu > eProcurement > Manage Requisitions

Manage Requisitions

Search Requisitions

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

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

! The Requester specified has no Complete Requisitions.

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

2. Search for the requisition to copy using one or more of the below criteria.

Business Unit	Requisition Name
Requisition ID	Requests Status (i.e. Approved, Completed, etc.)
Date From	Date To
Requester (Employee ID)	PO ID

3. Find the requisition to copy, select “Copy Requisition”, and hit “Go.”

Manage Requisitions

Search Requisitions

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

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

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	Budget	Total	
▶ 0000000071	0000000071	UWSYS	02/09/2017	Pending	Not Chk'd	100,000.00 USD	<input type="text" value="Copy Requisition"/> <input type="button" value="Go"/>
▶ 0000000070	0000000070	UWSYS	02/09/2017	Pending	Not Chk'd	2,500.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000069	Aaron's Stuff	UWSYS	02/09/2017	Pending	Not Chk'd	1,500.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000068	Johns Dept for xyz	UWSYS	02/09/2017	Pending	Not Chk'd	500.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000067	Training REQ 5	UWSYS	02/09/2017	Pending	Not Chk'd	600.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>



- The below screen will appear. You can go directly to the Review and Submit tab if no changes are needed. Otherwise, update the Requisition Name and/or the item information. To update the item information, click the link with the item.

UNIVERSITY OF WISCONSIN SYSTEM Shared Financial System
Favorites Main Menu > eProcurement > Manage Requisitions

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UWSYS UW Systemwide *Currency: USD
Requester: 00856855 MCDONALD, DENISE Priority: Medium
Requisition Name: [Yellow Highlighted]

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Nicole's stuff	CDW-G	2.0000	EACH	50,000.00000	100,000.00

Total Amount: 100,000.00 USD

Comments: [Empty text area]

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget Save & submit Save & preview approvals Cancel requisition Find more items

Click to update item information, if required.

- The item screen will appear. You can update anything on this page. Once you make all the updates, hit OK.

UNIVERSITY OF WISCONSIN SYSTEM Shared Financial System
Favorites Main Menu > eProcurement > Manage Requisitions

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: [Search box]

Catalog Favorites Templates Forms Web Special Request

Special Item

*Item Description: changed Nicole's stuff to new stuff
*Price: 50000.00000 *Currency: USD
*Quantity: 2.0000 *Unit of Measure: EA
*Category: 0000 *Due Date: [Empty]
Vendor ID: 0000002811 Suggest New Vendor
Vendor Name: CDW-G
Vendor Item ID: [Empty]
Mfg ID: [Empty]
Manufacturer: [Empty]
Mfg Item ID: [Empty]

Additional Information: [Empty text area]

Send to Vendor Show at Receipt Show at Voucher

Request New Item Request New Item

OK Cancel Add or Start New Type



6. Select the carrot to expand the requisition.

7. You can go directly to the Review and Submit tab if no changes are needed. Otherwise, modify any of the below highlighted fields, add attachments, or do anything that is needed.



Create Requisition

- 1. Define Requisition
- 2. Add Items and Services
- 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UWSYS UW Systemwide *Currency: USD
 Requester: 00856855 MCDONALD, DENISE Priority: Medium
 Requisition Name:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	changed Nicole's stuff to new	CDW-G	2.0000	EACH	50,000.00000	100,000.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 2.0000 Price: 50,000.00000
 Status: Active *Ship To: VANHISE [Modify Onetime Address](#)
 Attention To: MCDONALD, DENISE
 *Distribute By: Qty SpeedChart:

Account	Fund	Dept	Program	Class	PC Bus Unit	Project
3730	106	404000	1			

Total Amount: 100,000.00 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

[Find more items](#)

- Click Save & Submit.
- Once the requisition is successfully submitted, the required approvals prior to Purchase Order creation will be displayed. You are done.

Department Approval

Line 1: Pending
DRAWER DIMDERS

Department Approval

Pending
Employee_EXMRG74
UW ePro Level 1 approver

Controller

Line 1: Awaiting Further Approvals
DRAWER DIMDERS

Controller

Not Routed
Employee_EXMRG60
UW ePro Level 2 approver

Buyer

Line 1: Awaiting Further Approvals
DRAWER DIMDERS

Buyer

Not Routed
Auditor_EXAUD60
UW ePro Level 3 approver

- Submit
- Edit Requisition
- Apply Approval Changes
- Check Budget



Cancel a Requisition

You may need to cancel a requisition you created. If you need to cancel the requisition go to the below Navigation.

Main Menu > eProcurement > Manage Requisitions

You will get the below screen. Request Status should be blank. If it is not, use the drop down to select the blank space.

Enter in as many filters as you desire. The more fields populated the quicker your search.

My recommendation is to have at least the Business Unit populated before you search. It would also be ideal to have the Requisition ID number you want to cancel.

The screenshot shows the 'Manage Requisitions' search interface. The search criteria include Business Unit, Requisition ID, Date From, Date To, Requester, Request Name, Request Status, Budget Status, and PO ID. A 'Search' button is highlighted in green. A red box at the top right contains the text: 'Enter Business Unit and enter Requisition ID you want to cancel. You can use the magnifying glass to find the Business Unit and Requisition ID.' A red box at the bottom center contains the text: 'AFTER DESIRED SEARCH CRITERIA ENTERED, CLICK Search'. A red box at the bottom left contains the text: 'You can also enter in your Employee ID'. A red box at the bottom right contains the text: 'Select Date Range using calendar'. A red box at the top left contains the text: 'Enter Business Unit and enter Requisition ID you want to cancel. You can use the magnifying glass to find the Business Unit and Requisition ID.' A red box at the bottom center contains the text: 'AFTER DESIRED SEARCH CRITERIA ENTERED, CLICK Search'. A red box at the bottom left contains the text: 'You can also enter in your Employee ID'. A red box at the bottom right contains the text: 'Select Date Range using calendar'. A red box at the top left contains the text: 'Enter Business Unit and enter Requisition ID you want to cancel. You can use the magnifying glass to find the Business Unit and Requisition ID.'



Sample Search. Used Business Unit, Dates, and requestor (Employee ID).

UNIVERSITY OF WISCONSIN SYSTEM Shared Financial System Expenses user - EXMRG74
Favorites | Main Menu > eProcurement > Manage Requisitions

Manage Requisitions

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

Business Unit: UWSYS Requisition Name:
Requisition ID: Request Status: Budget Status:
Date From: 10/03/2017 Date To: 10/10/2017
Requester: EXMRG74 Entered By: PO ID:

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	Budget	Total		
0000000075	test template	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000074	test	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000073	consultants	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000072	TEST IT CONSULTING SERV...	UWSYS	10/06/2017	Pending	Not Chk'd	2,500,000.00 USD	<Select Action>	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Find the requisition you want to cancel. Go to the menu to the right and use the drop down to find “Cancel.”

UNIVERSITY OF WISCONSIN SYSTEM Shared Financial System Expenses user - EXMRG74
Favorites | Main Menu > eProcurement > Manage Requisitions

Manage Requisitions

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

Business Unit: UWSYS Requisition Name:
Requisition ID: Request Status: Budget Status:
Date From: 10/03/2017 Date To: 10/10/2017
Requester: EXMRG74 Entered By: PO ID:

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	Budget	Total		
0000000075	test template	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	Cancel Requisition	Go
0000000074	test	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000073	consultants	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000072	TEST IT CONSULTING SERV...	UWSYS	10/06/2017	Pending	Not Chk'd	2,500,000.00 USD	<Select Action>	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Once it is selected, click Go.



Requisition Details for: Employee, EXMRG74

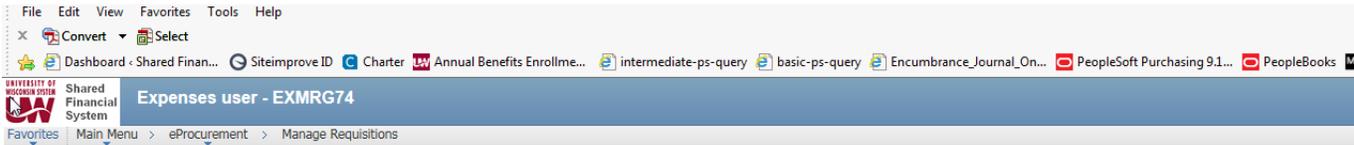
Business Unit: UWSYS Date: 10/09/2017
 Requisition Name: test template Status: Pending
 Requisition ID: 0000000075 Total: 20,000.00 USD

Line Details						
Line	Item Description	Status	Price		Qty	Total
1	consulting services	Pending Approval	10,000.00000	EACH	2.0000	20000.00

[Return to Manage Requisitions](#)

Cancel Requisition

You will be brought to this screen. Click Cancel Requisition



Manage Requisitions

Search Requisitions

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

Business Unit: UWSYS Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: 10/03/2017 Date To: 10/10/2017

Requester: EXMRG74 Entered By: PO ID:

Search Clear

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	Budget	Total		
0000000075	test template	UWSYS	10/09/2017	Canceled	Valid	0.00 USD	<Select Action>	Go
0000000074	test	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000073	consultants	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<Select Action>	Go
0000000072	TEST IT CONSULTING SERV...	UWSYS	10/06/2017	Approved	Valid	2,500,000.00 USD	<Select Action>	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

You will be brought back to the Manage Requisition Page. The requisition now has a status of Canceled. You are done.



New Year Requisitions Instructions (May 1 – June 30)

May 1st through June 30th, requisitions for the New Fiscal can be entered into the System. These requisitions must be flagged as NEW YEAR requisitions. The below steps give instructions on identifying the requisitions as a NEW YEAR. The screen shots assume FY18 is the NEW YEAR.

1. Follow the path below to create a requisition.
Main Menu > eProcurement > Create Requisition

2. Add FY18 to the beginning of the Requisition Name Field.

Shared Financial System

Favorites | Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UWSYS UW Systemwide

Requester: 00856855 *Currency: USD

Requisition Name: **FY18 - Computer Purchase** Priority: Medium

Line Defaults

Continue

Add FY18 to beginning of Requisition Name. Click Add Items and Services tab

3. Add item(s) as normal.
4. After clicking Add Item, click the Review and Submit tab.

Shared Financial System SFQA

Home | Worklist

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog | Favorites | Templates | Forms | Web | Special Request

Special Item

*Item Description: computer screen

*Price: 100.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 0000 Due Date: []

Vendor ID: 0000002156 Suggest New Vendor

Vendor Name: DELL COMPUTER

Vendor Item ID: []

Mfg ID: []

Manufacturer: []

Mfg Item ID: []

Additional Information

Request New Item

Request New Item

Send to Vendor Show at Receipt Show at Voucher

5. Click the carrot to Expand



Shared Financial System SFQA

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Business Unit: UWSYS UW Systemwide Requester: 00858855 MCDONALD, DENISE Requisition Name: FY18 - Computer Purchase

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	computer screen	DELL COMPUTERS	1.0000	EACH	100.00000	100.00

Comments: Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Buttons: Check Budget, Pre-Check Budget, Save & submit, Save & preview approvals, Cancel requisition

6. Update as Normal, but Insert “FY18” in comments section. If you have other comments, just insert after FY18.

Shared Financial System SFQA

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Business Unit: UWSYS UW Systemwide Requester: 00858855 MCDONALD, DENISE Requisition Name: FY18 - Computer Purchase

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	computer screen	DELL COMPUTERS	1.0000	EACH	100.00000	100.00

Comments: **FY18 - Computer purchase per contract** Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Buttons: Check Budget, Pre-Check Budget, Save & submit, Save & preview approvals, Cancel requisition

7. Save and Submit as normal. Approvers and Buyers will now know the requisition is for a New Year PO.