

# **CAL POLY HUMBOLDT**

**Contracts, Procurement & Accounts Payable**

## **CFS REQUISITION PROCESS GUIDE**

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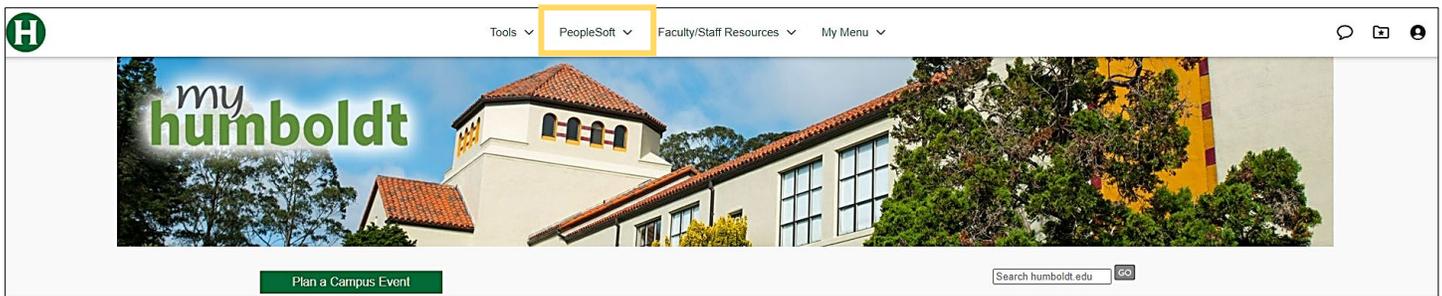
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## Step 1: Creating a Requisition

When creating a requisition with multiple lines using the same Chartfield information, it is best to enter Requisitions using the requisition defaults. Setting the defaults before entering each line will save time and reduce errors.

1. Log in to CFS from My Humboldt with your username and password

<https://pmc.humboldt.edu/user/login>



2. From the PeopleSoft tab, click on the Finance (CFS) Link

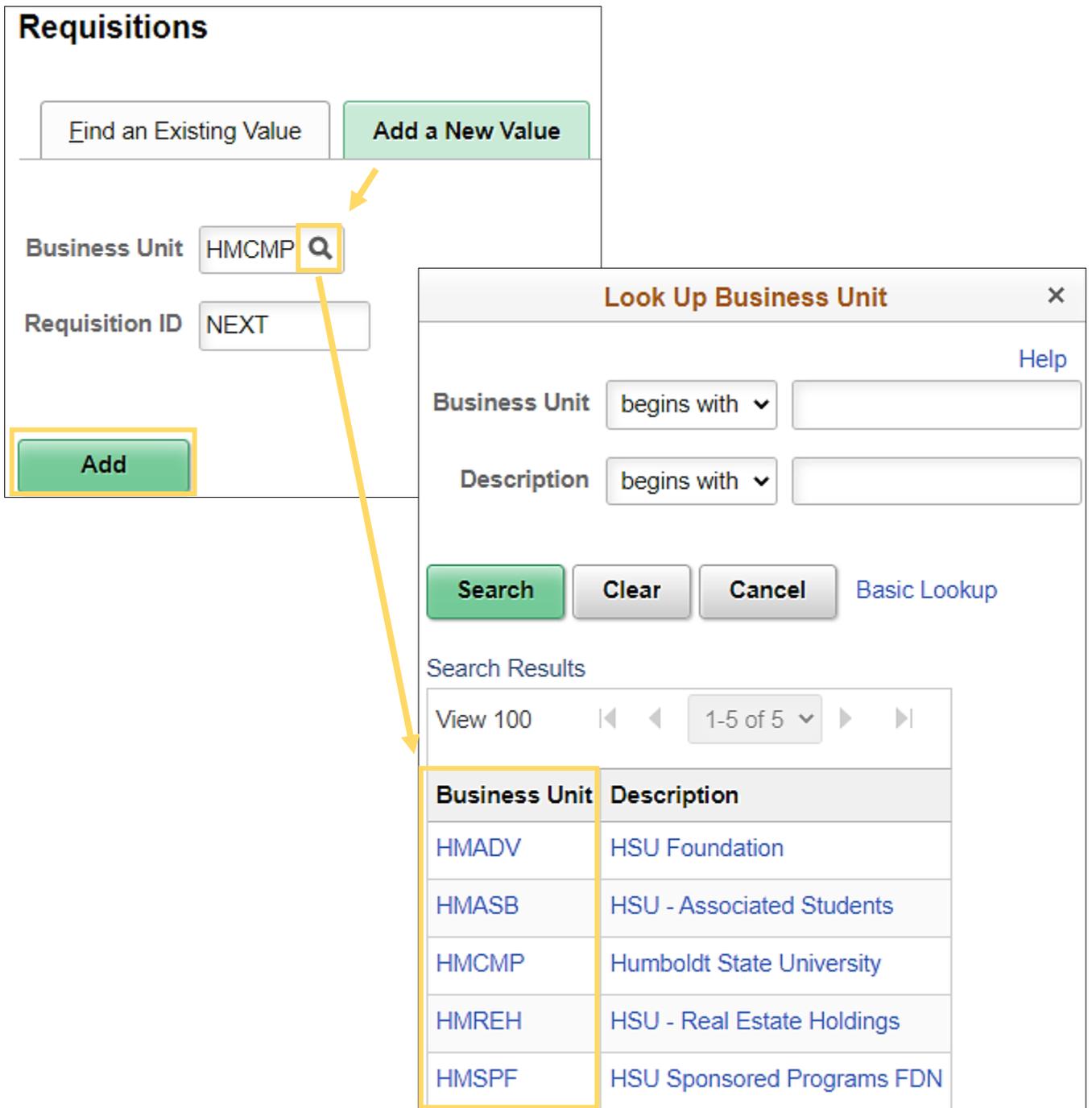


3. The Oracle menu page will display. Click on the compass NavBar icon at the top right of the homepage.



4. Follow the following path. Navigator>Purchasing>Requisitions>Add/Update Requisitions

5. The Add a New Value screen will display. The business unit will default to HMCMP, and the Requisition ID will default to NEXT. Click the Add button
- If you are using a different Business Unit, click on the  to see the other options



**Requisitions**

Business Unit  

Requisition ID

**Look Up Business Unit** ×

[Help](#)

Business Unit

Description

[Basic Lookup](#)

Search Results

View 100   1-5 of 5

Business Unit	Description
HMADV	HSU Foundation
HMASB	HSU - Associated Students
HMCMP	Humboldt State University
HMREH	HSU - Real Estate Holdings
HMSPF	HSU Sponsored Programs FDN

The Requisition Header information will be automatically populated.

Maintain Requisitions

### Requisition

Business Unit HMCMP      Status Open

Requisition ID NEXT      Budget Status Not Chk'd

Requisition Name  Copy From       Hold From Further Processing

▼ Header ?

\*Requester   Lewis,Edna

\*Requisition Date   [Requester Info](#)

Origin   Online Entry

\*Currency Code  Dollar

Accounting Date

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

[Requisition Activities](#)

**Amount Summary ?**

Total Amount	0.00	USD
--------------	------	-----

**Add Items From ?**

[Purchasing Kit](#)      [Catalog](#)

[Item Search](#)      [Requester Items](#)

**Line ?**

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	▶
---------	------------------	--------	----------------------	------------------	------------	----------	-------------------	---

Line	Item	Description	Quantity	*UOM	Category	Price
1	<input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value="0.0000"/>	<input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value=""/> <input type="button" value="Q"/>	<input type="text" value="0"/>

View the table below to see definitions for each field and whether the entry is required or optional.

Field	What do I need to enter?
Business Unit	The default Business Unit is HMCMP
Requisition ID	The Requisition ID number is automatically assigned when the requisition is saved.
Requisition Name	Entry is recommended but not required. You may enter a name for your requisition to help you identify it later. If you do not enter a Requisition Name, the system will set the Requisition ID as the Requisition Name once you save the requisition.
Status	No entry is required. The status defaults to Open.
Budget Status	No entry is required. The status defaults to Not Chk'd
Requester	No entry is required. Defaults to the CFS ID/Name of the person creating the requisition. If it does not, click on the search icon to select your Requester from the list.
Requisition Date	No entry is required. Defaults to the date the requisition was created and saved.
Origin	No entry is required. Origin defaults to ONL
Currency Code	No entry is required. The currency Code defaults to USD (US Dollar).
Accounting Date	No entry is required. Accounting Date defaults to the date the requisition was created and saved.

6. Click Requisition Defaults to view or modify the settings

**Header** ?

\*Requester  Lewis,Edna

\*Requisition Date  [Requester Info](#)

Origin  Online Entry

\*Currency Code  Dollar

Accounting Date

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



View the list below to learn more about each field and what to fill out.

Field	Description
Default Options	<p>Default: Select this option to use the values that default from the system. You may still fill in any blank field.</p> <p>Override: Select this option to use the values you specify on this page to override the system-defined defaults. You may change any value that defaults on this page by using this option.</p>
Supplier	<p>The supplier that you want to use for this purchase requisition. If the supplier exists, use the magnifying glass icon to locate and select the supplier from the list.</p> <p>If the desired supplier is not on the list, leave this field blank and note the supplier's name, address, and other related information in the comments section.</p>
Unit of Measure	<p>Enter the unit of measure: either EA (each) for item orders or SVC for services and blanket orders.</p>
Ship To	<p>The Ship To address where the requisition items are to be sent defaults from the Requester. To change the delivery address, use the magnifying glass icon to locate and select the appropriate value. If the value you want does not appear, you may use the Header Comments to indicate the delivery address.</p>
Distribute By	<p>Distribute By will default to Quantity. Leave as is if the requisition is for a commodity. Change it to Amount if the requisition is for a service.</p>
Distributions	<p>Default Distribution Chartfield values are defined for each Requester and are displayed here. They may be changed as necessary to reflect where the charges for the requisition should be billed.</p> <p>Required fields include Account, Fund, and Dept. Optional fields include Program, Class, and Project.</p>

**Note: You are unable to add additional chartfields on a single distribution line.**

8. Click OK when you have made all of the modifications you wish to appear on all lines of your requisition.

**Distribution**

SpeedChart

**Distributions**

**Details**  Asset Information

Dist	Percent	GL Unit	Account
1	<input type="text"/>	HMCMF <input type="text"/>	680003 <input type="text"/>

**OK**

## Step 2: Requisition Line Details

1. The line section of the screen will default to the details tab. Complete each requisition line (including line Description, Quantity, UOM, Category, and Price)

As long as the requisition status remains open, you can make changes to any field you have entered

**Line**

**Details**  Ship To/Due Date  Status  Supplier Information  Item Information  Attributes  Contract  Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	Precision 3460 Small <input type="text"/>	0.0000 <input type="text"/>	EA <input type="text"/>	20800 <input type="text"/>	1437.64 <input type="text"/>	0.00	Open

2. You can add additional lines to the requisition using the same default chartfield information.

3. To add a line to the requisition, click the add a row icon at the end of the first line item

**Line**

**Details**  Ship To/Due Date  Status  Supplier Information  Item Information  Attributes  Contract  Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	Precision 3460 Small <input type="text"/>	0.0000 <input type="text"/>	EA <input type="text"/>	20800 <input type="text"/>	1,437.6400 <input type="text"/>	0.00	Open

4. When prompted, enter the number of rows you wish to add, then click the OK button

cfs.calstate.edu says

Enter number of rows to add:

**Line**

**Details**  Ship To/Due Date  Status  Supplier Information  Item Information  Attributes  Contract  Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	Precision 3460 Small <input type="text"/>	1 <input type="text"/>	EA <input type="text"/>	20800 <input type="text"/>	1,437.6400 <input type="text"/>	0.00	Open
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	Open

All blank rows must be populated. It's recommended that you add just one row at a time, fill out the line item information, click Save, and add another.

If you are interrupted while filling out the requisition, you will only lose the one-line item row you worked on if you are timed out for inactivity.

<b>Field</b>	<b>Description</b>
Description	Enter the <b>description</b> of the product or service. If you need to add more information than this field will accommodate, use the Line Comments  icon.
Quantity	Enter the <b>quantity</b> of the product. If it is a service, enter "1."
UOM	Enter the Unit of Measure. Select <b>EA</b> for all commodities or Select <b>SVC</b> for all services.
Category	Enter <b>57800</b> for miscellaneous commodities or <b>96200</b> for miscellaneous services
Price	Enter <b>Price</b>

### Step 3: Modify the chartfield for the Line Item

For each line item, you will need to view the **Distribution** screen to verify or modify the chartfields that will be charged for the line item.

1. Click on the **Schedule** icon at the far right of the Requisition Line.

**Requisition**

Business Unit: HMCMP      Status: Open   
 Requisition ID: NEXT      Budget Status: Not Chk'd   
 Requisition Name:  Copy From  Hold From Further Processing

**Header**

\*Requester: 30952963356 Lewis,Edna  
 \*Requisition Date: 10/18/2022 Requirer Info  
 Origin: ONL Online Entry  
 \*Currency Code: USD Dollar  
 Accounting Date: 10/18/2022

**Amount Summary**

Total Amount: 0.00 USD

**Add Items From**

Purchasing Kit Item Search      Catalog Requirer Items

**Line**

1-1 of 1

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Soucging Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text"/>	Precision 3450 Small	1.0000	EA	20800	1,437.6400	0.00	Open			

2. Click on the **Distribution** icon next to the left of the Status column

**Schedule**

Business Unit: HMCMP      Requisition Date: 10/18/2022  
 Requisition ID: NEXT      Status: Open  
[Return to Main Page](#)

**Line**

1 Item      Precision 3460 Small FormFacto      Quantity: 1.0000 Each      Merchandise Amt

**Schedule**

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	SR	1.0000	1,437.64000	1,437.64		Lewis,Edna	Active

3. Verify that the chartfields on this screen are correct for this purchase and modify the fields as needed.

Only the fields shown in the screenshot below are used.

**Distribution**

Requisition ID NEXT      Item Precision 3460 Small FormFacto

Line 1      Status Active

Schedule 1

Ship To SR      SR      Quantity 1.0000 EA

\*Distribute By       Open Quantity 1.0000

\*Liquidate By       Merchandise Amt 1,437.64 USD

SpeedChart  [Multi-SpeedCharts](#)

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**Distributions**

**Chartfields**   Details   Asset Information   Budget Information   **||>**

Distrib	Status	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	<input type="text" value="1.0000"/>	1,437.64	HMCMP <input type="button" value="Search"/>	<input type="text" value="660003"/> <input type="button" value="Search"/>	<input type="text" value="HM500"/> <input type="button" value="Search"/>	<input type="text" value="D30003"/> <input type="button" value="Search"/>	<input type="text"/> <input type="button" value="Search"/>	<input type="text"/> <input type="button" value="Search"/>	<input type="text"/> <input type="button" value="Search"/>

**CFS Requirement:**

- Must be a valid Account, Fund, Dept, Program, Class, or Project code
- Fund/Dept combination (not all fund codes are available for each department)
- Account/Fund combination (some fund codes restrict which account codes can be used with them)

4. Once you have verified that the information on the Distribution screen is correct, click **OK**

**Schedule**

Business Unit HMCMP      Requisition Date 10/18/2022

Requisition ID NEXT      Status Open

[Return to Main Page](#)

---

**Line**  |  |  | 1 of 1 |

1 Item Precision 3450 Small Form Facto      Quantity 1.0000 Each      Merchandise Amt 1,437.64 USD

**Schedule**   |  |  | 1-1 of 1 |

**Details** **||>**

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	<input type="text" value="SR"/> <input type="button" value="Search"/>	<input type="text" value="1.0000"/>	<input type="text" value="1,437.64000"/>	1,437.64	<input type="text"/>	Lewis,Edna	Active

## Step 4: Add Comments to a Requisition

The Add Comments section provides additional information to the Buyer or the Supplier. This is also where you will enter the vendor information if you are unable to find their Supplier ID.

1. Click the Add Comments link on the Requisition screen to add a comment. This comment will apply to the entire requisition.

The screenshot shows the 'Maintain Requisitions' interface. The 'Requisition' header section includes the following fields and controls:

- Business Unit:** HMCMP
- Requisition ID:** NEXT
- Requisition Name:** [Empty text box] [Copy From](#)
- Status:** Open
- Budget Status:** Not Chk'd
- Hold From Further Processing**
- Header** (expanded):
  - \*Requester:** 30952963356  Lewis, Edna
  - \*Requisition Date:** 10/18/2022  [Requester Info](#)
  - Origin:** ONL  Online Entry
  - \*Currency Code:** USD  Dollar
  - Accounting Date:** 10/18/2022
- Amount Summary** (expanded):
  - Total Amount:** 1,437.64 USD
- [Requisition Defaults](#)
- [Requisition Activities](#)
- Add Comments** (highlighted with a yellow box)

2. Enter the information that you would like to add

The screenshot shows the 'Header Comments' interface. The 'Comments' section includes the following fields and controls:

- Business Unit:** HMCMP
- Requisition ID:** NEXT
- Requisition Date:** 10/18/2022
- Status:** Open
- \*Sort Method:** Comment Time Stamp
- \*Sort Sequence:** Ascending
- [Sort](#)
- Comments** (1 of 1) [View All](#)
- Use Standard Comments**
- Comment Status:** Active [Inactivate](#)
- Send to Supplier**
- Show at Receipt**
- Show at Voucher**
- Associated Document**
  - Attachment:** [Attach](#) [View](#) [Delete](#)  **Email**
- From -> REQ HMCMP-NEXT

3. Check the Send to Supplier, Show at Receipt, and Shown at Voucher boxes. This will ensure that the comments are printed on the requisition. Your comment will not be seen if you do not select these options.
  - Types of information commonly provided include:
  - Special Instructions (i.e., Rush Order Information)
  - Name, contact phone number, and email address for the person(s) requesting this purchase (if other than Requester)
  - New Supplier

- Existing Supplier Information (if cannot locate supplier ID)
  - Specific location for the delivery of items in the order
  - ITAR for IT-related purchases
  - Provide Procurement with any additional required information
4. To enter a comment using the pre-defined comments section, click the Use Standard Comments link
  5. From the standard comments window, enter STD in the Comment Type field.
  6. Click the search icon in the Comment ID field and select from the search results list.
  7. The standard comment will populate in the Comments textbox.
  8. Click the **OK** button to continue.

**Header Comments**

Business Unit HMCMP  
 Requisition ID NEXT

---

\*Sort Method

**Comments**

[Use Standard Comments](#)

**Standard Comments**

**Comments**

\*Action

\*Effective Date  \*Status

Description

Short Desc

Comments

**Note:** Once comments are entered into the comments field, the comments link on the Requisition screen will change to **“Edit Comments.”**

**Header** ?

\*Requester   Lewis, Edna

\*Requisition Date   [Requester Info](#)

Origin   Online Entry

\*Currency Code  Dollar

Accounting Date

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

## Step 5: Adding Attachments to your Requisition

The Add Comments section provides additional information to the Buyer or the Supplier.

1. Click the Add Comments link on the Requisition screen to add an attachment.

Maintain Requisitions  
**Requisition**

Business Unit HMCMP      Status Open   
Requisition ID NEXT      Budget Status Not Chk'd   
Requisition Name  Copy From       Hold From Further Processing

▼ Header ?

\*Requester 30952963356  Lewis,Edna  
\*Requisition Date 10/18/2022  Requester Info  
Origin ONL  Online Entry  
\*Currency Code USD Dollar  
Accounting Date 10/18/2022

**Amount Summary ?**  
Total Amount 1,437.64 USD

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

2. Click "Attach" to upload your document

Header Comments

Business Unit HMCMP      Requisition Date 10/18/2022  
Requisition ID NEXT      Status Open

\*Sort Method Comment Time Stamp      \*Sort Sequence Ascending      [Sort](#)

Comments  1 of 1 [View All](#)

Use Standard Comments      Comment Status Active      [Inactivate](#) [+](#)

Send to Supplier       Show at Receipt  
 Show at Voucher

**Associated Document**  
Attachment [Attach](#) [View](#) [Delete](#)  Email

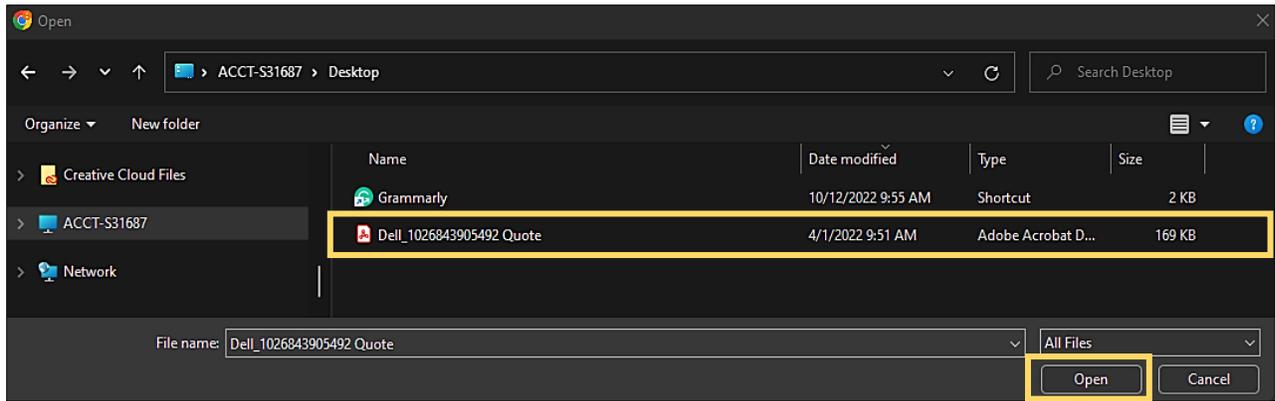
From -> REQ HMCMP-NEXT

3. Choose File
4. Locate the file that you want to attach from your computer. Click on it to select it, and then click Open

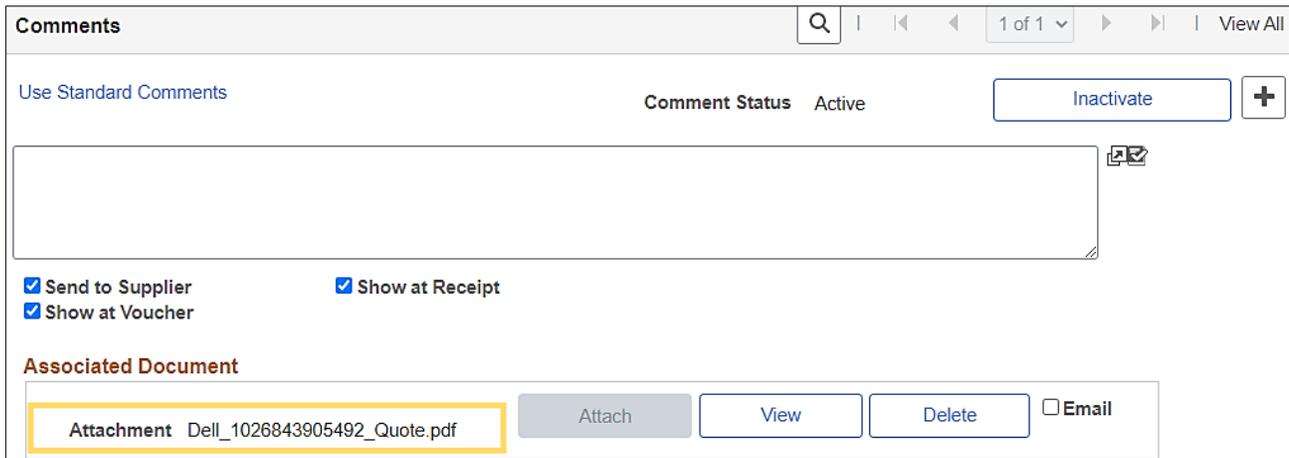
**File Attachment**

[Choose File](#) No file chosen

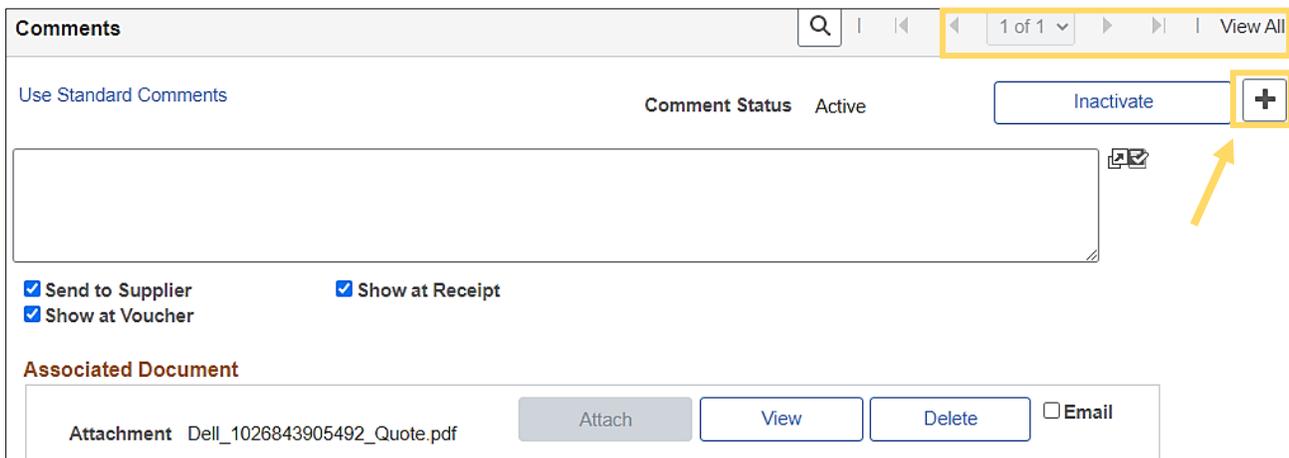
[Upload](#) [Cancel](#)



5. Once the file uploads, the Associated Document appears next to the attachment tab. You can click View to view your attachment or delete it to remove it.



6. If you have multiple PDFs that need to be attached, you can click the add a new row icon on the Comments page.



7. You will now see that there is an additional section to add your document (2 of 2)
8. Repeat steps 2 through 4 above
9. Click OK to return to the main page of the requisition

**Comments** 2 of 2

Use Standard Comments

Comment Status Active

Send to Supplier       Show at Receipt  
 Show at Voucher

**Associated Document**

Attachment     Email

10. Click **Save** at the bottom left of the screen to save your requisition.

**Requisition**

Business Unit HMCMP      Status Open

Requisition ID NEXT      Budget Status Not Chk'd

Requisition Name  Copy From       Hold From Further Processing

**Header**

\*Requester 30952963356 Lewis, Edna  
 \*Requisition Date 10/18/2022  
 Origin ONL Online Entry  
 \*Currency Code USD Dollar  
 Accounting Date 10/18/2022

**Amount Summary**

Total Amount	1,437.64	USD
--------------	----------	-----

**Add Items From**

Purchasing Kit Item Search      Catalog Requirer Items

**Line**

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount
1		Precision 3450 Small	1.0000	EA	20800	1,437.6400	1,437.64

11. A Requisition ID has been assigned, and the requisition is saved

12. You may now Approve and Budget check the Requisition by clicking on the green checkmark referenced by the Status field.

**Requisition**

Business Unit HMCMP

Requisition ID 0000013922

Requisition Name 0000013922

Status Open

Budget Status Not Chk'd

Hold From Further Processing

Your Requisition Status is now approved.

**Requisition**

Business Unit	HMCMP	Status	Approved	
Requisition ID	0000013922	Budget Status	Not Chk'd	
Requisition Name	<input type="text" value="0000013922"/>	<input type="checkbox"/> Hold From Further Processing		

Your Requisition Status is now budget checked.

**Requisition**

Business Unit	HMCMP	Status	Approved	
Requisition ID	0000013922	Budget Status	Not Chk'd	
Requisition Name	<input type="text" value="0000013922"/>	<input type="checkbox"/> Hold From Further Processing		

**Requisition**

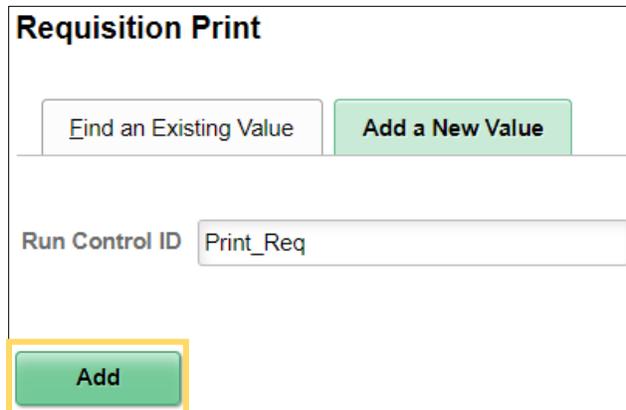
Business Unit	HMCMP	Status	Approved	
Requisition ID	0000013922	Budget Status	Valid	
Requisition Name	<input type="text" value="0000013922"/>	<input type="checkbox"/> Hold From Further Processing		

Once the requisition has been budget-checked, Procurement & Contract Services will convert the requisition into a purchase order.

## Step 6: Printing a Copy of the Requisition

To print a copy of a requisition, you must initially establish a Run Control ID. Once the Run Control ID has been set up, it can be used each time you need to print a requisition.

1. Follow the following path. Navigator>Purchasing>Requisitions>Reports>Print Requisition
2. From the Requisition Print window, click on the Add a New Value tab
3. In the Run Control ID field, enter req print and click the ADD button.
4. A Run Control ID has now been established. In the future, click on the Find an Existing Value tab and enter Print\_Req in the Run Control ID field



**Requisition Print**

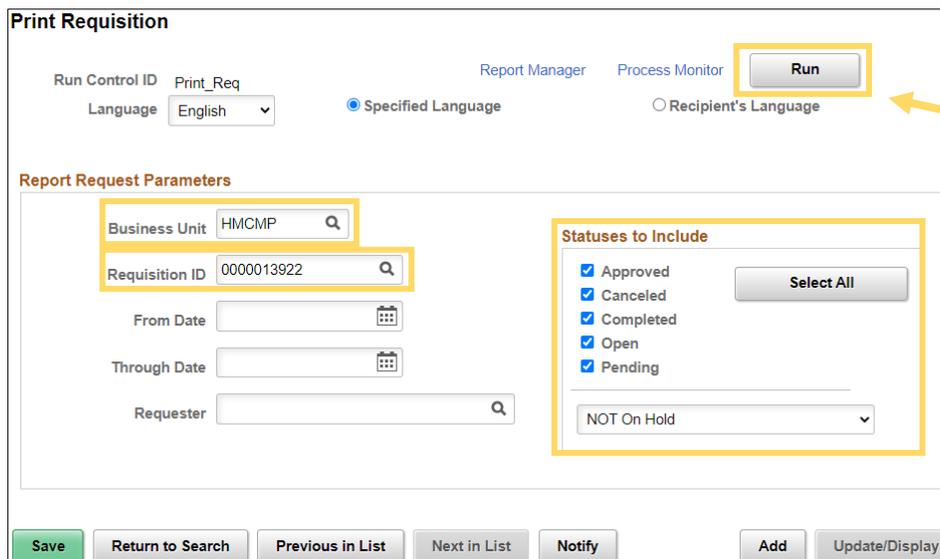
Find an Existing Value    **Add a New Value**

Run Control ID    Print\_Req

**Add**

The Requisition Print screen will display. Enter the following information to print a requisition for your department's files.

5. In the Business Unit field, enter HMCMP.
6. Enter the Requisition ID
7. In the Statuses to Include section, make sure ALL checkboxes are selected by clicking the Select All button
8. The drop-down menu defaults to "NOT On Hold."
9. Click the Run tab



**Print Requisition**

Run Control ID    Print\_Req    Report Manager    Process Monitor    **Run**

Language    English     Specified Language     Recipient's Language

**Report Request Parameters**

Business Unit    HMCMP    Requisition ID    0000013922

From Date    Through Date    Requester

**Statuses to Include**

Approved     Canceled     Completed     Open     Pending    **Select All**

NOT On Hold

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

10. Be sure the checkbox for Requisition Print SQR is selected, and the Type and Format are set to **Web and PDF**.

11. Click the **OK** tab

### Process Scheduler Request

User ID 30952963356 Run Control ID Print\_Req

Server Name  Run Date 10/24/2022

Recurrence  Run Time 3:56:57PM

Time Zone

#### Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	Distribution

The Requisition Print screen will re-display, showing a Process Instance number.

12. Click the Process Monitor link

### Print Requisition

Run Control ID Print\_Req Report Manager

Language English   Specified Language  Recipient's Language

Process Instance: 24273966

#### Report Request Parameters

Business Unit HMCMP

Requisition ID 0000013922

From Date

Through Date

Requester

#### Statuses to Include

Approved  Canceled  Completed  Open  Pending

NOT On Hold

On the View Process Request page, click the refresh button until the run status for your instance displays **Success**, and the Distribution Status displays **Posted**.

13. When it is finished processing, click the Details link.

Process List    Server List

**View Process Request For**

User ID:     Type:     Last:     1    All:     **Refresh**

Server:     Name:     Instance From:     Instance To:     [Report Manager](#)

Run Status:     Distribution Status:      Save On Refresh

**Process List**

1-40 of 40    View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	24273966		SQR Report	PORQ010	30952963356	10/24/2022 3:56:57PM PDT	Success	Posted	<a href="#">Details</a>

14. On the Process Detail screen, click the View Log/Trace link at the bottom of the screen

## Process Detail

**Process**

Instance: 24273966    Type: SQR Report  
 Name: PORQ010    Description: Requisition Print SQR  
 Run Status: Success    Distribution Status: Posted

**Run**

Run Control ID: Print\_Req  
 Location: Server  
 Server: PSUNX  
 Recurrence:

**Update Process**

Hold Request  
 Queue Request  
 Cancel Request  
 Delete Request  
 Re-send Content     Restart Request

**Date/Time**

Request Created On: 10/24/2022 3:57:24PM PDT  
 Run Anytime After: 10/24/2022 3:56:57PM PDT  
 Began Process At: 10/24/2022 3:57:45PM PDT  
 Ended Process At: 10/24/2022 3:57:58PM PDT

**Actions**

[Parameters](#)    [Transfer](#)  
[Message Log](#)  
[Batch Timings](#)  
[View Log/Trace](#)

15. Click on the PDF file link. A copy of the requisition will open in a new browser window

## View Log/Trace

### Report

Report ID 14644144      Process Instance 24273966      [Message Log](#)  
 Name PORQ010      Process Type SQR Report  
 Run Status Success

Requisition Print SQR

### Distribution Details

Distribution Node FCFSPRD      Expiration Date 12/08/2022

### File List

Name	File Size (bytes)	Datetime Created
<a href="#">SQR_PORQ010_24273966.log</a>	1,642	10/24/2022 3:57:58.898202PM PDT
<a href="#">porq010_24273966.PDF</a>	4,896	10/24/2022 3:57:58.898202PM PDT
<a href="#">porq010_24273966.out</a>	70	10/24/2022 3:57:58.898202PM PDT

To print the report, click on the print icon in your browser's toolbar or menu

**Requisition**  
Humboldt State University

**Ship To:** Shipping & Receiving  
Humboldt State University  
1 Harpst St  
Arcata CA 95521-8299

<b>Business Unit:</b>	<b>HMCMP</b>	<b>APPROVED</b>
Req ID	Date	Page
0000013922	10/18/2022	1
Requester	Telephone	Entered By
Lewis,Edna		Lewis,Edna

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project			Dist Amt
Buyer: Lewis,Edna									
1-1	Precision 3450 Small Form Factor			20800	1.0000	EA	1,437.64	1,437.64	
1-1-1	660003	HM500	D30003						1,437.64
<u>Line Total:</u>								1,437.64	

## Step 7: Cancel a Requisition

1. Follow the following path. Navigator>Purchasing>Requisitions>Add/Update Requisitions
  - Click on **“Find an Existing Value”**
  - If you are using a different Business Unit, click on the  to see the other options
  - Add the requisition ID, then click search

### Requisitions

Use the following search to look for an existing Requisition.

**Find an Existing Value** **Add a New Value**

**Search Criteria**

**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**

**Search** **Clear** **Basic Search**  **Save Search Criteria**

2. Once requisition pulls up, next to Status there is two option
  -  Create Header Change and  Cancel
3. Click 

### Requisition

<b>Business Unit</b>	HMCMP	<b>Status</b>	Approved	 
<b>Requisition ID</b>	0000013922	<b>Budget Status</b>	Valid	
<b>Requisition Name</b>	<input type="text" value="0000013922"/>			<input type="checkbox"/> <b>Hold From Further Processing</b>

4. A notice will appear to verify that the requisition should cancel, click yes to verify

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.

5. Once the system cycles through, it will go back to “Find an Existing Value”

### Requisitions

Use the following search to look for an existing Requisition.

▼ **Search Criteria**

\*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

[Basic Search](#)

6. The requisition is canceled.