How to check the Status of a Requisition

Navigation: Purchasing>Requisitions>Add/Update Requisitions

Enter the Requisition ID number and click on "Find an Existing Value".

Enter the Requisition ID number and click the "Search" button.
Requisition Status:

Open Status – Ready To Proceed

A. If a Requisition Status is “Open and you are ready to proceed”, retrieve the Requisition and uncheck the “Hold From Further Processing”:

B. Click on the to Submit for Approval icon:

C. Click at the bottom of the screen.

D. Once the Requisition is saved it will enter the Workflow Approval Process.
Requisition Status:

Open Status – Cancel the Requisition

A. If a Requisition Status is “Open” and for whatever reason is no longer required, you will need to Cancel the Requisition. To cancel a Requisition, retrieve the Requisition, uncheck the “Hold From Further Processing”:

B. Click on \( \times \):

C. You will receive the following message. Click \( \text{Yes} \) to proceed with the cancellation.
If the Requisition has already been saved, it has entered the Workflow Approval Process.

When you look up a Requisition on the Add/Update Requisitions screen, if it has already entered the Workflow Approval Process you will see this message:

```
Message

This requisition is currently active in the workflow approval process. (20001,44)

Changes to the requisition can not be made at this time. Click 'OK' to transfer to Inquiry. Click 'Cancel' to Return.

OK  Cancel
```

Click **OK** and you will be taken to the Requisition Inquiry screen:

The Status could be: Pending Approval, Approved, Canceled, Denied, Complete, Open, etc.

```
Requisitions

<table>
<thead>
<tr>
<th>Unit</th>
<th>Requisition</th>
<th>Requisition Name</th>
<th>Requisition Status</th>
<th>Requester</th>
<th>Req Date</th>
<th>Total Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>URIPS</td>
<td>0000152221</td>
<td>0000152221</td>
<td>Pending Approval</td>
<td>Smalridge,Julie</td>
<td>02/28/2019</td>
<td>338.00 USD</td>
</tr>
</tbody>
</table>

Search
Notify
```

Click the **Status** tab:
Click the Approval Status icon

Requisition status information

You can View Printable Req here

List of approvers, level of approval and date worked will display here

Click OK to exit.
Requisition Status:

Pending Status

If a Requisition Status is “Pending” it is Pending Approval. If the Requisition has been in “Pending” status for an extended period of time, you may need to notify the Approver that a Requisition is pending their approval.

A. To check the Approval History, retrieve the Requisition. You will receive the following message:

```
Requisition Status:

Pending Status

If a Requisition Status is “Pending” it is Pending Approval. If the Requisition has been in “Pending” status for an extended period of time, you may need to notify the Approver that a Requisition is pending their approval.

A. To check the Approval History, retrieve the Requisition. You will receive the following message:

This requisition is currently active in the workflow approval process. Click ‘OK’ to transfer to Inquiry. Click ‘Cancel’ to Return.

B. Click OK

C. Click the Status tab

D.

E. Click the Approval Status button

F. The Approval Status page shows the list of Approvers, level of approval and date worked.
```
Requisition Status:

Denied Status
If a Requisition Status is “denied”, the Requisition will need to be modified or canceled. When an Approver denies a Requisition, an email is sent to the Requester. If the Approver indicated a reason for the denial this will be contained in the email.

Modify the Requisition:
A. To modify the Requisition, retrieve the Requisition, make the necessary changes, and check the box to Submit for Approval.

B. Click Save. Once the Requisition is saved it will enter the Workflow Approval Process.

Cancel the Requisition:
C. If the “Denied” Requisition is no longer required it will need to be canceled. To cancel the Requisition click:

D. You will receive the following message. Click Yes to proceed with the cancelation.
E. Requisition Status:

Approved Status with Hold From Further Processing Status of “Y”

Requisitions with an “Approved” Status with a “Hold From Further Processing Status” of “Y” are either Requisitions that are in Budget Error or Requisitions that have been returned by Purchasing. In either case, action is required.

- If a Requisition does not pass Budget Checking, the Requester receives an email indicating that Requisition #XXXXXXXXX has Budget Errors. Either the Budget Error needs to be resolved or the Requisition needs to be canceled.

Resolving Budget Error

A. Once the Budget Error has been resolved, uncheck the “Hold From Further Processing”

B. Click on the button at the bottom of the screen.

C. Note: If there are changes to the Chartfield String or Price, the Requisition will require re-approval through the Workflow Process.

Cancel the Requisition

A. Retrieve the Requisition, uncheck the “Hold From Further Processing” box:

B. Click on the button: 
D. You will receive the following message. Click **Yes** to proceed with the cancelation.

<table>
<thead>
<tr>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)</td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

![Yes No button]

C. Click **Save**.
Requisitions Returned by Purchasing
Requisitions that have been returned by Purchasing will need corrective action or will need to be canceled.

Corrective Action
A. Once correction action has been taken; i.e. attaching specifications, change origin, etc. you will need to uncheck the “Hold From Further Processing”:

B. Click

Cancel the Requisition
A. To cancel the Requisition, retrieve the Requisition, uncheck the “Hold From Further Processing”:

B. Click on the \(\times\) :
C. You will receive the following message. Click Yes to proceed with the cancelation.

<table>
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<tr>
<td>Canceling a requisition will commit any changes made and prevent further changes. Continue? (01007)</td>
</tr>
<tr>
<td>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.</td>
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D. Click Save.
If you have already submitted your Requisition, you can also go to:
Navigation: Purchasing>Requisitions>Review Requisition Information>Requisitions

1. Enter the Requisition ID and Click OK:

[Image of Requisition Inquiry screen]

2. The Requisition Inquiry screen opens and displays the Requisition Status:

   The Status could be: Pending Approval, Approved, Canceled, Denied, Complete, Open, etc.

[Image of Requisitions screen]

3. For more information, Click the Status tab:
4. Then Click the Approval Status icon:

5. This screen will show you the current status of the Requisition:

6. Click to exit.