

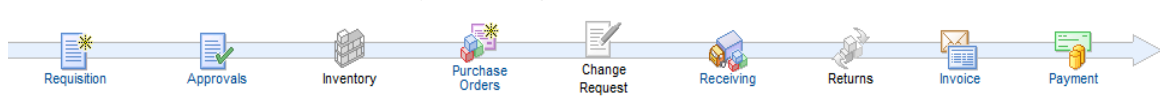


Job Aid EPS4 Using 'Manage Requisitions'

This job aid is used to assist a Requester manage a Requisition by using the Manage Requisitions function in eProcurement. From this page, a Requester can see the requisition status, review requisition details, edit a requisition or cancel a requisitions if necessary.

Lifecycle of a Requisition

1. Select **eProcurement**
2. Select **Manage Requisitions**
3. Enter **search criteria** for your requisition **adjusting** the following if necessary due to default settings in the system:
 - Delete **Date From** and **Date To** fields: default window is 7 days
 - Change the **Origin** field: default is '**Special Request**'
 - Change the **Request State** field: default is '**All but Complete**'
4. Click the **Search** button
5. To see a requisition's lifecycle, click the **expand** button (*the gray triangle to the left of the line*)
6. To see details about an active/completed stage, click on the icon once live



Edit a Requisition

1. Select **eProcurement**
2. Select **Manage Requisitions**
3. Enter **search criteria** for your requisition, remembering to adjust defaults in search if necessary
4. Click the **Search** button
5. In the Requisition ID's action drop-down list, select **Edit Requisition**

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.

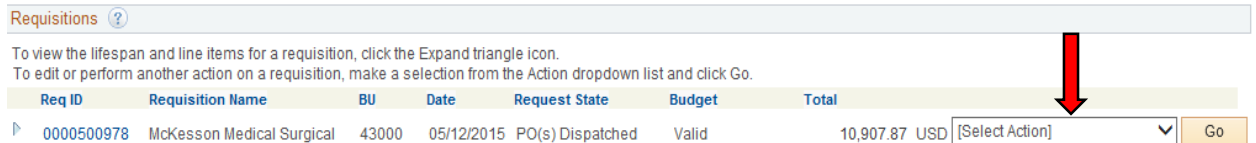
Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000500978	McKesson Medical Surgical	43000	05/12/2015	PO(s) Dispatched	Valid	10,907.87 USD	[Select Action] Go

6. Click **'Go'**
7. Make the necessary changes/edits, then select **Save & Submit**

Cancel a Requisition

(A requisition can only be canceled when the status is 'Approved', 'Pending', 'Open' or 'Denied')

1. Select **eProcurement**
2. Select **Manage Requisitions**.
3. Enter **search criteria** for your requisition, remembering to adjust defaults in search if necessary
4. Click the **Search** button
5. In the Requisition ID's action drop-down list, select **Cancel Requisition**



Requisitions ?

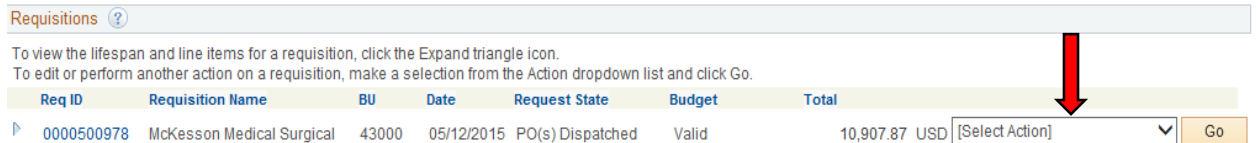
To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000500978	McKesson Medical Surgical	43000	05/12/2015	PO(s) Dispatched	Valid	10,907.87 USD	[Select Action] Go

6. Click **'Go'**
7. On the Requisition Details page, select the **Cancel Requisition**
8. On the Manage Requisitions page, the requisition status should change to **Canceled**

Copying a Requisition

1. Select **eProcurement**
2. Select **Manage Requisitions**.
3. Enter **search criteria** for your requisition, remembering to adjust defaults in search if necessary
4. Click the **Search** button
5. In the Requisition ID's action drop-down list, select **Copy**



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	Request State	Budget	Total	
0000500978	McKesson Medical Surgical	43000	05/12/2015	PO(s) Dispatched	Valid	10,907.87 USD	[Select Action] Go

6. Click **'Go'**
7. On the Requisition Details page, click on each line description (*if more than one*) to review the information and update to reflect needs for current request (including price, item number/description, category code and accounting allocation)
8. Add new supporting documentation
9. Click **'Save for Later'** then 'Preview Approvals' to confirm approval routing is as required
10. Click **'Save and Submit'**

Definitions of Request States

A requisition can be in one of many statuses:

Open – created, but has not been submitted into the Approval process

Pending – submitted, but still pending approvals

Approved – fully approved, but not sourced to a PO

Denied – Req lines were denied by an Approver; the Requisition can still be edited and resubmitted

Canceled – cannot edit/restart Req

PO(s) Created – PO has been created from the Req but not Dispatched for processing

PO(s) Dispatched – PO has been fully sourced and has been sent or is ready to send to Supplier

PO(s) Canceled – PO created from Req has been canceled

Received – items (goods/services) on Req/PO have been marked in the system as received

Complete – items on Req/PO have been fully received, matched and paid out (*3-way matching*)