

Modifying Requisitions

Changes can be made to a requisition *before* it has been approved and reserved. Changes to a requisition may include adding, canceling, or deleting lines, changing a vendor, changing or adding account codes, changing the quantity ordered, changing the price, and a number of other changes.

An important thing to keep in mind when modifying a requisition is that each line has to be changed independently. There is no “global” method of making changes on a requisition.

For example, if you want to change a vendor on a requisition that contains five lines, you will have to change the vendor on each individual line. In other words, you will need to change that vendor five times!

In order to modify a requisition, the requisition must be in your CFS account. How does a requisition get into your account? This happens in one of three ways:

- 1) You create a requisition and don't submit it to the approval process.
- 2) You create a requisition and submit it to the approval process. Then, somewhere along the approval process, it gets returned (rejected) to you.
- 3) Someone forwards the requisition to you. (If you're not in the approval process, you will not have requisitions forwarded to you.)

Once the requisition is in your account, you must find it. Now, how do you find it? You find requisitions using the Find Requisitions form. The Find Requisitions form is accessed via the Requisition Summary option in the Navigator. One of the ways to find a requisition is by its status. The status types include:

Incomplete the requisition has never been submitted to the approval process; thus, the requisition has never left your CFS account.

Rejected the requisition was rejected – sent back to the Preparer – by someone in the approval process.

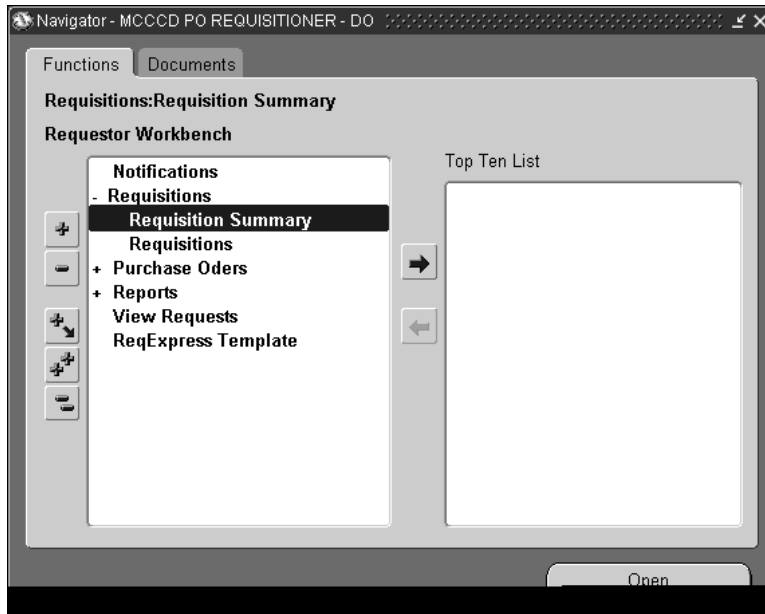
In Process the requisition is somewhere in the approval process. It has been submitted to the approval process, but has not yet been approved and reserved.

The next several pages provide instructions for finding your Incomplete and Rejected requisitions. Forwarded requisitions won't be covered since most Requisitioners don't receive forwarded requisitions. You can always call us at 480-731-8287 if you have any questions.

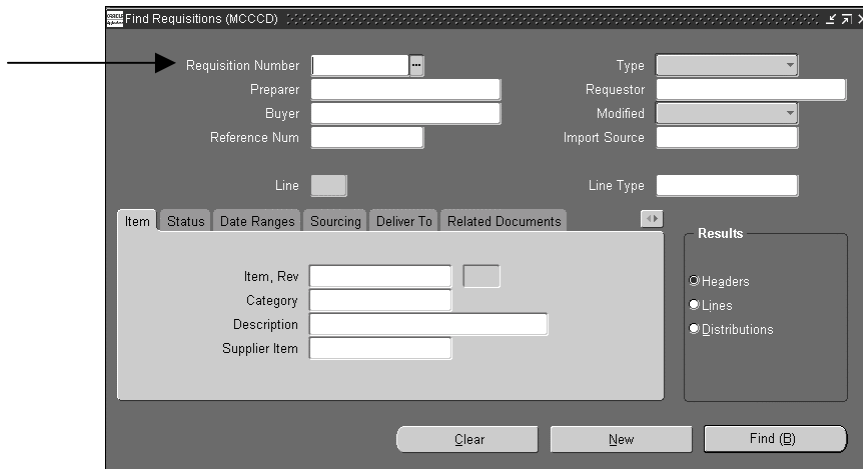
Finding Incomplete Requisitions

Find requisitions that have never left your account. These requisitions have a status of Incomplete.

1. First, log in to CFS and select the PO Requisitioner responsibility.
2. In the Navigator window, double-click Requisitions to expand the options.

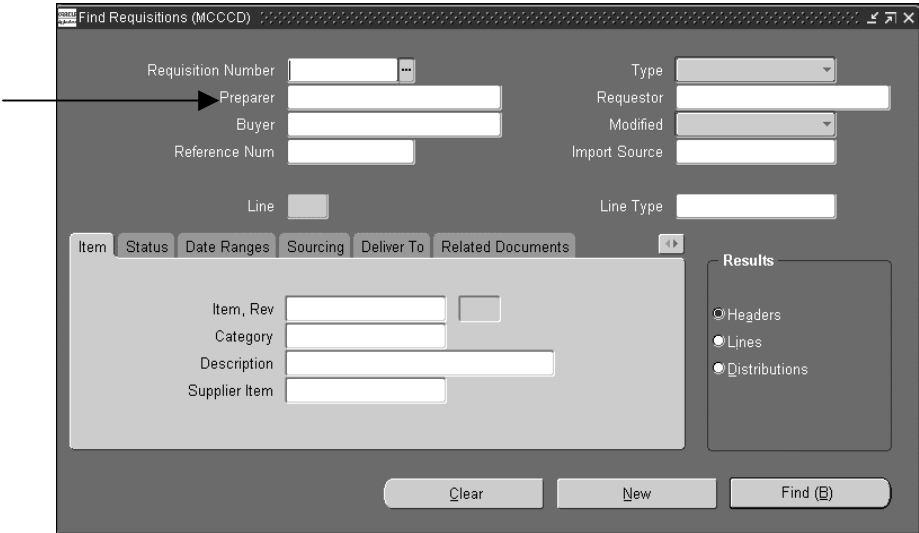


3. Double-click Requisitions Summary. The Find Requisitions window displays:

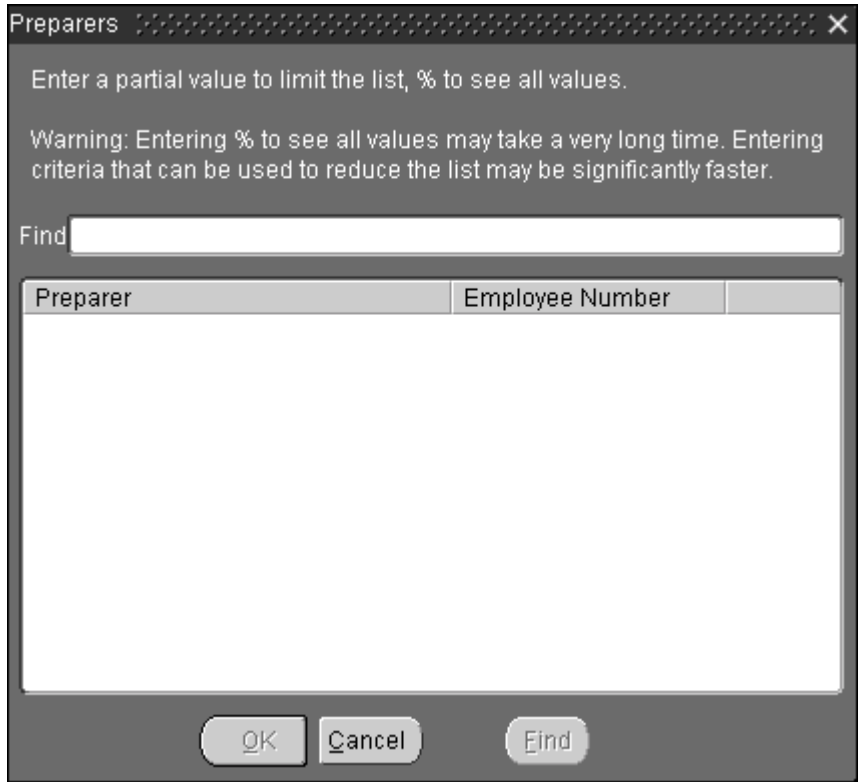


- **Note:** If you know the Requisition Number, enter it in the Requisition Number field and press Enter or click the Find button. Then, go to step 10.

- If you don't know the Requisition Number, you may search by other fields in this window. You can also combine information so that your search is more accurate.
 - In order to limit your search to *your* requisitions, always enter your name in the Preparer field.
4. Click in the Preparer field, and click the List of Values.



- A search window for Preparers displays:



5. In the Find field, enter your last name and press Enter.

Preparer	Employee Number
YSLAS, LAURA	10131522
YSLAS, PAULA A.	10120474

- If a list of names displays, double-click your name.

6. To search by requisition status, click the Status tab in the lower-left corner:

Find Requisitions (MCCCD)

Requisition Number:

Preparer: **YSLAS, PAULA A.**

Buyer:

Reference Num:

Line:

Type:

Requestor:

Modified:

Import Source:

Line Type:

Item | **Status** | Date Ranges | Sourcing | Deliver To | Related Documents

Approval:

Control:

Reserved:

Results

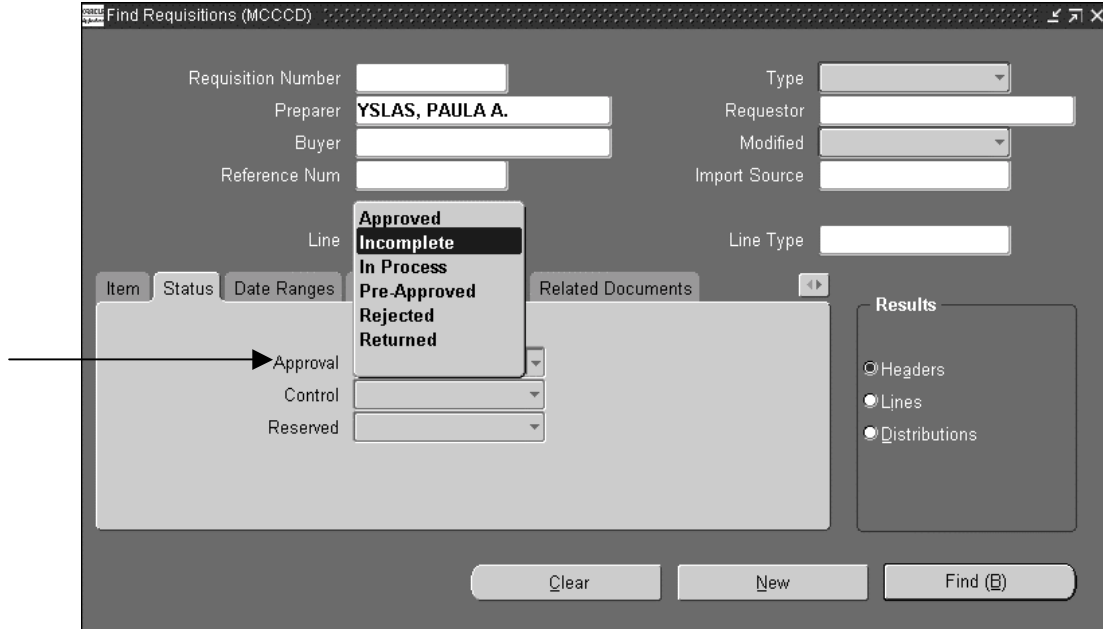
Headers

Lines

Distributions

Clear New Find (F)

7. Click in the Approval field, and select Incomplete.



8. Press Enter or click the Find button.

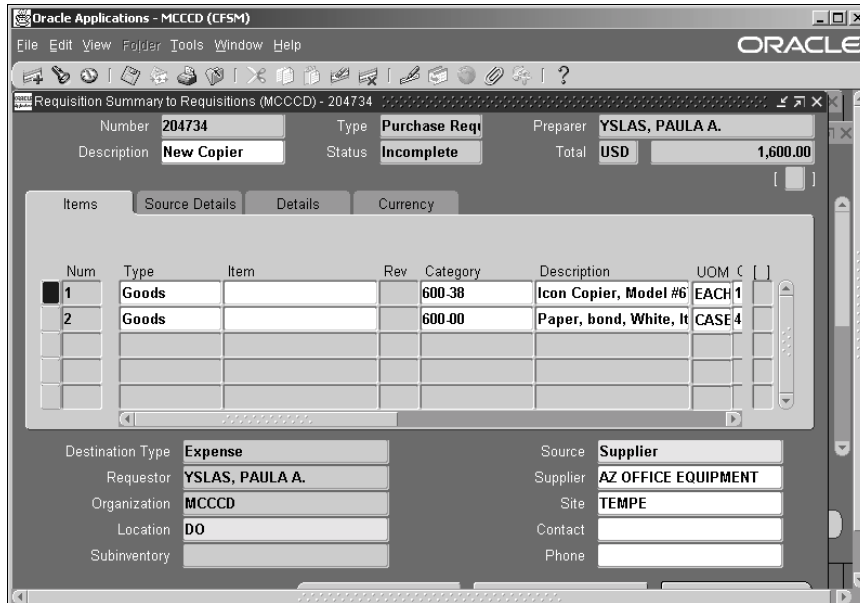
- All of your Incomplete requisitions display in the Requisitions Headers Summary.



9. Press your Down Arrow until you reach the line of the requisition you want to modify, or use your mouse to place your cursor in the **Number** field of the requisition line.

10. To open the requisition, click the Open button.

- Your requisition opens in the Requisitions window.



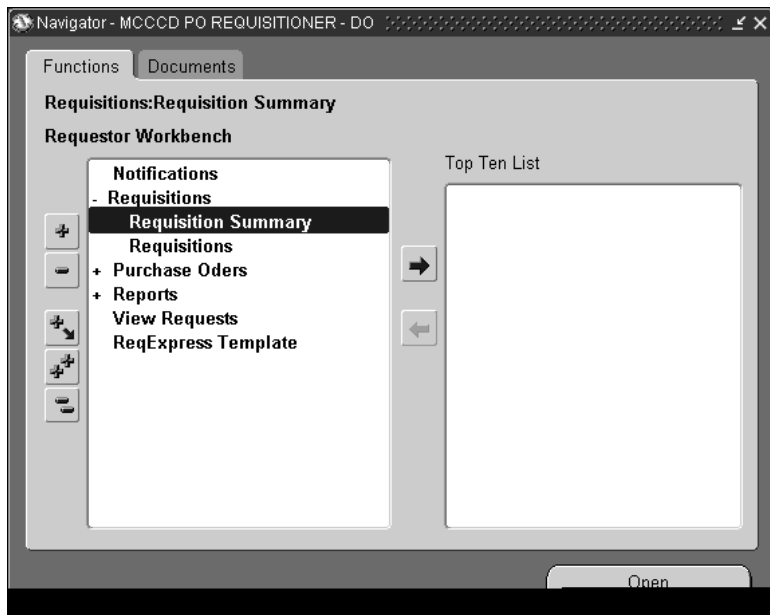
11. Go to the respective instructions to modify the requisition:

- to add a line, go to page 12.
- to delete a line, go to page 13.
- to change a field, go to page 14.
- to change or add an account code, go to page 15.
- to change the vendor, go to page 17.
- to cancel a line, go to page 19.

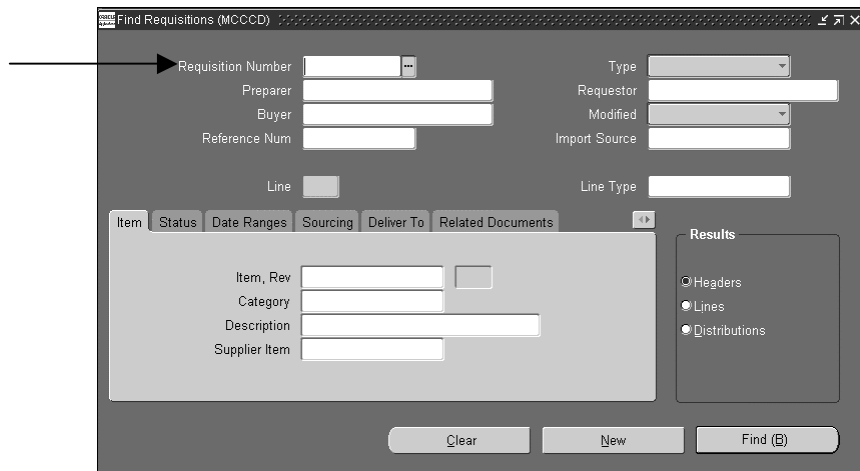
Finding Rejected Requisitions

Find requisitions that have been returned to your account. These requisitions have a status of Rejected. Before modifying a rejected requisition, you can view the reason for the rejection – if the approver entered one – by viewing its action history.

1. First, log in to CFS and select the PO Requisitioner responsibility.
2. In the Navigator window, double-click Requisitions to expand the options.



3. Double-click Requisitions Summary. The Find Requisitions window displays:



- **Note:** If you know the Requisition Number, enter it in the Requisition Number field and press Enter or click the Find button. Then, go to step XX.

- If you don't know the Requisition Number, you may search by other fields in this window. You can also combine information so that your search is more accurate.
- In order to limit your search to *your* requisitions, always enter your name in the Preparer field.

4. Click in the Preparer field, and click the List of Values.

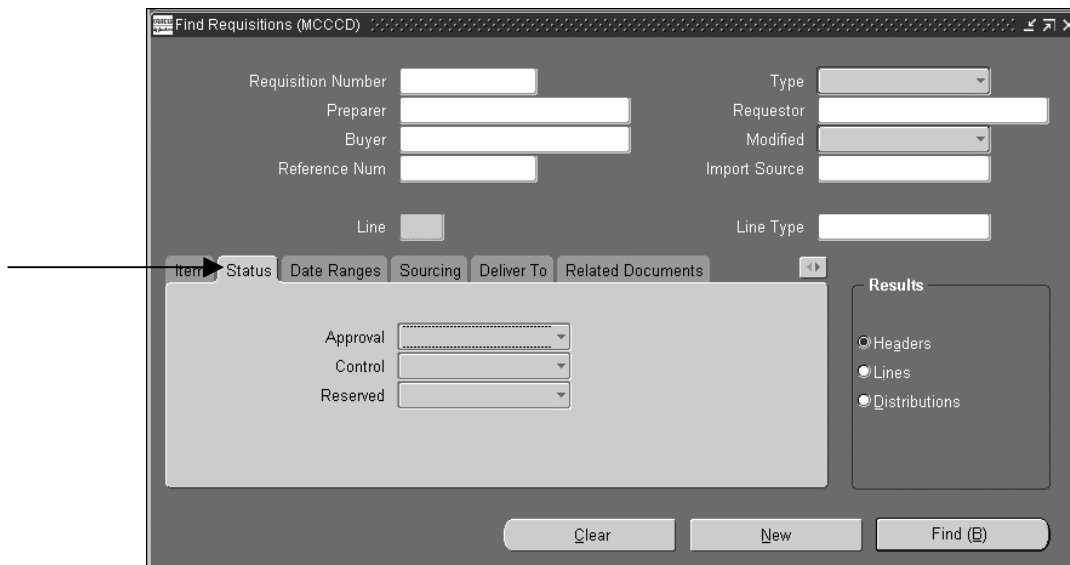
- A search window for Preparers displays:

5. In the Find field, enter your last name and press Enter.

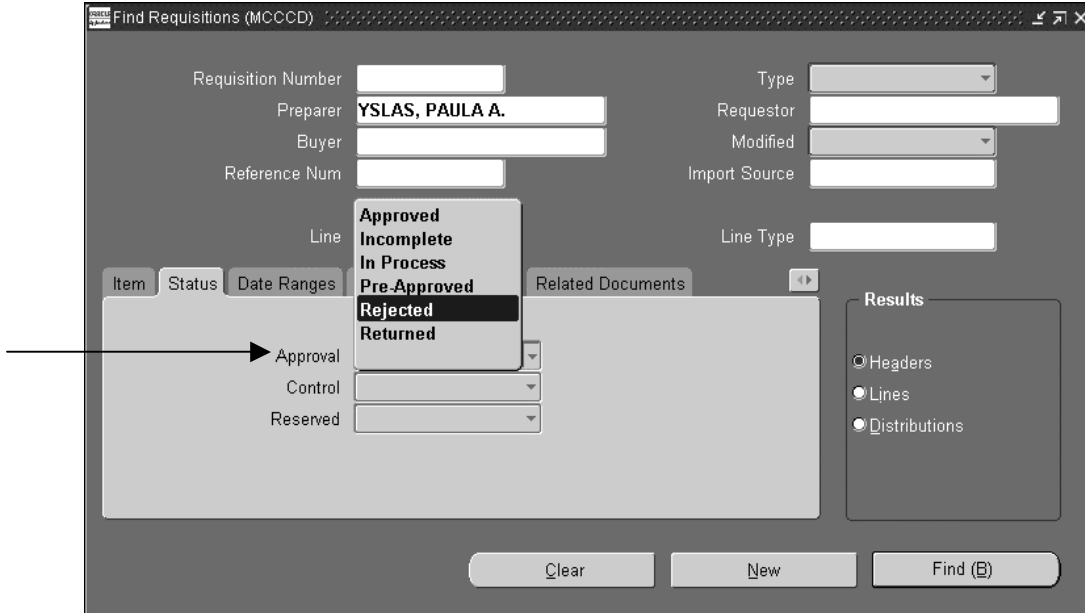


- If a list of names displays, double-click your name.

6. To search by requisition status, click the Status tab in the lower-left corner.

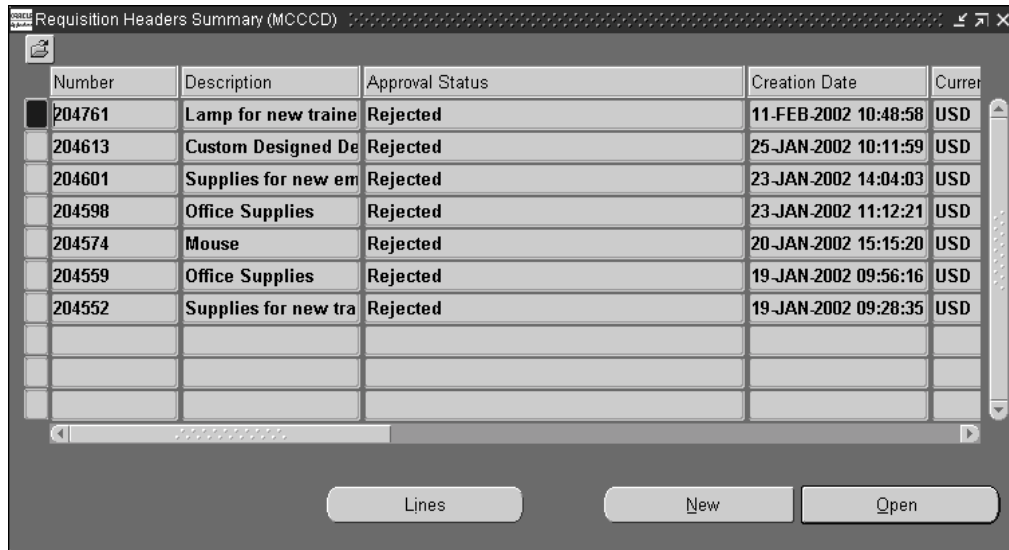


7. Click in the Approval field, and select Rejected.



8. Press Enter or click the Find button.

- All of your Rejected requisitions display in the Requisitions Headers Summary.



9. Press your Down Arrow until you reach the line of the requisition you want to modify, or use the mouse to place your cursor in the **Number** field of the requisition.

10. To read the reason for the rejection (*if* the approver entered one), from the Tools menu, select View Action History.

Seq	Date	Rev	Action	Performed By	Note
2	23-JAN-2002	0	Reject	THRELKELD, LORI D.	Cancel req. and get
1	23-JAN-2002		Forward	YSLAS, PAULA A.	
0	23-JAN-2002		Submit	YSLAS, PAULA A.	Please approve ASAP

11. Tab to, or click in, the Note field.
 - Press Ctrl+E, or click the Edit Field icon  in the Toolbar, to open the Editor.

Editor

Cancel req. and get from blanket PO

OK Cancel Search

- Click OK to close the Editor.
12. Click the X close box in the Purchase Requisition window (the History window) to return to the Requisition Headers Summary.
 13. To modify the requisition, click the Open button.
 - Your requisition opens in the Requisitions window.
 14. Go to the respective instructions to modify the requisition:
 - to add a line, go to page 12.
 - to delete a line, go to page 13.
 - to change a field, go to page 14.
 - to change or add an account code, go to page 15.
 - to change the vendor, go to page 17.
 - to cancel a line, go to page 19.

Adding a Line

To add new lines to your requisition, it is best if you set or edit preferences.

1. First, find and open your Incomplete or Rejected requisition. (Please refer to page 2 for finding Incomplete requisitions, and page 7 for finding Rejected requisitions.)
2. From the Tools menu, select Preferences.

3. Set your new preferences or make changes to the preferences already set.
4. Click the Apply button.
5. Click the Close box in the *Preferences* window – not the Oracle window.
6. In the Items area, click in Num field of the new line.

7. Continue to enter information into the respective fields of that line.
8. Save the requisition and then close or forward your requisition.

Deleting a Line

You can only delete lines on Incomplete requisitions. These are requisitions that have never been submitted to the approval process. These requisitions have never left your account. Once a requisition has left your account, lines can only be canceled, not deleted.

1. First, find and open your Incomplete requisition.
(Please refer to page 2 for finding Incomplete requisitions.)
2. In the Items section, click on the line you want to delete.

Num	Type	Item	Rev	Category	Description	UOM	C
1	Goods		206.00		Item # 5678 Dell Flat S	EACH	1
2	Svcs-Dollars		615.00		7.5 % sales tax for Phc	US D	2
3	Goods		206.00		Item # 1234 Glare Scr	EACH	1
4	Goods		615.00		Item # 6847, mouse pa	EACH	3

Destination Type: Expense
Requestor: YSLAS, PAULA A.
Organization: MCCCD
Location: DO
Subinventory:
Source: Supplier
Supplier:
Site:
Contact:
Phone:

3. From the Edit menu, select Delete.

 - A Caution dialog box displays:



4. Click OK.
5. Save the requisition and then close or forward your requisition.

Changing/Editing a Field

Any field on a line– except the line Type field – can be changed on an Incomplete or Rejected requisition. If the line type is Goods, you're out of luck! It can't be changed. If the line Type is Blanket, it can be changed to one of the other service dollars type – Service Dollars or Service Hours – and vice versa. All the other fields can be changed.

[To change account codes, please go to the next section.]

1. First, find and open your requisition. (Please refer to page 2 for finding Incomplete requisitions, and page 7 for finding Rejected requisitions.)
2. In the Items section, click on the line of the field you want to change.
3. Tab to, or click in, the field that is to be changed.
- Use the scroll bar at the bottom of the Items section to scroll right to view more fields.

Requisition Summary to Requisitions (MCCCD) - 204564

Number: 204564 Type: Purchase Requi Preparer: YSLAS, PAULA A.
Description: Flat screen monit Status: Incomplete Total: USD 508.25

Items Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	C
1	Goods			206-00	Item # 5678 Dell Flat	EACH	1
2	Svcs-Dollars			615-00	7.5 % sales tax for Phc	US D	2
3	Goods			206-00	Item # 1234 Glare Scr	EACH	1
4	Goods			615-00	Item # 6847, mouse pa	EACH	3

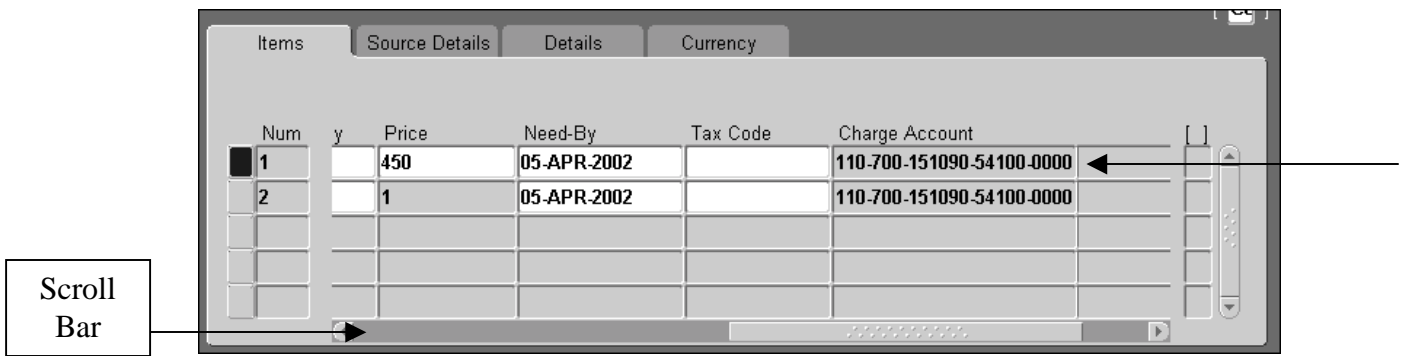
Destination Type: Expense Source: Supplier
Requestor: YSLAS, PAULA A. Supplier:
Organization: MCCCD Site:
Location: DO Contact:
Subinventory: Phone:

4. Delete the current information and make your changes.
5. Save the requisition and then close or forward your requisition.

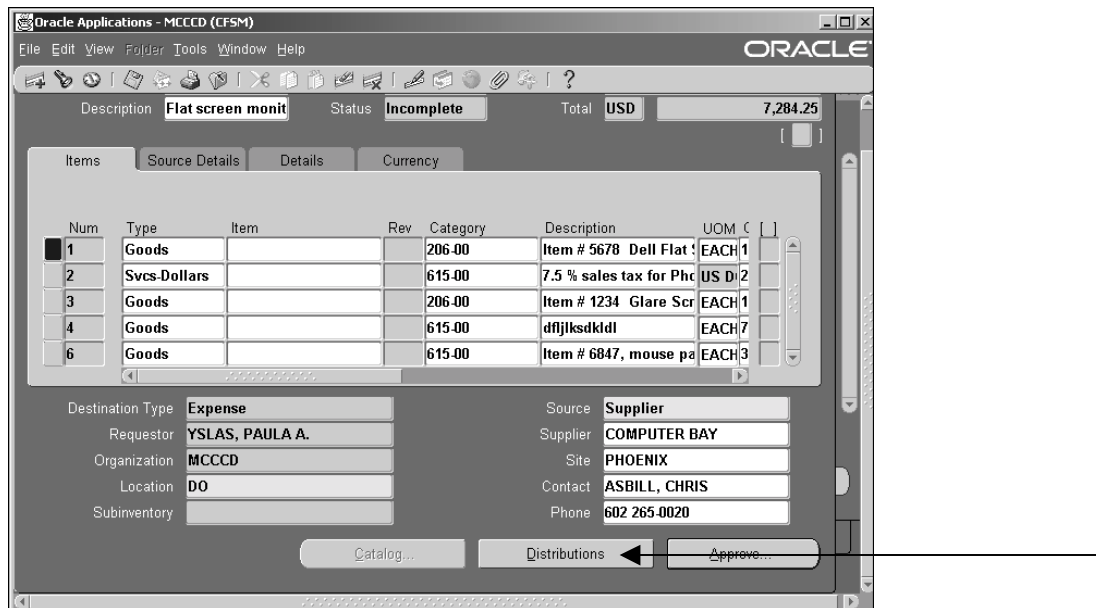
Changing Account Codes

When changing account codes, please keep in mind that each line has to be changed independently. If you are changing the account code for the entire requisition, *each line* has to be edited.

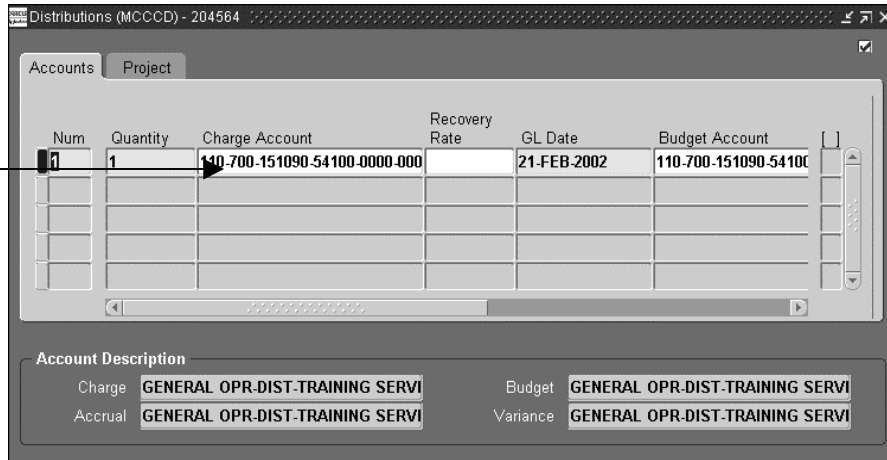
1. First, find and open your requisition. (Please refer to page 2 for finding Incomplete requisitions, and page 7 for finding Rejected requisitions.)
2. In the Items section, click on the line of the account code you want to change.
 - Use the scroll bar at the bottom of the Items section to scroll right to view the Charge Account field.



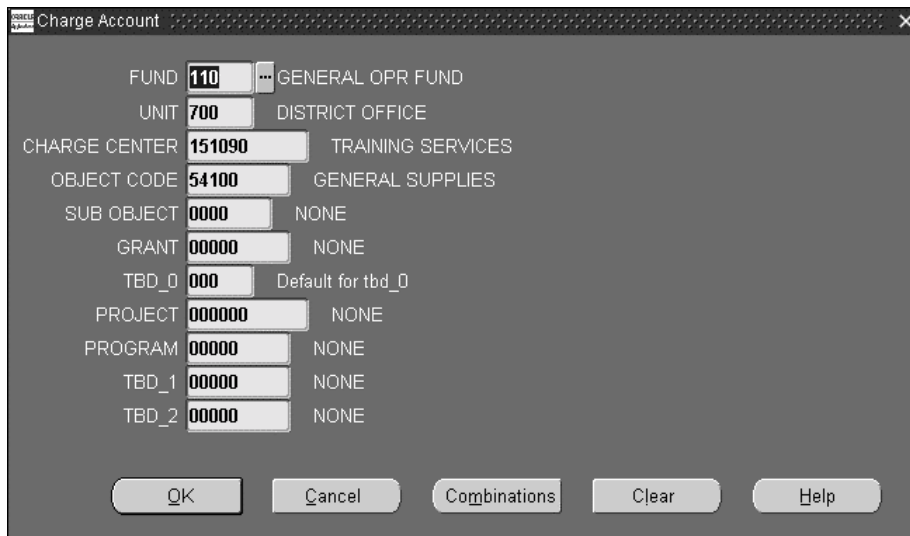
3. To access the Distribution window, click the Distributions button at the bottom of the Requisition window.
 - You may have to scroll down to see it:



- The Distributions window displays:



4. Tab to, or click in, the Charge Account field.
5. Click the List of Values icon.



6. Make your changes and press Enter or click OK.
7. Click the X close box of the Distributions window – not the Oracle window – to close the Distributions window and return to the Requisitions window.
8. If there are more account codes to change, place your cursor on the next line to be changed and repeat steps 3-6.
9. Save the requisition and then close or forward your requisition.

Changing a Vendor

When changing a vendor, please keep in mind that each line has to be changed independently. If you are changing the vendor for the entire requisition, *each line* has to be edited.

1. First, find and open your requisition. (Please refer to page 2 for finding Incomplete requisitions, and page 7 for finding Rejected requisitions.)
2. In the Items section, click on the first line of the requisition.

Oracle Applications - MCCCC (CF5M)

File Edit View Folder Tools Window Help

Notifications to Requisitions (MCCCC) - 204702

Number: 204702 Type: Purchase Requi Preparer: BURNS, CINDY R.
Description: Office Supplies Status: In Process Total: USD 25.78

Items Source Details Details Currency

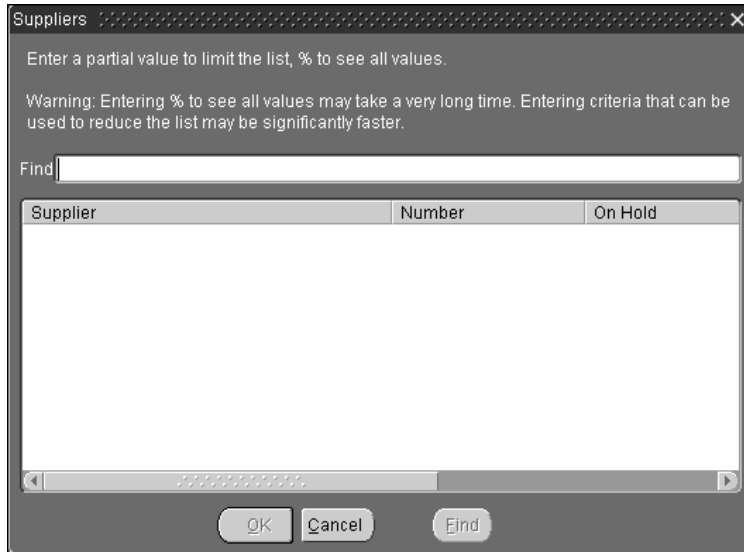
Num	Type	Item	Rev	Category	Description	UOM	C	
1	Goods			615.00	Pens	EACH	5	
2	Svcs-Dollars			962.00	taxes	US D.		

Destination Type: Expense Source: Supplier
Requestor: BURNS, CINDY R. Supplier: BOISE CASCADE OFFICE P
Organization: MCCCC Site: PHOENIX
Location: DO Contact: ABBAS, KIM
Subinventory: Phone: 602 233-0044

Catalog... Distributions Approve...

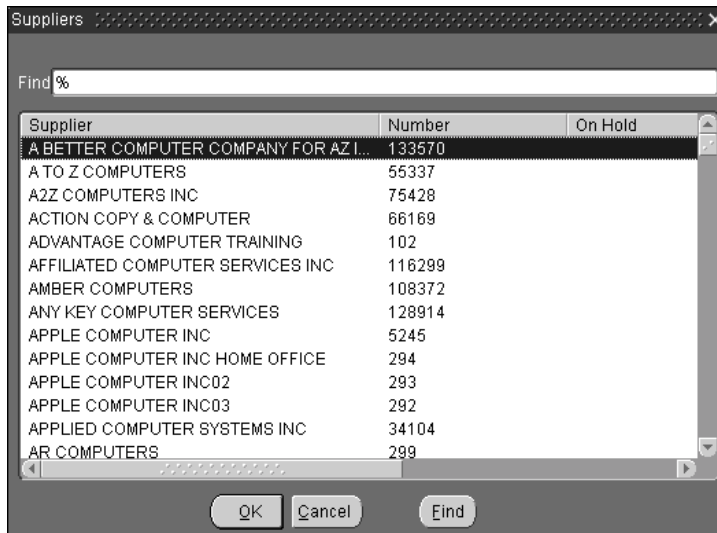
3. At the bottom of the window, click in the Supplier field.
4. Click the List of Values icon ... or press Ctrl+L.

- A search window for the vendor displays:



5. In the Find field, enter a % sign, enter a key word in the vendor name, enter another % sign, and then press Enter. For example, %computer%.

- A list of values meeting your search criteria displays:

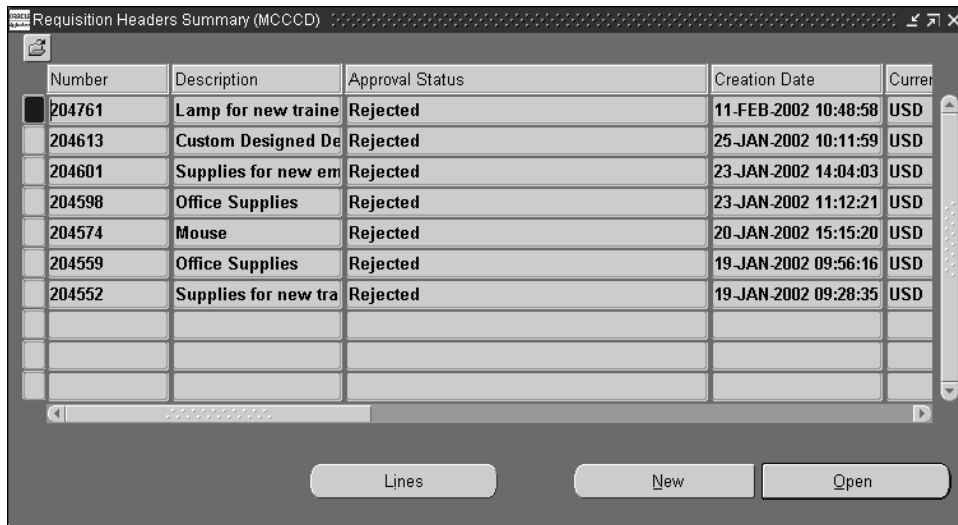


6. Select and enter your new vendor.
7. Place your cursor on the next line of the requisition and repeat steps 3-6.
8. Save the requisition and then close or forward your requisition.

Canceling a Line

You can cancel lines on rejected requisitions. These requisitions have been submitted to the approval process at one time or another. If a requisition has never been submitted to the approval process, lines cannot be canceled on it; they must be deleted instead.

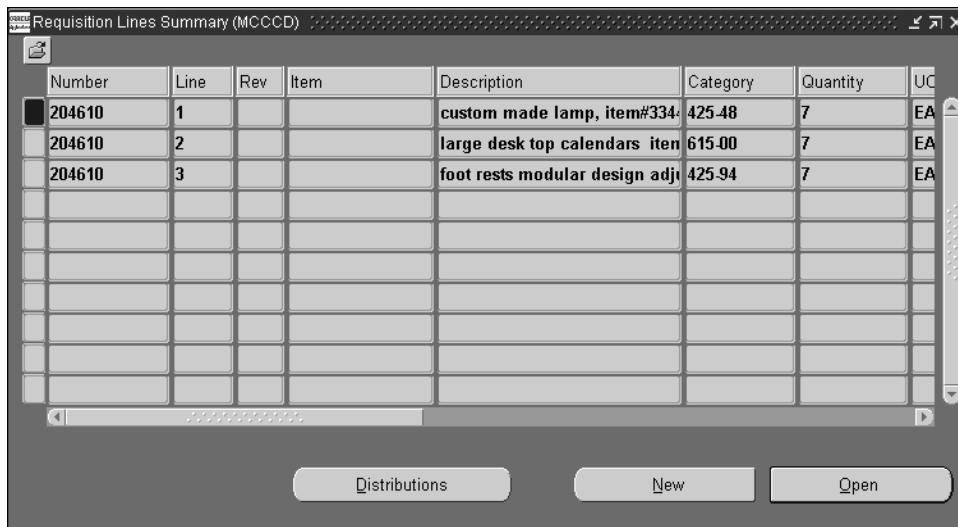
1. First, find and open your Rejected requisition. (Please refer to page 7.)



Number	Description	Approval Status	Creation Date	Currency
204761	Lamp for new trainee	Rejected	11-FEB-2002 10:48:58	USD
204613	Custom Designed De	Rejected	25-JAN-2002 10:11:59	USD
204601	Supplies for new em	Rejected	23-JAN-2002 14:04:03	USD
204598	Office Supplies	Rejected	23-JAN-2002 11:12:21	USD
204574	Mouse	Rejected	20-JAN-2002 15:15:20	USD
204559	Office Supplies	Rejected	19-JAN-2002 09:56:16	USD
204552	Supplies for new tra	Rejected	19-JAN-2002 09:28:35	USD

2. Down Arrow to, or click in the **Number** field of, the requisition that contains the lines you want to cancel.
3. To view the lines on the requisition, click the Lines button.

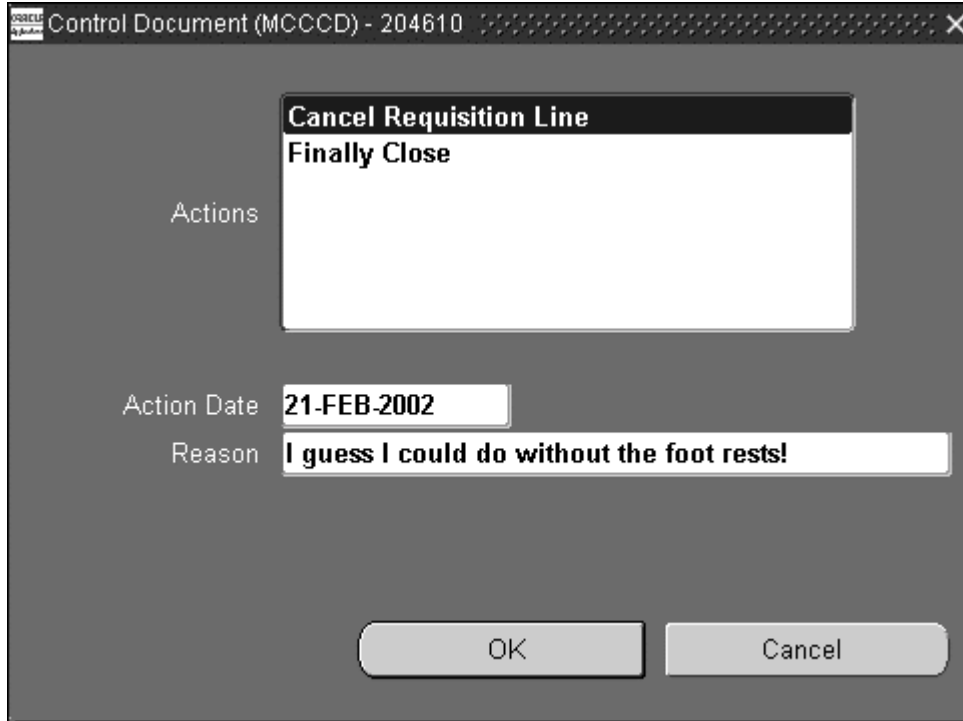
 - The Requisition Lines Summary displays.



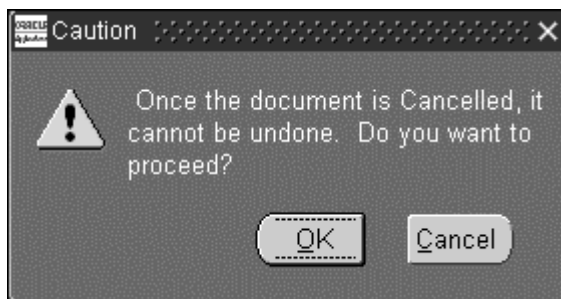
Number	Line	Rev	Item	Description	Category	Quantity	UC
204610	1			custom made lamp, item#334	425.48	7	EA
204610	2			large desk top calendars item	615.00	7	EA
204610	3			foot rests modular design adju	425.94	7	EA

4. Down Arrow to, or click in the **Number** field of, the line you want to cancel.

- From the Tools menu, select Control.

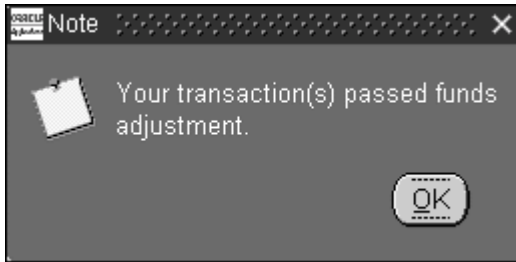


- Select the Cancel Requisition Line option.
 - Click in the Reason field, and enter a reason for canceling the line.
 - Click OK.
- A Caution dialog box displays:



- Click OK.

- A Note dialog box displays:



- This note doesn't pertain to your requisition because funds had not been reserved yet.

10. Click OK.

- Another Note dialog box displays letting you know the transaction is complete. It also lets you know that you won't see the cancel changes until you perform the search again. You can also see the change if you Open the requisition.



11. Click OK.

12. To open your requisition and view your changes, click the Open button.

13. Close or forward your requisition.