



Procurement

Oracle Procurement Step-by-Step Guide

Cancel Requisitions

January 29, 2021

FINAL

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Cancel a Requisition

UC Merced employees will use these steps to cancel a requisition

Cancel a requisition in **Pending Approval** status:

- A purchase order has not yet been created.
 - You will cancel the requisition without requiring a change order.

Cancel a requisition in **Approved** status:

Note: The ability to cancel a requisition that has turned into a purchase order (PO) is dependent on the supplier and terms of the purchase – those dependent factors may prevent an order from being canceled once a PO is issued.

- The purchase order has been created, and items **have been received**:
 - The purchase order **cannot** be canceled.
- The purchase order has been created, but the items **have not been received**:
 - You will cancel the line in the requisition by initiating a change order.
 - The requisition change order will require approval from the original workflow approvers, the buyer and the supplier.
 - If approved, the purchase order will automatically be canceled.

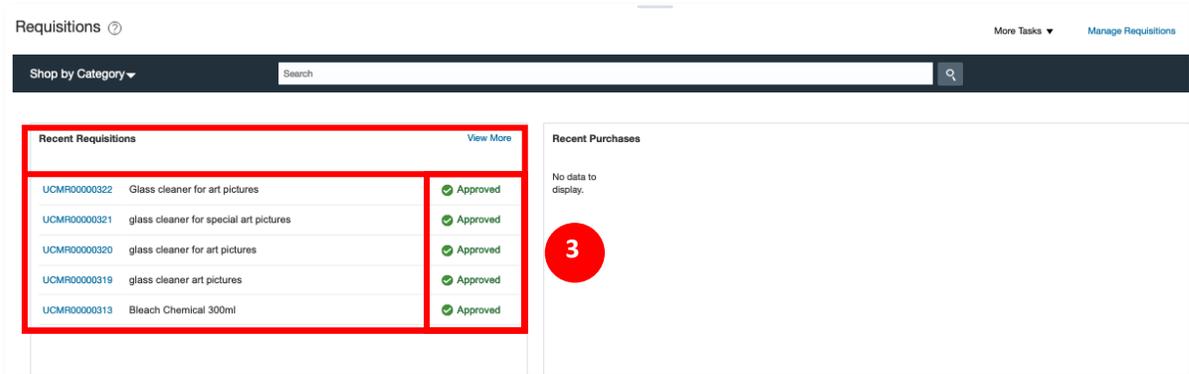
To perform this task, log into Oracle Cloud

System Steps:

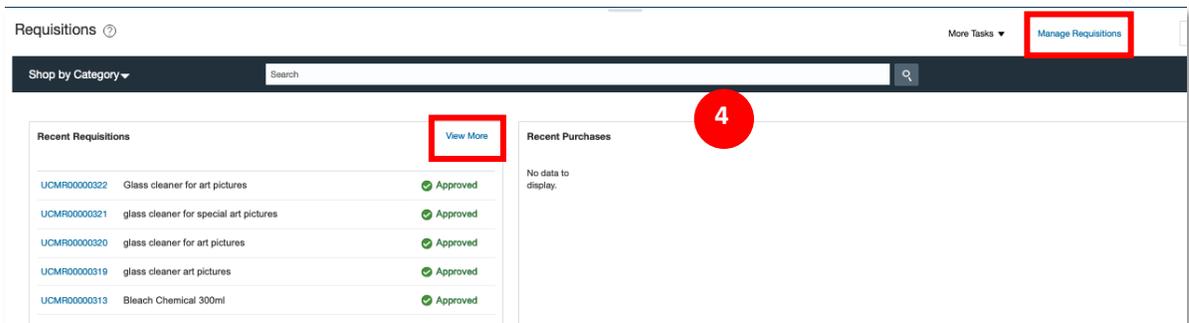
1. Click the **Procurement** infolet
2. Click the **Purchase Requisitions** sub-infolet



3. In the **Recent Requisitions** section of the **Requisitions** overview page, a user can see a list of **their** requisitions and corresponding statuses



4. Click either the **View More** hyperlink in the **Recent Requisitions** section, or the **Manage Requisitions** hyperlink to search for requisitions using user specified search criteria



5. In the **Search** section of the **Manage Requisitions** page, enter search criteria value(s) based on inquiry needs (enter at least one of the **** required** data points):

- a. **Requisitioning Unit:** select from the drop-down menu
- b. ****Entered By:** defaults to user logged in
- c. ****Requisition:** enter value if looking for a specific requisition
- d. **Description** enter value if it will serve as distinct criteria in the search
- e. **Created:** select from the drop-down menu
- f. **Status:** defaults to **All**, but select value from the drop-down menu if different status is desired
- g. **Requester:** enter the desired value, or select the value using the search feature if needed
- h. ****Supplier:** enter the desired value, or select the value using the search feature if needed
- i. **Order:** enter the desired value, or select the value using the search feature if needed
- j. ****Item:** enter the desired value, or select the value using the search feature if needed
- k. **Requisitions Requiring Action:** select from the drop-down menu

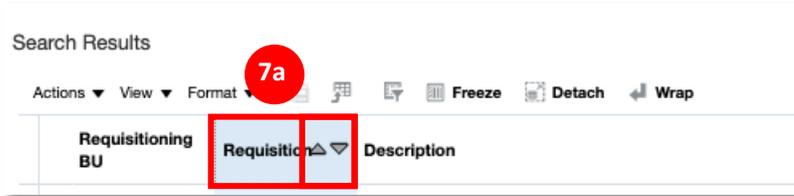
6. Click the **Search** button

7. In the **Search Results** section of the **Manage Requisitions** page, review the results as desired

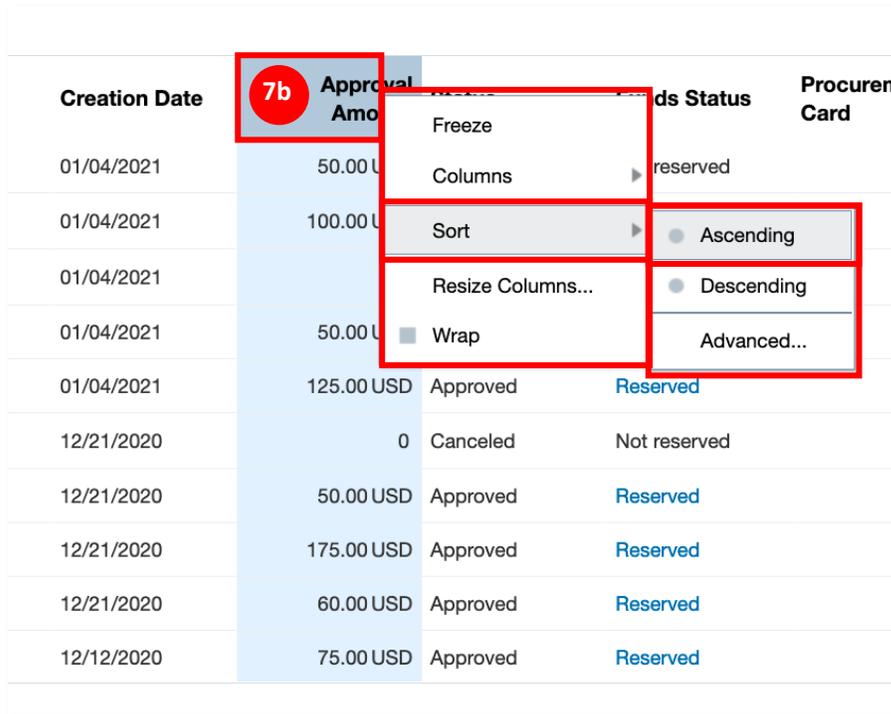
Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
UCM Business ...	UCMR00000322	Glass cleaner for art pictures	FinInst1	12/21/2020	35.00 USD	Approved	Reserved				
UCM Business ...	UCMR00000321	glass cleaner for special art pictures	FinInst1	12/21/2020	50.00 USD	Approved	Reserved				
UCM Business ...	UCMR00000320	glass cleaner for art pictures	FinInst1	12/21/2020	175.00 USD	Approved	Reserved				
UCM Business ...	UCMR00000319	glass cleaner art pictures	FinInst1	12/21/2020	60.00 USD	Approved	Reserved				

Note: one can select any of the column headers and click the arrows to activate ascending or descending sorting of the displayed results.

- a. One can select column **headers** and **hover their mouse in the right side of the column header** to click the **Sort** arrow to activate ascending or descending sorting of the displayed results.



- b. For column **headers** that **do not have the Sort** arrows when **hovering your mouse in the right side of the column header**, select the column header and right click your mouse to engage the **Column** menu to select the respective options to **Sort >> Ascending or Descending**.



- 8. In the **Search Results** section of the **Manage Requisitions** page, click the **Requisition** hyperlink on the desired record

Manage Requisitions

Search

Advanced Manage Watchlist Saved Search Requisitions Entered

Search Results

Actions View Format Freeze Detach Wrap

Requisitioning BU	Requisition	Description	Entered By	Creation Date	Approval Amount	Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
UCM Business ...	UCMR00000322	glass cleaner for s	Fininst1	12/21/2020	35.00 USD	Approved	Reserved				
UCM Business ...	UCMR00000321	glass cleaner for special pictures	Fininst1	12/21/2020	50.00 USD	Approved	Reserved				
UCM Business ...	UCMR00000320	glass cleaner for art pictures	Fininst1	12/21/2020	175.00 USD	Approved	Reserved				
UCM Business ...	UCMR00000319	glass cleaner art pictures	Fininst1	12/21/2020	60.00 USD	Approved	Reserved				

9. In the **Requisition** page, click the **Actions** menu and select the **Cancel Requisition** option

Requisition: UCMR00000322

Requisitioning BU UCM Business Unit
Entered By Fininst1
Description Glass cleaner for art pictures

Creation Date 12/21/2020
Status Approved
Justification Glass cleaner needed for special art pictures in hallway

Requisition Amount
Approval Amount
Funds Status Reserved
Attachments None
Attention Cindy Roberts
Bldg/Room B101

Actions

- Duplicate
- Cancel Requisition
- Withdraw and Edit
- Reassign
- View Document History
- View PDF

10. In the **Cancel Requisition** pop-up window, enter the following information as required (***mandatory** data fields are indicated by an asterisk):

- a. ***Reason:** enter an explanation as to why the requisition is being cancelled

11. Click the **OK** button

Cancel Requisition

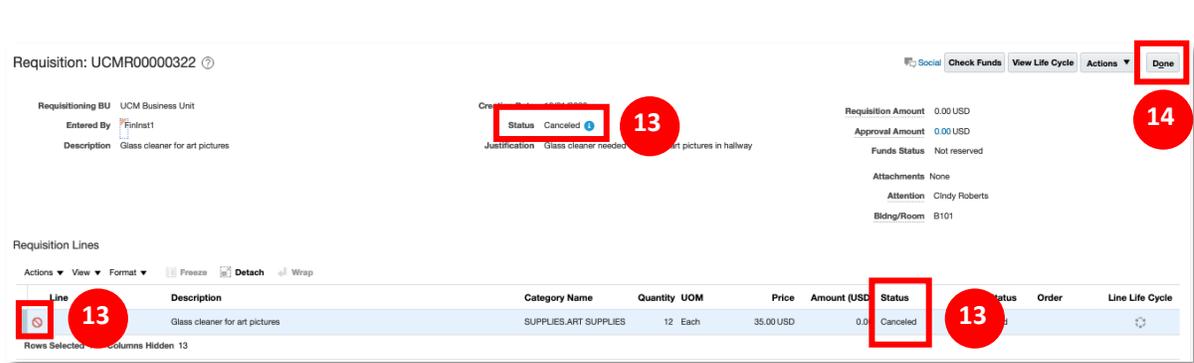
* Reason SBSBG Build

OK Cancel

12. In the **Confirmation** pop-up window, acknowledging there has been a cancellation initiated, click the **OK** button

13. Notice in the **Requisition** page, the **Status** is now updated to **Cancelled** on the header and line levels

14. Click the **Done** button



15. Back in the **Manage Requisitions** page, click the **Done** button to complete this process