



Procurement

Oracle Procurement Step-by-Step Guide

Cancel Requisitions

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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

Requisitions ③			More Tasks 🔻	Manage Requisitions
Shop by Category - Search		٩		
Recent Requisitions	View More	Recent Purchases		
UCMR00000322 Glass cleaner for art pictures	Approved	No data to display.		
UCMR00000321 glass cleaner for special art pictures	Approved			
UCMR00000320 glass cleaner for art pictures	Approved	3		
UCMR00000319 glass cleaner art pictures	Approved			
UCMR00000313 Bleach Chemical 300ml	Approved			

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

Requisitions ②			More Tasks 🔻	Manage Requisitions
Shop by Category - Search	1	_	ৎ	
Recent Requisitions	View More	Recent Purchases		
UCMR00000322 Glass cleaner for art pictures	S Approved	No data to display.		
UCMR00000321 glass cleaner for special art pictures	Approved			
UCMR00000320 glass cleaner for art pictures	Approved			
UCMR000000319 glass cleaner art pictures	S Approved			
UCMR00000313 Bleach Chemical 300ml	Approved			

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

Manage Requisitions	©		Done
✓ Search		Advanced Max	nage Watchlist Saved Search Requisitions I Entered
5	Requisitioning BU UCM Business Unit ** Entered By Fininst1 Q	Requester ** Suppler	** At least one is required
	** Requisition	Order	٩
	Created •	Requisitions Requiring Attention	
	All .		Search Res

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

Mar	age Requisiti	ons ⊘										Done
Þ	Search							Advanced	Manage Watchlis	t Saved Search	Requisitions I Entered	•
Sear	ch Results						7					
Act	ons ▼ View ▼ For	mat 🔻 📋 🎵	🕎 🔢 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 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.

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Creation Date	7b Approval	d		ds Status Procurem
01/04/2021	50.00 1	Freeze		reserved
01/04/2021	100.001	Columns	4	
01/04/2021		Sort	•	Ascending
01/04/2021	50.001	Resize Columns		Descending
01/04/2021	105.00100	Wrap		Advanced
01/04/2021	125.00 USD	Approved	Res	ervea
12/21/2020	0	Canceled	Not	reserved
12/21/2020	50.00 USD	Approved	Res	erved
12/21/2020	175.00 USD	Approved	Res	erved
12/21/2020	60.00 USD	Approved	Res	erved
12/12/2020	75.00 USD	Approved	Res	erved

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



Manage Requisitions ⑦								Done
▶ Search				Advanced	Manage Watchi	st Saved Search	Requisitions I Entere	d •
Search Results								
Actions View View Format View Promate Process Contraction Contractions								
Requisitioning Requisition Description	Entered By	Creation Date	Approval Amount Status	Funds Status	Procurement Card	Order	Order Status	Emergency Purchase Order
UCM Business . UCMR00000322 Blass cleaner for a 8	FinInst1	12/21/2020	35.00 USD Approved	Reserved				
UCM Business UCMR00000321 glass cleaner for speciarcures	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 🕥 🕫 Check Funds View Life Cycle Actions 7 Dane									
Requisitioning BU UCM Business Unit Creation Date 1221/2020 Requisition Amoo Entered By Fininst1 Status Approved Approved Amoo Description Glass cleaner for art pictures Justification Glass cleaner needed for special art pictures in hallway Fundes Stat Attention Fining Fining Fining Fundes Stat Biding/Ro	Reserved s None n Cindy Roberts n B101	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



- 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



Requisition: UCM	R00000322 ⑦			₩.,	Social Check Funds View Life Cyr	de Actions ▼ D <u>o</u> ne
Requisitioning BU (Entered By Description (JCM Business Unit Finitest1 Jass cleaner for art pictures	Creating Canceled Status Canceled Justification Glass cleaner needed	13 rt pictures in hallway	Requisition Amou Approval Amou Funds Stat Attachmer Attach Bildng/Roc	mt 0.00 USD mt 0.00 USD us Not reserved tis None on Clindy Roberts on B101	14
Requisition Lines	mat 🕶 📑 Freeze 🐨 Detach 🚽 Wrap					
Line	Description	Category Name	Quantity UOM	Price Amount (USD Status	tatus Order	Line Life Cycle
Rows Selected	Glass cleaner for art pictures umns Hidden 13	SUPPLIES.ART SUPPLIES	12 Each 35.	.00 USD 0.0 Canceled	13	0

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

