Procurement

Oracle Procurement Step-by-Step Guide

Cancel Requisitions

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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

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

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