Steps for Clearing Requisitions
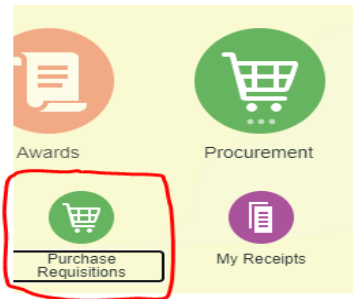
Any Requisitions in your workflow list which:

    a. you do not need
    b. have an Approval Amount > $0, and
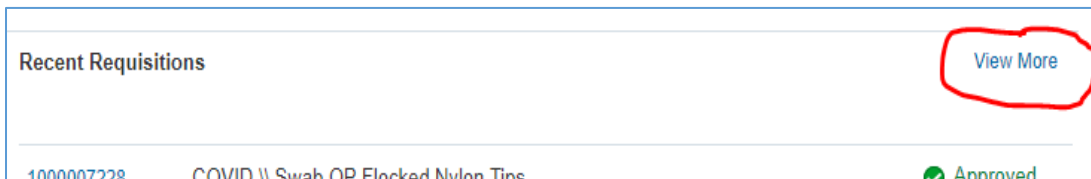   c. are <u>not</u> in Approved Status (e.g., Returned, Rejected),

must be edited to delete all lines so that the Requisition can be canceled.

The steps to complete this task are:

1. Navigate to Quantum Financials > Procurement > Purchase Requisitions

2. When your Requisition workflow list appears, click View More to see all Requisitions in your list

3. When your entire list appears, sort the Status column to bring all non-approved Requisitions to the top of your list. Work each one to change their Status to Canceled with $0 Approval Amount.
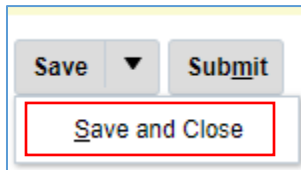
4. Click on each Requisition number to open the Requisition Lines. Click the Actions dropdown arrow (far left, middle of the screen) and select Edit.
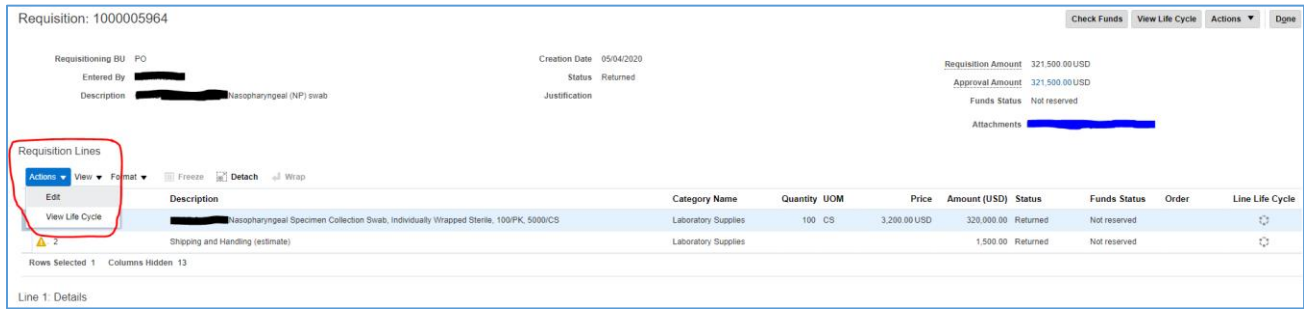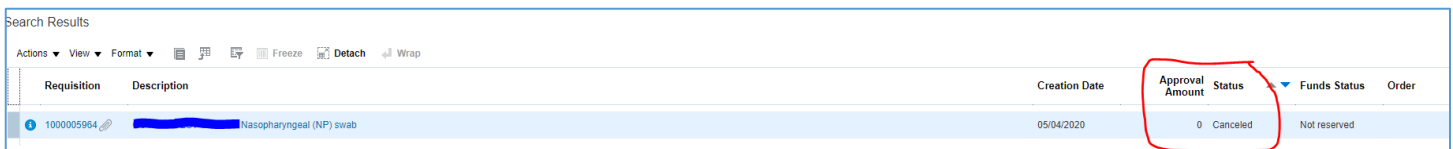

5. You will now be able to delete each line by clicking the Delete X to the far right. You can also make changes to the Description and/or Justification.
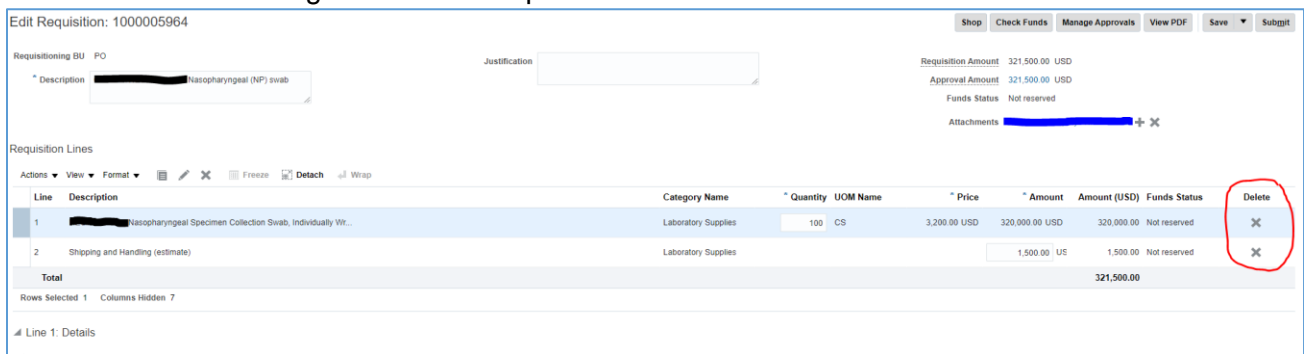
6. Click Save and Close.

The Requisition will now appear in your list as Canceled with $0 Approval Amount.

Note:

You should only have Requisitions in your workflow list that you need (i.e., they have already been sourced to a Purchase Order or you are waiting for them to be sourced).

If there are any Requisitions that you know you do not need (e.g., those that have been Returned or Rejected), you should regularly perform these steps to delete the commitments associated with the Requisitions so that your commitments are not overstated.