

# In This Guide

- ✓ Selecting a requisition
  ✓ Withdrawing a requisition from workflow
- $\checkmark$  Reviewing the requisition status

This guide demonstrates how to withdraw a requisition from workflow.

Why withdraw a requisition?

• If you no longer require the order and need to cancel the requisition.

### **Shopping & Policy Reminders**

- Only requisitions in a pending status can be withdrawn.
- Once a requisition is withdrawn, it cannot be reinstated!
- If you need to make changes to a requisition that is currently in workflow, it is recommended that you contact the appropriate approver and ask that the approver <u>return</u> the requisition to the requester for edits.
- If you <u>withdraw</u> the requisition, you can use the copy cart functionality to place the items into a new requisition (The copy function is not applicable for punch-out transactions.)

Shoppers, requesters or approvers will <u>not</u> receive an email notification that a requisition has been withdrawn. You should communicate the withdrawal by other means if needed.

### Procedure

- 1. Click **document search** on the navigation bar.
- 2. Optional: To restrict your search to requisitions, select **Requisitions** from the Search box.
- 3. Enter the requisition name or number and click the **Go** button.

DK GURRAL	Roger Requestor profile   log Document Search	jout Search for Catalog No.	Select Draft Cart or Add Item to Cart (SKU) Go
home/shop   favorites	forms   carts	history document search	settlement   more >> 💌 🗚
search exports			2
	\		
Search All Documents	s •	All Dates	Go advanced search
Requisitions Purchase Orde Invoices	Go to: my requisitions	my purchase orders   my invoices	



4. Click the requisition number.

A A A A A A		Roger Requestor	profile   logo	out	ਤੇ≅ Select Dra	ft Cart or Ad	d Item to Cart
OK GORRAL		Document S	earch	Search for Ca	atalog No. (SKU) 🔽		Go
home/shop   favorites		forms	carts	history	ocument settlem	ent   mo	re >> 💌 🗚
search exports							? 🚆
start new sear	ch	edit search	Go to: my req	uisitions   my p	ourchase orders   m	iy invoices	
		Showing <b>1</b> - <b>1</b> of	1 results	All Da	ites		
Search Terms	٩	Results per	5	ort by: Best mat	tch 🔻	▲ Pag	e 1 of 1 🕨 <b>?</b>
Keyword		page 20 💌					_
training sample		Number	Type	Owner	Document Date/Time	Supplier	Total
Simple Search	•	<i>€</i> 678274 🔍	Requisitions	Sally Shopper	12/3/2011 2:33 PM	STAPLES	42.13 USD
Filtered By							
Type: All Documents							
Date Range: All Dates							
Save Search							Ţ

The requisition **Status** displays on the **Requisition Summary** tab. The requisition in this example is in the **Pending** status.

		oger Req Imma 78274	uestor profile   logout <b>ry - Requisition</b> Se	arch <mark>Catal</mark> for	ेन Select Draft Cart or Add og No. (SKU) 💌	l Item to Cart
home/shop	favorites   forms	ca	arts   history document search	t settler	nent   more >> 💌 » Font	Size: A   A   A
search ex	ports					?
Requisition Summary	PR Approvals PO Previe Shipping Billing	ew Comi Accou	ments Attachments History	Availabl Taxes/S&	e Actions: Add Comment Add Comment Add Notes to History Withdraw Entire Requ Copy to New Cart	Go
	General	?	Shipping	?	Billing	?
Status Submitted	Pending Fiscal Approval 12/3/2011 2:33 F	PM	Ship To Attn: Roger Requestor Room		Bill To Connors State College Accounts Pavable	
Cart Name	Training Sample :	1	Dept AAD0320 - FINANCIAL INFO	ORMATION	918-463-6329	
Description	no value		Adair Cnty Ext Office		Warner, OK 74469	
Requestor	Roger Requestor		220 W Division St Crthse Basem	ent	United States	
Priority	Normal		Stilwell, OK 74960 United States			
Shopper	Sally Shopper				Billing Options	

- 5. Optional: Click the **PR Approvals** tab if you would like to review the approval path.
- 6. Select **Withdraw Entire Requisition** from the **Available Actions** list.
- 7. Click the **Go** button.



8. In the **Withdraw Entire Requisition** box, enter the withdrawal reason and click the **Withdraw Enter Requisition** button.

Withdraw Entire Requisition	?					
Once a PR or line is withdrawn, it cannot be reinstated. Click OK to withdraw, or Cancel to leav the PR unchanged.						
PR Withdrawal Reason						
This order is no longer required	4					
968 characters remaining expand   cl	lear					
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document. <u>Withdraw Entire Requisition</u> <u>Cancel</u>						
40						

9. The **Status** on the **Requisition Summary** page is updated to **Withdrawn**.

			Roger Requesto Summary 678274	or profile   logout - Requisition	Sea	rch <mark>Cat</mark> for	alog No. (	Select Dr <mark>SKU) 🔽</mark>	aft Cart	or Add Item	to Ca	rt Go
home,	/shop	favorites	forms	carts	history	docur sea	ment rch	settlen	nent	more >>	•	AAA
search	n export	ts										?
Requis	sition PR	Approvals Comn	nents (1) Attach	nments History			Available	Actions:	Add Con	nment	•	Go
Sum	mary S	Shipping   Billin	g Accounting	g Codes   Supplier Info	Taxes/S&H							?
Hide hea	ader									Hide value de	escriptio	ons
		General	?	Shipping		?		B	illing			?
Status		Withdray (12/3/2011 2	<b>wn</b> 2:45 PM)	<b>Ship To</b> Attn: Roger Requestor		Bil	<mark>ll To</mark> onnors Sta	ate Colleg	e			
Submit	ted	12/3/2011	2:33 PM	Room		Ac	Accounts Payable					
Cart N	ame	Training Sa	ample 1	Dept AAD0320 - FINANCIA MANAGEMENT	LINFORMATION	N 91 Rt	18-463-63 1 Box 10	29 00				
Descrip	otion			Adair Cnty Ext Office Warner, OK 74469								
Reques	Requestor Roger Requestor			220 W Division St Crthse Basement United States								
Priority	/	Normal		United States								
Shoppe	er	Sally Shop	per			Bi	lling Optio	ons				
Contra Campu	ct # Is Code	<i>no value</i> PS Panhandle Si	tate	Delivery Options Req Delivery no va	lue	Ad	counting	Date	12/3/2	011		Ŧ

You have successfully withdrawn a requisition from workflow.



## **Alternate Navigation**

The procedure in this guide illustrates how to search for requisitions: You can also locate requisitions with the following navigation:

#### A. Go to the **carts** $\Rightarrow$ **my requisitions**.

	GURRAL	Roger Reques	stor profile   logout Search Results	]	ेन्न 2011-12 Search for <mark>Cat</mark>	2-03 sally_shoppe alog No. (SKU)	er 01   2 item(	(5), <b>42.13</b> USD
home/sh			carts	histor	y   docum searc	ent   settlen :h	nent   mo	ne >> 🔽 🗚
active ca	rt   draft carts	assigned carts	favorites my requi	isitions				?
New Sear	ch Select Query S	ave Query Reque	est Export					
Results pe	er page 10 💌	Requ	isition(s) meeting th	e search o	criteria: 3		Page 1 of 1 上	legend ?
Status 🗠	Requisition No. $\triangle$	Supplier(s)	Requisition Nan	ne 🗠	Requisitioner 🗠	<b>Requisition</b> Date	/Time 🔻 Req	uisition Total
✓	672514 🗟	A. Daigger & Co.	2011-11-21 roger_req	uestor 02	Requestor, Roger	11/21/2011 3:2	22 PM	100.00 USD
✓	672511 🗟	A. Daigger & Co.	2011-11-21 roger_req	uestor 01	Requestor, Roger	11/21/2011 3::	11 PM	100.00 USD
R	669002 🗟	A. Daigger & Co.	new cart for smit	h lab	Requestor, Roger	11/18/2011 8:5	50 AM	100.00 USD
New Sear	ch Select Query S	ave Query Reque	est Export					

B. From the OK Corral homepage, go to **Action Items** ⇒ **My Orders** and click **Requisitions Pending**.

