

**Requisitions – Manage Requisitions**

- Attached is a sheet of definitions for the various “states” your requisition may be in at any given time in the process.

**Manage Requisition "Request State" Definitions**

<b>Requisition State</b>	<b>Budget State</b>	<b>Means</b>	<b>Next Step</b>
Approved	Prov Valid	It has been Approved, needs to be Budget Checked	Do a Budget Check then go to Buyer's Center and" Expedite to create a PO"
Approved	Valid	Ready to Expedite into a Purchase Order	Go to eProcurement>Buyer Center>Expedite Requisition
Canceled	Not Chk'd	The Req has been cancelled. The Req s/b Budget Checked and then Closed. It would automatically be closed in 90 days.	Select Action - "Check Budget" . Then go to Requesters Workbench to force it closed. (UPK - Closing Requisitions under Approvers)
Denied	Pro Valid	The Req has been denied. You should cancel it to get off of the list. Then Close	Go to "Select Action" and "Cancel"
Open	Prov Valid	The Req has not been submitted for Approval	Need to Edit the Req and then "Submit for Approval"
Open	Error	There is a budget exception with the Req.	Check to see what the error is by clicking on the link "Error". The error could be insufficient dollars in budget or incorrect "CF" (Chart Fields) (accounting information). You then need to act on the error, which could mean talking with the Fiscal Manager to get the right Chart Fields or ensure that the budget is correct. Once the error is resolved, you need to edit the Req by hitting the "Pre-Check Budget" and then hit "Save & Submit".
Open	Not Chk'd	You have not done a "Pre-Check" of the budget or Submitted for Approval.	Edit the Req and hit "Pre-Check Budget". Then "Save & Submit" for approval.

Partially Dispatched	Valid	<p>1. You have cancelled/closed a PO and another PO was created.</p> <p>2. Multiple Line Req and only partially Expedited to a PO</p>	<p>1. You can verify by clicking on the word PO on the lifeline to determine if the PO was cancelled/closed. If it needs to be Received, receive as normal.</p> <p>2. Cancel the PO and resource or create another PO for the lines that were not sourced.</p> <p>(If you cancel a PO, "yes" resource Req, unless you want it cancelled completely.)</p>
Partially Received	Valid	<p>The PO has not been completely received.</p> <p>You did not the receive the complete order.</p>	<p>When the goods come in, receive the remaining quantity. If the goods do not come in, close the PO. (this will relieve the encumbrance)</p>
Pending	Prov Valid	Needs to be Approved	Wait for the approval
Pending	Error	<p>The requisition was submitted when a budget was not available.</p> <p>Make sure the budget is Provisionally Valid before you submit for approval.</p>	<p>Check with your Fiscal Manager to get a valid Chart Field string to ensure that it has the correct fields. Once you have the budget added or the Chart Fields is correct, you can click the "Pre-Check Budget" and then hit "Save and Submit" if it is valid.</p>
Pending	Not Chk'd	You need to do the Precheck Budget action.	<p>Need to go to "Select Action" and "Precheck Budget".</p> <p>If you receive an error, correct the error recheck the "Precheck Budget". Otherwise, the status will become valid you will be "Pending Approval"</p>
PO Partially Cancelled	Valid	One of the lines was cancelled on a PO.	<p>If the line was cancelled legitimately, then no action is needed. If the line was cancelled in error, you need to create a new Req for the cancelled line.</p>
PO Partially Completed	Valid	<p>1. You have cancelled a PO and another PO was created.</p> <p>2. Multiple Line Req and only partially Expedited to a PO</p>	<p>1. You can verify by clicking on the word PO on the lifeline to determine if the PO was cancelled. If it needs to be Received, receive as normal</p> <p>2. Cancel the PO and resource or create another PO for the lines that were not sourced.</p> <p>(If you cancel a PO, "yes" resource Req, unless you want it cancelled completely.)</p>

PO Partially Created	Valid	One of the lines was Expedited to a PO, the other line(s) was not.	If the unsourced line is valid, it needs to be expedited to a PO, otherwise cancel the unsourced line(s).
PO Partially Dispatched	Valid	1. You have cancelled/closed a PO and another PO was created. 2. Multiple Line Req and only partially Expedited to a PO	1. You can verify by clicking on the word PO on the lifeline to determine if the PO was cancelled/closed. If it needs to be Received, receive as normal. 2. Cancel the PO and resource or create another PO for the lines that were not sourced. (If you cancel a PO, "yes" resource Req, unless you want it cancelled completely.)
PO(s) Canceled	Valid	The PO was cancelled.	No action required.
PO(s) Completed	Valid	The PO has been closed.	No action required.
PO(s) Created	Valid	The PO was Expedited, but the PO process was not completed.	You need to go to the BuyerCenter>Manage PO> click on the Open PO and click on Header Details to change the type, billing location, and email. Disptach the PO.
PO's Dispatched	Valid	The PO has been dispatched. It is ready to be received (goods).	Receive the item (goods) by going to "Select Action" and choosing "Receive" and hit "Go".
Received	Valid	Well-done! The Transaction is completed.	Write the PO number on the Invoice and the Budget Year. Scan and email (with the PO number in the subject lint) to AP@SLCO.ORG.
See Lines	Not Chk'd	If there is a line with a negative amount, it will show "See Lines". Make sure that both lines are approved, otherwise the credit will not go through	Precheck Budget Make sure that you Expedite both lines
See Lines	Valid	If there is a line with a negative amount, it will show "See Lines". Make sure that both lines are approved, otherwise the credit will not go through	Make sure that you Expedite both lines
See Lines	Error	You have a budget error with a line that has a credit.	Fix the error. Precheck the Budget, Save and Submit

