

Changing the Contract ID on eProcurement Requisitions



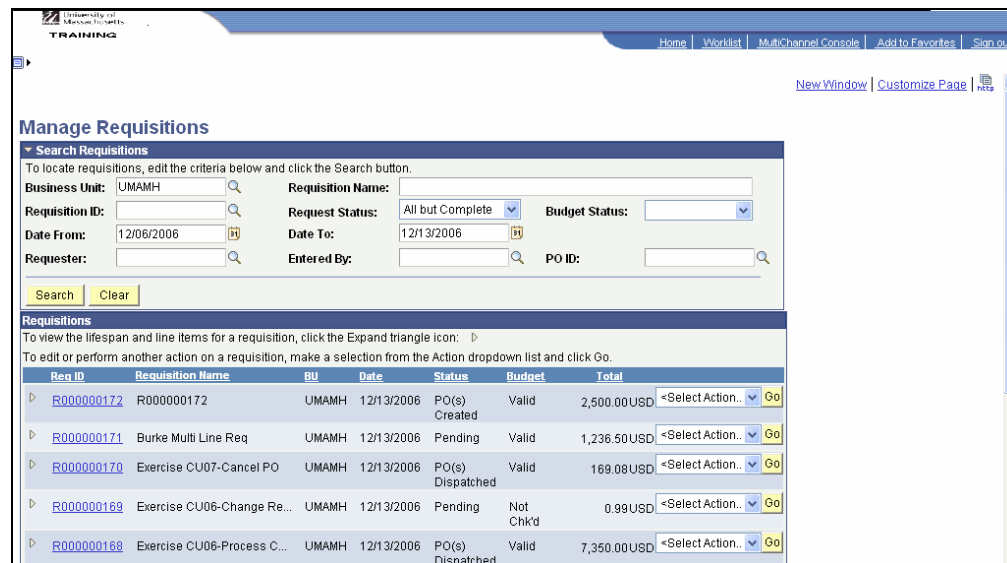
When a requisition is created, the **Contract ID** entered on the **Define Requisition** tab of the **Create Requisition** page defaults to all lines of the requisition going forward. This can be changed at the line level or for an entire requisition

- Step 1.** Log on to the e*mpac Finance Application with your FIN Username and Password, and navigate to the **Manage Requisitions** page.



eProcurement → Manage Requisitions

The **Manage Requisitions** page opens with a list of requisitions meeting the default criteria.



Manage Requisitions

Search Requisitions
 To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

Requisitions
 To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total		
▶ R000000172	R000000172	UMAMH	12/13/2006	PO(s) Created	Valid	2,500.00USD	<Select Action..	Go
▶ R000000171	Burke Multi Line Req	UMAMH	12/13/2006	Pending	Valid	1,236.50USD	<Select Action..	Go
▶ R000000170	Exercise CU07-Cancel PO	UMAMH	12/13/2006	PO(s) Dispatched	Valid	169.08USD	<Select Action..	Go
▶ R000000169	Exercise CU06-Change Re...	UMAMH	12/13/2006	Pending	Not Chk'd	0.98USD	<Select Action..	Go
▶ R000000168	Exercise CU06-Process C...	UMAMH	12/13/2006	PO(s) Dispatched	Valid	7,350.00USD	<Select Action..	Go

- Step 2.** To access the specific requisition being changed, edit the search criteria that defaults. You can search by
- Requisition ID
 - Dates
 - Requester
 - Requisition Name, and
 - Request Status

Step 3. Click **Search** and select the appropriate requisition.

The **Requisition Details** page opens.



The screenshot shows the 'Requisition Details' page. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below the page title, there are links for 'New Window' and 'Customize Page'. The main content area displays a table with the following data:

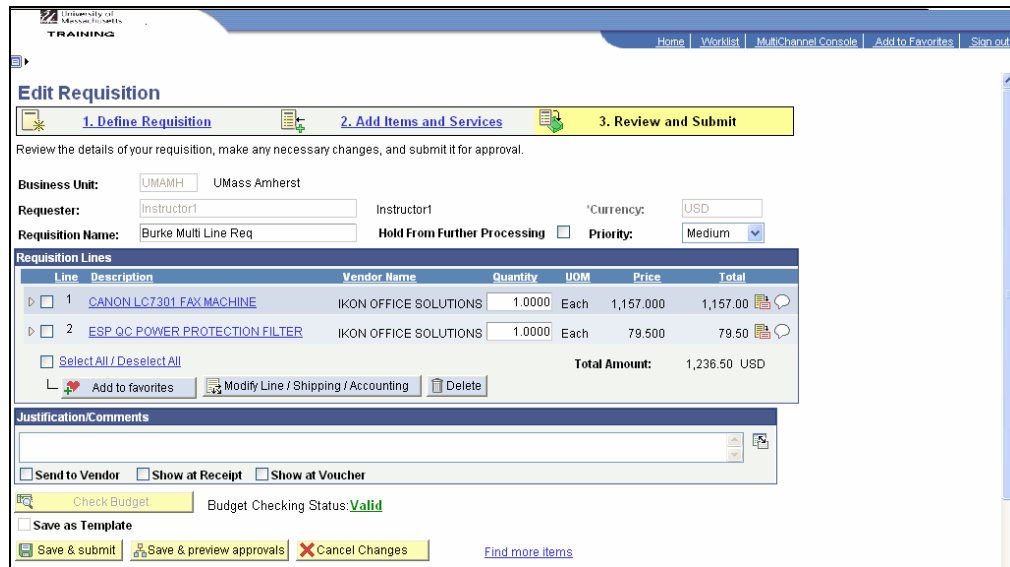
Requisition Name	Requisition ID	Unit	Date	Status	Total
Burke Multi Line Req	R000000171	UMAMH	12/13/2006	Pending	1,236.50

Line	Item Description	Source Status	Qty	Price	Total
1	CANON LC7301 FAX MACHINE	Not Sourced	1.0000	Each 1,157.0000 USD	1,157.00
2	ESP QC POWER PROTECTION FILT...	Not Sourced	1.0000	Each 79.5000 USD	79.50

Below the table is an 'Edit Requisition' button and two links: 'Return to Manage Requisitions' and 'Requisition Schedule and Distribution'.

Step 4. Click **Edit Requisition**.

The **Edit Requisition** page opens displaying the **Review and Submit** tab.



The screenshot shows the 'Edit Requisition' page with three tabs: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. The 'Review and Submit' tab is active. Below the tabs, there is a text prompt: 'Review the details of your requisition, make any necessary changes, and submit it for approval.'

Business Unit: UMass Amherst
 Requester: Instructor1
 Requisition Name: Burke Multi Line Req
 Hold From Further Processing:
 Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	CANON LC7301 FAX MACHINE	IKON OFFICE SOLUTIONS	1.0000	Each	1,157.0000	1,157.00
2	ESP QC POWER PROTECTION FILTER	IKON OFFICE SOLUTIONS	1.0000	Each	79.5000	79.50
Total Amount:						1,236.50 USD

Buttons: Add to favorites, Modify Line / Shipping / Accounting, Delete

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget: Budget Checking Status: Valid

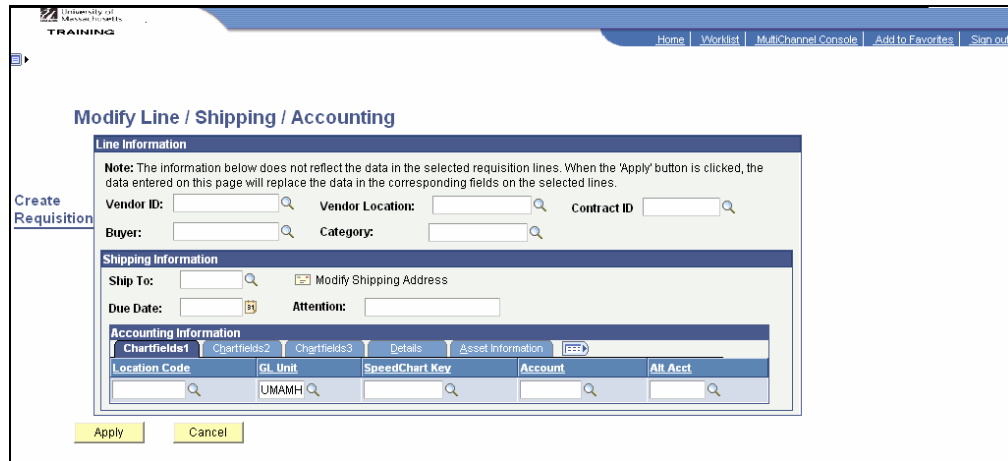
Buttons: Save & submit, Save & preview approvals, Cancel Changes, Find more items

Step 5. Use the table below to decide how to proceed.

IF the contract ID is being changed...	THEN...
on a specific line	select the check box next to the line number.
on the entire requisition	select the Select All/Deselect All check box (under the list of line items).

Step 6. Click .


The **Modify Line / Shipping / Accounting** page opens.

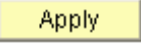


Step 7. Enter the vendor number in the **Vendor ID** field.

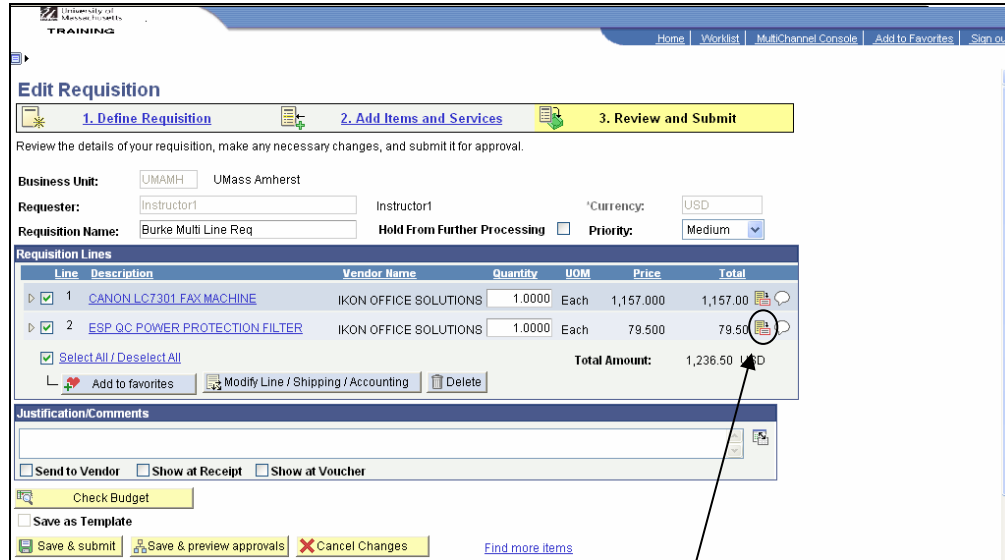
Step 8. Enter the new contract in the **Contract ID** field.




Note: Click  to view a list of contracts assigned to the vendor.

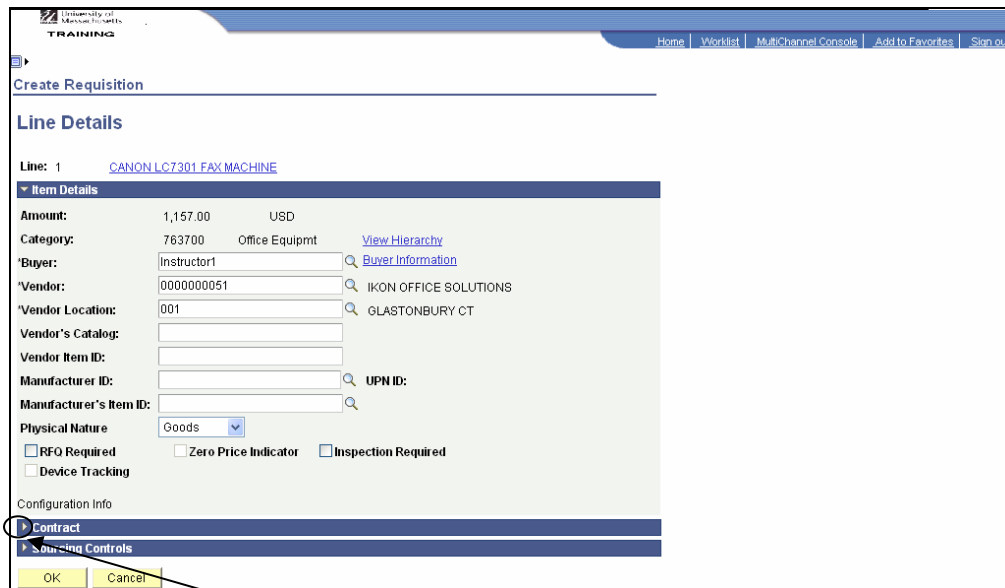
- Step 9. Click . When this button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

The **Edit Requisition** page reopens displaying the **Review and Submit** tab.



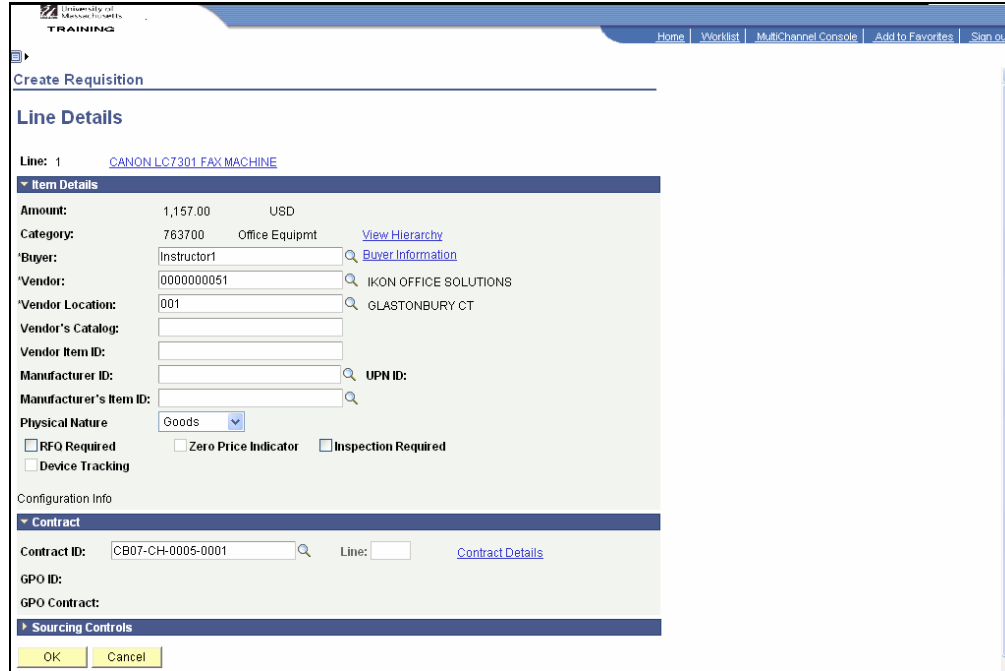
- Step 10. To verify that the Contract ID has been changed, click  (Line Details) for each line changed.

The **(Create Requisition) Line Details** page opens.



- Step 11. Click the expansion arrow on the **Contract** group box.

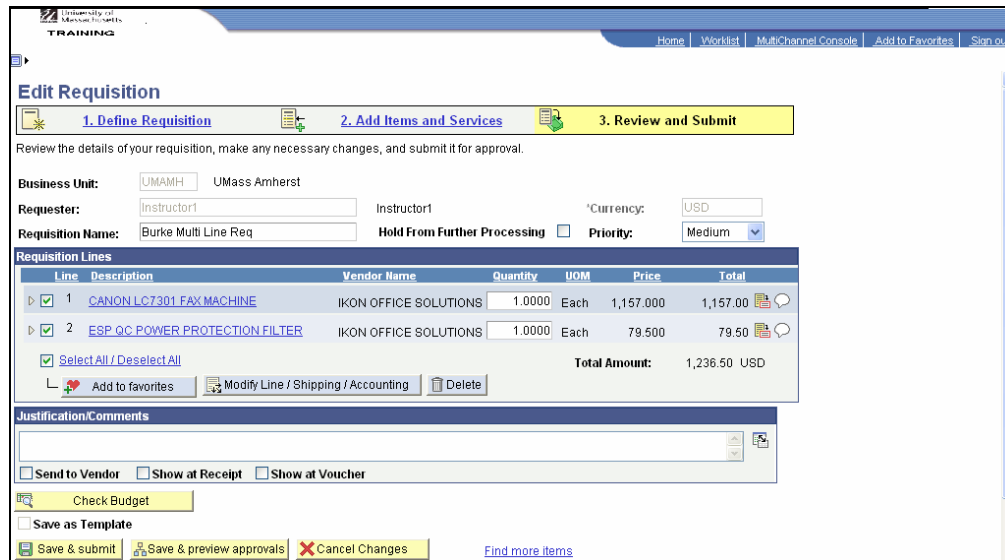
The **Create Requisition (Line Details)** page displays the **Contract** group box.




Step 12. Verify that the new contract displays in the **Contract ID** field.

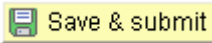
Step 13. Click .

The **Edit Requisition** reopens displaying the **Review and Submit** tab.

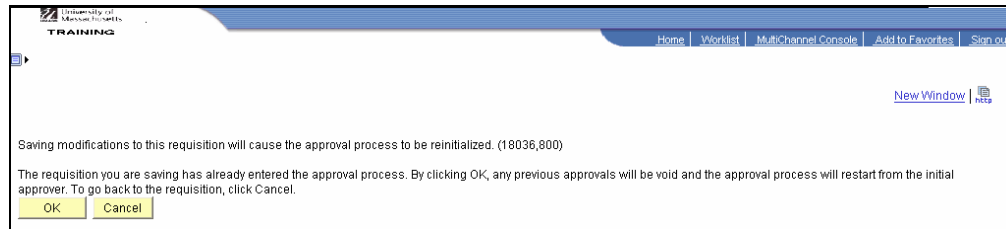




Note: To save the requisition without submitting it to Workflow, click . Requisitions that are not submitted to Workflow will not be reviewed or approved and will not be sourced to purchased orders.

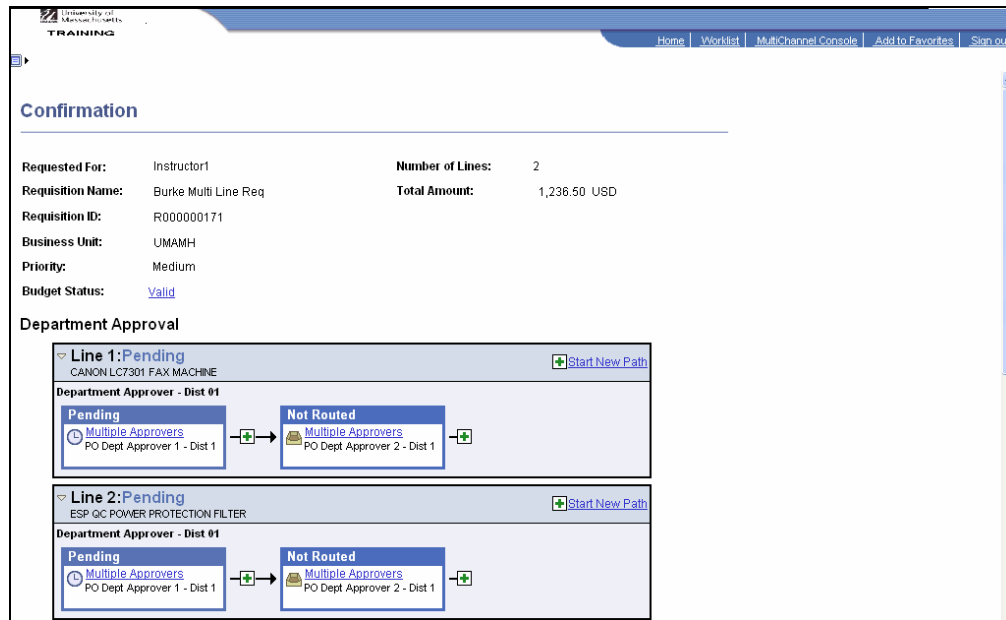
Step 14. To save the requisition and submit it to Workflow, click .

The following message displays.



Step 15. Click .

The **Confirmation** page opens.




Note: Any approvals that are required for the requisition are displayed. Workflow varies by campus.



Step 16.

Scroll to the bottom of the page and click .

Note: If the **Check Budget** and **Edit Requisition** buttons are grayed out, expand or collapse any triangle icon () to refresh the page. The buttons will become available.

When processing completes, the **Budget Status** field should display "Valid".

End of Procedure