Changing the Contract ID on eProcurement Requisitions

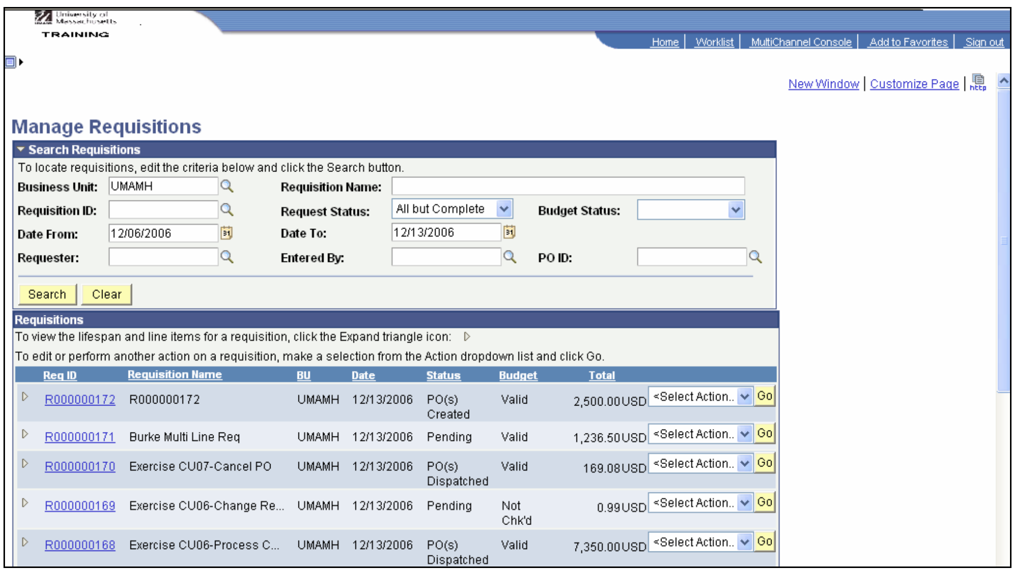
Intro

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.

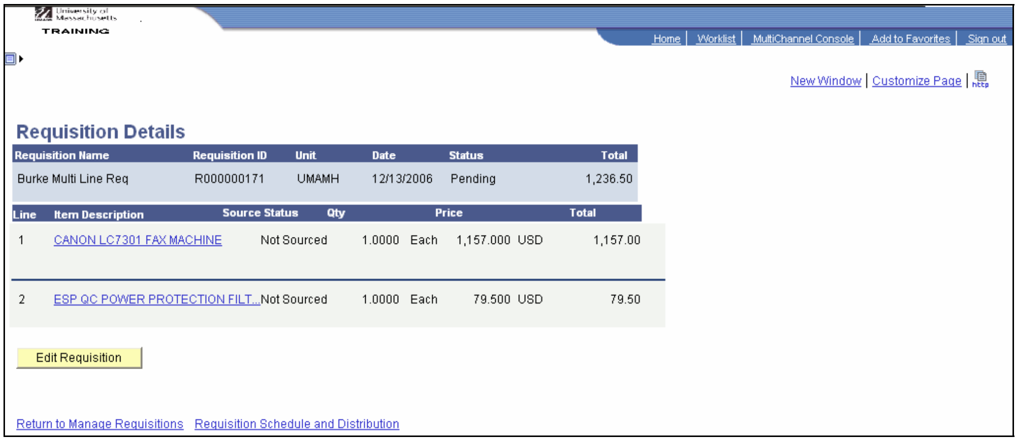


Step 2. To access the specific requisition being changed, edit the search criteria that defaults. You can search by

- Requisition ID
- Dates
- Requester
- Requisition Name, and
- Request Status

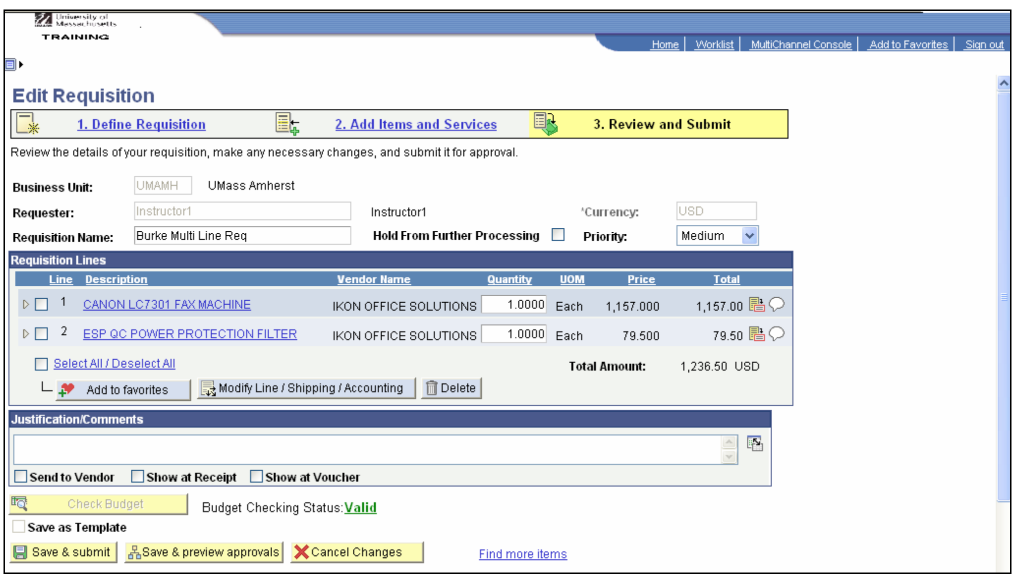
Step 3. Click **Search** and select the appropriate requisition.

The ***Requisition Details*** page opens.



Step 4. Click **Edit Requisition**.

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

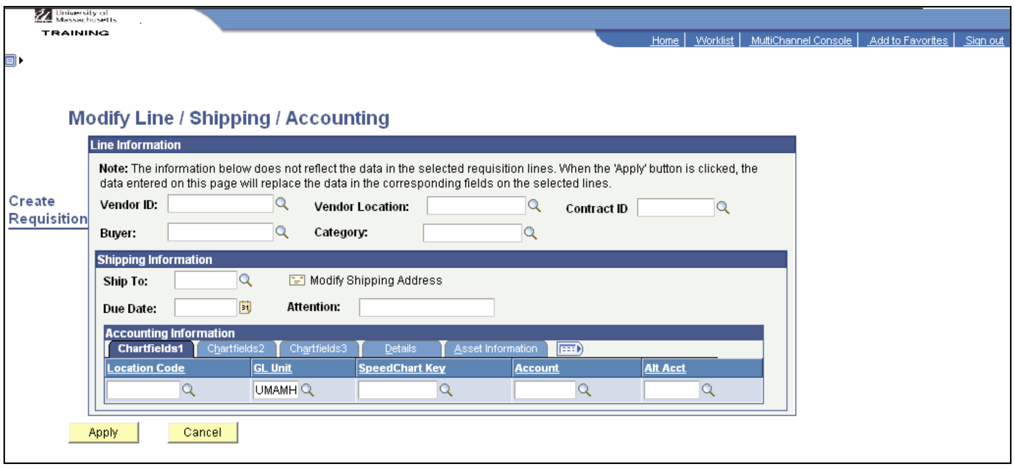


Step 5. Use the table below to decide how to proceed.

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 Modify Line / Shipping / Accounting.

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



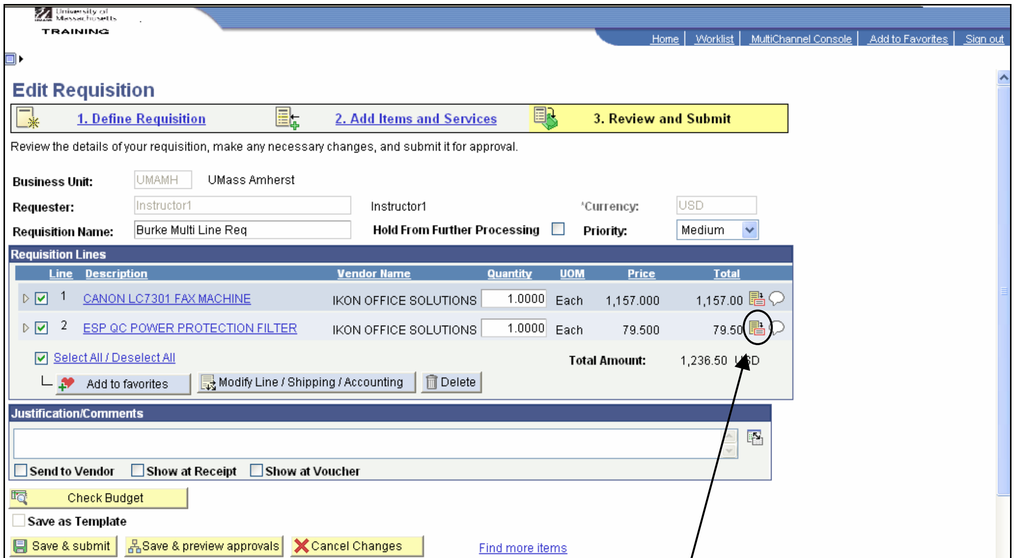
Step 7. Enter the vendor number in the ***Vendor ID*** field.

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

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

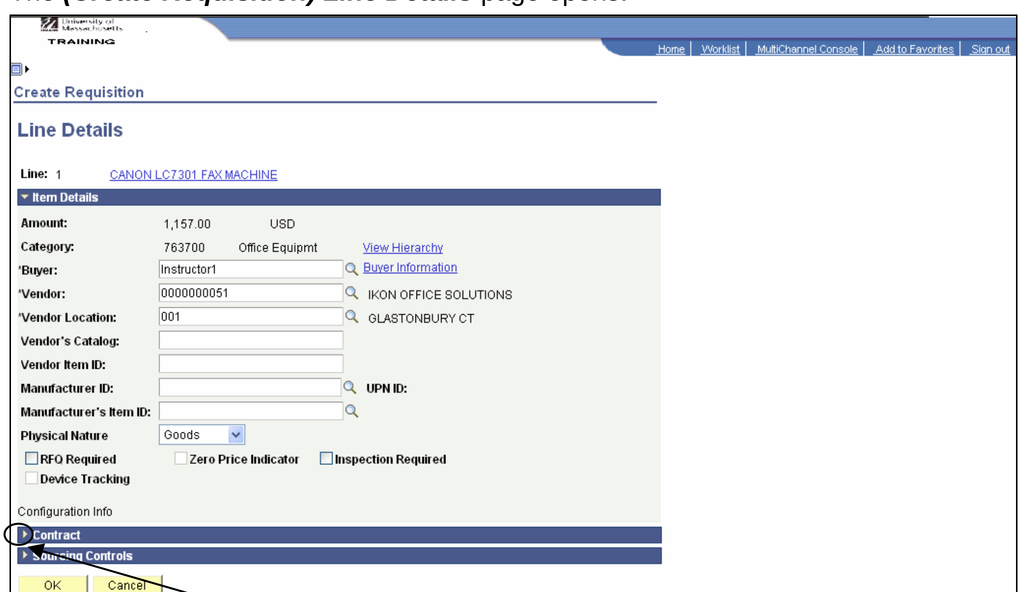
Step 9. Click Apply. When this button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

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



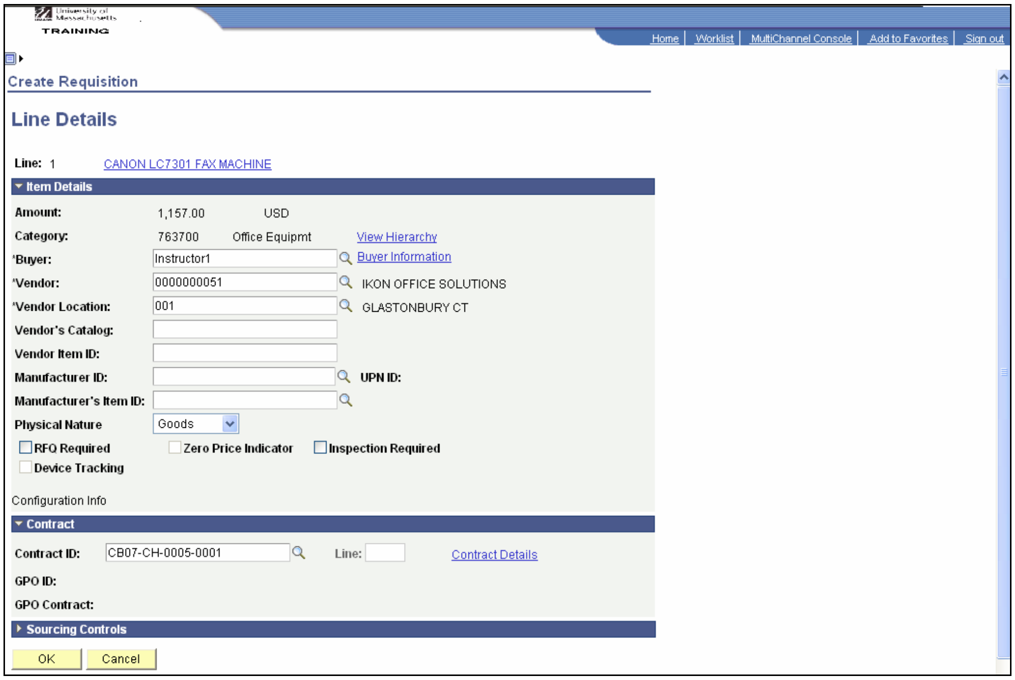
Step 10. To verify that the Contract ID has been changed, click (Line Details) for each line changed.

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



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

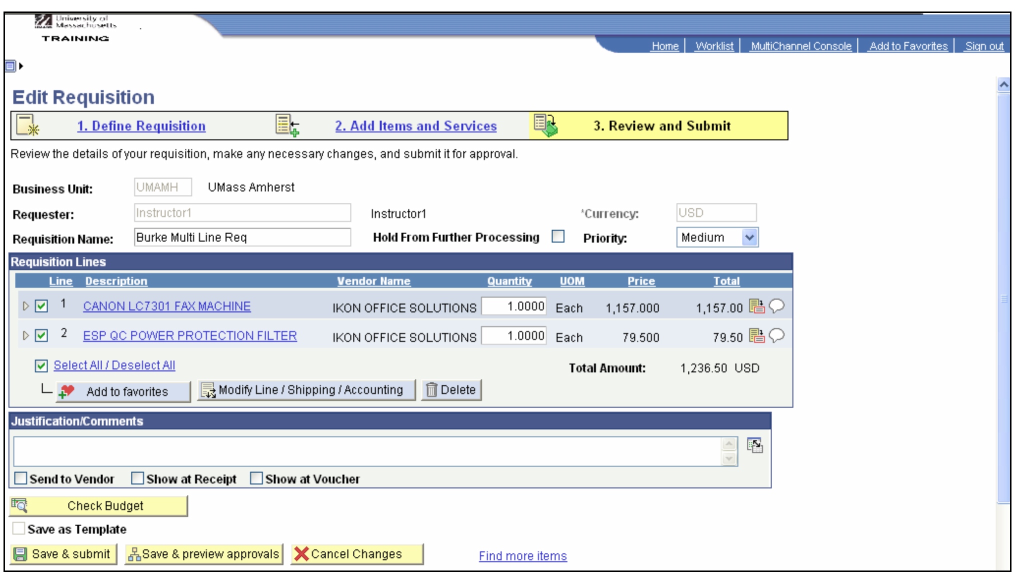
The ***Create Requisition (Line Details)*** page displays the ***Contract*** group box.



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

Step 13. Click OK.

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



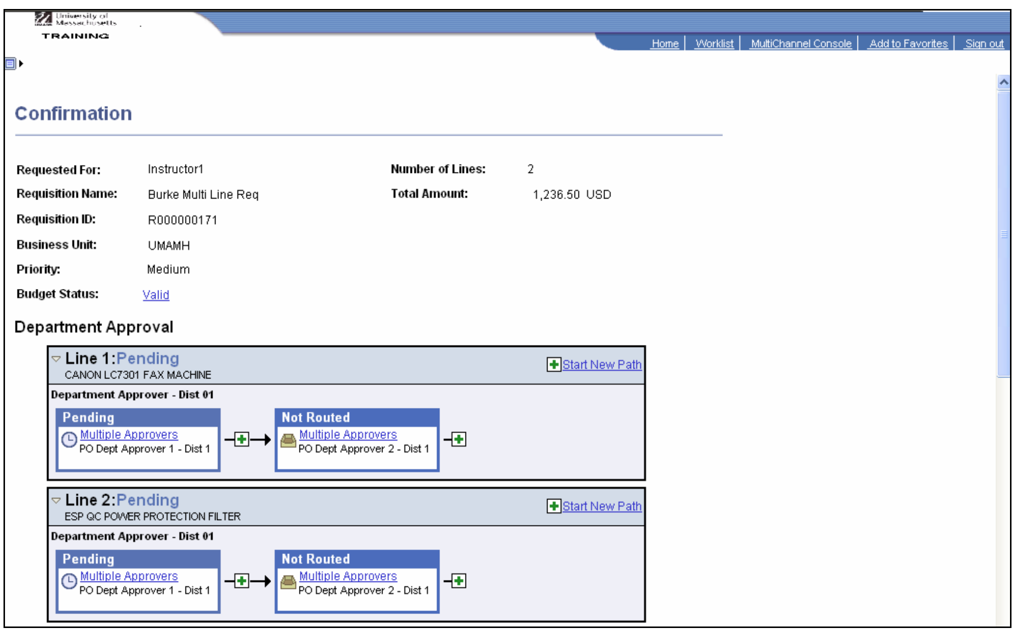
Note: To save the requisition without submitting it to Workflow, click Save & preview approvals. Requisitions that are not submitted to Workflow will not be reviewed or approved and will not be sourced to purchased orders.

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

The following message displays.

Step 15. Click OK.

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 Check Budget.

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