

## Changing the Contract ID on eProcurement Requisitions



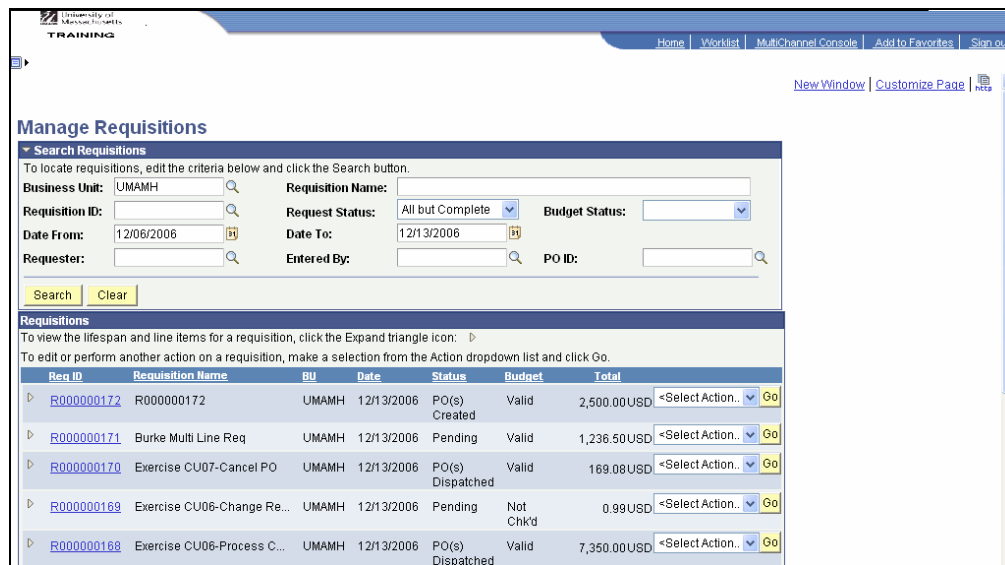
When a requisition is created, the **Contract ID** entered on the **Define Requisition** tab of the **Create Requisition** page defaults to all lines of the requisition going forward. This can be changed at the line level or for an entire requisition

- 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	0.99USD	<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.



**Requisition Details**

Requisition Name	Requisition ID	Unit	Date	Status	Total
Burke Multi Line Req	R00000171	UMAMH	12/13/2006	Pending	1,236.50

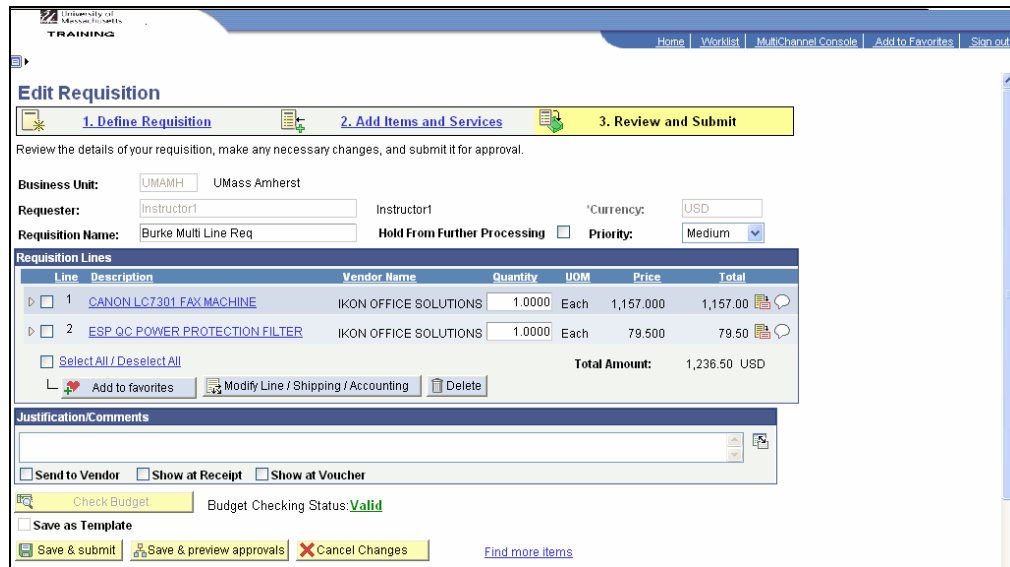
Line	Item Description	Source Status	Qty	Price	Total
1	CANON LC7301 FAX MACHINE	Not Sourced	1.0000	Each 1,157.0000 USD	1,157.00
2	ESP QC POWER PROTECTION FILT...	Not Sourced	1.0000	Each 79.5000 USD	79.50

**Edit Requisition**

[Return to Manage Requisitions](#) [Requisition Schedule and Distribution](#)

Step 4. Click **Edit Requisition**.

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



**Edit Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

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

**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
<b>Total Amount:</b>						1,236.50 USD

**Justification/Comments**

Send to Vendor  Show at Receipt  Show at Voucher

Check Budget Budget Checking Status: Valid

Save as Template

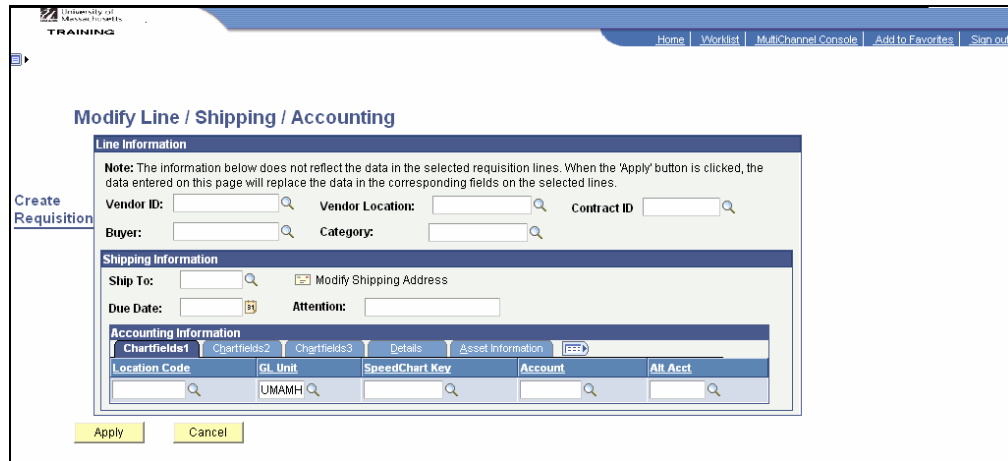
[Find more items](#)

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

<b>IF the contract ID is being changed...</b>	<b>THEN...</b>
on a specific line	select the check box next to the line number.
on the entire requisition	select the <b>Select All/Deselect All</b> 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.

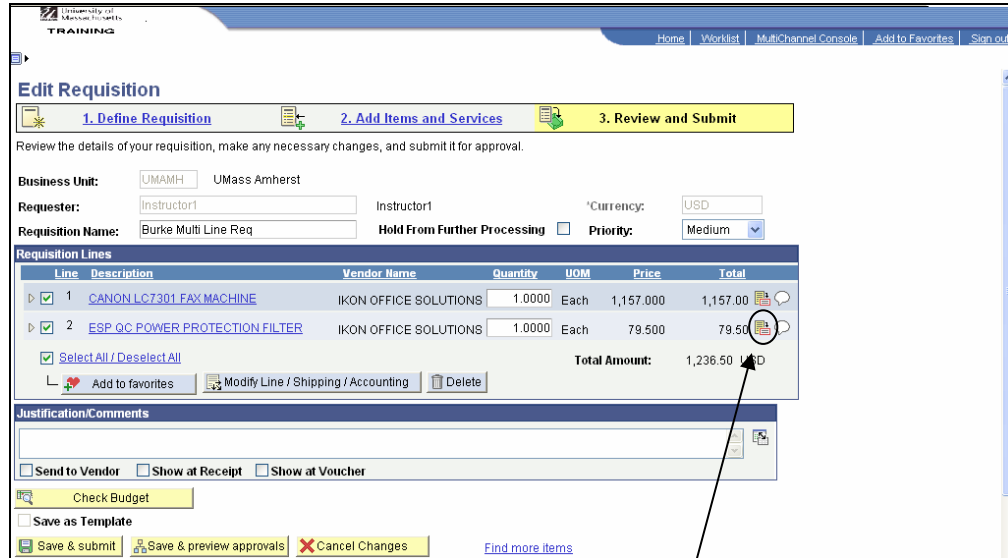
**Step 8.** Enter the new contract in the **Contract ID** field.



**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.



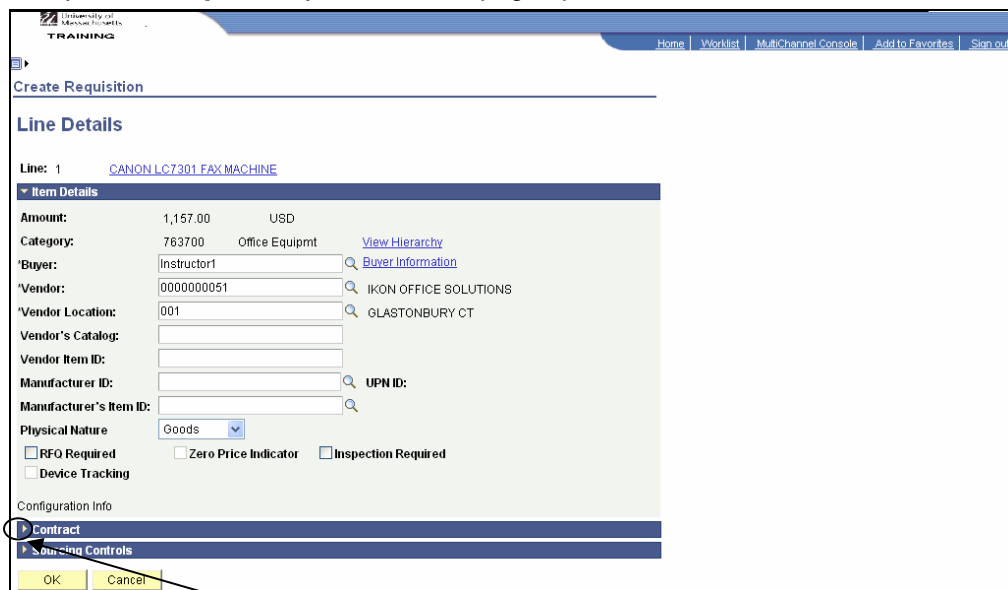
**Business Unit:** UMAMH UMass Amherst  
**Requester:** Instructor1 Instructor1 \*Currency: USD  
**Requisition Name:** Burke Multi Line Req **Hold From Further Processing**  **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	CANON LC7301 FAX MACHINE	IKON OFFICE SOLUTIONS	1.0000	Each	1,157.000	1,157.00
2	ESP QC POWER PROTECTION FILTER	IKON OFFICE SOLUTIONS	1.0000	Each	79.500	79.50
<b>Total Amount:</b>						1,236.50 USD

**Buttons:** Add to favorites, Modify Line / Shipping / Accounting, Delete, Save & submit, Save & preview approvals, Cancel Changes, Find more items

**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.



**Line:** 1 CANON LC7301 FAX MACHINE

**Item Details**

**Amount:** 1,157.00 USD  
**Category:** 763700 Office Equipmt [View Hierarchy](#)  
**Buyer:** Instructor1 [Buyer Information](#)  
**Vendor:** 0000000051 [IKON OFFICE SOLUTIONS](#)  
**Vendor Location:** 001 [GLASTONBURY CT](#)  
**Vendor's Catalog:**  
**Vendor Item ID:**  
**Manufacturer ID:** [UPN ID:](#)  
**Manufacturer's Item ID:** [UPN ID:](#)  
**Physical Nature:** Goods  
 RFQ Required  Zero Price Indicator  Inspection Required  
 Device Tracking

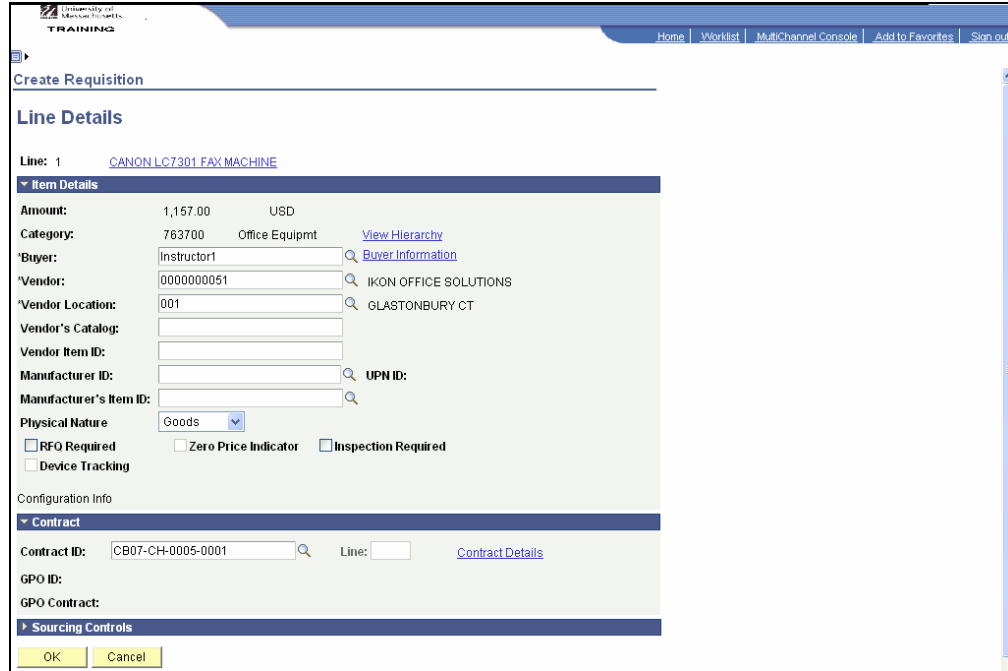
**Configuration Info**

**Contract** (Expanded)  
**Contracting Controls**

**Buttons:** OK, Cancel

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

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

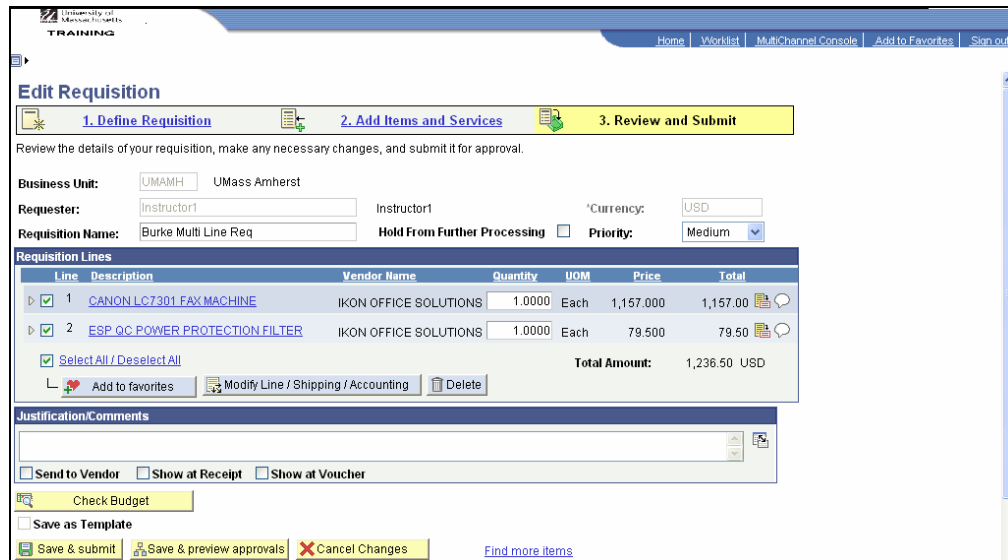


The screenshot shows the 'Create Requisition' page with the 'Line Details' section expanded. The 'Contract' section is also visible, showing a search field for 'Contract ID' with the value 'CB07-CH-0005-0001' and a 'Line' field. Below the contract section is the 'Sourcing Controls' section. At the bottom of the form are 'OK' and 'Cancel' buttons.

**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.





The screenshot shows the 'Edit Requisition' page with the 'Review and Submit' tab selected. The page displays a summary of the requisition, including the business unit (UMAMH), requester (Instructor1), and requisition name (Burke Multi Line Req). Below this is a table of requisition lines:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	CANON LC7301 FAX MACHINE	IKON OFFICE SOLUTIONS	1.0000	Each	1,157.000	1,157.00
2	ESP QC POWER PROTECTION FILTER	IKON OFFICE SOLUTIONS	1.0000	Each	79.500	79.50
<b>Total Amount:</b>						1,236.50 USD

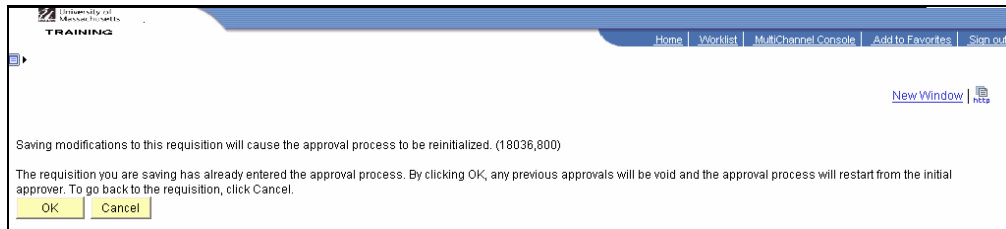
Below the table are options to 'Add to favorites', 'Modify Line / Shipping / Accounting', and 'Delete'. At the bottom of the page are buttons for 'Check Budget', 'Save as Template', 'Save & submit', 'Save & preview approvals', 'Cancel Changes', and 'Find more items'.



**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.

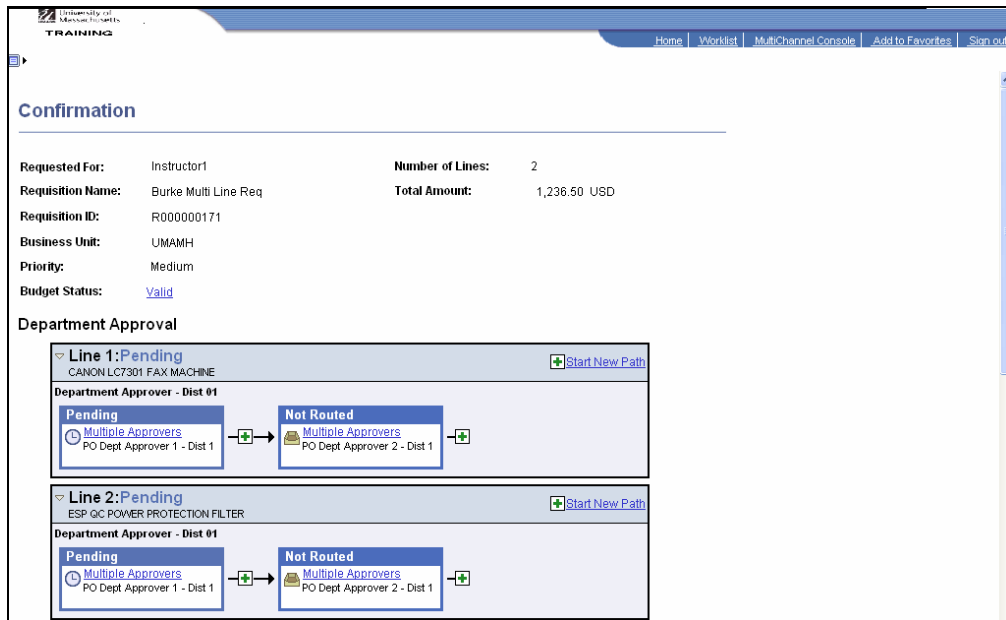
**Step 14.** To save the requisition and submit it to Workflow, click .

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**



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<b>Last Edited Date</b>	<b>12/14/06</b>
<b>Last Edited By</b>	<b>Rebecca Burke</b>