

Procurement: Reassign Purchase Requisition

For employees needing to reassign a Purchase Requisition

Purpose: To reassign a purchase requisition.

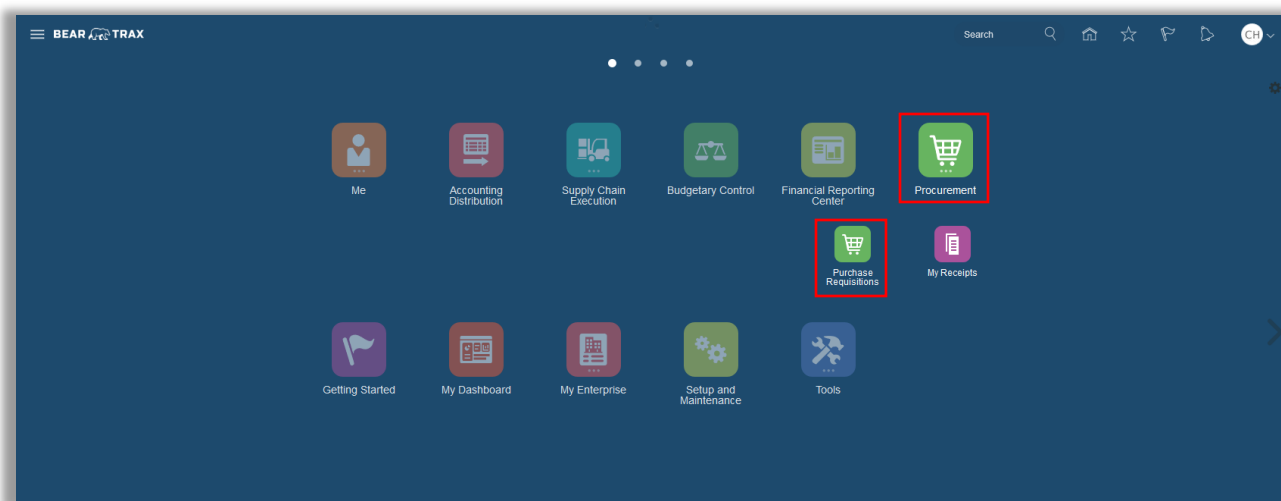
How to Access: Log into the [Bear Trax](#) application. Select the **Procurement** task in the Navigator.

Helpful Hints: Be sure to keep in mind that...

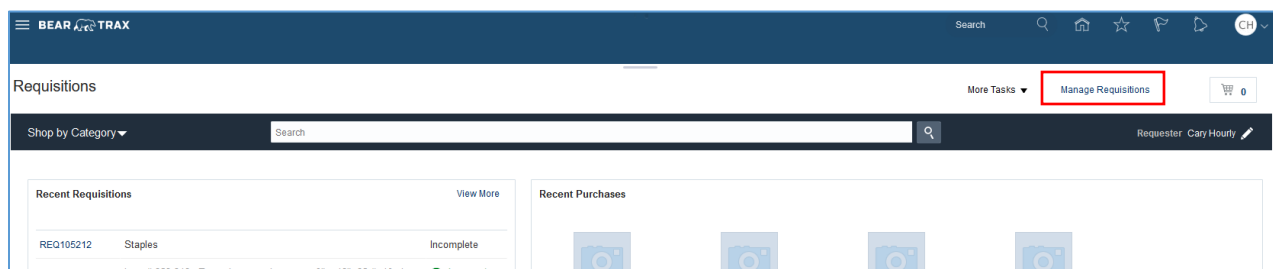
- Initiators of the requisition can reassign it, as can those with authority to approve the requisition
- The employee that you reassign the requisition to must have the permissions to view, review, edit, and/or approve or reject the requisition

Procedure: Complete the following steps to reassign a requisition:

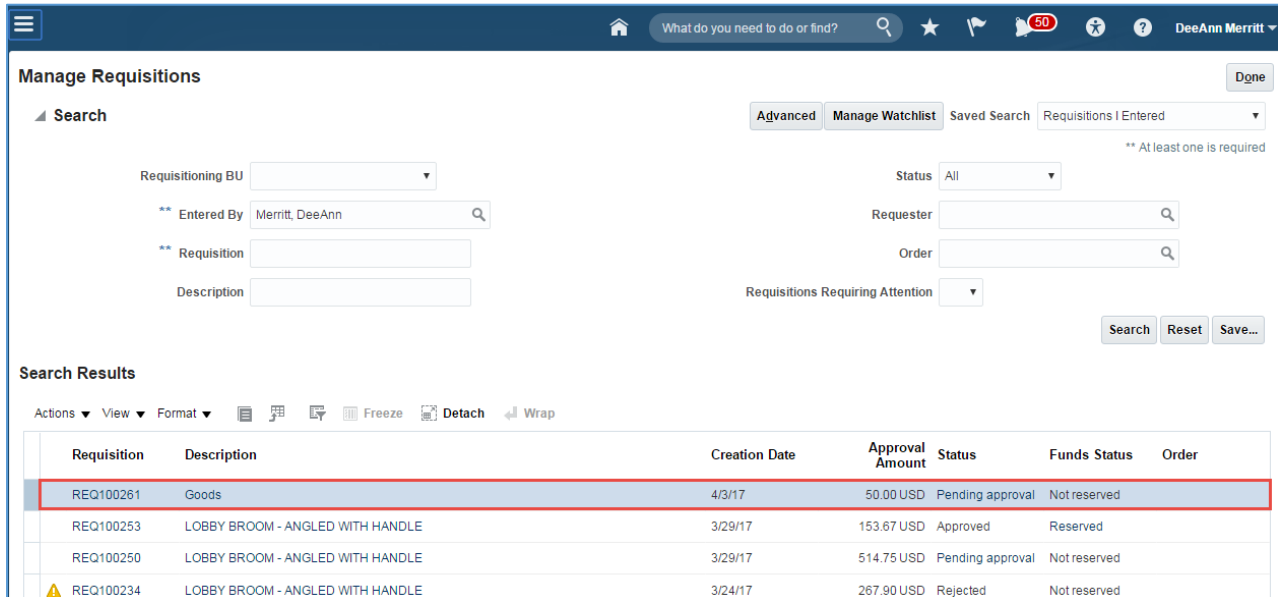
1. Click on the **Purchase Requisitions** icon.



2. Click the **Tasks** icon and select **Manage Requisitions** in the upper right hand corner.



3. Use the **Search** fields to find a specific requisition and select from **Search Results** OR under **My Requisitions**, highlight the requisition line in the list that needs to be reassigned.



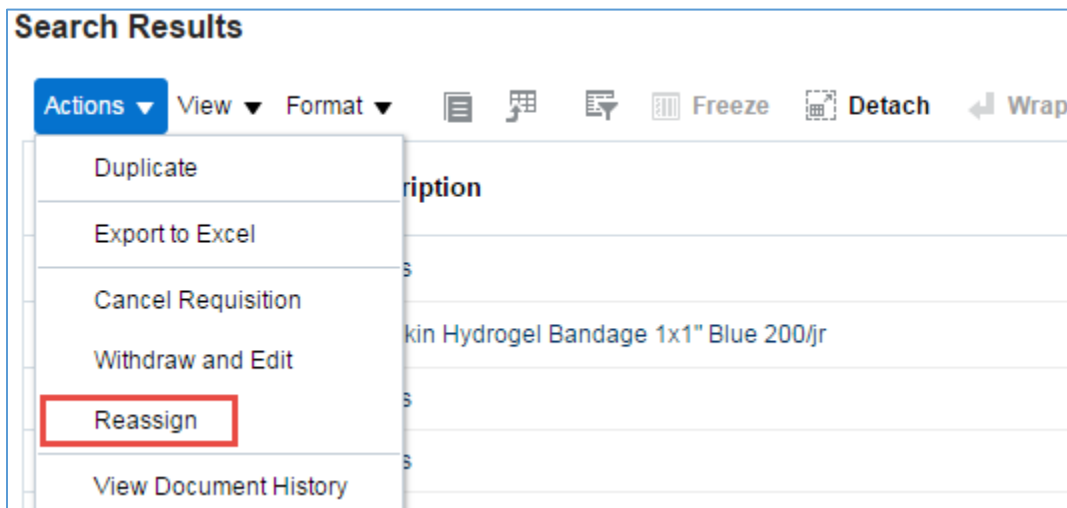
Manage Requisitions

Search filters: Requisitioning BU, Entered By (Merritt, DeeAnn), Requisition, Description, Status (All), Requester, Order, Requisitions Requiring Attention.

Search Results

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
REQ100261	Goods	4/3/17	50.00 USD	Pending approval	Not reserved	
REQ100253	LOBBY BROOM - ANGLED WITH HANDLE	3/29/17	153.67 USD	Approved	Reserved	
REQ100250	LOBBY BROOM - ANGLED WITH HANDLE	3/29/17	514.75 USD	Pending approval	Not reserved	
REQ100234	LOBBY BROOM - ANGLED WITH HANDLE	3/24/17	267.90 USD	Rejected	Not reserved	

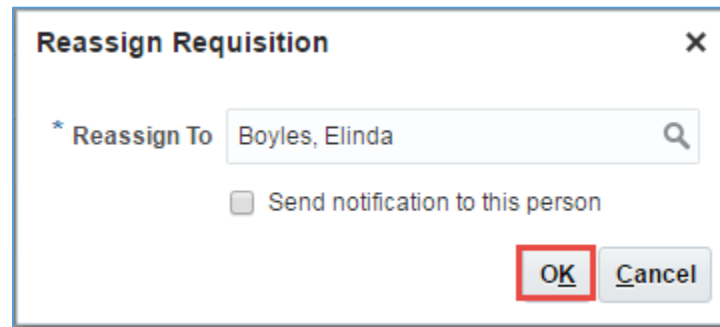
4. Click on the **Actions** drop down menu and select **Reassign**.



Search Results

Actions dropdown menu options: Duplicate, Export to Excel, Cancel Requisition, Withdraw and Edit, **Reassign**, View Document History.

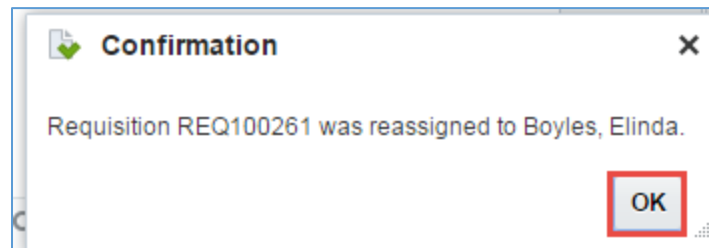
5. Type in the last name of the person you want to reassign the requisition to.



A dialog box titled "Reassign Requisition" with a close button (X) in the top right corner. It contains a label "* Reassign To" followed by a text input field containing "Boyles, Elinda" and a search icon. Below this is a checkbox labeled "Send notification to this person" which is currently unchecked. At the bottom right are two buttons: "OK" (highlighted with a red box) and "Cancel".

Note: It is recommended to check the box and send a notification to the person you are reassigning the requisition to so that the reassignment will be brought to their attention.

6. A confirmation message will appear, click **OK**.



A confirmation dialog box titled "Confirmation" with a green checkmark icon and a close button (X) in the top right corner. The message inside reads "Requisition REQ100261 was reassigned to Boyles, Elinda." At the bottom right is an "OK" button (highlighted with a red box).

Final Notes

By following these steps, you have successfully reassigned a requisition to another approved employee.