



# ABILITY TO REASSIGN REQUISITIONS TO OTHERS

PO

## QUICK REFERENCE GUIDE PO-02

### Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of the Ability to Reassign Requisitions to Others in the North Carolina Financial System (**NCFS**).

### Introduction and Overview

This QRG covers the steps to reassign requisitions to others in. By utilizing this feature, users gain the ability to delegate requisitions to other personnel, thereby facilitating streamlined workflow management and effective task distribution.



#### User Tip:

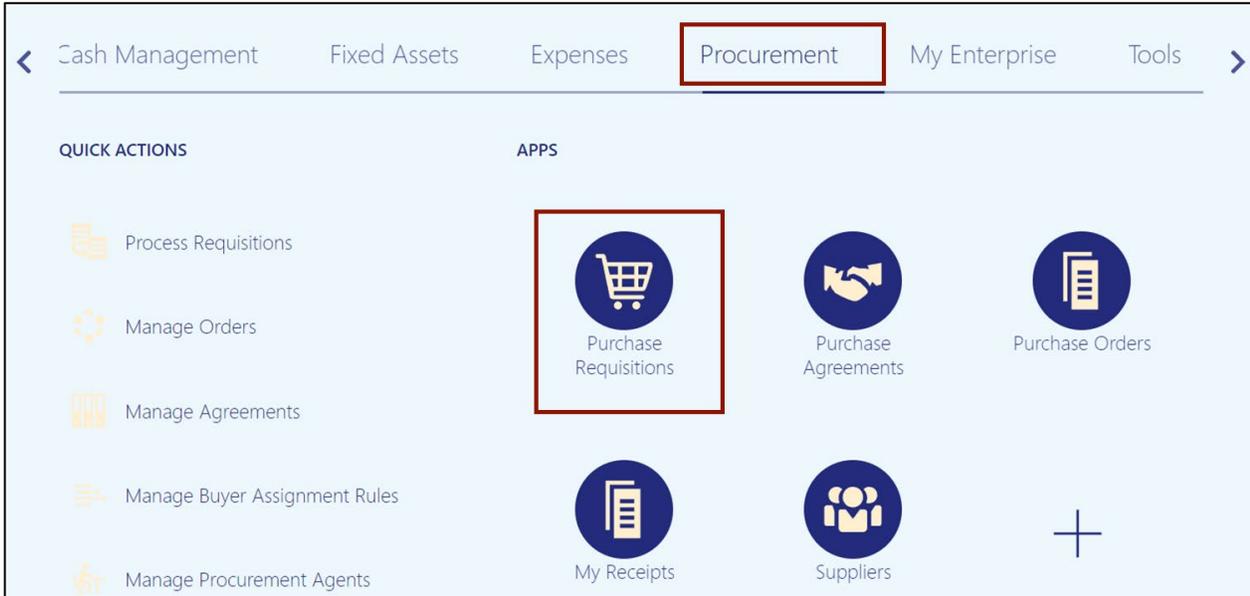
The following are prerequisites to reassign requisition to others:

1. Create requisition.
2. Requisition should be in incomplete status and stuck in approval workflow.

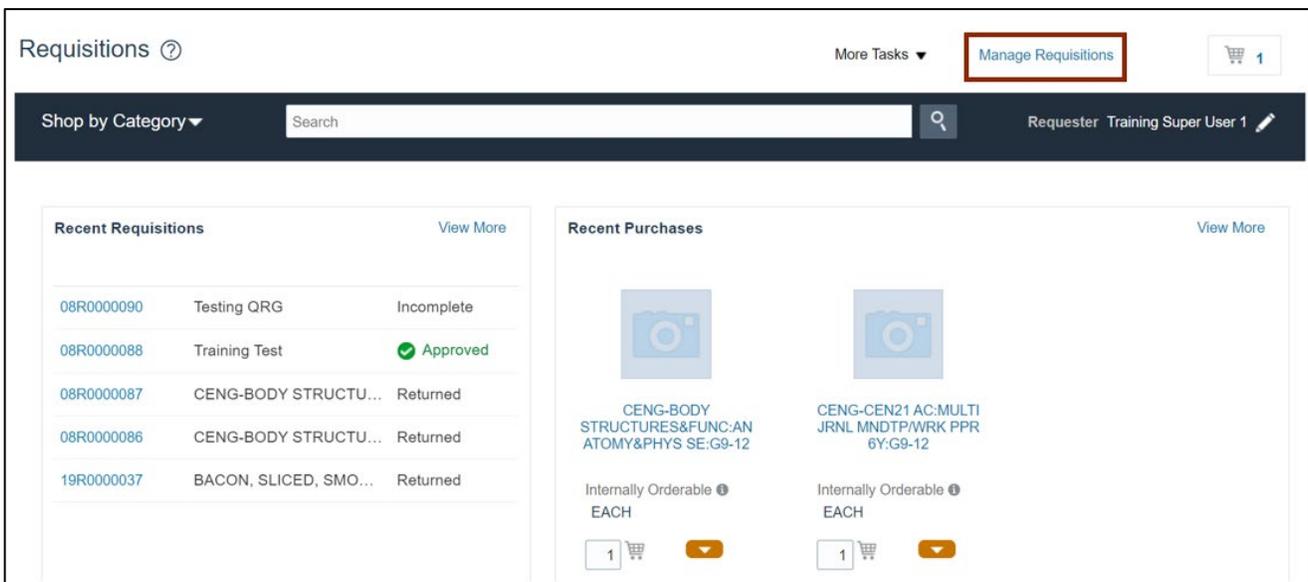
## Ability to Reassign Requisitions to Others

To reassign requisitions to others in NCFs, please follow the steps below:

1. Log in to the NCFs portal with your credentials to access the system.
2. On the **Home** page, click the **Procurement** tab and click the **Purchase Requisitions** app.



3. On the **Requisitions** dashboard, click **Manage Requisitions**.



- 4. On the **Manage Requisitions** page, enter the requisition in the **Requisition** field which should be reassigned.

In this example, enter **08R0000090**.

Note: **Entered By** field will be auto populated. Remove the data and enter the **Requisition** number.

The screenshot shows the 'Manage Requisitions' search interface. The 'Entered By' and '\*\* Requisition' fields are highlighted with a red box. The 'Requisition' field contains the value '08R0000090'. Other fields include 'Requisitioning BU', 'Description', 'Created', 'Status', 'Requester', '\*\* Supplier', 'Order', '\*\* Item', and 'Requisitions Requiring Attention'. A 'Done' button is in the top right, and 'Search', 'Reset', and 'Save...' buttons are at the bottom right.

- 5. Click the **Search** button.

This screenshot is identical to the previous one, but the 'Search' button at the bottom right is highlighted with a red box, indicating the next step in the process.

6. On the **Search Results** section, click the **Requisition number** link.

In this example, choose **08R0000090**.

Manage Requisitions ? Done

Search Advanced Manage Watchlist Saved Search Requisitions I Entered

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
08R0000090	Testing QRG	5/22/23	10.00 USD	Incomplete	Not reserved	

7. Click the **Actions** drop-down, then select **Reassign**.

Requisition: 08R0000090 ? Check Funds View Life Cycle Actions Done

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION  
 Entered By Training Super User 1  
 Description Testing QRG

Creation Date 5/22/23  
 Status Incomplete  
 Justification

Requisition Amount  
 Approval Amount  
 Funds Status  
 Attachments  
 Customer

Actions View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity UOM	Price	Amount (USD)	Status	Funds Status
1		Testing QRG	101015-Livestock	1 EACH	10.00 USD	10.00	Incomplete	Not reserved

8. On the **Reassign Requisition** pop-up, enter the name in the **Reassign To** field.

Requisition: 08R0000090 ? Check Funds View Life Cycle Actions Done

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION  
 Entered By Training Super User 1  
 Description Testing QRG

Creation Date 5/22/23  
 Status Incomplete  
 Justification

Requisition Amount 10.00 USD  
 Approval Amount 10.00 USD  
 Funds Status Not reserved  
 Attachments None  
 Customer

**Reassign Requisition**

\* Reassign To Frasca, ABIOLA

Send notification to this person

OK Cancel

NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

9. Select the **Send notification to this person** check box.

Requisition: 08R0000090 ?

Check Funds View Life Cycle Actions Done

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION  
 Entered By Training Super User 1  
 Description Testing ORG

Creation Date 5/22/23  
 Status Incomplete  
 Justification

Requisition Amount 10.00 USD  
 Approval Amount 10.00 USD  
 Funds Status Not reserved  
 Attachments None  
 Customer

**NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.**

**Reassign Requisition**

\* Reassign To Frasca, ABIOLA

Send notification to this person

OK Cancel

10. Click the **OK** button.

Requisition: 08R0000090 ?

Check Funds View Life Cycle Actions Done

Requisitioning BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION  
 Entered By Training Super User 1  
 Description Testing ORG

Creation Date 5/22/23  
 Status Incomplete  
 Justification

Requisition Amount 10.00 USD  
 Approval Amount 10.00 USD  
 Funds Status Not reserved  
 Attachments None  
 Customer

**NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.**

**Reassign Requisition**

\* Reassign To Frasca, ABIOLA

Send notification to this person

OK Cancel

11. The *Confirmation* pop-up appears, click the **OK** button. Click the **Done** button to return to **Requisitions** dashboard.

Manage Requisitions ?

Confirmation

Requisition 08R0000090 was reassigned to requester Frasca, ABIOLA.

OK

Done

Search

Requisitioning BU [dropdown]  
 \*\* Entered By [input]  
 \*\* Requisition 08R0000090  
 Description [input]  
 Created [dropdown]  
 Status All [dropdown]

Requester [input]  
 \*\* Supplier [input]  
 Order [input]  
 \*\* Item [input]

Requisitions Requiring Attention [dropdown]

Saved Search Requisitions I Entered [dropdown]

\*\* At least one is required

Search Reset Save...

## Wrap-Up

Reassign requisitions to others using the steps above. By utilizing this feature, users gain the ability to delegate requisitions to other personnel, thereby facilitating streamlined workflow management and effective task distribution.

## Additional Resources

NA