

ABILITY TO REASSIGN

REQUISITIONS TO

PO

OTHERS

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.

Requisitions (2			More Tasks 🔻 Mar	age Requisitions
Shop by Catego	Search			ৎ	Requester Training Super User 1 🎤
Recent Requisi	tions	View More	Recent Purchases		View More
08R0000090	Testing QRG	Incomplete	1000		
08R0000088	Training Test	Approved			
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08R0000086	CENG-BODY STRUCTU	Returned	STRUCTURES&FUNC:AN ATOMY&PHYS SE:G9-12	JRNL MNDTP/WRK PPR 6Y:G9-12	
19R0000037	BACON, SLICED, SMO	Returned	Internally Orderable EACH	Internally Orderable EACH	

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.

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5. Click the **Search** button.

Manage Requisit	ions (?)						D <u>o</u> ne
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6. On the *Search Results* section, click the **Requisition numbe**r link.

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

Manage Requisitions ⑦							
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Actions View View Format View Bormat I I I I I I I I I I I I I I I I I I I)						
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	0				Check Funds	View Life Cycle	Actions T	D <u>o</u> ne
							Duplicate		
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Entered By	Training Super User 1		Status	Incomplete		Approval Amou	Delete		
Description	Testing QRG		Justification			Funds Stat	Edit		
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1	Т	lesting QRG	101015-Livestock	1 EACH	10.00 USD	10.00	Incomplete	Not reserve	d

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

Requisition	: 08R0000090 ⑦			Check Funds	View Life Cycle Actions ▼ Done
Requisitioning BU Entered By Description	0800 DEPARTMENT OF PUBLIC INSTRUCTION Training Super User 1 Testing QRG	Creation Date Status Justification	5/22/23 Incomplete	Requisition Amount Approval Amount Funds Status	10.00 USD 10.00 USD Not reserved
				Attachments	None
		Reassign Requi	Frasca, ABIOLA	< Customer	NOTE: Customer must be selected for consumption requisition only and not for
Requisition Li	nes		O <u>K</u> <u>C</u> ance		purchase requisition.

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

Requisition	: 08R0000090 ⑦				Check Funds V	iew Life Cycle Actions ▼ Done	
Requisitioning BU Entered By Description	0800 DEPARTMENT OF PUBLIC INSTRUCTION PTraining Super User 1 Testing QRG	Creation Date 5/22/23 Status Incomplete Justification			Requisition Amount 10.00 USD Approval Amount 10.00 USD Funds Status Not reserved		
Paguisition I i	200	Reassign Requi	sition Frasca, ABIOLA Send notification to this pers	x on K <u>C</u> ancel	Customer	NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.	

10. Click the **OK** button.

Requisition	1: 08R0000090 ⑦			Check Funds	/iew Life Cycle Actions ▼ Done
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Requisition Li	nos	* Reassign To	Frasca, ABIOLA Send notification to this person K Can	Q cel	NOTE: Customer must be selected for consumption requisition only and not for purchase requisition.

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

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** Entered By		Q	** Supplier	r	Q
** Requisition	08R0000090		Order	r	Q
Description			** Item	1	Q
Created	~		Requisitions Requiring Attention	1 🗸	
Status	All 🗸				
				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

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