

Changing the Requester on Requisitions

For all Employees

Purpose:

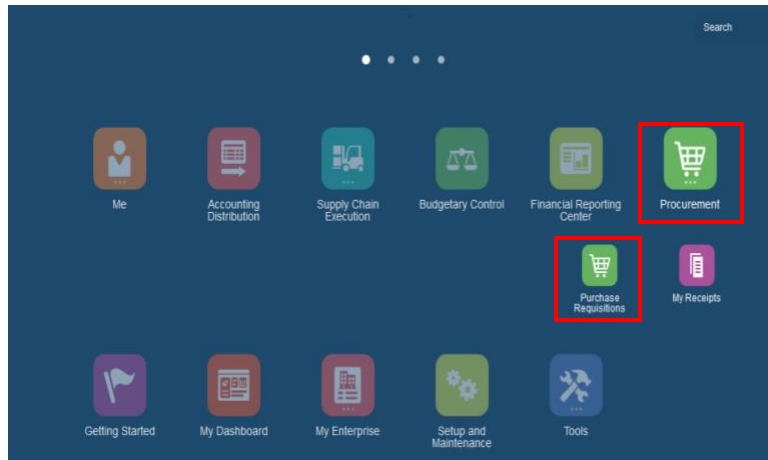
To learn how to reassign all your requisitions to another user to allow other individual to manage remainder of procure to pay process. **This will only change requisitions that are still in an open status.**

Note: This process moves all requisitions from one requester to another. There is no way to move only select requisitions. Thus, this process should only be used in the event a person is leaving SSU or moving to another department and all their requisitions should be moved to another individual. **Changes should only be made after the employee has created their last Requisition.**

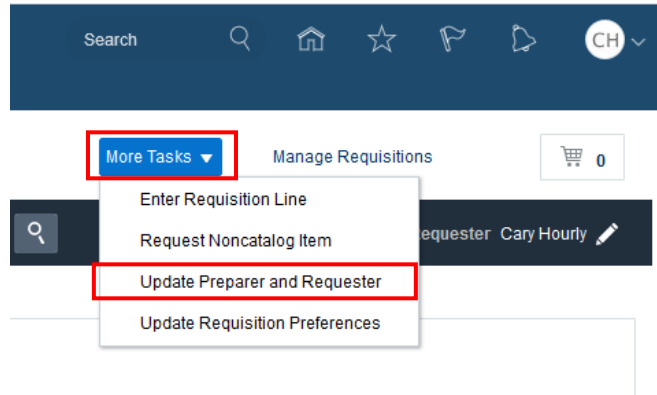
Procedure:

Complete the following steps to change the requester on requisitions

1. Navigate to Purchase Requisitions under the Procurement Icon.

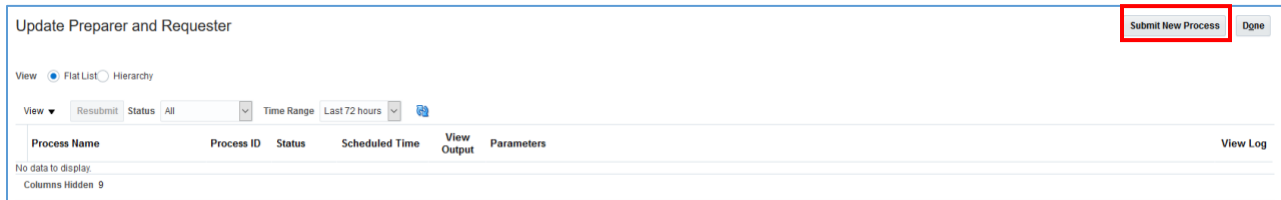


2. Select **More Tasks** then select **Update Preparer and Requester**.

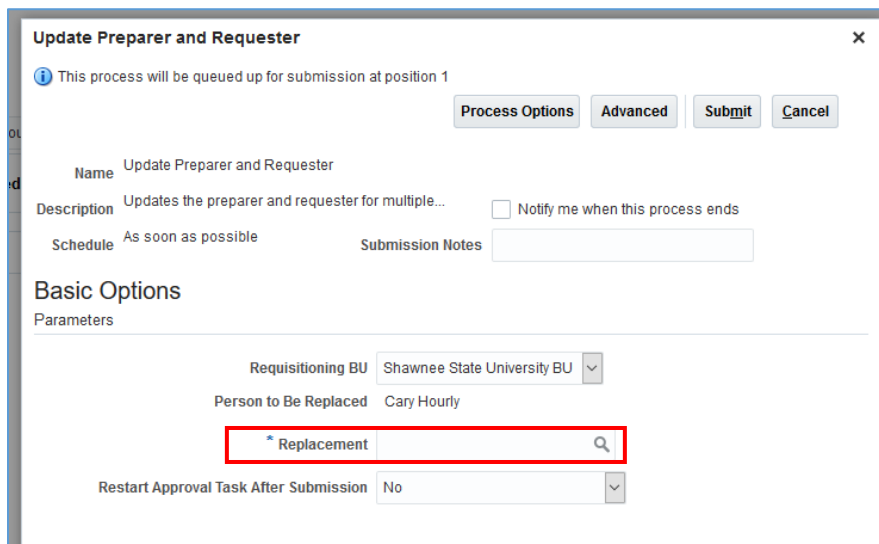


3. Run process to update requester on **all** your requisitions.

- From the Update Preparer and Requester screen, click **Submit New Process** in the upper right corner.

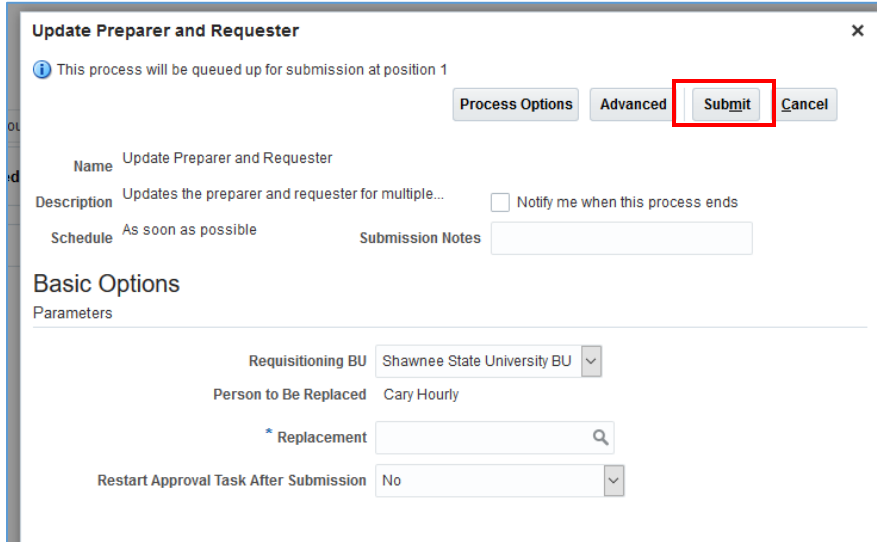


- a. In the pop up window, add the person you would like to replace you on all requisitions in the Replacement field. (**Note:** You must type in the person's name in the format **last name, first name**.)



Note: Restart Approval Task After Submission should remain at the defaulted No.

- b. Click **Submit** to begin reassignment process.



Update Preparer and Requester

This process will be queued up for submission at position 1

Process Options Advanced **Submit** Cancel

Name: Update Preparer and Requester

Description: Updates the preparer and requester for multiple... Notify me when this process ends

Schedule: As soon as possible Submission Notes:

Basic Options

Parameters

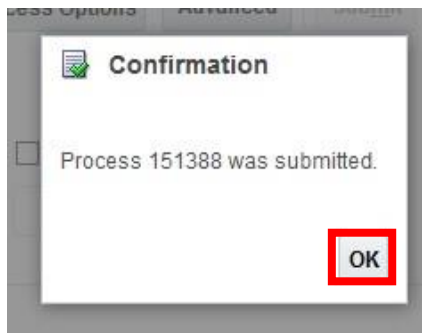
Requisitioning BU: Shawnee State University BU

Person to Be Replaced: Cary Hourly

* Replacement:

Restart Approval Task After Submission: No

- c. A confirmation will appear, click **OK**.



- The process will now show on the Update Preparer and Requester screen.
- You may click on the **square icon** under View Output to download a PDF listing of all requisitions and purchase orders moved.
- Click **Done** to exit this screen.

Update Preparer and Requester Submit New Process Done

View Flat List Hierarchy

View Status Time Range

Process Name	Metadata Name	Process ID	Status	Scheduled Time	Submitted By	View Output	Parameters	View Log	Start Time	Completion Time	Parent Request ID	Completion Text	Recurring Schedule	Requester	Submission Notes
Update Preparer and Requester	MassUpdatePreparerAndR...	151388	Error	3/6/2018 12:42 P...	rosie	<input checked="" type="button" value="View Output"/>	N, 300000008285992, 300000001655053, 30000000...	<input type="button" value="View Log"/>	3/6/2018 1...	3/6/2018 1...	151388		False	rosie	

- The user you reassigned to will now show all your requisitions and purchase orders listed under their name upon logging in, just the same as any they had initially submitted.

Final Notes

By following these steps, you have successfully created and/or submitted an expense report.