

Edit a requisition: Change the Activity code

iProc Requisitioner | Oracle Financials

This guide is intended for iProc Requisitioners who want to change the Activity code used on a requisition that they have already created in the iProcurement (iProc) part of the Oracle Financials system.

When can I edit a requisition?

If you have submitted a requisition but then realise you need to make an alteration, you will need to edit the requisition. There are some restrictions on being able to edit the requisition via iProcurement, depending on what stage of the approval process the requisition is at. If the requisition status is one of the following it can be edited:

- In Process
- Approved without an order number

If the requisition is approved and an order number has been assigned it cannot be edited. You will need to contact the Buyer to request the change you wish to make.

What can I edit on a requisition?

It is only possible to amend certain details of the requisition. Only fields that are available during checkout can be amended, ie you cannot add a new requisition line.

To change the Activity code on a requisition you will need to:

1. Click the **Requisitions** tab from within iProc. A list of requisitions that you have created will be displayed.
2. Before trying to edit a requisition you must check the **Status**. If the status is **In Process**, or **Approved without an order number** you can proceed to edit the requisition.
3. Select the requisition you want to amend with the radio button on the left of the requisition line and then click **Change**. Alternatively, you could click on the requisition description to see further information and then click **Change**.
4. A **Warning** message will appear to say that if you continue, the requisition will be withdrawn from the approval process and re-submitted for approval once you have made your changes. Click **Yes** to continue.
5. Click **Checkout**.
6. Click on the **Charge Account** link from the *Checkout: Requisition Information* screen. All requisition lines will be shown.
7. Click on a **Charge Account**. A new window appears showing the details for the selected line.

8. Type the **Activity** code directly into the *Charge Account* field, first by deleting the Activity code that has defaulted in and then typing the correct code for this requisition/requisition line. **This field is case-sensitive. Remember, the Activity code is the first 7 characters only. Do not delete the first asterisk or anything that appears after it.**

Please note that:

- A *Charge Account* is made up of 6 segments and they begin with 2 letters and then 5 numbers. The last 5 segments will not need changing.
- The first segment, Activity, refers to the code you wish to charge this requisition to. This is a General Ledger, or GL code.
- The second segment is the **IE code** (Income and Expenditure) and this defaults in based on the *Category* selected on the *Non-catalog Request* screen, or from the product selected on eMarketplace. Check this is correct for the item on the requisition. If it is not correct and this is a *Non-Catalog Request*, the *Category code* should be amended from the *Checkout: Requisition Information* screen via the *Edit Lines* button. Never amend the IE code manually as this causes serious accounting errors.

Alternatively, select this icon  to edit the *Charge Account*. The *Charge Account* for the selected line is displayed. Either enter the **Activity** code, or use the **magnifying glass** icon to search. Activity codes begin with 2 letters and then 5 numbers. **This field is case-sensitive.**

Select **Create** to generate the new *Charge Account*. The new *Charge Account* will be displayed with the Activity code you have selected. In the *Activity* field, check the 3 letter school code and the name of the account are correct.

Select this code combination with the radio button and then click the **Select** button to choose this *Charge Account*. You will be returned to the *Requisition Information: Split Cost Allocation* screen and the *Charge Account* will be updated for that line.

9. If you wish to use the **same Activity code on all lines and the IE code is the same for all lines**, you can tick the box at the bottom left of the screen that says **Apply this Cost Allocation information to all applicable requisition lines**. **This will apply the same Charge Account to all requisition lines**, meaning that you do not have to change the Activity code for each line. **You MUST check that the IE code is the same for each line before selecting this option**, otherwise the same IE code will be applied on all lines, potentially making the *Charge Accounts* inaccurate.
10. Click **Apply** to save the changes. You will be returned to the previous screen and the *Charge Account* will have been updated with the correct Activity code for the line, or for all of the requisition lines if you have chosen that option in the previous step.
11. If you need to change the *Charge Accounts* manually on any of the other requisition lines you will need to repeat steps 7 – 10, unless you choose to use the option to apply the same *Charge Account* to all lines on the requisition in step 9.
12. When all Activity codes are correct on all lines, click **Apply**. You will be taken back to the *Checkout: Requisition Information* screen.

13. Click **Next** to continue. Alternatively, you could click **Submit** if you do not wish to add notes or attachments to this requisition and follow the guidance in the [Checkout: Review and Submit](#) guide (follow from step 2).
- When the requisition has been submitted, you'll see a *Confirmation* message that the requisition has been re-submitted with the edits and retains the same requisition number. The message shows who the requisition has been sent to for approval.
 - The requisition will now have to be sent up the approval path from scratch. Even if an Approver has approved this requisition in the past they will still be required to approve the revised requisition.
 - The *Status* of the requisition will be *In Process*, as the requisition requires re-approval after being edited. If you click on the **Status** for the revised requisition, you will see that the *Approval History* screen now shows the actions associated with this revised requisition. It will have been *Withdrawn* by the Requisitioner for editing then resubmitted for approval. It is now *Pending* with the Approver name.

Next step: Follow the guidance in the [Checkout: Approvals and Notes](#) guide.