PO-02 Ability to Reassign Requisitions to Others

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.

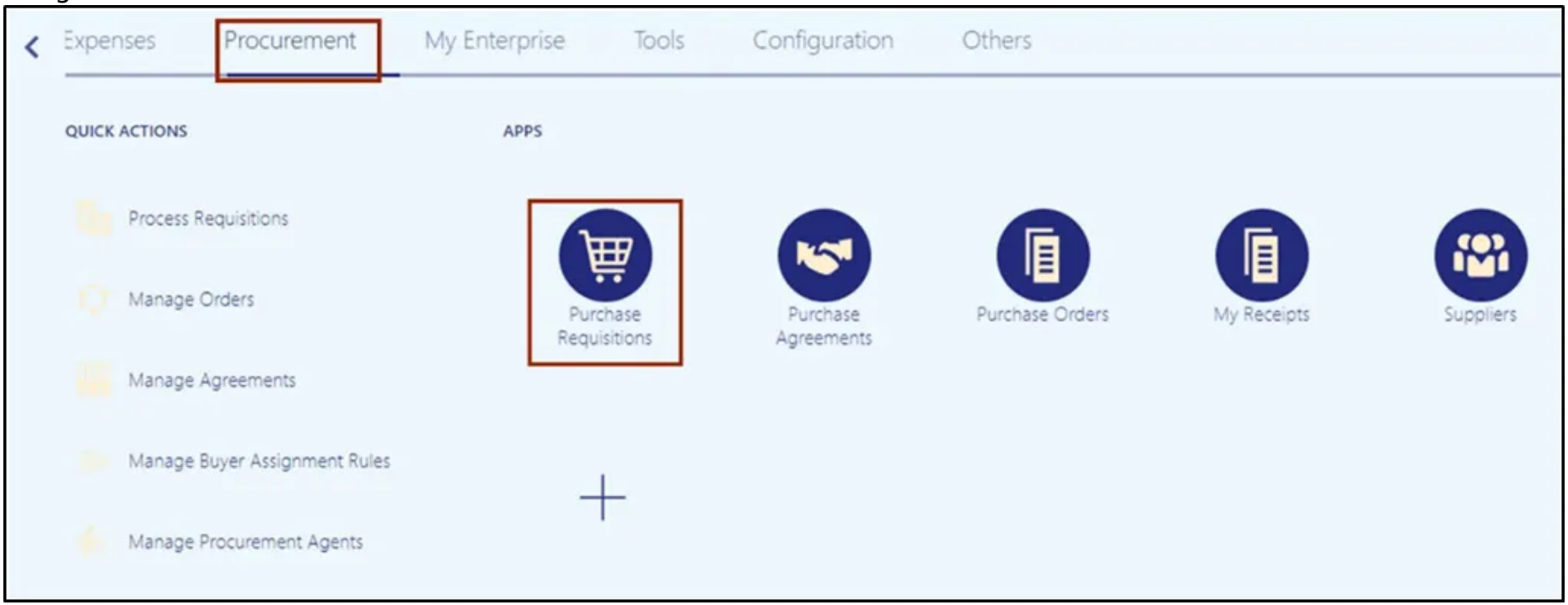
Ability to Reassign Requisitions to Others

To reassign requisitions to others in NCFS, please follow these steps. There are 10 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

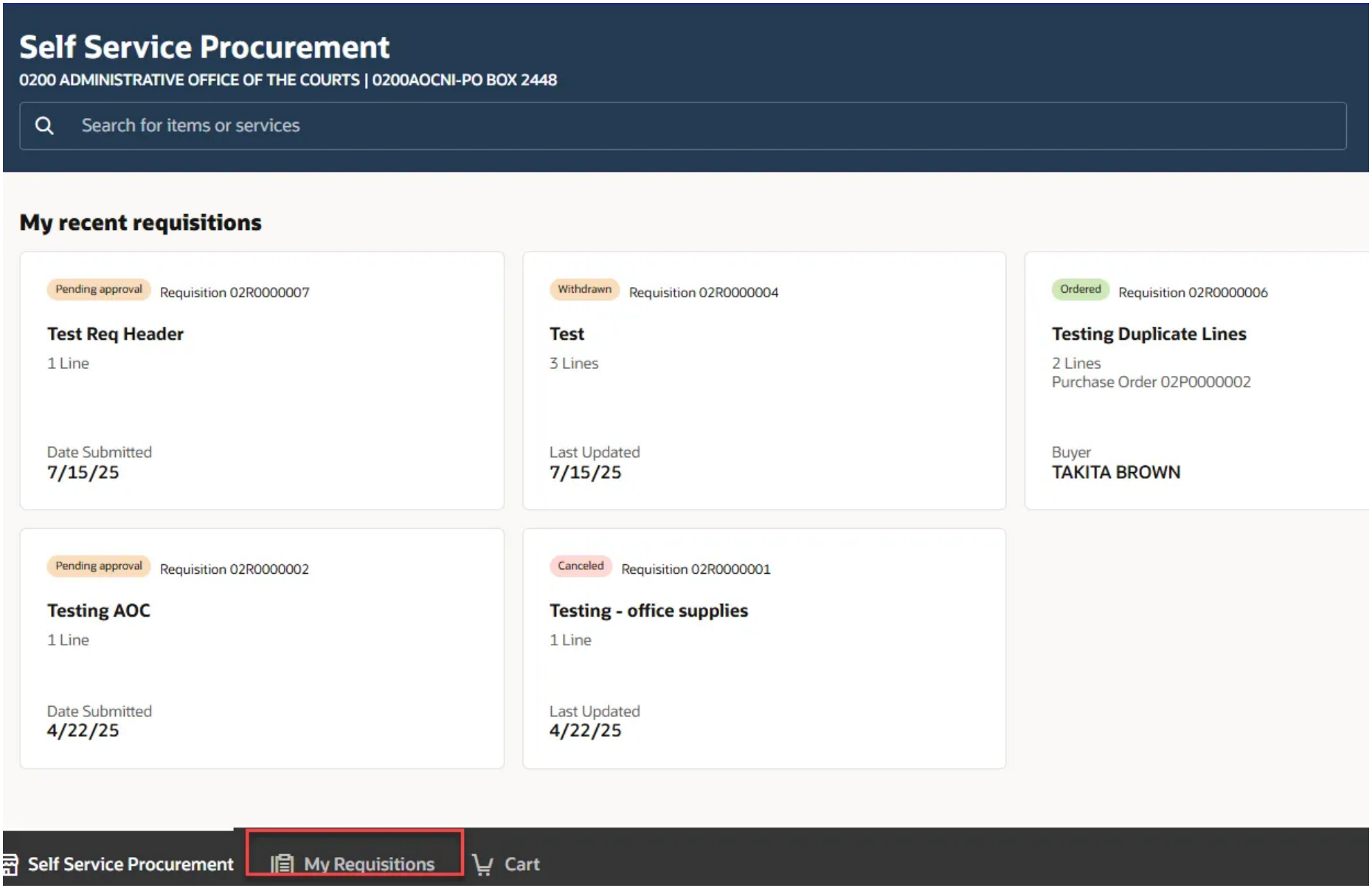
Step 2. On the **Home** page, select the **Procurement** Tab. Select the **Purchase Requisitions** app.

Image



Step 3. On the **Self-Service Procurement** dashboard, select **My Requisitions**.

Image

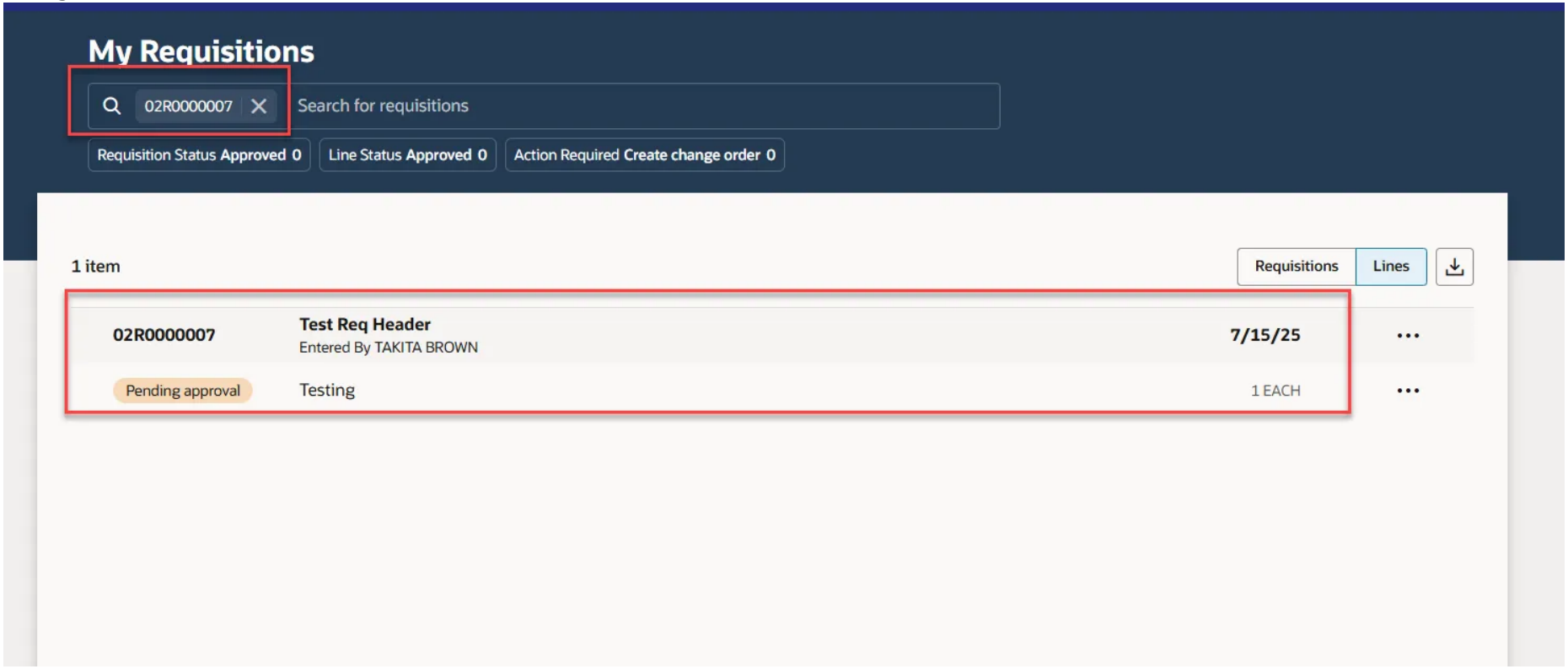


Step 4. On the **My Requisitions** page, enter the requisition in the **Search for Requisitions** field which should be reassigned.

Example: 02R0000007

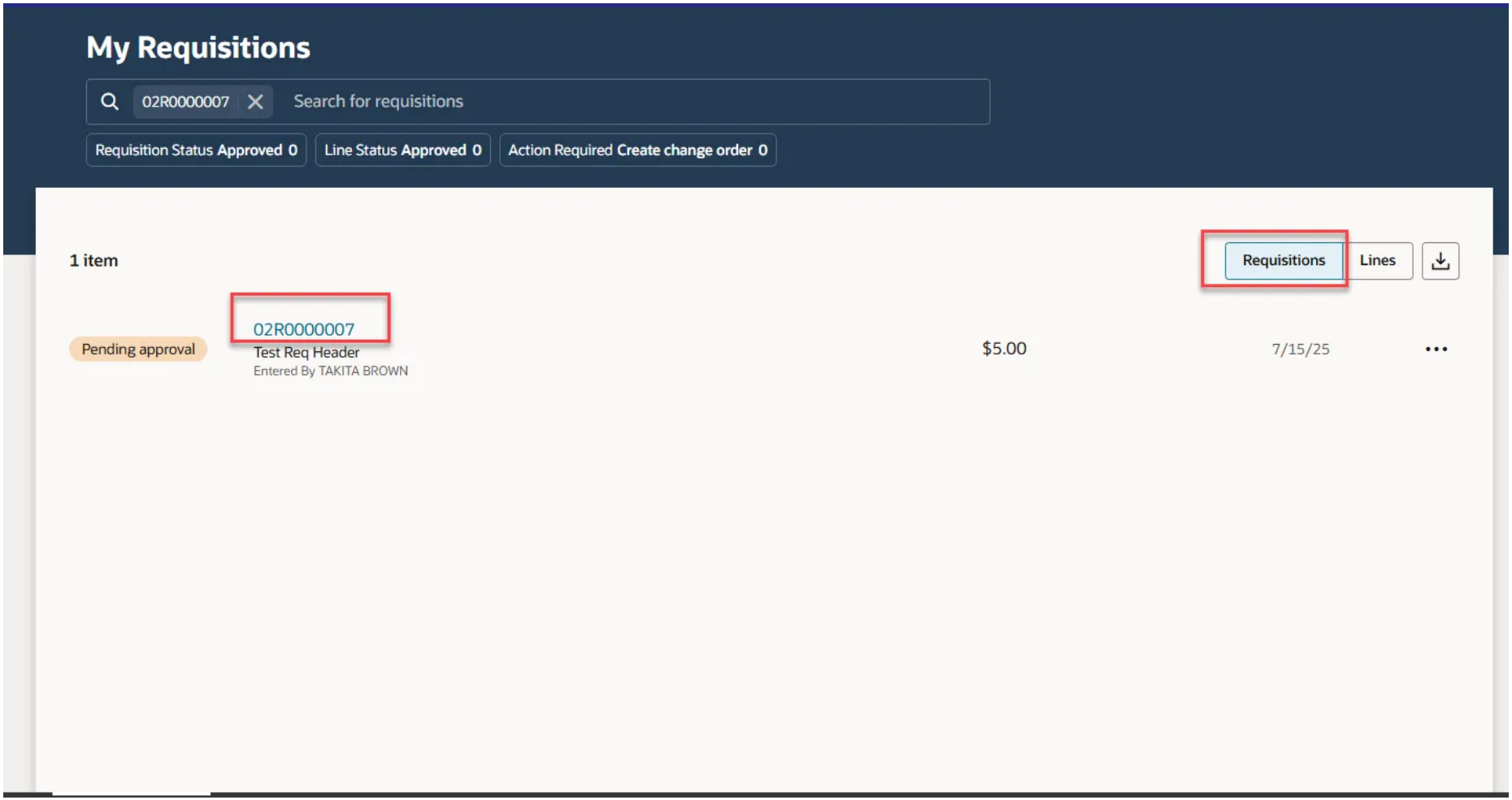
* Note: **Entered By** field will be auto populated. Remove the data and enter the Requisition number. The requisition will populate.

Image



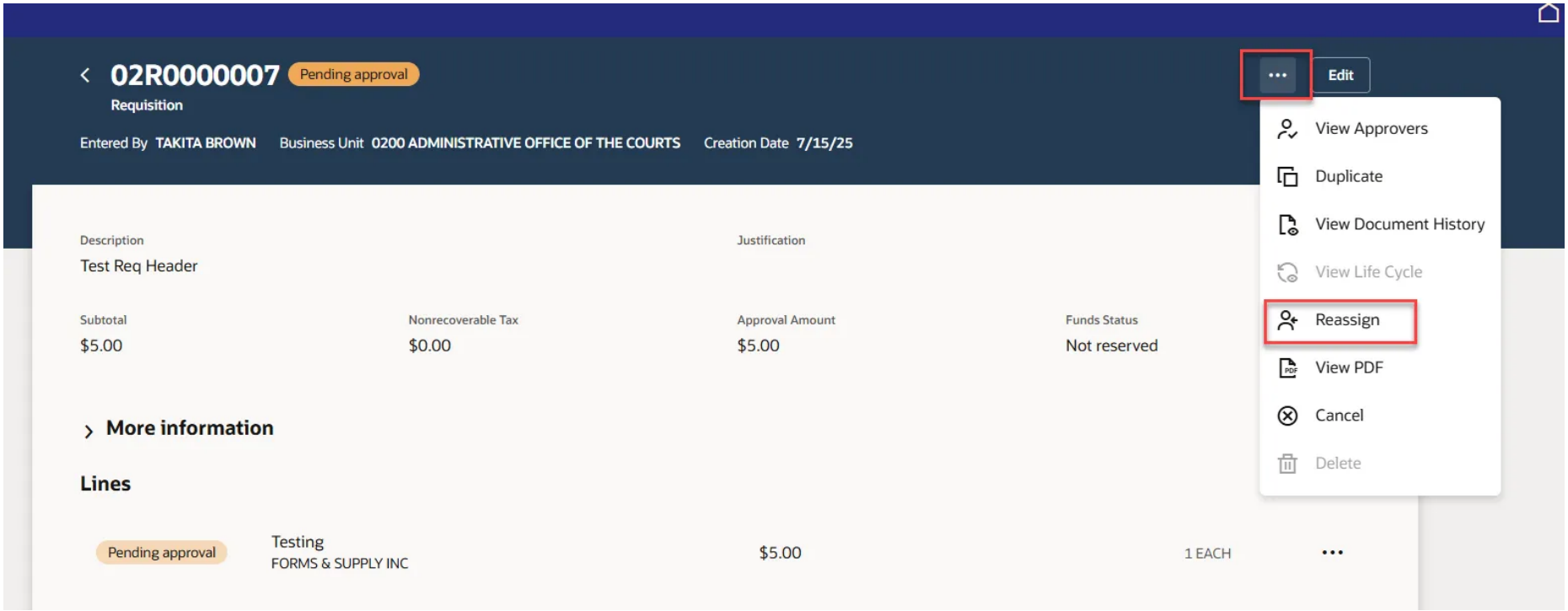
Step 5. Select the **Requisitions** box in the top right and then select the **Requisition number** link.

Image



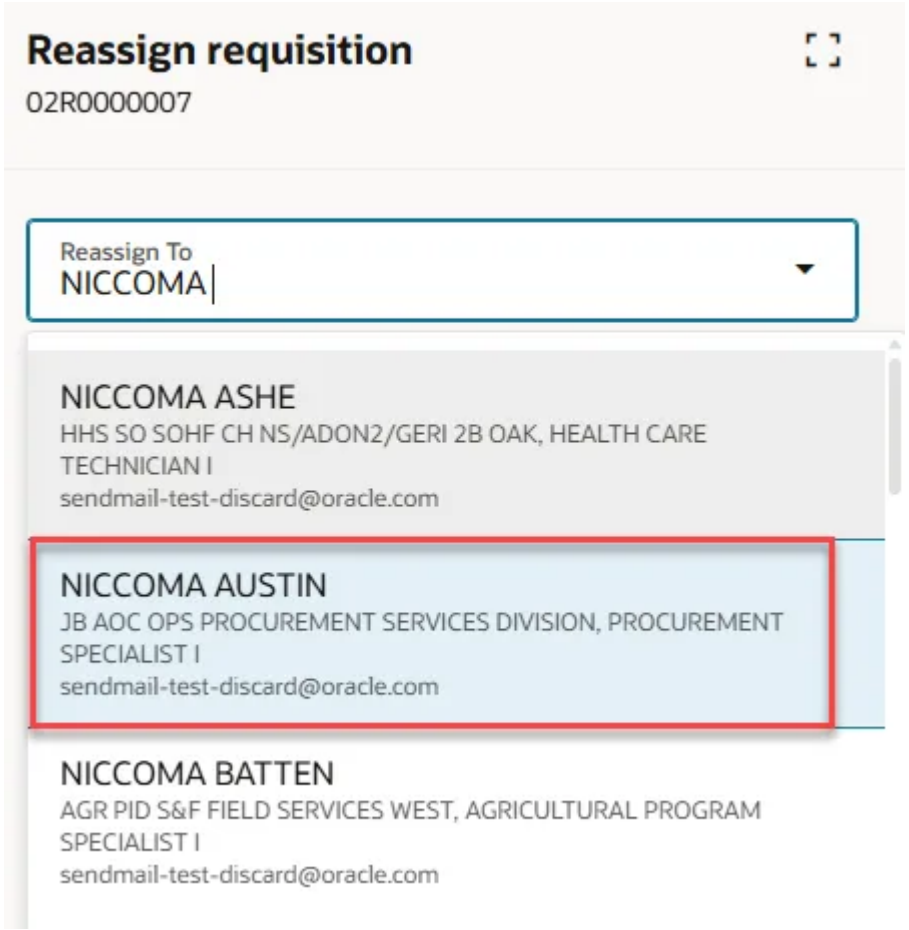
Step 6. Select the **More Actions (…)** drop-down, then select **Reassign**.

Image



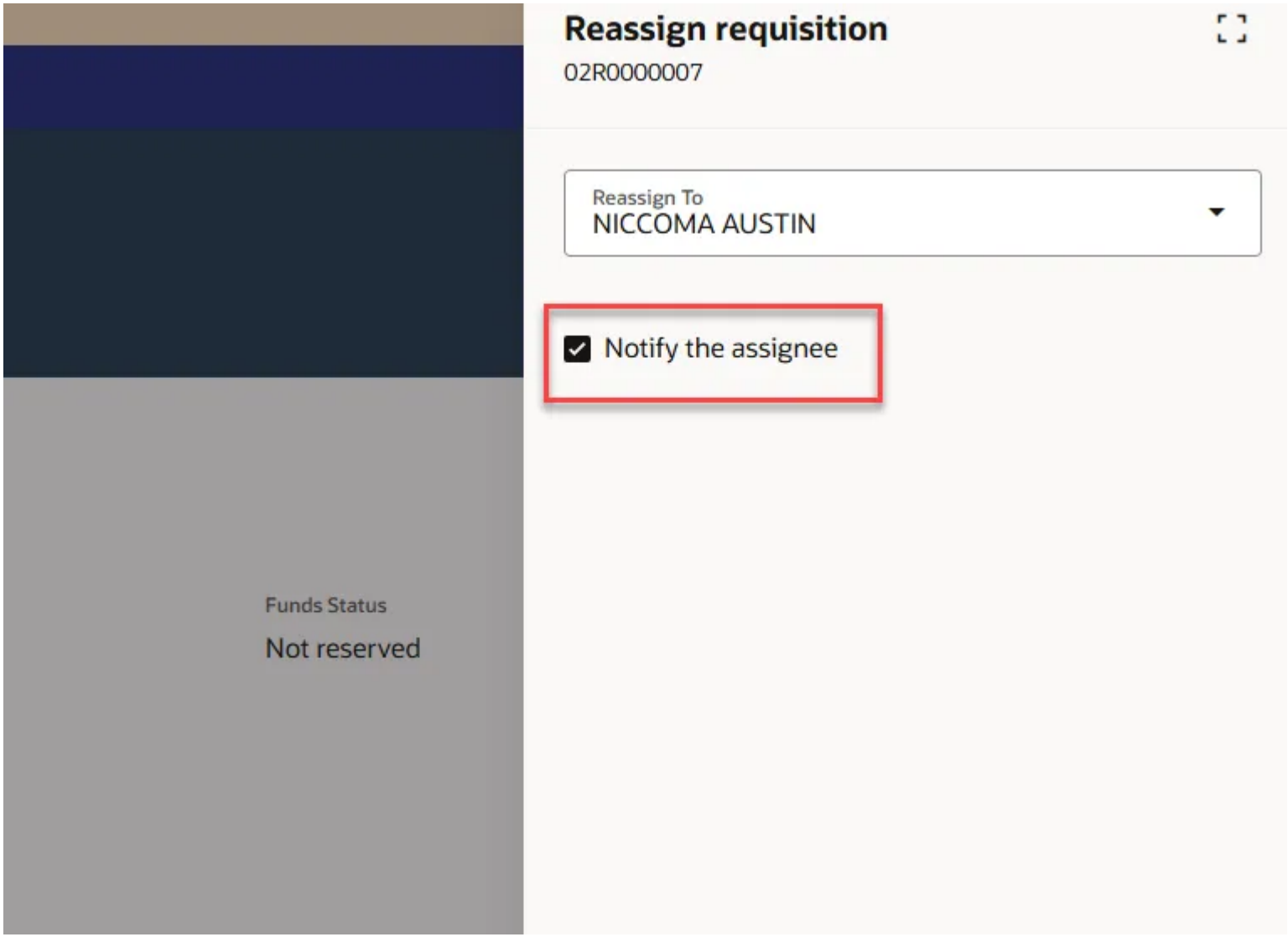
Step 7. On the **Reassign Requisition** pop-up, enter the name in the **Reassign** To field.

Image



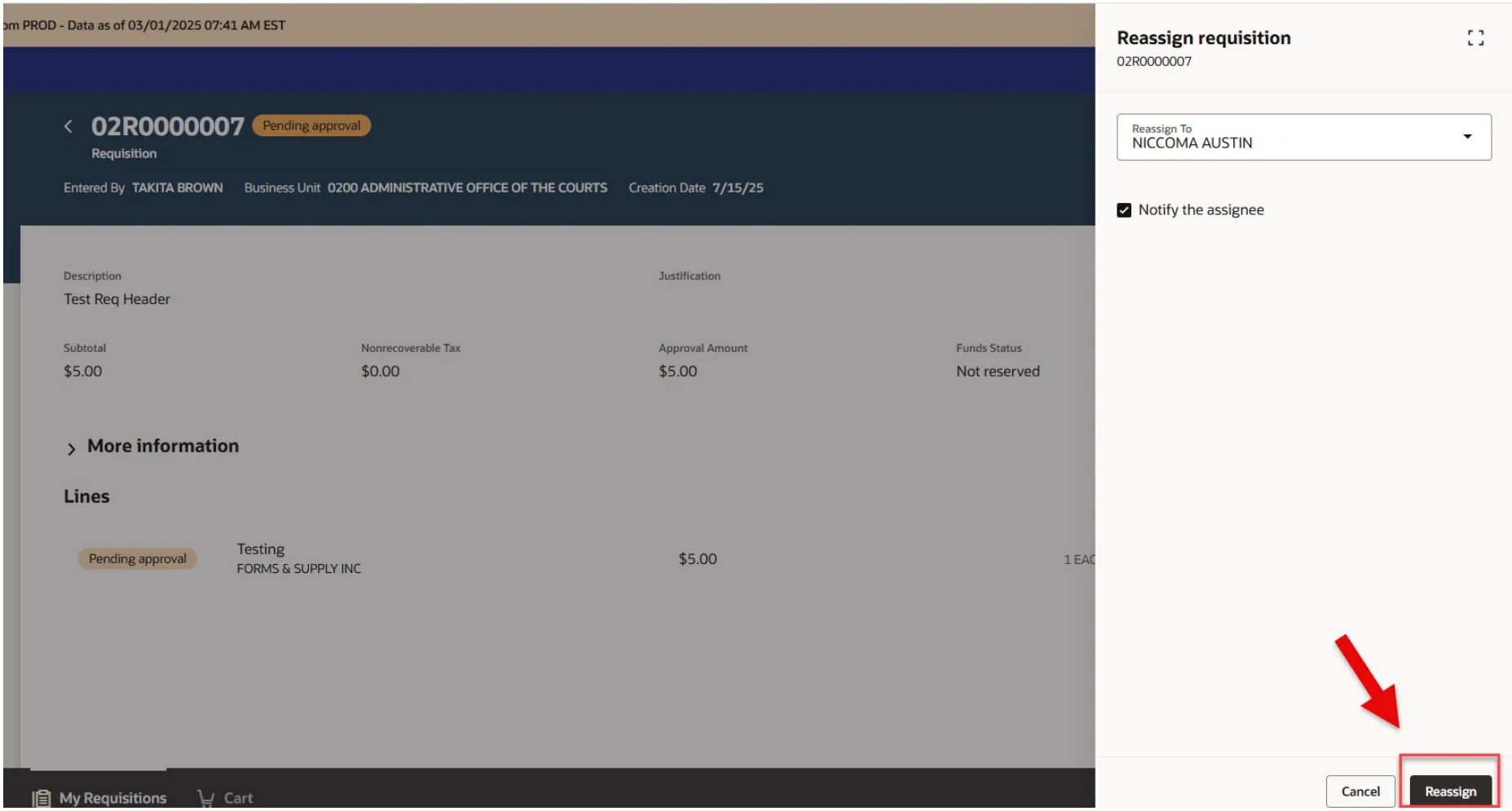
Step 8. Check **Notify the assignee** section to select this person.

Image



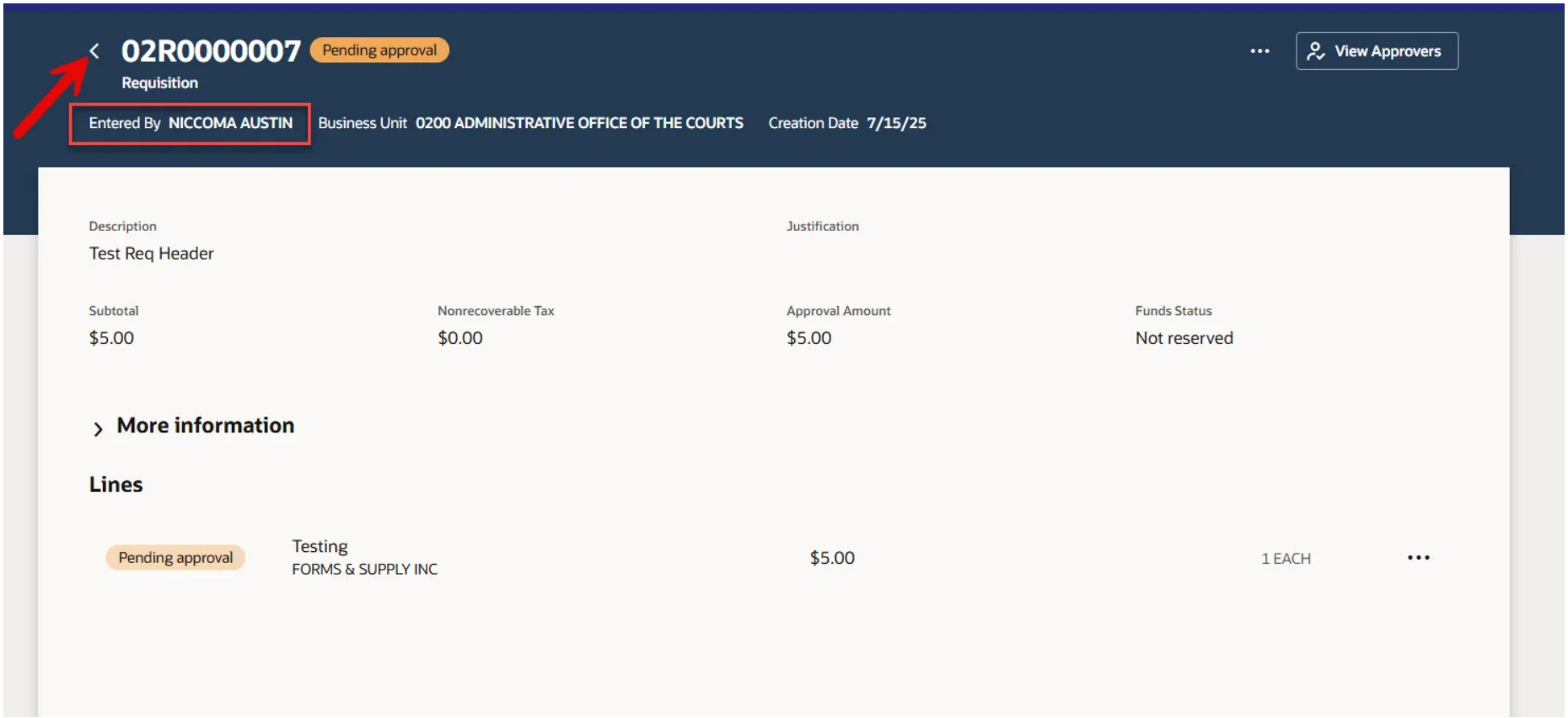
Step 9. Select the Reassign button

Image



Step 10. The *Confirmation* pop-up appears and goes away. The person the requisition was assigned to is shown under **Entered By**. Select the **back arrow (<)**, beside the requisition number to return to **My Requisitions** dashboard.

Image



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.

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