



Changing Requester on Requisitions

This guide will cover:

- Reassigning 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.**



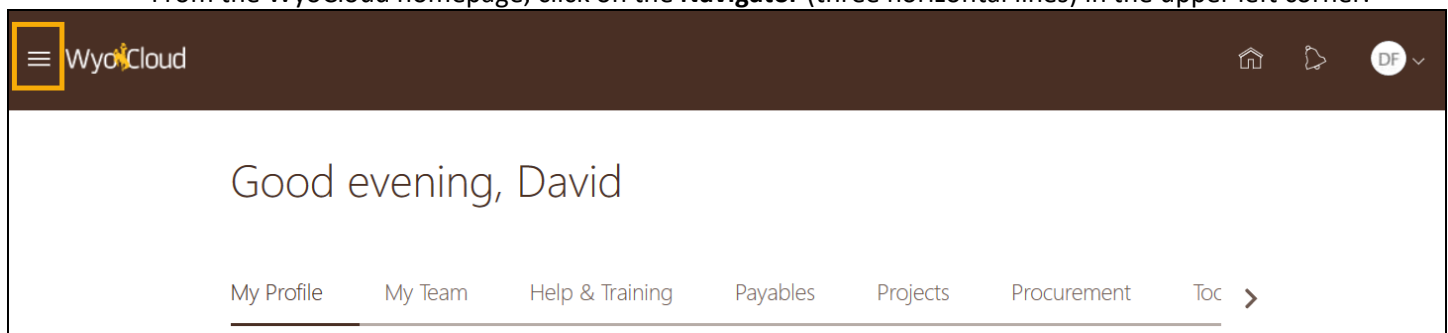
Note: This process moves all requisitions from one requester to another. There is no way to move only select requisitions. Thus this process should only be used in the event a person is leaving UW or moving to another department and all their requisitions should be moved to another individual.

Changes should only be made after the employee has created their last Requisition.

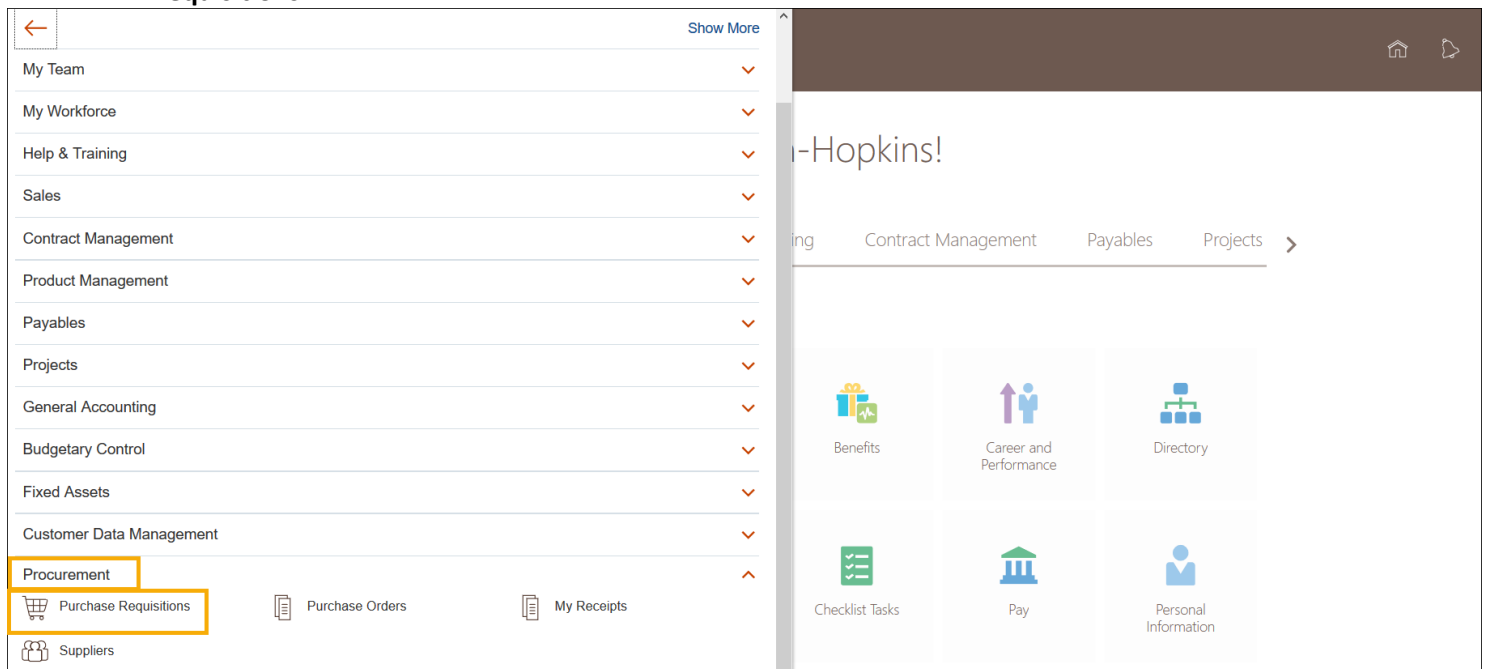
Step One

Navigate to the Procurement area of WyoCloud from WyoWeb.

- From the WyoCloud homepage, click on the **Navigator** (three horizontal lines) in the upper left corner.



- First click **Procurement** to expand (you may have to scroll down within the navigator), then click **Purchase Requisitions**.





- The **Purchase Requisition** page will display.
- Select **More Tasks** then **Update Preparer and Requester**.

The screenshot shows the 'Requisitions' page. At the top right, there is a 'More Tasks' dropdown menu. The dropdown menu is open, showing four options: 'Enter Requisition Line', 'Request Noncatalog Item', 'Update Preparer and Requester' (which is highlighted with a yellow box), and 'Update Requisition Preferences'. The 'More Tasks' button is also highlighted with a yellow box. Below the dropdown, there are sections for 'Recent Requisitions' and 'Recent Purchases'. The 'Recent Requisitions' section contains a table with the following data:

Procurement Catalogs - Shop Here	Purchasing Catalog	Approval
R137274	WM V5734	Pending approval
R137273	Epson Pro G7400U	Pending approval
R137272	Ethernet Switch	Incomplete
R137271	HON Concinnity L	Pending approval

The 'Recent Purchases' section shows three items:

- HP ProDesk 600 G4 SFF Core i5 8500 8GB RAM 256G... \$626.04 EA
- Electronic HP Care Pack Next Business Day Hardw... \$142.14 EA
- HP ProBook x360 11 G2 Education Edition 11 ... \$891.49 EA

Step Two

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.

The screenshot shows the 'Update Preparer and Requester' screen. In the top right corner, there is a 'Submit New Process' button highlighted with a yellow box. Below the button, there is a table with the following columns: 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, and Submission Notes. The table is currently empty, with the text 'No data to display.' at the bottom.

- In the pop up window, add the person you'd 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**.



Update Preparer and Requester

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

Parameters

Requisitioning BU UWYO

Person to Be Replaced Robin Petroski

* Replacement

Restart Approval Task After Submission No

- **NOTE: Restart Approval Task After Submission should remain at the defaulted No.**
- Click **Submit** to begin reassignment process.

Update Preparer and Requester

Process Options Advanced **Submit** Cancel

Name Update Preparer and Requester

Description Upd . . . r and requester for multiple... Notify me when this process ends

Schedule As soon as possible Submission Notes

Parameters

Requisitioning BU UWYO

Person to Be Replaced Robin Petroski

* Replacement Harrison-Hopkins, Kaylen

Restart Approval Task After Submission No

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

Confirmation

Process 151388 was submitted.

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.

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		N, 300000008285992, 300000001655053, 3000000...		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.

You have now completed updating requester for requisitions.