



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Editing and Updating Requisitions

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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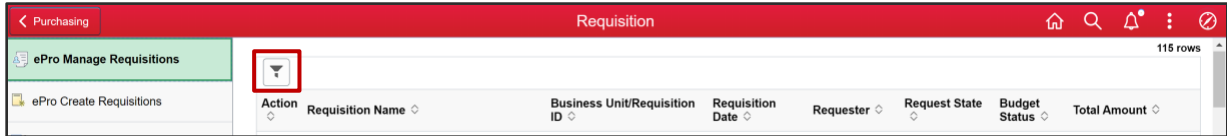
Editing and Updating Requisitions

Navigation

Dashboard: Purchasing; **Tile:** Requisitions

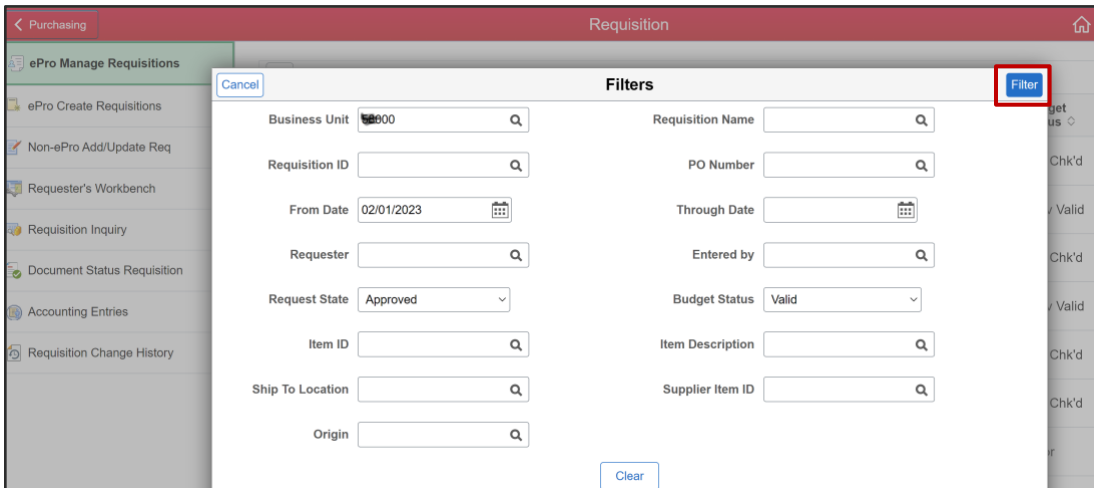
From the ePro Manage Requisitions page:

1. Select the filter icon to locate a requisition by using various fields (such as: DATE, STATUS, etc.).

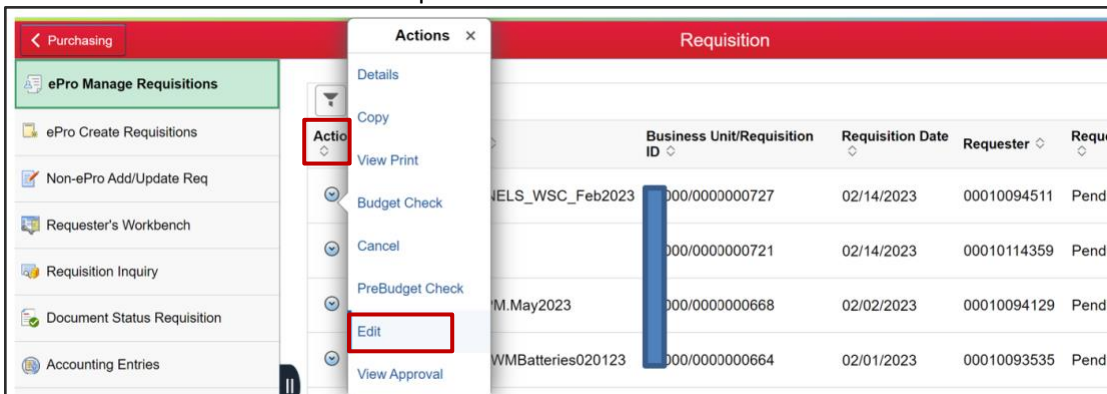


2. Enter search criteria.

Note: Some fields are pre-populated — but can be changed or removed.



3. Select **Filter** to initiate the search.
4. Select the **ACTIONS** drop-down icon.
5. Select **Edit** from the **ACTIONS** drop-down menu.



Note: The *Checkout* page is used to make most changes.

Important: If the PO already has a requisition line, you must communicate with the purchaser before making changes.

- Select the specific item (hyperlink) under ITEM DESCRIPTION to change the PRICE, QUANTITY, DESCRIPTION, or other items.

Shopping Cart for Requisition ID 000001097
2 item(s) to buy now.

Requisition Summary

Business Unit: 0000
 Requisition Name: office supplies May2023
 Requester: 000100000000
 Currency: USD

| Item Description | Status | Price | Currency | Quantity | Unit of Measure | |
|------------------------------------|--------|-------|----------|----------|-----------------|----------|
| AAA Batteries | Open | 6.60 | USD | 5 | PAK | 🔍 Delete |
| Pen, Gel Ink, Blue | Open | 14.35 | USD | 6 | DOZ | 🔍 Delete |

Total: 119.10 USD

- Select **Apply** after all changes are entered.

Special Requests

*Item Description: Pen, Gel Ink, Blue

*Price: 14.35
 *NIGP Class: 620
 NIGP Item: 80
 *Quantity: 6
 Supplier ID: 1113111598
 Location: *00

*Currency Code: USD
 *Unit of Measure: DOZ
 Due Date: [Calendar Icon]

Supplier Name: ACME SUPPLY CO LTD

Supplier Item ID: [Text Field]
 Suggest New Supplier
 Manufacturer ID: [Text Field]
 Manufacturer's Item ID: [Text Field]

Additional Information: 4 dozen TREC; 2 dozen TALCB

Send to Supplier: Yes
 Shown at Receipt: No
 Shown at Voucher: No

The **Checkout** page displays again.

Adding a New Line

Navigation

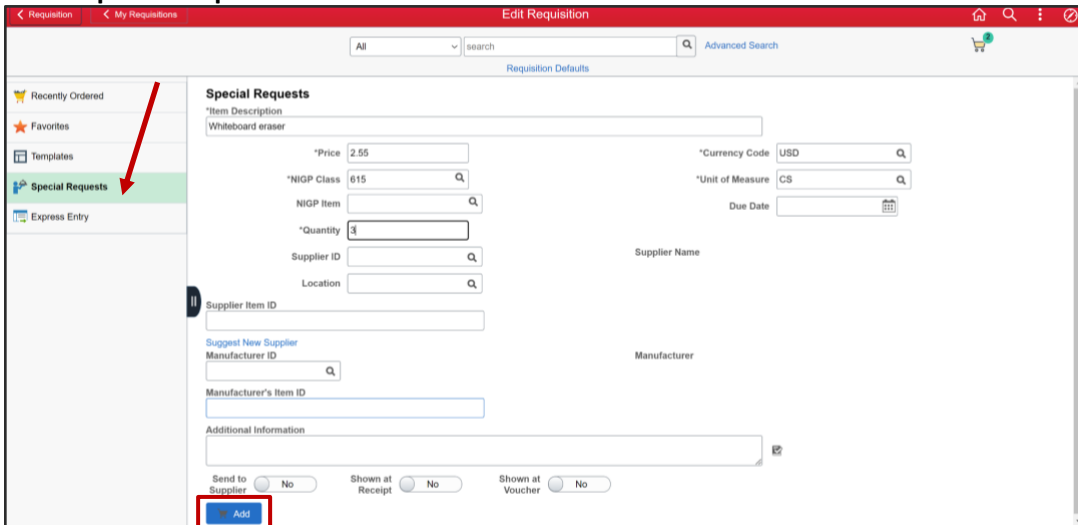
Dashboard: Purchasing; **Tile:** Requisitions

From the *Edit Requisitions* page:

1. Select **Continue Shopping** to add a line.



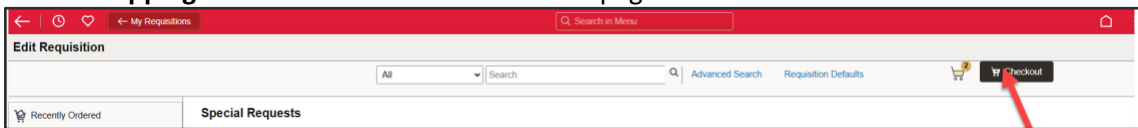
2. Select **Special Requests** in the left menu.



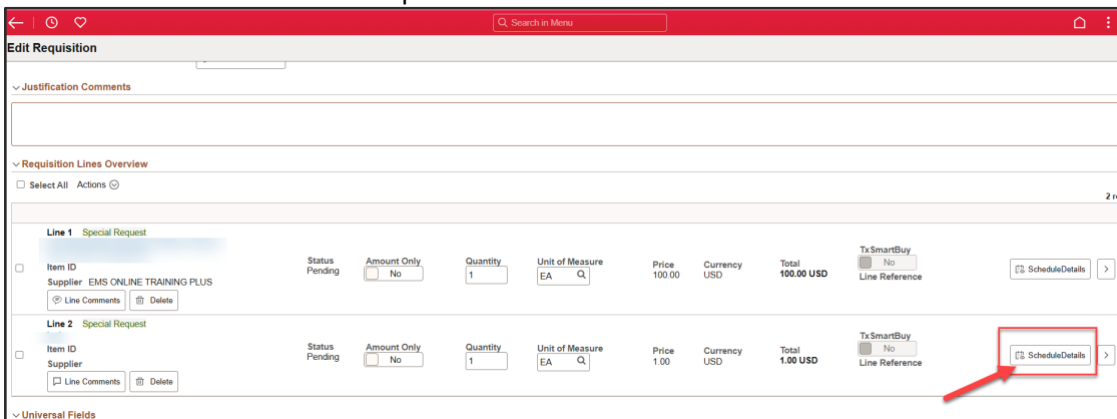
3. Enter data for the new line.

Note: Required fields are indicated with asterisks (*).

4. Select **Add**.
5. Select **Shopping Cart** to continue to the *Checkout* page.



6. Select the **Schedule** icon for the specific item.



7. Enter CHARTFIELD information in the **Distribution** section.

8. Select **Done**.

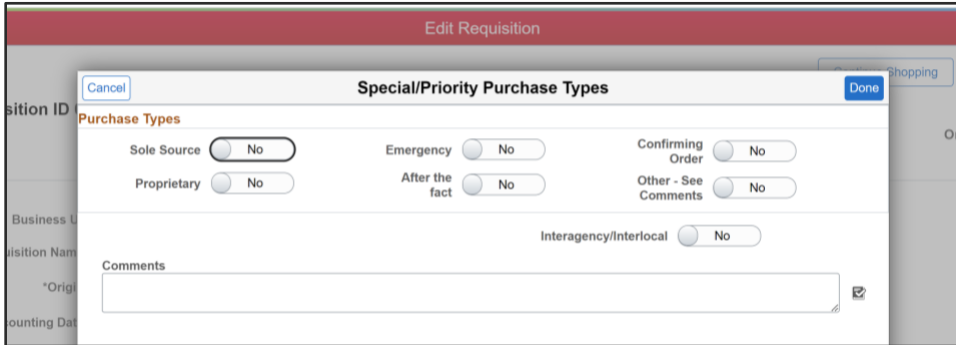
You are routed back to the *Checkout* page.

| Line | Item Description | Status | Quantity | Unit of Measure | Price | Total | TxSmartBuy | Line Reference |
|------|--------------------|--------|----------|-----------------|-------|-----------|------------|----------------|
| 1 | AAA Batteries | Open | 5 | PAK | 6.60 | 33.00 USD | No | |
| 2 | Pen, Gel Ink, Blue | Open | 6 | DOZ | 14.35 | 86.10 USD | No | |
| 3 | Whiteboard eraser | Open | 3 | CS | 2.55 | 7.65 USD | No | |

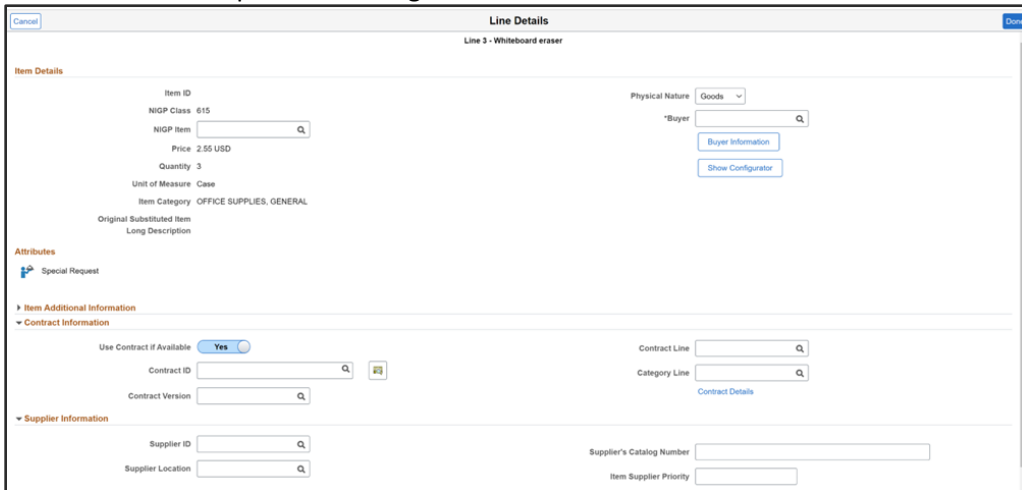
9. **Save** or **Submit** the requisition — however, additional options are available (prior to saving or submitting the requisition):

- A. Select **Header Comments/Attachments** to add or update. Select **Done** to complete the changes.

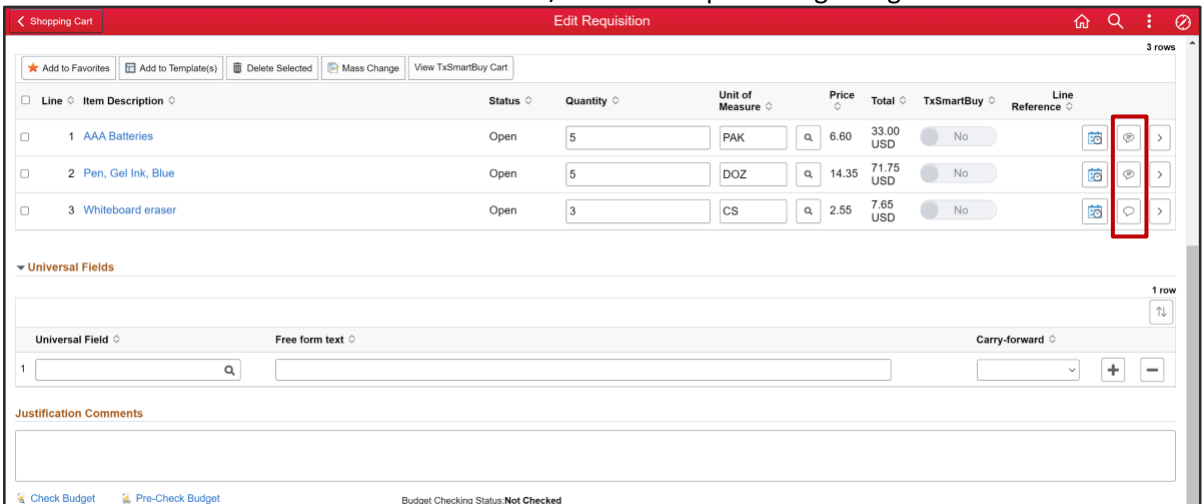
- B. Select **Special/Priority** (if applicable); Select **Type**; Add a **Comment**.
Select **Done** to complete the changes.



- C. Select the **Line Details** icon (>) to associate the requisition with a specific supplier or contract. Select a **Contract** to populate the supplier data –or– select a supplier from the lookup. Select **Done** to complete the changes.



- D. Select **Universal Field(s)** as applicable, per your agency policy.
E. Select the **Comment** icon to enter a comment/attachment pertaining to a given line.



10. Select **Save** to update the requisition to *Open* status.
–or–
select **Submit** to send it for approvals, putting it in *Pending* status.

Budget Check a Requisition

Navigation

Dashboard: Purchasing; **Tile:** Requisitions

To *Budget Check* a requisition and establish a pre-encumbrance:

1. Locate the desired requisition on the *ePro Manage Requisitions* page.
2. Select **Budget Check** from the Actions dropdown.



This can only be done when the requisition is approved (BUDGET STATUS = *Approved*).

- When successful, the BUDGET STATUS changes from *Not Chkd* (not checked) to *Valid*.
 - When not successful, an *Error* hyperlink is provide.
3. Work with GL/budget staff to resolve any error (if applicable) and attempt the budget check again.

Note: Most agencies choose to opt-in into a *four-times-per-day* batch process that automatically attempts to budget check eligible requisitions.

To check if *ChartField* entries and combos are good and available on current funds:

1. Select **Pre-Check Budget** from the ACTIONS drop-down menu.
This does not pre-encumber funds — but (if successful) it can provide a *Provisionally Valid* budget status.

Revision History

| Date | Description of Change | Changed By |
|---------------|-----------------------|------------|
| Jan. 10, 2025 | Initial release | J. Scales |
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