

Procurement — Learning Path

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This learning path is for procurement users who need to create, review, and maintain material requisitions and procurement records. By completing it, learners will be able to navigate Procurement record lists, initiate material requisition work, update records through the appropriate edit screens, and use record views to support ongoing procurement administration.

Learning objectives

- By the end of this path you can locate material requisitions and procurement records using their list views.
- By the end of this path you can start a new material requisition for a procurement need.
- By the end of this path you can open and review material requisition details.
- By the end of this path you can create and maintain procurement records.
- By the end of this path you can use record-editing screens to keep requisition and procurement information current.

Prerequisites

- Access to the Procurement app.
- Permission to view procurement and material requisition records.
- Permission to create and edit material requisitions and procurement records.
- Familiarity with opening records from a list and working with business-application record pages.

Module 1: Find and understand existing procurement work

Goal: Learn where to find existing requisitions and procurement records before taking action.

Lesson 1.1: Locate a material requisition that needs attention

When you need to understand an existing request before updating or acting on it, begin from the material requisition list. Open [material requisition](#) to access the requisition area, then use [List Material Requisitions](#) to find the relevant requisition record. Open the record from the list so you can review the information already captured.

Practice: Find one material requisition in the list and open it for review.

Lesson 1.2: Locate an existing procurement record

When a request has progressed to procurement administration, use the procurement record list to find the record you need to work with. Open [procurement](#), then use [Procurement List](#) to identify and open the appropriate procurement record.

Practice: Open a procurement record from the procurement record list and identify whether it is the record you intended to review.

Module 2: Create and maintain material requisitions

Goal: Start material requisition work and keep requisition records accurate as information changes.

Lesson 2.1: Start a new material requisition

When your organization has a material need that must be formally requested, start a new requisition rather than changing an unrelated existing record. From [material requisition](#), open [Material Requisition](#) to begin the new requisition process. Enter the requisition information required by your organization and complete the record according to your established process.

Practice: Start a new material requisition and enter the information available for a sample request.

Lesson 2.2: Create an internal material requisition

When the requested materials are for an internal need, use the internal requisition entry point. Open [For Internal Use](#), create the internal material requisition, and review

the information before completing your organization's required record-creation process.

Practice: Create a draft internal material requisition for a realistic internal materials need.

Lesson 2.3: Correct or update a requisition record

When information on a requisition changes, update the existing record so the procurement team works from the current details. Locate the requisition through [List Material Requisitions](#), open the relevant record, and use [Material Requisition](#) to make the necessary updates. Review the updated record after completing the change.

Practice: Open a material requisition and make one approved update using the requisition edit record screen.

Module 3: Manage procurement records through their lifecycle

Goal: Create procurement records and maintain them as procurement work progresses.

Lesson 3.1: Create a procurement record for new work

When a procurement activity needs to be recorded, begin from the Procurement area rather than modifying an existing record. Open [procurement](#), then use [Procurement](#) to enter the procurement record information required for the activity.

Practice: Create a procurement record for a sample procurement activity using the information supplied by your instructor or team.

Lesson 3.2: Update an existing procurement record

When procurement information needs correction or completion, first locate the correct existing record. Use [Procurement List](#) to open the record, then use [Procurement](#) to update it. Confirm that you worked on the intended record before finishing.

Practice: Find an existing procurement record and update one approved item of information.

Module 4: Work accurately across requisition and procurement records

Goal: Use the right record area and editing screen for the work you need to perform.

Lesson 4.1: Choose the correct record type for the task

When you receive a request to act, first determine whether the work concerns a material request or procurement administration. Use [material requisition](#) and [List Material Requisitions](#) when you need to locate requisition work. Use [procurement](#) and [Procurement List](#) when you need to locate procurement work. Open the applicable record before making changes.

Practice: For three sample requests, identify whether you would begin in the material requisition area or the procurement area.

Lesson 4.2: Use the appropriate edit screen

When you need to change information, use the edit screen that matches the record type. For a material requisition, open [Material Requisition](#). For a procurement record, open [Procurement](#). Make changes only after confirming the record and record type are correct.

Practice: Explain which edit screen you would use for one requisition update and one procurement-record update.

Final assessment

1. A colleague asks you to review an existing materials request before any changes are made. Which area and screen should you use to locate the request?
2. You need to raise a request for materials needed internally by your organization. Which screen should you start from?
3. You find that information on an existing material requisition needs to be corrected. After locating the record, which edit screen should you use?
4. You need to update information on an existing procurement record, not a material requisition. What sequence of screens should you use?
5. A request asks you to “update the record,” but does not specify whether it is a requisition or procurement record. What should you confirm before selecting an edit screen?

Answers

1. Use [material requisition](#) and [List Material Requisitions](#). **Why:** These screens are used to access and locate existing material requisitions.
2. Start from [For Internal Use](#). **Why:** This screen is specifically provided for creating an internal material requisition.
3. Use [Material Requisition](#). **Why:** It is the edit record screen for material requisition work.
4. Open [Procurement List](#), locate the record, and then use [Procurement](#). **Why:** The list view helps you find the record, while the edit screen is used to maintain it.
5. Confirm whether the request concerns a material requisition or a procurement record. **Why:** Each record type has its own list and edit screen, so selecting the correct one prevents changes to the wrong type of record.