

EP.020.550 – EDITING, SAVING, AND SUBMITTING A REQUISITION

| | |
|----------------------------------|--|
| Purpose | <ul style="list-style-type: none"> To list the activities that can be performed on the Edit Requisition page. To edit, save and submit a requisition |
| Description | <p>This topic demonstrates how to edit, save, and submit an existing requisition. Some examples of requisition edits include entering line comments, changing the quantity of an item, and changing distribution information. Users can edit requisitions until they are approved.</p> |
| Security Role | BOR_EP_MAINT_REQ |
| Dependencies/ Constraints | None |
| Additional Information | None |

Procedure

Below are step by step instructions on how to edit, save, and submit an ePro Requisition.

| Step | Action |
|------|--|
| 1. | Click the NavBar icon. |
| 2. | Click the Menu icon. |
| 3. | Click the eProcurement link. |
| 4. | Click the Manage Requisitions link. The system navigates to the Manage Requisitions page. |
| 5. | <p>Search for a requisition to modify. Requisitions can be searched for by entering a Requisition ID, dates, requester, who entered the PO, status, and PO number. From the Manage Requisitions page, users can view a list of requisitions in various statuses.</p> <p>For more information on managing requisitions, see EP.020.540 - Managing Requisitions.</p> |
| 6. | To edit a requisition, select Edit from the Action dropdown list located to the right of the requisition line. |
| 7. | <p>Click the Go button.</p> <p>Note: <i>The Edit Requisition page is accessible only for open requisitions. The following message will appear, “This requisition is pending approval. Editing this requisition may reinitialize approval process” Select OK to bypass this message.</i></p> |

| Step | Action |
|------|--|
| 8. | <p>The system navigates to the Edit Requisition page. Users can perform several actions on the Edit Requisition page including changing the quantity of a line item, adding comments and modifying shipping or accounting information.</p> <p>Users can make changes at the line item level or as a Mass Change. If multiple lines on the requisition need the same modification, click on the Mass Change link, and make the necessary adjustment(s). See Section 2: Mass Change Page Information for additional information on the Mass Change page.</p> <p>The Edit Requisition page includes the following sections for users to review and/or modify:</p> <ul style="list-style-type: none"> • Requisition Summary: provides Business Unit, Requester, Currency, Requisition Name, Requisition ID, and Priority information • Requisition Lines: includes Line number, Item Description, Source Status, Amount Only, Quantity, Price, Status, and Total. This section also allows the user to drill down further into the requisition line details. • Shipping Summary • Requisition Comments and Attachments • Approval Justification <p>Note: <i>Some changes are unavailable for GFM requisitions.</i></p> |
| 9. | <p>To change the quantity of a line item, enter the correct number in the Quantity field. Make the necessary changes and click Apply.</p> <p>Note: <i>The quantity field cannot be updated on GFM requisitions.</i></p> |
| 10. | <p>To edit the Price, UOM, Description, and/or Supplier, click the Description link of the item. Make the necessary changes and click Apply.</p> <p>Note: <i>The Price, UOM, Description, and/or Supplier fields cannot be update on GFM requisitions.</i></p> |
| 11. | <p>To Add or Edit line comments or add an attachment for a particular item, click the Edit and/or Add icon in the Comments column for the line item.</p> |

| Step | Action |
|------|--|
| 12. | <p>A new window opens where users can perform the following actions:</p> <ul style="list-style-type: none"> • Enter Comments: to enter comments, type comments in the Comments box. • Display Comments Option(s): Select one or more of the following options as needed: <ul style="list-style-type: none"> ○ Send to Supplier: displays comments on the purchase order ○ Show at Receipt: displays comments in the receipt comments ○ Show at Voucher to display in the voucher comments. • Add attachments: click the Add Attachments button then click the Browse button. Locate the file to upload and click on the file. Click the Upload button. Then click the OK button. <p><i>Note: any attachments added at this point will pass to the purchase order only; attachments do not pass to receipts and vouchers.</i></p> |
| 13. | Click the OK button. |
| 14. | <p>The system navigates back to the Edit Requisition page. Users can edit shipping information for one or multiple line items by following one of the options below:</p> <ul style="list-style-type: none"> • Option 1: To Edit One Line Item: Click on the Expand triangle beside the line item to expand the line item details. Make the necessary adjustments by entering the updated information in the related fields. • Option 2: To Edit All Line Items: If shipping information for all line items is the same and users would like to edit it, click on the Edit for All Lines link in the Shipping Summary section or click the Mass Change link instead of the Expand triangle mentioned above. Make the necessary adjustments by entering the updated information in the related fields. See Section 2: Mass Change Page Information for additional information on the Mass Change page. |
| 15. | Click the OK button. |

| Step | Action |
|------|---|
| 16. | <p>To change the accounting information for a Requisition, use the Accounting Lines section to change the requisition accounting information. Users can edit accounting information for one or multiple line items as described below:</p> <ul style="list-style-type: none"> • Option 1: To Edit One Line Item: Click on the Expand triangle beside the line item to expand the line item details. Then click on the Expand triangle beside Accounting Lines to expand the Accounting Lines detail. Make necessary adjustments by entering the updated information in the related fields. • Option 2: To Edit All Line Items: If shipping information for all line items is the same and users would like to edit it, click on the Edit for All Lines link in the Shipping Summary section or click the Mass Change link instead of the Expand triangle mentioned above. Make the necessary adjustments by entering the updated information in the related fields. See Section 2: Mass Change Page Information for additional information on the Mass Change page. |
| 17. | Click the OK button. |
| 18. | <p>If changes were made to the distribution information, you can perform a pre-budget check to determine whether the budget is available.</p> <p>To perform the pre-budget check, click the Pre-Check Budget link.</p> <p>For more information regarding pre-budget checking, see EP.020.500 - Creating a Special Request Requisition</p> <p>Note: You can also perform pre-check budget from the Confirmation page.</p> |
| 19. | If not yet ready to submit the requisition, click the Save For Later button to save the requisition in an 'Open' status. |
| 20. | Once all edits are made, the requisition will need to be submitted. To submit, click the Save & submit button. A confirmation page appears to confirm the requisition was submitted and entered the approval path. The requisition will now be in Pending Approval status. |

Section 2: Mass Change Page Information

The Mass Change page is used to modify line information, shipping instructions, and accounting details for requisition lines selected prior to clicking the Mass Change button. If all lines on a requisition need the same change, use of the Mass Change page is a time saving option.

The mass change page can be used to update a single field in one section or to update multiple fields in each of the sections.

Note: *In order to enter ChartField information in the Accounting Lines section, first select a value in the GL Unit field (this is the Business Unit number).*

Once all values that need to be modified are entered, select the OK button. If values were entered in the accounting lines section, the Distribution Change Options box will open and users must select an option to continue.

The options that appear in this Distribution Change Options window are dependent on the changes made. Select one of the following options, and click the OK button to apply the change:

- **All Distribution Lines:** Select to apply changes to all existing distribution lines.
- **Matching Distribution Lines:** Select to apply changes to each existing distribution lines by matching the distribution line numbers.
- **Replace Distribution Lines:** Select to remove the existing distribution lines and replace them with the distribution line changes.

Once users select OK, the system navigates to the Checkout – Review and Submit page. Users should expand a requisition line and review the information to ensure changes were made as expected.