Editing Requisitions

There are many ways to edit a requisition.

Clicking any of these edit buttons will open your requisition on the "3. Review and Submit" page.

Requisitions in Open, Pending, and Denied Status can be edited.

The Req must be saved in open status to resubmit. Regardless of the how/why the changes are made, it is the process of clicking "Save and Preview Approvals" that changes the status.

Confirmation

Requested For:	Purchasing & Payment Services	**Number of Lines:**	1
Requisition Name:	Edit Screen Shots	**Total Amount:**	15.99 USD
Requisition ID:	0000079310	**Justification:**	
Business Unit:	NT752	Dept Contact Vendor Contact Benefit Statement Special	
Priority:	Medium	Notes to Payment, Purchasing, Etc.	
Budget Status:	Not Checked		

Submit   **Edit Requisition**   Apply Approval Changes

Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
Edit Screen Shots	0000079310	NT752	07/17/2009	Open	15.99

Justification / Comments:
Dept Contact Vendor Contact Benefit Statement Special Notes to Payment, Purchasing, Etc.

Line	Item Description	Source Status	Amount Only	Qty		Price	Status	Total
1	Hamburgers, French Fries, Dr...	Not Sourced	N	1.0000	Each	15.99000 USD	Open	15.99

Edit Requisition

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Search Count:
(1-1 of 1)

	Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▷	0000079310	Edit Screen Shots	NT752	07/17/2009	Open	Not Chk'd	15.99 USD	Edit Requisition ▾ Go

Requester:	Purchasing & Payment Services	**Entered By:**	Sims,Renee Florence

Editing Requisitions

All Reqs open to the Review and Submit page when editing.

Always start by Click on page1. "Define Requisition."

There are three main changes that can be done on the Define Requisition page:

1) Loading a newly added vendor (formally submitted as a suggested vendor)

2) Changing the fund source

3) Changing the budget date

Edit Requisition

1. Define Requisition   2. Add Items and Services   3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: NT752   University of North Texas

Requester: N10305   Purchasing & Payment Services   Copy Bid Vendors

Requisition Name: Edit Screen Shots   **Requisition ID:** 0000070218   **Priority:** Medium

Requisition Lines

Line	Description	Vendor Name
1	Hamburgers, French Fries, Drin	WENDY S

Select All / Deselect All

Add to Favorites   Add to Template(s)   Modify Line / Shipping / Accounti

Click on vendor search icon to find the new vendor on the vendor table.

Click on the Details Tab and edit the budget date

Load the new dept or projid in the speedchart field.

Edit Requisition

1. Define Requisition   2. Add

Specify requisition name, requester, and other information that appli

Business Unit: NT752   University of North Texas

Requester: N10305

Requisition Name: Edit Screen Shots

Line Defaults

Note: The defaults specified below will be applied to requisition lin

Vendor: _____   **Vendor Location:** _____

Buyer: _____   **Category:** _____   **Unit of Measure:** __

Shipping Defaults

Ship To: USB 135

Due Date: _____   **Attention:** _____   **SpeedChart Key** _____

Accounting Defaults

Chartfields1 | Details | Asset Information

Location	GL Unit	Account	Alt Acct	Fund	Dept	Class	PC Bus Unit	Project	Activity	Source Type
USB 13	NT752			21	53950	97	NT752			

Continue

Editing Requisitions

Returning to the Review and Submit page 3, Select the lines you wish the new data to affect.

If all lines, Select All

Next, click on Modify/Line/Shipping/Accounting button

Click on Load Value From Defaults link at the bottom of the modify screen

Finally, click Apply

Edit Requisition

| | 1. Define Requisition | | 2. Add Items and Services | | 3. Review and Submit |

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: NT752   University of North Texas

Requester: N10305   Purchasing & Payment Services   Copy Bid Vendors

Requisition Name: Edit Screen Shots   **Requisition ID:** 0000079310   **Priority:** Medium

Requisition Lines

	Line	Description	Vendor Name	Quantity	UOM	Price	Total
▷ ☑	1	Hamburgers, French Fries, Drink		1.0000	Each	15.99000	15.99

☑ Select All / Deselect All

Modify Line / Shipping / Accounting   **Total Amount:** 15.99 USD

Add to Favorites   Add to Template(s)   Modify Line / Shipping / Accounting   Delete

Create Requisition

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: [ ]   **Vendor Location:** [ ]

Buyer: [ ]   **Category:** [ ]

Shipping Information

Ship To: [ ]

Due Date: [ ]   **Attention:** [ ]   **SpeedChart Key** [ ]

Accounting Information

| Chartfields1 | Details | Asset Information |

Percent	Location	GL Unit	Account	Alt Acct	Fund	Dept	Class	PC Bus Unit	Project	Activity
1		NT752								

Load Values From Defaults

Load Values From Defaults

Apply   Cancel

Editing Requisitions

Choose the last option to Replace Distribution Lines.

Then click OK

Returning to the Review and Submit page 3, save your changes by clicking the Save and Preview Approvals button.

Distribution Change Options

For the selected requisition lines, apply distribution changes to

○ **All Distribution Lines**

  Apply changes to all existing distribution lines.

○ **Matching Distribution Lines**

  Apply changes to each existing distribution line by matching the distribution line numbers.

⦿ **Replace Distribution Lines**

  Remove the existing distribution lines and replace with the distribution lines changes.

[OK]   [Cancel]

Edit Requisition

| | 1. Define Requisition | | 2. Add Items and Services | | 3. Review and Submit |

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit:	NT752	University of North Texas		
Requester:	N10305	Purchasing & Payment Services	Copy Bid Vendors	
Requisition Name:	Edit Screen Shots	**Requisition ID:** 0000079310	**Priority:**	Medium ▾

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
▷ ☑ 1	Hamburgers, French Fries, Drin		1.0000	Each	15.99000	15.99

☑ Select All / Deselect All

Total Amount: 15.99 USD

└ ♥ Add to Favorites 📇 Add to Template(s) 📋 Modify Line / Shipping / Accounting 🗑 Delete

Justification/Comments

Dept Contact
Vendor Contact

☐ Send to Vendor ☐ Show at Receipt ☐ Show at V...

🔍 Check Budget   ☐ Req needs vendor setup

💾 Save & submit   🖧 Save & preview approvals   ✖ Cancel Changes

Save your changes

Editing Requisitions

Cick on the blue hyperlinked line item description to edit description, quantity, the price, category code or to suggest a vendor.

Make changes as desired. If you need to Suggest a Vendor, click the blue hyperlink and fill out the form as prompted.

Click OK to return to the Review and Submit page 3.

Be sure to save your changes by clicking the Save and Preview button.

Edit Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: NT752 University of North Texas

Requester: N10305   Purchasing & Payment Services   Copy Bid Vendors

Requisition Name: Edit Screen Shots   **Requisition ID:** 0000079310   **Priority:** Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Hamburgers, French Fries, Drin	WENDY S	1.0000	Each	15.99000	15.99

☐ Select All / Deselect All   **Total Amount:** 15.99 USD

💜Add to Favorites   Add to Template(s)   Modify Line / Shipping / Accounting   🗑 Delete

Justification

Dept Cont
Vendor Co
☐ Send to

🔍 Save &

Special Request | **Templates**

Special Item

*Item Description:	Hamburgers, French Fries, Drinks for a business meeting
*Price:	15.99000 *Currency: USD
*Quantity:	1.0000 *Unit of Measure: EA
*Category:	385-01 Due Date:
Vendor ID:	0000001676 WENDY S Suggest New Vendor

Additional Information

☐ Send to Vendor   ☐ Show at Receipt   ☐ Show at Voucher

OK	Cancel	Add or Start New Type

Editing Requisitions

If choosing more than one deptid or projid, select only the line item to be affected.

Click Modify Line/Shipping/Accounting button

Use the speedchart to pull the deptid or projid

Can also choose a budget date for multiyear orders by editing the Details tab

Click Apply (do NOT click the Load Value from Defaults link)

Choose Replace Distribution Lines option and then Click OK

Editing Requisitions

Regardless of the type of edits needed, make a note in the justification indicating the reason for the edits. If the only reason for the edit is to reinitialize approval routing, indicate so and then "Save & Preview Approvals."

Must save any changes first THEN BUDGET CHECK

Once all your edits are complete and you Req has a Valid Budget, click Save and Preview for the last time

Edit Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: NT752 University of North Texas

Requester: N10305 Purchasing & Payment Services Copy Bid Vendors

Requisition Name: Edit Screen Shots Requisition ID: 0000079310 Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Hamburgers, French Fries, Drin	WENDY S	1.0000	Each	15.99000	15.99

Select All / Deselect All Total Amount: 15.99 USD

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

Justification/Comments

Dept Contact
Vendor Contact

Send to Vendor Show at Receipt Show at Voucher

Check Budget Budget Checking Status: Valid Req needs vendor setup

Save & submit Save & preview approvals Cancel Changes

Editing Requisitions

Always submit your Req from this view.

Confirm routing shows correct (if routing shows Skipped, notify BSC as soon as possible)

Also note Proxy will not show until you actually submit the Req, use Manage Reqs to view proxy routing

Add any ad hoc routing (if you edit after adding ad hoc, your changes are lost)

Always insert ad hoc "approval" routing before Purchasing review – the last stage.

Click Submit

Close window or open a new menu item (do no edit again)