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.





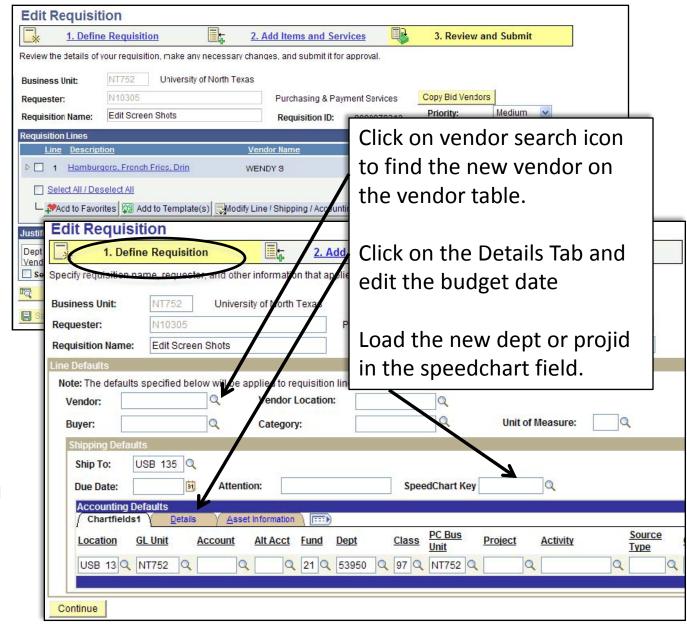


All Reqs open to the Review and Submit page when editing.

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



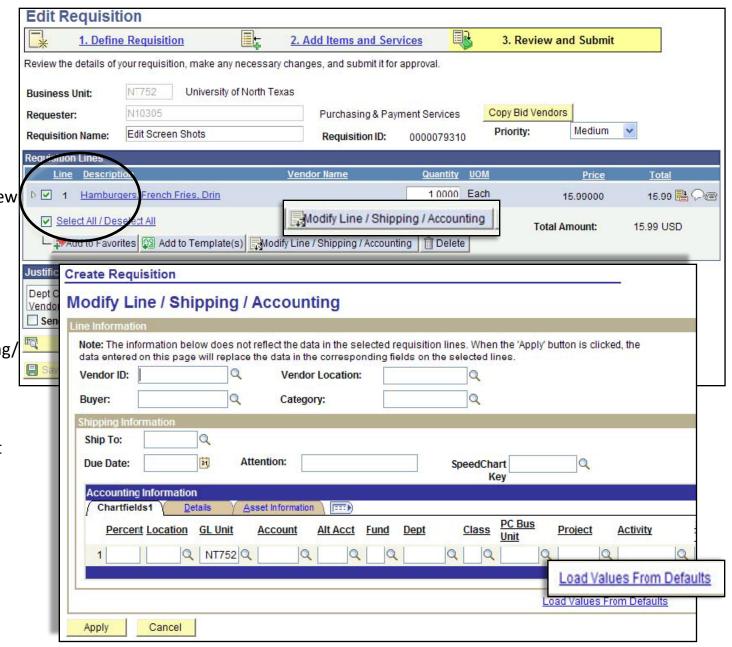
Returning to the Review and Submit page 3, Select the lines you wish the new data to affect.

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

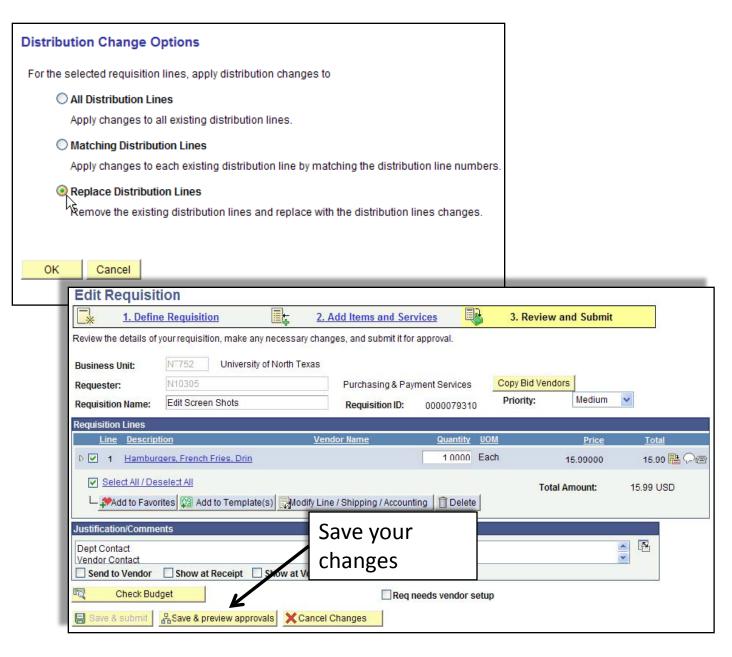
Finally, click Apply



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.

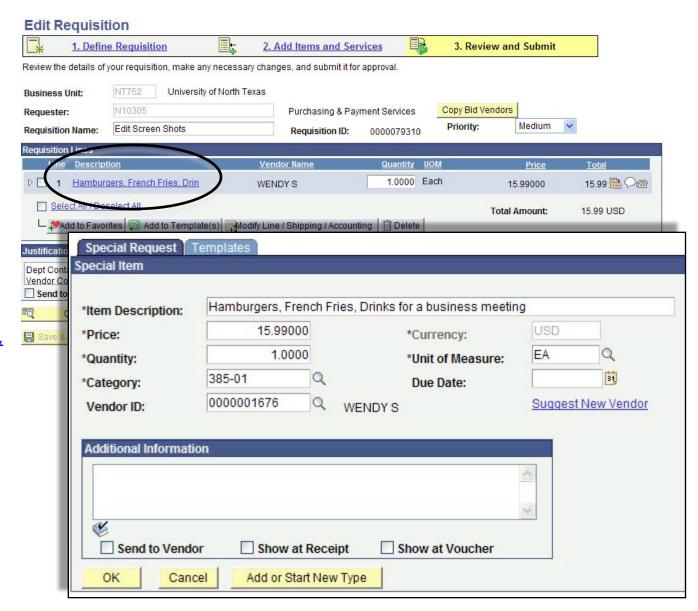


Cick on the blue hyperlinked line item description to edit description, quantity, the price, category code or to suggest a vendor.

Make changes as desired. If you need to <u>Suggest a Vendor</u>, 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.



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

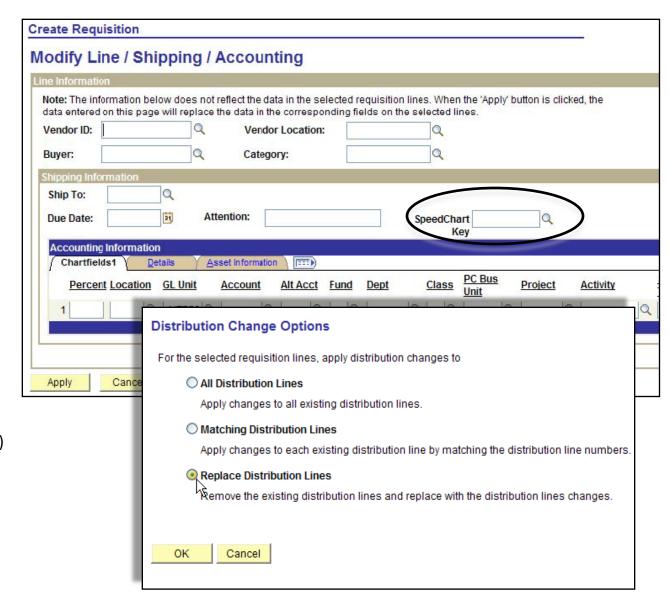
Click Modify Line/Shipping/Accounting button

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)

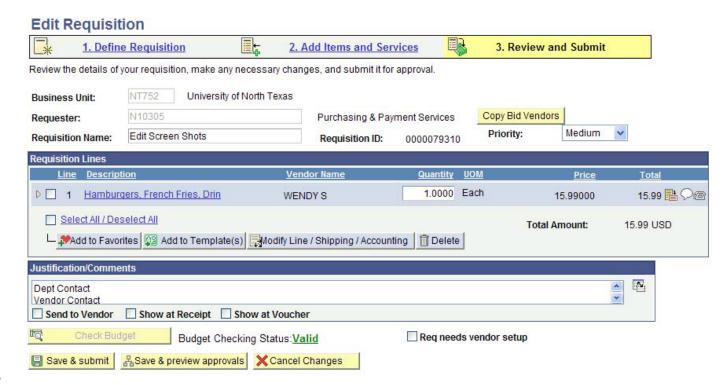
Choose Replace Distribution Lines option and then Click OK



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



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)

