

SOP #: 4.2.3.1	Area: Purchasing
Title: Editing Requisitions	Effective Date: 03/01/2016
Version #: 1.0	Revision Date: 08/17/2016
Approval Date: 02-24-2016	Review Date: N/A


## Title: Editing Requisitions

If a change needs to be made on a requisition before it has been sourced to a purchase order and sent to a vendor, it can be edited.

To edit a requisition, follow the steps below:

1. Enter **EUID** and **Password**.
2. Click **Sign In**.

UNIVERSITY OF NORTH TEXAS SYSTEM



# Enterprise Information System

**The Enterprise Information System is the primary administrative information resource for the University of North Texas System.**

This system is the property of the University of North Texas System and your use of this resource constitutes an agreement to abide by relevant federal and state laws and institutional policies. Unauthorized use of this system is prohibited. Violations can result in penalties and criminal prosecution. Usage may be subject to security testing and monitoring. Users have no expectation of privacy except as otherwise provided by applicable privacy laws.

**System Login**

EUID (required)

Password (required)

**Sign In**

**Trouble logging in?**

[Activate my account](#)

[What's my EUID?](#)

[Reset my password](#)

**Scheduled Maintenance**

Service may be interrupted during these regular maintenance times:

- Tuesday 7:00 - 9:30 pm
- Thursday 7:00 - 9:30 pm
- Saturday 7:00 pm to noon Sunday

**Web Browsers & Settings**

Enterprise Information System (EIS) currently supports the following Web browsers and versions:

- Google Chrome 24
- Firefox 17
- Internet Explorer 11, 10, 9, and 8
- Safari 6

**Note:** Internet Explorer's Compatibility Mode is unsupported in EIS. Turn off this feature in Internet Explorer under Tools > Compatibility Mode Settings.

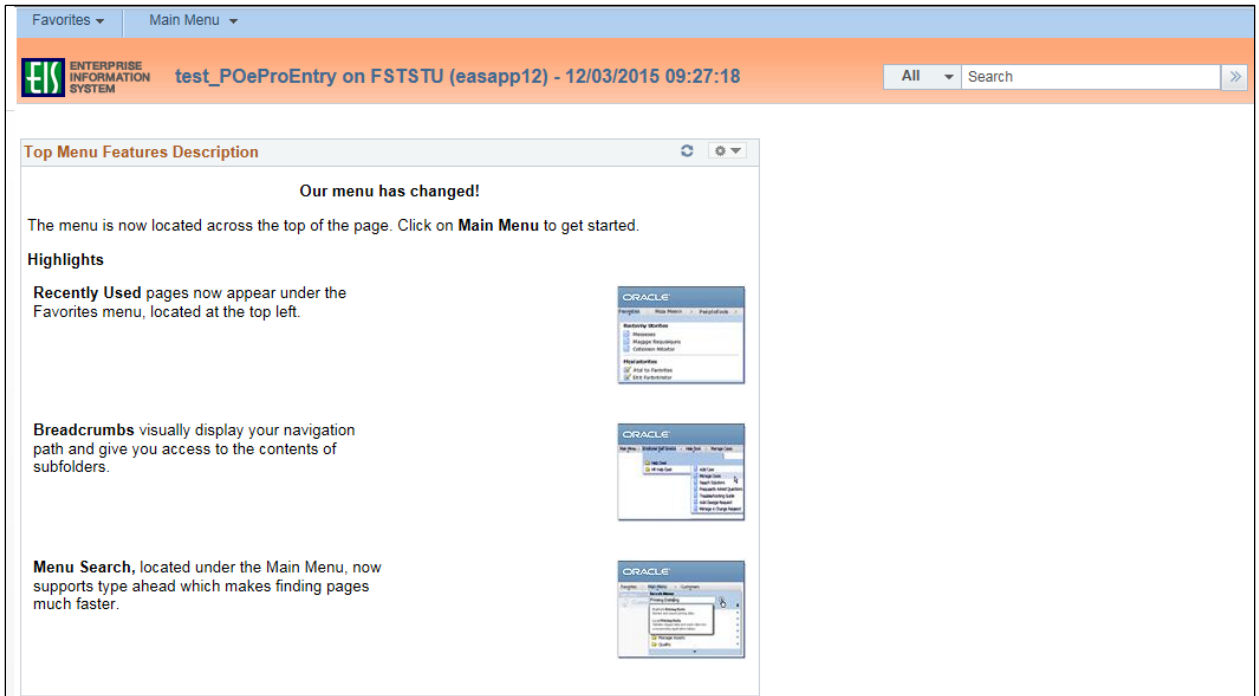
To use the Enterprise Information System, set your Web browser to allow JavaScript, accept cookies, and turn off popup blocking.

Some documents inside EIS are in PDF format and require the free [Adobe Reader](#) software to open.

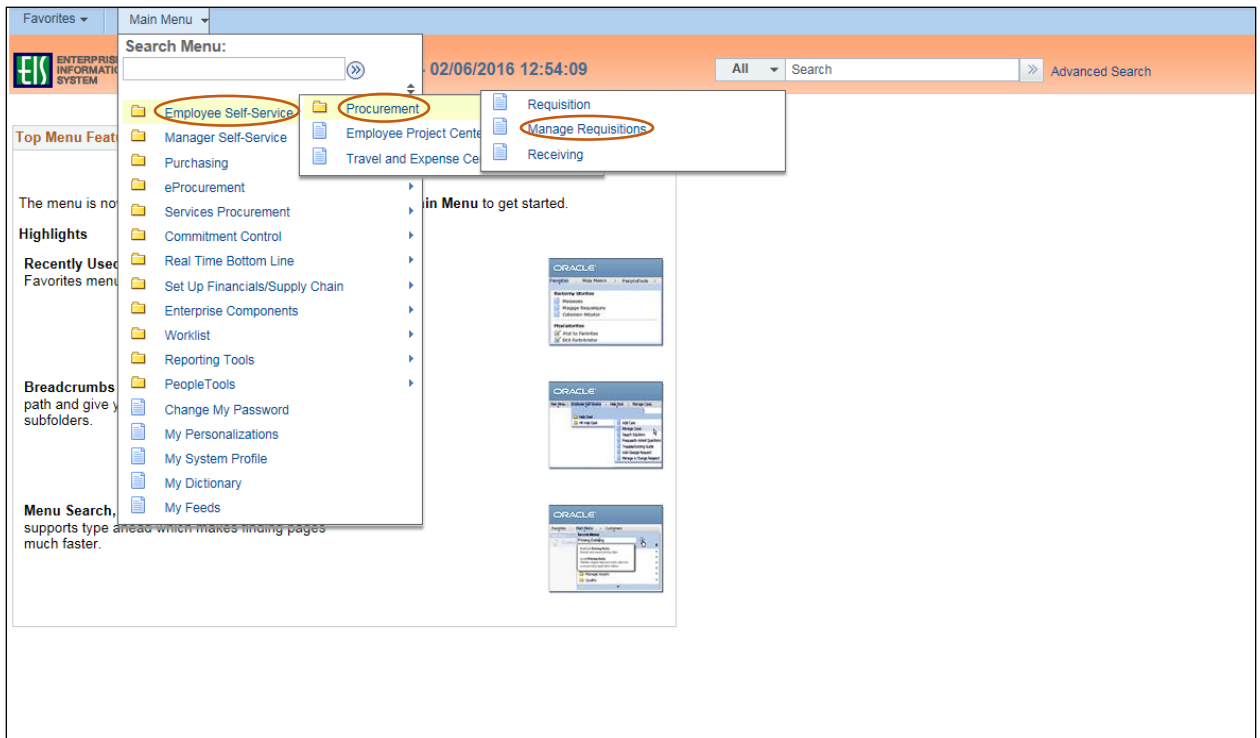
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[State of Texas](#) • [Statewide Search](#) • [Texas Homeland Security](#) • [Fraud Reporting](#) • [Public Information Act](#) • [Online Institutional Resumes](#)  
[University of North Texas](#) • [UNT Health Science Center](#) • [University of North Texas Dallas](#) • [UNT Dallas College of Law](#)  
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3. Click **Main Menu**.



4. Navigate to **Manage Requisitions** by clicking on Employee Self-Service>Procurement>Manage Requisitions.



- Verify that the information in the **Business Unit** and **Requester** fields is correct.
- Enter the appropriate search date range into the **Date From** and **Date To** fields.  
**Note:** Leave the **Date From** and/or **Date To** fields blank to expand your search.
- Click **Search**.

**Manage Requisitions**

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SY769        Requisition Name:

Requisition ID:        Request State: All but Complete       Budget Status:

Date From: 12/16/2015       Date To: 12/23/2015       Entered By:

Requester: E15203        PO ID:

        [Show Advanced Search](#)

**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.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 000000115	Computer for Professor ...	SY769	12/21/2015	Open	Not Chk'd	1,150.00 USD	[Select Action]	Go
▶ 000000114	Comment Test	SY769	12/18/2015	Pending	Valid	100.00 USD	[Select Action]	Go
▶ 000000113	Computer Desk for Dr. D...	SY769	12/18/2015	Approved	Valid	600.00 USD	[Select Action]	Go
▶ 000000112	Computer for Professor ...	SY769	12/18/2015	Pending	Valid	1,150.00 USD	[Select Action]	Go

[Create New Requisition](#)      [Review Change Request](#)      [Review Change Tracking](#)      [Manage Receipts](#)      [Requisition Report](#)

- Click the triangle icon ▶ next to the **Req ID** to view the current status of the requisition.  
**Note:** The requisition's status screen will open.

**Manage Requisitions**

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SY769        Requisition Name:

Requisition ID:        Request State: All but Complete       Budget Status:

Date From: 12/16/2015       Date To: 12/23/2015       Entered By:

Requester: E15203        PO ID:

        [Show Advanced Search](#)

**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.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 000000115	Computer for Professor ...	SY769	12/21/2015	Open	Not Chk'd	1,150.00 USD	[Select Action]	Go
▶ 000000114	Comment Test	SY769	12/18/2015	Pending	Valid	100.00 USD	[Select Action]	Go
▶ 000000113	Computer Desk for Dr. D...	SY769	12/18/2015	Approved	Valid	600.00 USD	[Select Action]	Go
▶ 000000112	Computer for Professor ...	SY769	12/18/2015	Pending	Valid	1,150.00 USD	[Select Action]	Go

[Create New Requisition](#)      [Review Change Request](#)      [Review Change Tracking](#)      [Manage Receipts](#)      [Requisition Report](#)

9. Select **Edit** from the requisition's associated dropdown menu.

The screenshot shows the 'Manage Requisitions' page in the Enterprise Information System. The search criteria are: Business Unit SY769, Requisition Name Computer for Professor..., Request State All but Complete, Budget Status, Date From 02/18/2016, Date To 02/19/2016, Requester E92200, and Entered By Thomas, Meesha Meoria. The requisition details for 000000154 are shown, including a Request Lifespan diagram and a table of line items. A dropdown menu is open over the 'Total' column of the requisition table, with 'Edit' highlighted.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
000000154	Computer for Professor ...	SY769	02/19/2016	Pending	Valid	1,150.00 USD	[Select Action] Go

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	Dell Desktop Computer	Pending Approval	1000.00000 USD		1.0000 EA	Summus Industries Inc	✗
2	Dell Keyboard	Pending Approval	150.00000 USD		1.0000 EA	Summus Industries Inc	✗

10. Click **Go**.

The screenshot shows the 'Manage Requisitions' page with search criteria: Business Unit SY769, Requisition Name Computer for Professor..., Request State All but Complete, Budget Status, Date From 12/16/2015, Date To 12/23/2015, Requester E15203, and Entered By Thomas, Meesha Meoria. The requisition details for 000000113 are shown, including a Request Lifespan diagram and a table of line items. The 'Go' button in the requisition table is circled in red.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
000000115	Computer for Professor ...	SY769	12/21/2015	Open	Not Chkd	1,150.00 USD	[Select Action] Go
000000114	Comment Test	SY769	12/18/2015	Pending	Valid	100.00 USD	[Select Action] Go
000000113	Computer Desk for Dr. D...	SY769	12/18/2015	PO(s) Created	Valid	600.00 USD	[Edit] Go

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	Computer Desk	PO Created	500.00000 USD		1.0000 EA	Summus Industries Inc	✗
2	Dell Printer	PO Created	100.00000 USD		1.0000 EA	Summus Industries Inc	✗

11. Click **OK**.

The screenshot shows the 'Manage Requisitions' interface. A search criteria form is visible at the top. Below it, a table lists requisitions. A modal message box is open, displaying the text: 'This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)'. The message box includes 'OK' and 'Cancel' buttons.

12. Click on the gray triangle next to **Accounting Lines** to reveal the Chartfields.

The screenshot displays the 'Edit Requisition - Review and Submit' page. The 'Requisition Summary' section shows details like Business Unit (SY769), Requisition Name (The Festus Group-Victor Aimuyo), and Requisition ID (000007281). The 'Cart Summary' indicates a total amount of 2,100.00 USD. The 'Requisition Lines' table is expanded to show a shipping line for 'Cognos training' with a quantity of 1,000. The 'Accounting Lines' section is highlighted with a red circle and a gray triangle icon next to its label.

13. Review **Chartfields 1** and **Chartfields 2** to determine if changes are needed.

**Accounting Lines** Personalize | Find | View All | First 1 of 1 Last

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		BSCP 400	1.0000	100.0000	2,100.00	SY769	

**Accounting Lines** Personalize | Find | View All | First 1 of 1 Last

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate
55253	7243	926000	200	830001	550								

14. Click the box next to the appropriate Line(s).

Employee Self-Service > Procurement > Requisition

mk10001 on F8T3TU (easapp12) - 03/25/2016 11:14:21

**Edit Requisition - Review and Submit**

Review the item information and submit the req for approval.

My Preferences

**Requisition Summary**

Business Unit: SY769 Univ. of North Texas System  
 Requisition Name: The Festus Group-Victor Almuyo  
 Requester: E92200 Business Services-Gen  
 Requisition ID: 0000007281  
 Priority: High  
 Currency: USD

Cart Summary: Total Amount 2,100.00 USD

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UDM	Price	Total	Details	Comments	Bid Tab	Delete
<input type="checkbox"/>	Cognos training			1.0000	Each	2100.0000	2100.00			Edit	Delete
1	Shipping Line		*Ship To: BSCA 400 Address: UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76209 Attention To: Business Services-Gen Due Date: 03/10/2016	1.0000		2100.0000				Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields	

Accounting Lines

Accounting Lines

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate
55253	7243	926000	200	830001	550								

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

15. Click **Mass Change**.

Enterprise Information System  
 mk10001 on FSTSTU (easapp12) - 03/25/2016 11:14:21

**Edit Requisition - Review and Submit**  
 Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SY769    Univ. of North Texas System    Requisition Name: The Festus Group-Victor Almuyo  
 Requester: E92200    Business Services-Gen    Requisition ID: 000007281  
 \*Currency: USD    Priority: High

Cart Summary: Total Amount 2,100.00 USD  
 Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Cognos training			1,0000	Each	2100.0000	2100.00				

Shipping Line 1

\*Ship To: BSCA 400  
 Address: UNT System Business Service Center  
 Send to: invoices@untsystem.edu  
 1112 Dallas Dr., Ste. 4000  
 Denton, TX 76205

Attention To: Business Services-Gen  
 Due Date: 03/10/2016

Accounting Lines

\*Distribute By: Qty

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit
55253	7243	926000	200	830001	550	

Mass Change

16. Enter the appropriate **GL Unit** in **Chartfields 1**.

17. Enter the appropriate information for the remaining required Chart of Account fields where needed:

- Dept
- Fund Cat
- Fund
- Function

**Note:** Account and Alt Acct should remain blank.

18. Click **OK**.

Enterprise Information System  
 mk10001 on FSTSTU (easapp12) - 03/28/2016 13:09:28

**Edit Lines/Shipping/Accounting for Selected Lines**

Line Information

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

Supplier ID:    Supplier Location:    Buyer:    Category:

Shipping Information

Ship To Location:    Add One Time Address:    Due Date:    Attention:

Comments:

Accounting Lines

SpeedChart:

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function
1		SY769			922000	200	830001	200

Load Values From Defaults

OK    Cancel

19. Select **All Distribution Lines** or **Matching Distribution Lines**.  
**Note:** Do not select the **Replace Distribution Lines** option.
20. Click **OK**.

**Distribution Change Options**

For the selected requisition lines that are available for sourcing, 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

21. Review **Acct** and **Alt Account** fields under **Accounting Lines** in **Chartfields 2** to ensure the information is correct.
22. Make changes as needed.

**Edit Requisition - Review and Submit**

Requisition Summary

Business Unit: SY759, Requester: E92200, \*Currency: USD, Univ. of North Texas System, Business Services-Gen, Requisition Name: The Festus Group-Victor Amiyu, Requisition ID: 000007281, Priority: High

Cart Summary: Total Amount 2,100.00 USD

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Cognos training			1,000	Each	2100.0000	2100.00				

**Accounting Lines**

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate	
							55253	7243	922000	200	830001	200									



23. Change **Ship To**, **Due Date**, or **Quantity** fields as appropriate.
24. Click the item name under the **Description** category.

**Edit Requisition - Review and Submit**

Review the item information and submit the req for approval

**Requisition Summary**

Business Unit: SY769 Univ. of North Texas System  
 Requisition Name: Computer Desk for Dr. Davis  
 Requester: E15203 Requestion ID: 000000113  
 Currency: USD Priority: Medium  
 Custom Fields

Cart Summary: Total Amount 600.00 USD

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Computer Desk		Summus Industries Inc	1,000	Each	500.0000	500.00				
	Shipping Line 1		*Ship To: USB 135 Address: UNT Central Receiving Denton, TX 76205 Attention To: Facilities Maintenance Due Date: 12/31/2015	Add Shipto Comments Add One Time Address	Quantity: 1,000 Price: 500.0000			Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields			
2	Dell Printer		Summus Industries Inc	1,000	Each	100.0000	100.00				
	Shipping Line 1		*Ship To: USB 135 Address: UNT Central Receiving Denton, TX 76205 Attention To: Facilities Maintenance Due Date: 12/31/2015	Add Shipto Comments Add One Time Address	Quantity: 1,000 Price: 100.0000			Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields			

Total Amount 600.00 USD

25. Change information in fields as needed.

**Edit Requisition**

Welcome Facilities Maintenance

Request Options: Search All

**New Requisition**

\*Goods/Service Description: Computer Desk  
 Quantity: 1 \*Unit of Measure: EA  
 Amount: 500.0000 \*Currency Code: USD  
 \*Category: 204-64  
 Supplier ID: 0000006227 Suggest New Supplier  
 Supplier Name: Summus Industries Inc  
 Quote Number: 888888888 ? Quote Date: 12/18/2015  
 Beginning Date: 12/25/2015 ? Date of Completion: 12/31/2015 ?

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher

Apply

## 26. Click **Apply**.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Manage Requisitions > Requisition

**ENT** ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 12/23/2015 13:48:17 All Search >> Advanced Search

### Edit Requisition ?

Welcome Facilities Maintenance [Home](#) [My Preferences](#) [Requisition Settings](#) | [2 Lines](#) [Checkout](#)

Request Options ▾ Search All ▾ Search Advanced Search

All Request Options

ePro Services

**New Requisition**

Web

Forms

Favorites

Recently Ordered

External Catalogs

#### New Requisition

*Goods/Service Description	Computer Desk	*Unit of Measure	EA
Quantity	2	*Currency Code	USD
Amount	750.00	Suggest New Supplier	
*Category	204-64	Quote Date	12/18/2015
Supplier ID	0000006227	Date of Completion	12/31/2015 <span>?</span>
Supplier Name	Summus Industries Inc		
Quote Number	888888888		
Beginning Date	12/25/2015 <span>?</span>		

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

[Apply](#)

27. Click **Submit**.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Procurement](#) > [Manage Requisitions](#) > [Requisition](#)

**ENTERPRISE INFORMATION SYSTEM** mmt0110 on FSTSTU (easapp12) - 12/23/2015 13:48:17

[All](#) |  | [Advanced Search](#)

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Review the item information and submit the req for approval.

[My Preferences](#) | [Requisition Settings](#)

**Requisition Summary**

Business Unit: <input type="text" value="SY769"/>	Univ. of North Texas System	Requisition Name: <input type="text" value="Computer Desk for Dr. Davis"/>	<a href="#">Copy Bid Vendor</a>
Requester: <input type="text" value="E15203"/>	Facilities Maintenance	Requisition ID: 0000000113	<a href="#">Delete Bid Vend</a>
Currency: USD		Priority: <input type="text" value="Medium"/>	<a href="#">Refresh</a>
			<a href="#">Custom Fields</a>

**Cart Summary: Total Amount 1,600.00 USD** | [Add More Items](#)

Expand lines to review shipping and accounting details

[First](#) | 1 to 2 of 2 | [Last](#)

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Computer Desk		Summus Industries Inc	2.0000	Each	750.0000	1500.00				
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Shipping Line 1</p> <p>*Ship To: <input type="text" value="USB 135"/>   <a href="#">Add ShipTo Comments</a>   <b>Quantity</b> <input type="text" value="2.0000"/></p> <p>Address: <input type="text" value="UNT Central Receiving Denton, TX 76205"/>   <a href="#">Add One Time Address</a>   <b>Price</b> <input type="text" value="750.0000"/></p> <p>Attention To: <input type="text" value="Facilities Maintenance"/></p> <p>Due Date: <input type="text" value="12/31/2015"/></p> <p style="text-align: right;"> <a href="#">Price Adjustment</a>  <a href="#">Pegging Inquiry</a>  <a href="#">Pegging Workbench</a>  <a href="#">Custom Fields</a> </p> <p style="text-align: center;">Accounting Lines</p> </div>											
2	Dell Printer		Summus Industries Inc	1.0000	Each	100.0000	100.00				
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Shipping Line 1</p> <p>*Ship To: <input type="text" value="USB 135"/>   <a href="#">Add ShipTo Comments</a>   <b>Quantity</b> <input type="text" value="1.0000"/></p> <p>Address: <input type="text" value="UNT Central Receiving Denton, TX 76205"/>   <a href="#">Add One Time Address</a>   <b>Price</b> <input type="text" value="100.0000"/></p> <p>Attention To: <input type="text" value="Facilities Maintenance"/></p> <p>Due Date: <input type="text" value="12/31/2015"/></p> <p style="text-align: right;"> <a href="#">Price Adjustment</a>  <a href="#">Pegging Inquiry</a>  <a href="#">Pegging Workbench</a>  <a href="#">Custom Fields</a> </p> <p style="text-align: center;">Accounting Lines</p> </div>											

Select All / Deselect All | **Select lines to:** | [Add to Favorites](#) | [Add to Template\(s\)](#) | [Delete Selected](#) | [Mass Change](#)

**Total Amount** 1,600.00 USD  
**Pre-Encumbrance Balance** Not Available

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**Shipping Summary**

[Edit for All Lines](#)

Ship To Location:   
 Address:   
 Attention To:   
 Comments:

**Requisition Comments and Attachments**

Enter requisition comments

Dept Contact: Sarah | Contact Phone: 940-555-5555 | Contact Email: sarahjones@unt.edu |

Send to Supplier |  Show at Receipt |  Shown at Voucher | [Edit more Comments and Attachments](#)

**Approval Justification**

Enter approval justification for this requisition

Dept Contact: Sarah | Contact Phone: 940-555-5555 | Contact Email: sarahjones@unt.edu |

Special Instructions: Please email the address above when the order ships.

Purpose Statement: This purchase will allow Professor Davis to conduct cutting edge research which could result in grants and national recognition for the UNT System.

Check Budget |  Pre-Check Budget | **Budget Checking Status: Not Checked**

[Submit](#) | [Save Before Submit](#) | [Add More Items](#) | [Preview Approvals](#)

**Note:** The **Confirmation** screen will open.

The edited requisition will be re-routed through the normal approval process.

When a requisition has been changed, the system displays the **Change Request/Line Approval Summary** area, which provides details about the changes that have been made to the requisition.

Confirmation

Your requisition has been submitted.

Requested For	Facilities Maintenance	Number of Lines	2
Requisition Name	Computer Desk for Dr. Davis	Total Amount	1,600.00 USD
Requisition ID	000000113	<b>Approval Justification</b>	
Business Unit	SY769	Dept Contact: Sarah I Contact Phone: 940-555-5551	
Status	See Lines	Contact Email: sarahjones@unt.edu   Special	
Priority	Medium	Instructions: Please email the address above when the order ships Purpose Statement: This purchase will allow Professor Davis to conduct cutting edge research which could result in grants and national recognition for the UNT System.	
Budget Status	Valid		
Track Batch	1		

[View printable version](#)
[Edit This Requisition](#)
[Check Budget](#)
[Pre-Check Budget](#)

**Purchasing Approval**

Computer Desk for Dr. Davis: Pending [View/Hide Comments](#) [Start New Path](#)

UNTS Buyer Approval

Pending

Multiple Approvers  
Buyer Requisition WF Approval [+](#)

[Comment History](#)

**UNTS Dept ID - ePro**

Line 1: Initiated [View/Hide Comments](#) [Start New Path](#)

Computer Desk

UNTS Department Approval

Not Routed

[+](#) Asher, Donna Brooks ePro Req Dept Manager [+](#)

[Comment History](#)

Line 2: Initiated [View/Hide Comments](#) [Start New Path](#)

Dell Printer

UNTS Department Approval

Not Routed

[+](#) Asher, Donna Brooks ePro Req Dept Manager [+](#)

[Comment History](#)

**Change Request/Line Approval Summary** [Personalize](#) | [View All](#) | [1 of 1](#)

Line	Item Description	Change Request	Line Re-Approval
1	Computer Desk	Created	Routed for Approval

[Apply Approval Changes](#)

[Create New Requisition](#)
[Manage Requisitions](#)