

PROCUREMENT: Modifying Requisitions

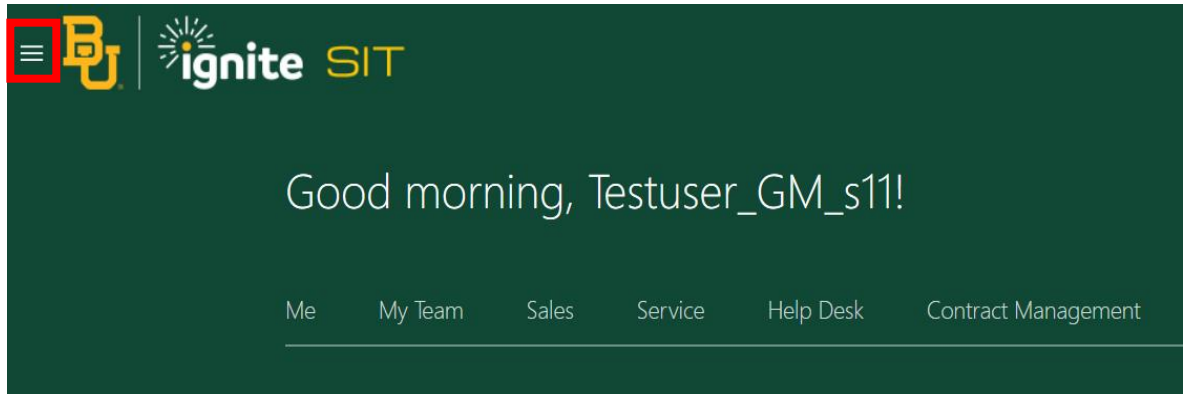
Overview

- This job aid will walk you through the appropriate steps to modify a requisition that you've recently submitted.
- You can only modify a requisition if the PO has not been created by the Buyer.
- If the PO has been created by the Buyer, you must follow the instructions to create a Change Order (please see Change Order job aid).
- You can modify requisitions that you have submitted via the following:
 - Goods- Non-Catalog
 - Services- Non-Catalog
 - Payment Request
 - Goods- After the Fact
 - Services- After the Fact
- If a requisition has been submitted but is pending approval from the Department Approver, follow the steps outlined in section 2.
- If a requisition has been approved, but a PO has not been created, follow the steps outlined in section 3.

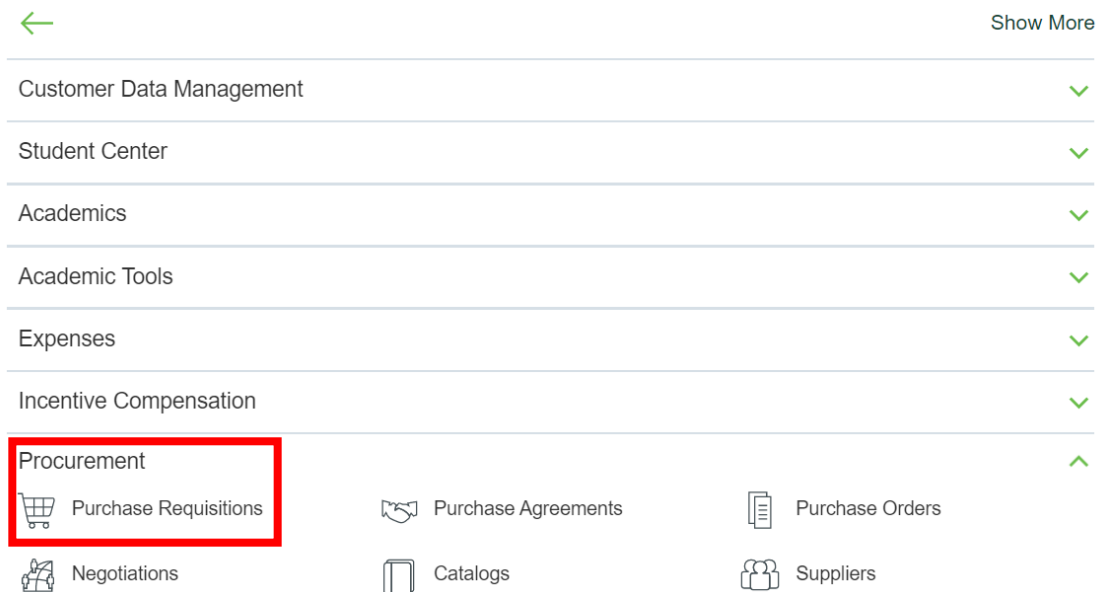
PROCUREMENT: Modifying Requisitions

I. Navigate to Requisition Page

- I. You can access the **Purchase Requisitions** task in two ways:
 - a. (Option I) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

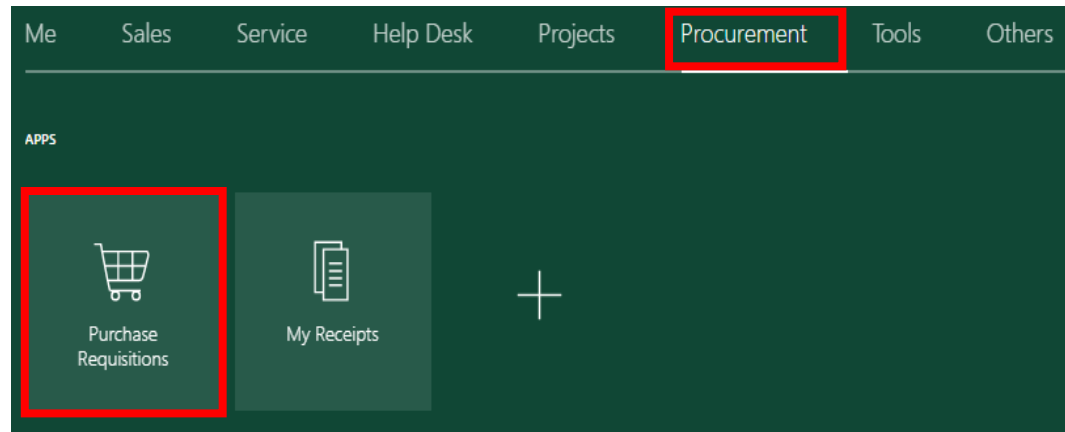


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



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- c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.



2. Modifying Requisitions Pending Approval

- 1. View your **Recent Requisitions** and select the **requisition number**. You can see the **status** for your submitted requisition.

Recent Requisitions		View More
REQ0000529	Test Tubes	Pending approval
REQ0000522	Chairs for new employees	Pending approval
REQ0000504	Items	Pending approval
REQ0000493	Nike football equipment	Pending approval
REQ0000485	Copy paper for biology lab	Pending approval

PROCUREMENT: Modifying Requisitions

2. Select the **Actions** dropdown. Select **Withdraw and Edit**.
 - a. **Withdraw and Edit:** Withdraw your requisition and edit the necessary information.
 - b. **Cancel Requisition:** This will cancel the entire submitted requisition.

Requisition: REQ0000529

Requisitioning BU: BAYLOR
Entered By: Bruiser Bear
Description: Test Tubes
Creation Date: 2/26/20
Status: Pending approval
Justification:

Requisition Amount: 144.00 USD
Approval Amount: 144.00 USD
Funds Status: Not reserved
Attachments: No

Requisition Lines

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Lin
1		Test Tubes	Scientific Supplies	12	EA	12.00 USD	144.00	Pending approval	Not reserved		

3. On the pop-up, select **Yes**.

Creation Date: 2/26/20
Status: Pending approval
Requisition Amount: 144.00 USD
Approval Amount: 144.00 USD

Warning

This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes.
Do you want to continue?

Yes No

Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status
Test Tubes	Scientific Supplies	12	EA	12.00 USD	144.00	Pending approval	Not reserved

PROCUREMENT: Modifying Requisitions

4. Make the necessary changes, then select **Check Funds**.

Edit Requisition: REQ0000529

Shop **Check Funds** Manage Approvals View PDF Save Submit

Requisitioning BU BAYLOR
* Description Test Tubes
Justification
 Emergency purchase order number required
Requisition Amount 168.00 USD
Approval Amount Calculate Amount with Tax
Funds Status Not reserved
Attachments None +

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
1	Test Tubes	Scientific Supplies	14	EA	12.00 USD	168.00	Not reserved	X
Total						168.00		

Rows Selected 1 Columns Hidden 8

Line 1: Details

5. A pop-up will appear indicating whether the funds are available. Select **Ok**.

Confirmation

The transaction passed the funds check process.

View Funds Check Results **OK**

PROCUREMENT: Modifying Requisitions

6. Select **Submit**.

Edit Requisition: REQ0000529

Requisitioning BU: BAYLOR

* Description: Test Tubes

Justification: [Empty field]

Emergency purchase order number required

Requisition Amount: 168.00 USD

Approval Amount: Calculate Amount with Tax

Funds Status: Not reserved

Attachments: None +

Requisition Lines

Actions: View, Format, Freeze, Detach, Wrap

Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
1	Test Tubes	Scientific Supplies	14	EA	12.00 USD	168.00	Not reserved	X
Total						168.00		

7. A pop-up message will appear confirming that the requisition has been submitted for approval. Select **OK**. To view a PDF version of the request, select **View PDF**.

pending approval

pending approval

Confirmation X

Requisition REQ0000493 was submitted.

View PDF **OK**

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- You can see the **requisition number** and **status**. After the requisition has been submitted, it will require the necessary approvals and then source to a PO. The Supplier will send Baylor University an invoice, which will be reviewed and then paid by AP.

Requisitions

More Tasks ▼

Search

Recent Requisitions		View More
REQ0000504	Items	Pending approval
REQ0000493	Nike football equipment	Pending approval
REQ0000485	Copy paper for biology lab	Pending approval

3. Requisition Approved but no PO Created

- View your **Recent Requisitions** and select the **requisition number**. You can see the **status** for your submitted requisition.



Requisitions

More Tasks ▼

Manage Requisitions

Search

Recent Requisitions		View More
REQ0000530	Lab Chemicals	Approved
REQ0000527	chairs for new employees	Pending approval
REQ0000520	Royalties	Approved
REQ0000518	Dell Standard 19 Inch Monitor	Pending approval
REQ0000517	Dell Standard 19 Inch Monitor	Pending approval

PROCUREMENT: Modifying Requisitions

2. Select the **Actions** dropdown. Select **Withdraw and Edit** (this is withdrawing from the Buyer's queue).
 - a. **Withdraw and Edit:** Withdraw your requisition and edit the necessary information.
 - b. **Cancel Requisition:** This will cancel the entire submitted requisition.

Requisition: REQ0000530

Check Funds View Life Cycle **Actions**

Duplicate
Cancel Requisition
Withdraw and Edit
Reassign
View Document History
View PDF

Requisitioning BU BAYLOR
Entered By Dr. Jane Smith
Description Lab Chemicals
Creation Date 2/26/20
Status Approved
Justification

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line
1		Lab Chemicals	Scientific Supplies	12	EA	12.00 USD	144.00	Approved	Reserved		

3. On the pop-up, select **Yes**.

Warning

This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes.
Do you want to continue?

Yes No

Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status
Lab Chemicals	Scientific Supplies	12	EA	12.00 USD	144.00	Approved	Reserved

PROCUREMENT: Modifying Requisitions

4. Make the necessary changes, then select **Check Funds**.

Edit Requisition: REQ0000530

Shop **Check Funds** Manage Approvals View PDF Save Submit

Requisitioning BU BAYLOR Justification

* Description Lab Chemicals

Requisition Amount 204.00 USD
Approval Amount Calculate Amount with Tax
Funds Status Not reserved
Attachments None +

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Line Type	Item	Revision	Description	Cate Nam	* Quantity	UOM Name	* Price	Price (USD)	Amount (USD)	C R
1	Goods			Lab Chemicals	S...	17	EA	12.00 USD	12.00	204.00	

5. A pop-up message will appear confirming that the requisition has been submitted for approval. Select **OK**. To view a PDF version of the request, select **View PDF**.

pending approval

pending approval

Confirmation X

Requisition REQ0000493 was submitted.

View PDF **OK**

6. Select **Submit**.

Shop Check Funds Manage Approvals View PDF Save **Submit**

Requisitioning BU BAYLOR Justification

* Description Lab Chemicals

Requisition Amount 168.00 USD
Approval Amount Calculate Amount with Tax
Funds Status Not reserved
Attachments None +

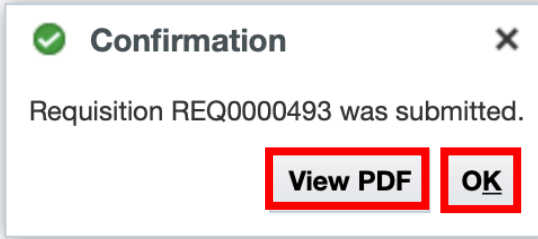
agency purchase order number required

PROCUREMENT: Modifying Requisitions

9. A pop-up message will appear confirming that the requisition has been submitted for approval. Select **OK**. To view a PDF version of the request, select **View PDF**.

pending approval


pending approval

 A confirmation dialog box with a green checkmark icon and a close button (X). The text inside reads "Requisition REQ0000493 was submitted." Below the text are two buttons: "View PDF" and "OK". Both buttons are highlighted with red rectangular boxes.

10. You can see the **requisition number** and **status** of pending approval.

Requisitions

More Tasks ▼

Search 

Recent Requisitions		View More
REQ0000504	Items	Pending approval
REQ0000493	Nike football equipment	Pending approval
REQ0000485	Copy paper for biology lab	Pending approval