

PROCUREMENT: Modifying Requisitions

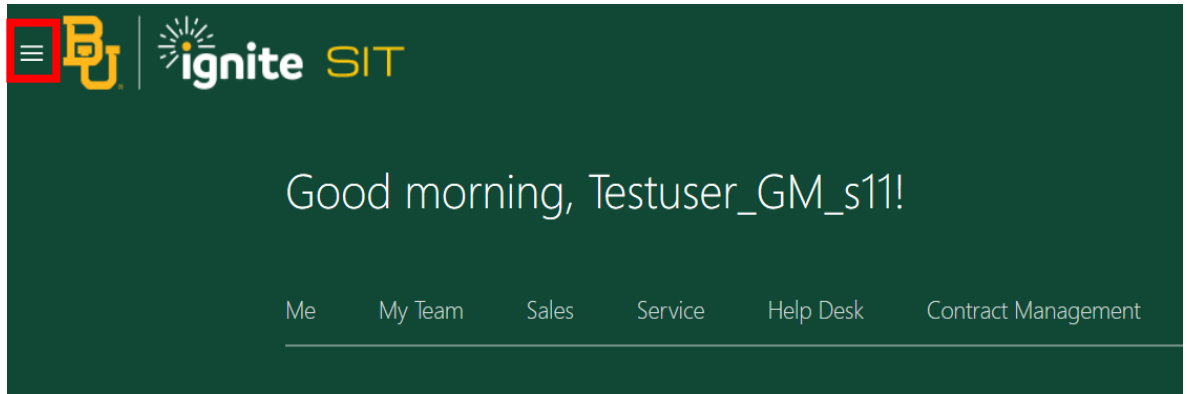
Overview

- This job aid walks you through the appropriate steps to modify a requisition that **you** have 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** (See the *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.

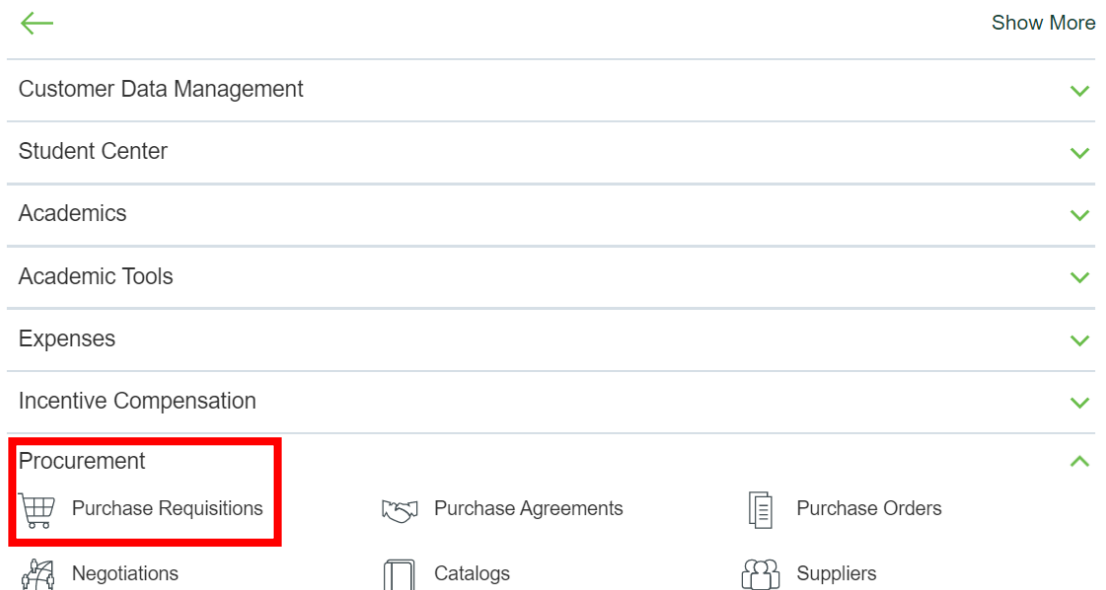
PROCUREMENT: Modifying Requisitions

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.

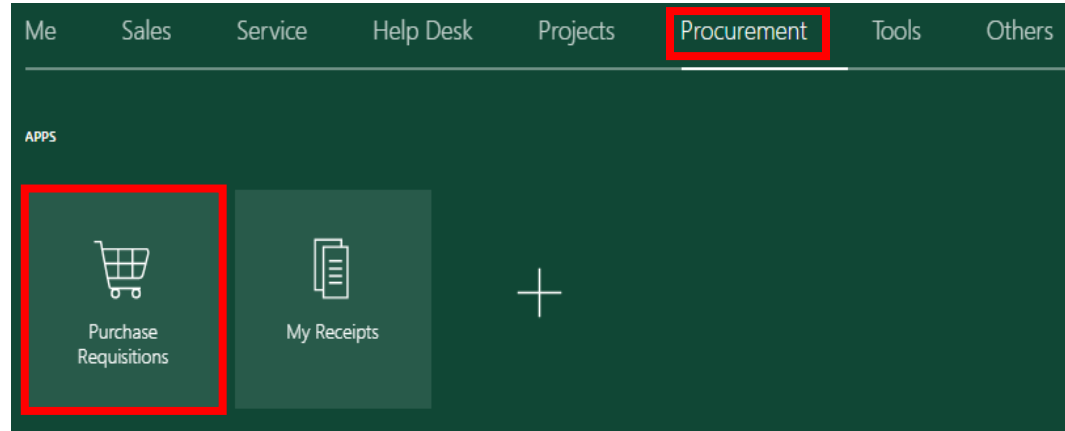


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



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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

- I. 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

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2. Select the **Actions** dropdown. Choose to either **Withdraw and Edit** or **Cancel Requisition**.
 - a. **Withdraw and Edit:** Withdraws your requisition and allows you to edit as necessary.
 - b. **Cancel Requisition:** 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: None

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**.

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

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

Edit Requisition: REQ0000529

Requisitioning BU: BAYLOR
Description: Test Tubes
Justification: [Empty]
Emergency purchase order number required:

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

Requisition Lines

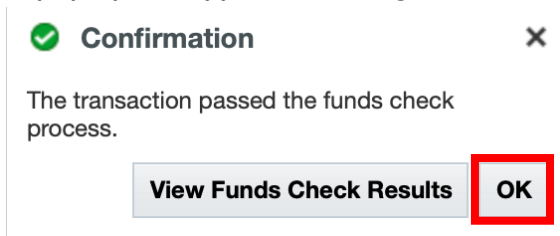
Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
1	Test Tubes	Scientific Supplies	14	EA	12.00 USD	168.00	Not reserved	X
Total						168.00		

Rows Selected 1 Columns Hidden 8

Line 1: Details

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



- Select **Submit**.

The screenshot shows the Ignite BPT interface for editing requisition REQ0000529. The top navigation bar includes the Ignite BPT logo and a "Submit" button highlighted with a red border. The form fields include: Requisitioning BU (BAYLOR), Description (Test Tubes), Justification (empty), and a checkbox for "Emergency purchase order number required". Summary statistics on the right show: Requisition Amount (168.00 USD), Approval Amount (Calculate Amount with Tax), Funds Status (Not reserved), and Attachments (None). Below the form is a "Requisition Lines" table with a toolbar for actions like View, Format, Freeze, Detach, and 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		

- 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**.



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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

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2. Select the **Actions** dropdown. Choose to either **Withdraw and Edit** or **Cancel Requisition**.
 - a. **Withdraw and Edit:** Withdraws your requisition and allows you to edit as necessary.
 - b. **Cancel Requisition:** Will cancel the entire submitted requisition.

Requisition: REQ0000530

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

Check Funds View Life Cycle **Actions**

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

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

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

Edit Requisition: REQ0000530

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

Requisitioning BU: BAYLOR
* Description: Lab Chemicals
Justification:
Requisition Amount: 204.00 USD
Approval Amount: Calculate Amount with Tax
Funds Status: Not reserved
Attachments: None +

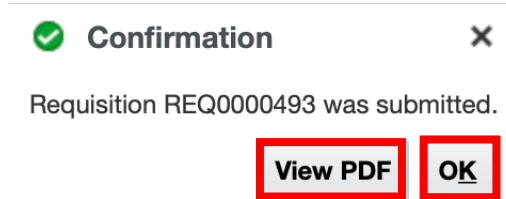
Requisition Lines

Actions View Format Freeze Detach Wrap

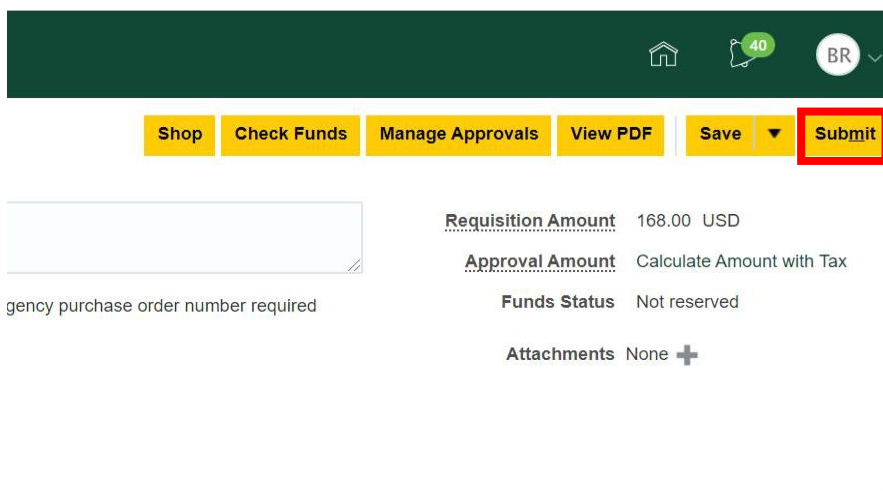
Line	Line Type	Item	Revision	Description	Cate Nam	* Quantity	UOM Name	* Price	Price (USD)	Amount (USD)	C R
1	Goods			Lab Chemicals	S...	17	EA	12.00 USD	12.00	204.00	

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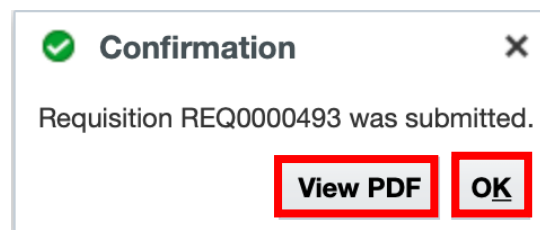
5. A pop-up message will appear confirming that the requisition has been submitted for approval. Select **OK**. To view a PDF version of the request, select **View PDF**.



6. Select **Submit**.



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**.




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

Requisitions

More Tasks ▼

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