

# Editing a Purchase Requisition



## Editing a Purchase Requisition

Requisitioners may need to edit a Purchase Requisition (PR) if it has been denied by an approver or to make updates to the header or line level information. PRs can be edited as long as it has not been fully invoiced. Changes to the PR including increases in Total Cost or changes to the Ship To address, Requestor, Supplier, Accounting (e.g., Cost Center number, Internal Order number, or WBS Element), or Commodity Code will prompt re-approval of the PR. After a PR has been fully invoiced, changes must be made via a journal entry or a new PR.

### Reasons for PR Change or Cancellation

Updating quantity and price (except catalog unit prices)

Adding or deleting a line item, especially if you received a different quantity than ordered

Changing the cost object

A PR been denied by an approver

### Things to Remember When Editing a PR

View the history section of the PR to see if approvers or buyers have made changes to the PR

Any changes made increase the lead time for delivery

Requisitioners need to communicate any changes to the supplier

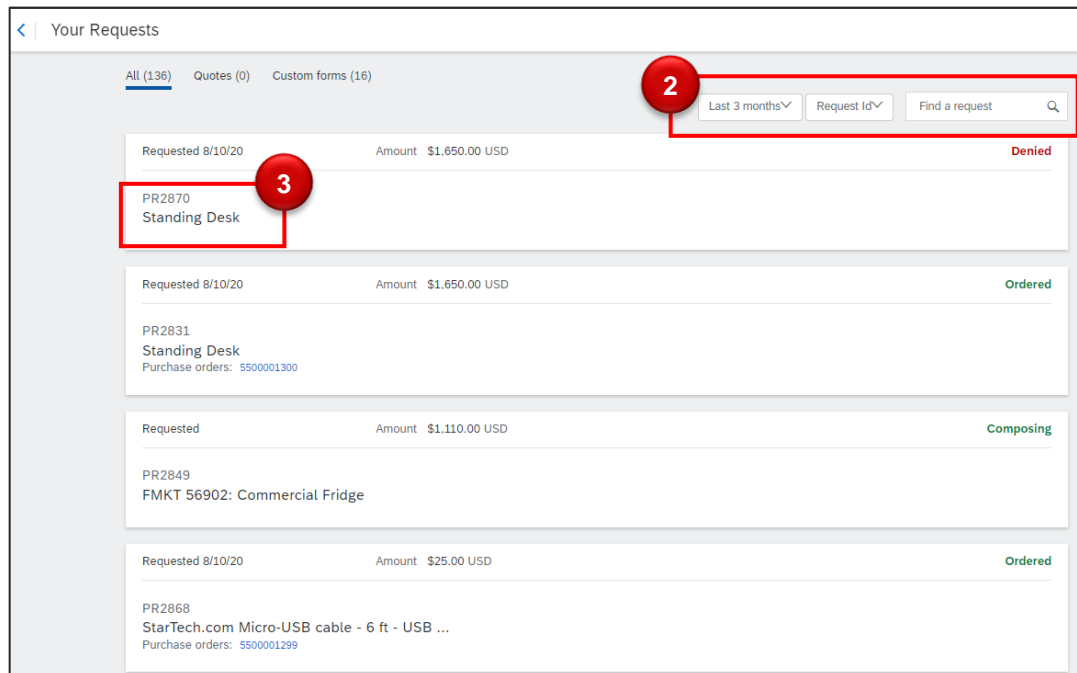
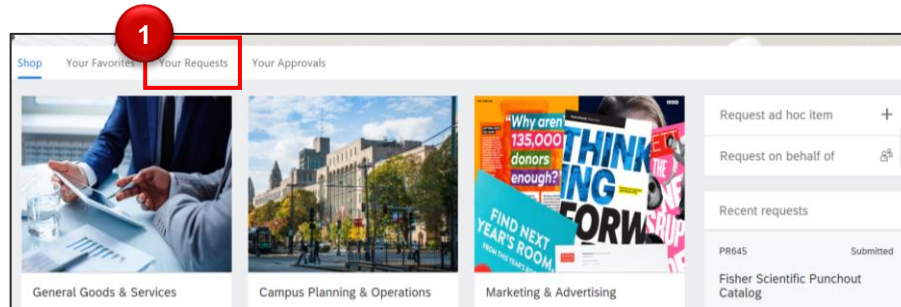
PR will need to be reapproved

Increases in Total Cost or changes to the Ship To address, Requestor, Supplier, Accounting (e.g., Cost Center number, Internal Order number, or WBS Element), or Commodity Code will prompt re-approval of the PR.

A new version of the PR, designated by a version number (example: V2), is created and submitted for approval. The new version will be transmitted to the supplier to confirm your communication of the changes with the supplier.

# Editing a Purchase Requisition

View all submitted PRs by navigating to the **Your Requests** tab from the **Guided BUYing** homepage.



- 1 Navigate to the **Your Requests** tab from the **Guided BUYing** homepage.
- 2 Filter/search for the PR. Search options include:  
**Request ID:** PR#  
**Order ID:** PO#  
**Request Title:** PR Title  
**Supplier ID:** Supplier #  
**Supplier Name**
- 3 Click the PR # of the appropriate PR.

# Editing a Purchase Requisition

The first step in the editing process depends on if the PR has been denied or if a PO has been generated.

The first screenshot shows a 'Relocating Office' purchase requisition (PR2871) in a 'Denied' state. The approval flow shows a 'Request' step (green circle) and an 'Approved' step (grey circle). A red 'x' is placed over the 'Approved' step, indicating denial. A red circle labeled '4a' highlights the 'Withdraw' button. A red arrow points from this button to the 'Withdraw' button in the second screenshot.

The second screenshot shows a 'Withdraw request' dialog box with the text: 'To edit a request, you must first withdraw it. Are you sure you want to withdraw this request?'. The 'Withdraw' button is highlighted with a red box. A red arrow points from this button to the 'Withdraw' button in the 'Success' message dialog box. The 'Success' message says 'Your requisition has been withdrawn.' and has 'Done' and 'View requisition' buttons. The 'View requisition' button is highlighted with a red box. A red arrow points from this button to the 'Edit' button in the third screenshot.

The third screenshot shows the purchase requisition in a 'Composing' state. The approval flow shows a 'Request' step (green circle) and an 'Approved' step (grey circle). A red circle labeled '4a' highlights the 'Edit' button. A red arrow points from this button to the 'Edit' button in the 'Edit the requisition?' dialog box. The dialog box contains the text: 'You can edit the requisition on the checkout page.' and has an 'Edit' button highlighted with a red box.

**4a** **Editing a Denied PR:** To edit a denied PR, you must first withdraw the PR.

Click **Withdraw** and confirm on the prompt to revert PR to a Composing status.

Next, click **View requisition**.

Click **Edit** and confirm on the prompt to make changes at checkout and resubmit the PR.



# Editing a Purchase Requisition

If a PO has not been generated, select **Withdraw** or **Edit**. If a PO has been generated, select **Change Request**.

Submitted

Approval Flow

Click on the line to add approvers

Request BU\_Buyer Business an... DAWNA JOHNSON

Edit requisition?

This action withdraws the requisition so you can edit it on the checkout page.

Comments

Write comments (optional)

Edit Cancel

Standing Desk

Request details / PR2831

Ordered

Ship to	Charge to	Total Cost
975 Commonwealth Avenue Boston, MA 02215 United States	GL Account (0000510100 (NON-CAPITAL/M EQUIPMENT))	\$1,650.00 USD

Change requisition?

Changing the requisition will generate another version.

Change requisition Close

**4b** Editing before a PO has been generated: Click **Edit** to make changes directly at checkout. Next, click **Edit** on the prompt.

**Withdraw** reverts the PR to a composing status. PRs in a composing status are available under the **Your Requests** tab.

**4c** Editing after a PO has been generated: Click **Change Request**. Next, click **Change requisition** on the prompt.



# Editing a Purchase Requisition

The PR is now editable. Make changes to **Line Item Details**, **Accounting**, or **Shipping** information. In this example, quantity (Qty) is edited.

Consulting Services  
Checkout / PR2475

Submit Save and exit ...

Ship to	Manage locations	Charge to	Manage details	Total Cost	\$11,250.00 USD
975 Commonwealth Avenue Boston, MA 02215 United States		GL Account (0000515015 (CONTRACTED SERVICES-CONSULTING))		Net Amount	\$11,250.00 USD

▼ Show advanced options

Items (1)

>		Consulting Services 0010000647 (Apple Inc.)	Quantity	Price	Net Amount
			- 45 +	250 USD	\$11,250.00 USD
			Unit of Measure	Gross Amount ⓘ	
			Hour	\$11,250.00 USD	

Consulting Services  
Checkout / PR2475

Submit Save and exit ...

Ship to	Manage locations	Charge to	Manage details	Total Cost	\$12,500.00 USD
975 Commonwealth Avenue Boston, MA 02215 United States		GL Account (0000515015 (CONTRACTED SERVICES-CONSULTING))		Net Amount	\$12,500.00 USD

▼ Show advanced options

Items (1)

>		Consulting Services 0010000647 (Apple Inc.)	Quantity	Price	Net Amount
			- 50 +	250 USD	\$12,500.00 USD
			Unit of Measure	Gross Amount ⓘ	
			Hour	\$12,500.00 USD	

The PR is now editable.

Edit details such as **Accounting**, **Price**, **Shipping information**, or other **Line Item Details**. In this example, **quantity (Qty)** will be edited.

5 Update the quantity in **Quantity** field.

# Editing a Purchase Requisition

Review changes and click **Submit**. Changes to the PR including increases in Total Cost or changes to the Ship To address, Requestor, Supplier, Accounting (e.g., Cost Center number, Internal Order number, or WBS Element), or Commodity Code will prompt re-approval of the PR. If editing after a PO is generated, a new version of the PR is generated and shown next to the PR number.

Consulting Services  
Checkout / PR2475

**6** Submit Save and exit ...

Ship to	Manage locations	Charge to	Manage details	Total Cost	\$12,500.00 USD
975 Commonwealth Avenue Boston, MA 02215 United States		GL Account (0000515015 (CONTRACTED SERVICES-CONSULTING))		Net Amount	\$12,500.00 USD

▼ Show advanced options

Items (1)

Quantity	Price	Net Amount
50	250 USD	\$12,500.00 USD
Unit of Measure		Gross Amount (i)
Hour		\$12,500.00 USD

Consulting Services  
0010000647 (Apple Inc.)

Change in progress

Approval Flow

Request

Approved

Click on the line to add approvers

Success

Your requisition has been sent for approval.

Done View requisition

Requested 8/10/20 Amount \$1,650.00 USD Change in progress

**7** PR2831-V2  
Standing Desk



**6** After all required changes are made, click **Submit**.

**7** **Note:** If a PO has been generated, a new version of the PR, designated by a version number (example: V2), is created and submitted for approval.

If editing before a PO is generated, there will be no version change to the PR, it will just be updated. You will see the history of the PR, including all edits, under the History tab.