Editing a Purchase Requisition (PR)

Reasons to Edit or Cancel a PR:

- Updating quantity and price (except catalog unit prices). Please <u>do not</u> decrease the PR amount.
- Changing Ship To address, Requestor, Supplier
- Adding or deleting a line item, especially if you received a different quantity than ordered
- Changing the Cost Object/Accounting (e.g., Cost Center number, Internal Order number, or WBS Element), or Commodity Code
- PR has been denied by an approver

Important notes about editing a PR:

- A PR can be edited as long as it has not been fully invoiced.
- If a PR has been fully invoiced, you may only edit via journal entry or by creating a new PR
- View the history section of the PR to see if approvers or buyers have made changes to the PR
- Requisitioners must communicate changes to the supplier
- When you edit a PR, a new version of the PR will be created and designated by a version number (e.g., "V2"). The new version will then be transmitted to the supplier to confirm your communication of the changes with the supplier. This will increase the lead time for delivery.

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Editing a Purchase Requisition

View all submitted PRs by navigating to the **Your Requests** tab from the **Guided BUying** homepage.
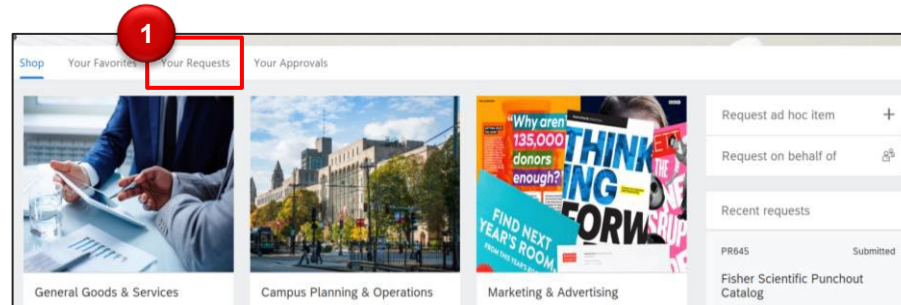
1 Navigate to the **Your Requests** tab from the **Guided BUying** homepage.
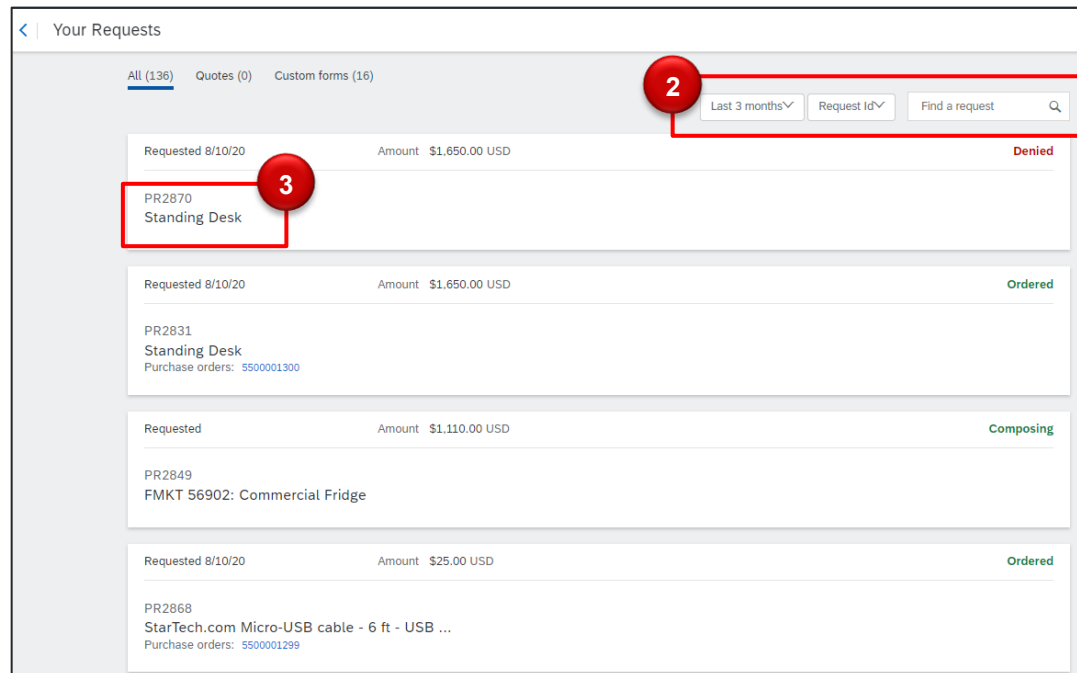
2 Filter/search for PR.

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.

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

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.

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

4b

Consulting Services
Request details / PR2475

Total Cost **$11,250.00** USD   Withdraw   Edit

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

4c

Standing Desk
Request details / PR2831

Change request   Cancel request

Ordered

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

⚠ 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.

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

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.

5

- Changes to the PR include 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.
- Editing the PR prompts 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.

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.

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