

Editing a Purchase Requisition (PR)



Editing a Purchase Requisition

Reasons to Edit or Cancel a PR:

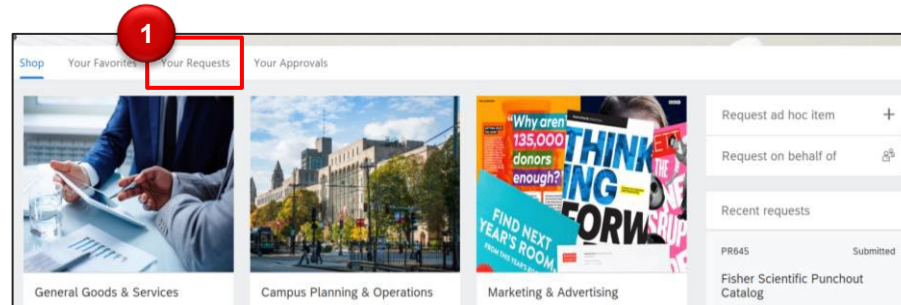
- Updating quantity and price (except catalog unit prices). Please do not decrease the PR amount.
- Changing Ship To address, Requestor, Supplier
- Adding or deleting a line item, especially if you received a different quantity than ordered
- Changing the Cost Object/Accounting (e.g., Cost Center number,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

Important notes about editing a PR:

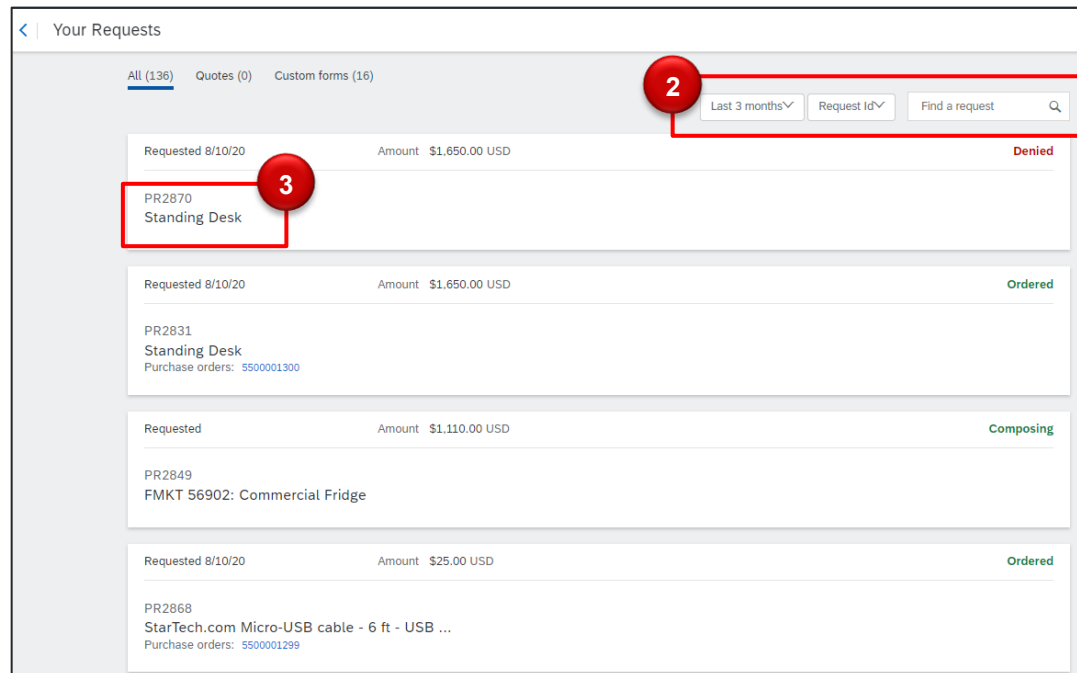
- A PR can be edited as long as it has not been fully invoiced.
- If a PR has been fully invoiced, you may only edit via journal entry or by creating a new PR
- View the history section of the PR to see if approvers or buyers have made changes to the PR
- Requisitioners must communicate changes to the 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.

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.

Editing a Purchase Requisition – Editing a Denied PR

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

The screenshots illustrate the steps to edit a denied purchase requisition:

- Denied Status:** The initial screen shows the requisition is 'Denied'. The 'Withdraw' button is highlighted with a red box and labeled '4a'.
- Withdraw Request:** A dialog box prompts the user to confirm withdrawal. The 'Withdraw' button is highlighted with a red box.
- Success:** A confirmation message states 'Your requisition has been withdrawn.' The 'View requisition' button is highlighted with a red box.
- Composing Status:** The requisition is now in 'Composing' status. The 'Edit' button is highlighted with a red box.
- Edit Confirmation:** A dialog box asks 'Edit the requisition?'. The 'Edit' button is highlighted with a red box.

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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 – Editing before vs after a PO has been generated

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

Consulting Services
Request details / PR2475
Total Cost \$11,250.00 USD

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

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.

Standing Desk
Request details / PR2831
Total Cost \$1,650.00 USD

Ordered

Ship to
975 Commonwealth Avenue
Boston, MA 02215
United States

Charge to
GL Account (0000510100 (NON-CAPITAL/M EQUIPMENT))

Change request? Cancel request

Change requisition?

Changing the requisition will generate another version.

Change requisition Close

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

Items (1)


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

Consulting Services
Checkout / PR2475

Submit Save and exit ...

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

Items (1)

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

- 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.

Consulting Services
Checkout / PR2475

Ship to: 975 Commonwealth Avenue, Boston, MA 02215, United States

Charge to: GL Account (0000515015 (CONTRACTED SERVICES-CONSULTING))

Total Cost: \$12,500.00 USD
Net Amount: \$12,500.00 USD

Items (1)

Quantity	Price	Net Amount
50	250 USD	\$12,500.00 USD

Unit of Measure: Hour

Change in progress

Approval Flow

Request

Approved

Success

Your requisition has been sent for approval.

Done View requisition

Requested 8/10/20

Amount \$1,650.00 USD

PR2831-V2

Standing Desk

Change in progress

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.