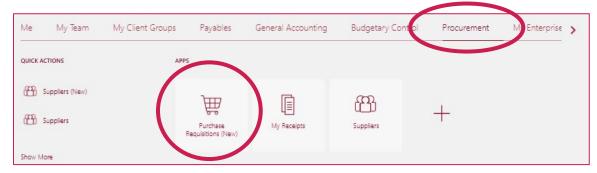
How to Correct a Rejected Requisition

Get Started

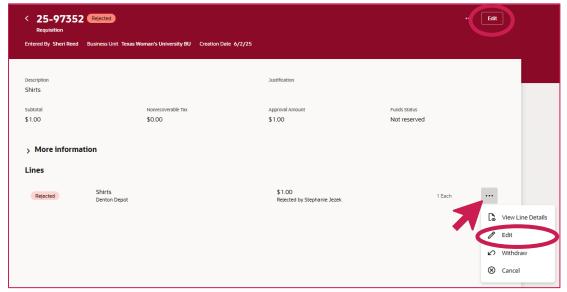
1. Navigate to **Procurement** > **Purchase Requisitions (New)**



2. Select the requisition to correct



3. Click **Edit** at the top -or- Actions menu represented by 3 dots for additional options.

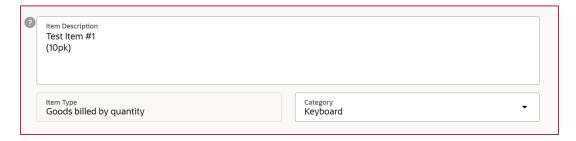


Edit by Line Item (skip to Step 8 to edit all lines at once.)

- **4.** Edit each line item as needed.
 - Click the **pencil icon** to update line information.
 - Click the **truck icon** to update billing and delivery.
 - Click the **duplicate icon** to duplicate line.
 - Click the **trashcan icon** to delete the line.



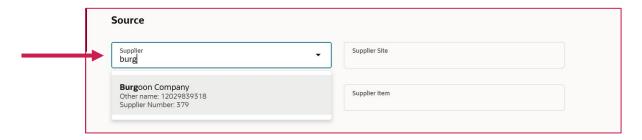
- **5.** Edit any **Line Details** that need to be corrected.
 - Description:
 - Item Description: Enter line items from your quote here.
 - Item Type: Choose Goods billed by quantity -or- Services billed by quantity.
 - Category: Select the category that best matches your item(s).



- Pricing:
 - Quantity: The number of units you're purchasing.
 - UOM (Unit of Measure): Choose the unit of measure that best matches your item(s).
 - Price: Enter the price per unit of measure. (Example: You're buying two 10pks of something. Each 10pk is quoted at \$20, so you would enter \$20.)
 - Currency: USD



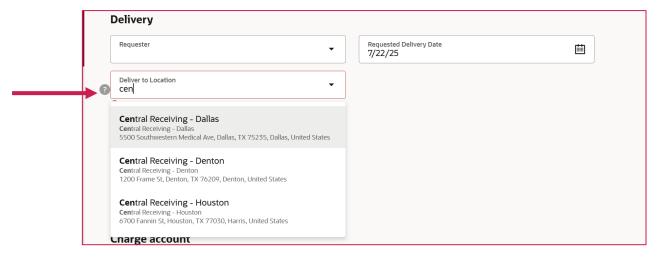
• **Source:** Start typing the supplier's name into Supplier and choose/update your supplier if available.



• **Notes:** Enter notes to supplier if needed. (Example: Project Manager, room number, special delivery instructions, etc.)



- 6. Edit any **Delivery and Billing Details** that need to be corrected.
 - **Delivery:** Make sure your Deliver to Location is one of the following options:
 - Central Receiving Dallas
 - Central Receiving Denton
 - Central Receiving Houston



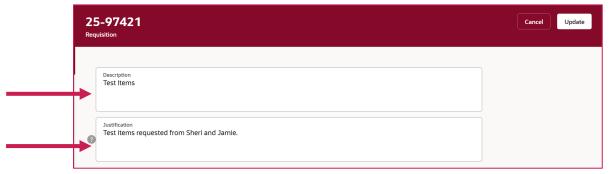
7. Once complete, click **Update**.

Edit by Requisition Summary

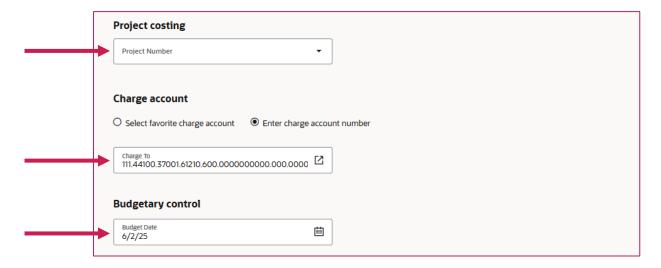
- 8. Click the pencil icon in Requisition Summary.
 - Edits in requisition summary apply to all lines.



- **9.** Edit the **Description** and **Justification**
 - **Description**: Required. Enter a simple description of your line items.
 - **Justification**: Optional. Provide a note to your approver here.



- Note: Do NOT check the box for Emergency Purchase Order Request. Requisitions
 cannot be processed when this box is checked.
- 10. Edit the **Delivery** details. (see Step 6)
- 11. Edit any **Billing** details, like: Project Costing, Charge Account and Budgetary Control.



12. Edit **Notes to Supplier**.



13. Edit/Add Attachments.

- o Edit an Attachment:
 - Click the three dots and select Edit.
 - To delete the attachment, you can click **Remove** instead.
 - Update the Name and Description as needed.
 - Make sure the Category is set to Buyer.
 - This allows the Buyers in Procurement access to view your attachments.
 - Click Update.



Add an Attachment:

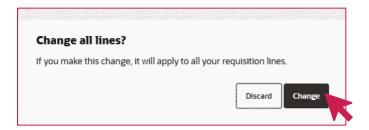
- Make sure Category is set to Buyer.
 - This allows the Buyers in Procurement access to view your attachments.
- Add your attachments via Drag and Drop, or by adding a URL.



Once complete, click **Update**,

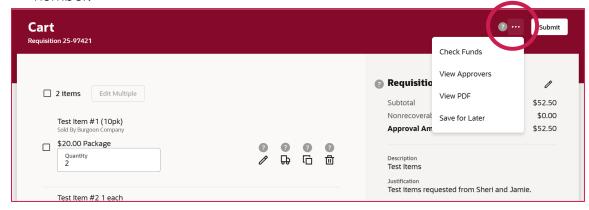


then click **Change** to confirm your updates.



Review and Submit

- Before you submit, you can click the three dots to do the following (if needed):
 - o Check Funds: Allows you to check the budget associated with your account string.
 - o **View Approvers**: Allows you to view the approvers for this requisition.
 - o **View PDF**: downloads a pdf version of your requisition to your desktop.
 - Save for Later: This clears your shopping cart and saves its contents under their requisition number.



• Review your information and click Submit.



o This submits your requisition for approval.