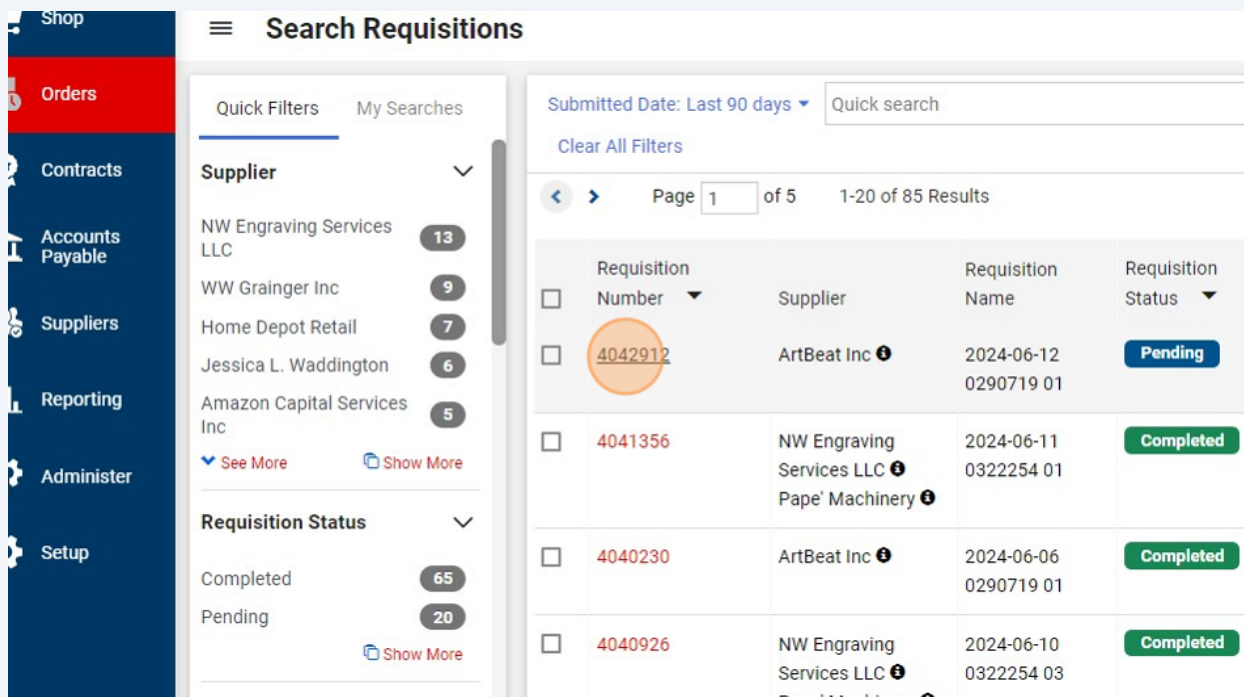


How to Edit a Requisition Before it Becomes a PO

You might realize after submitting a requisition that you need to make changes on it before it's approved. This is how to notify your approver to return the req to you for editing.

1

Find your req in the list of requisitions, or type the req number in the Quick Search field.



Search Requisitions

Submitted Date: Last 90 days | Quick search

Clear All Filters

Page 1 of 5 | 1-20 of 85 Results

Requisition Number	Supplier	Requisition Name	Requisition Status
4042912	ArtBeat Inc	2024-06-12 0290719 01	Pending
4041356	NW Engraving Services LLC Pape' Machinery	2024-06-11 0322254 01	Completed
4040230	ArtBeat Inc	2024-06-06 0290719 01	Completed
4040926	NW Engraving Services LLC Pape' Machinery	2024-06-10 0322254 03	Completed

2 Click the "Comments" tab.

The screenshot shows a web application interface. On the left is a dark blue sidebar with icons and labels for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has a header with a logo and the text 'TEST'. Below the header, the title 'Requisition • 4042912' is displayed. There are four tabs: Summary, Comments (highlighted with an orange circle), Attachments, and History. The 'Comments' tab is active, showing a table with the following data:

Prepared for	Diana Higgins	Ship Via	Best Carrier-Best Way
Buyer Code	0ad433c0-e2de-4a72-ae2a-43ef12b314aa WEB BUYER		
Bank Code	VDM 97a04a13-a1e2-4410-9753-0c6117f4b8dc		

Below the table is a section titled 'Accounting Codes' with a table:

Cost Center	Object Code
905101 Purchasing	55720 Supplies

3 Click the + button.

The screenshot shows a web application interface. At the top, there is a navigation bar with 'Purchase Orders' dropdown, 'Search (Alt+Q)', '0.00 USD', and notification icons. Below the navigation bar, there is a search bar with 'Assign To Myself' dropdown and '1 of 85 Results' dropdown. The main content area has a 'Show comments for' dropdown menu with 'Requisition' selected and a '+' button highlighted with an orange circle. A tooltip 'New Comment' is visible over the '+' button. To the right of the dropdown is a 'Summary' section with a 'Pending' status bar. The summary table is as follows:

Summary	
Pending	
Total (375.00 USD)	
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	
Subtotal	375.
	375.

Below the summary table is a section titled 'What's next?'.

4 Click "Add recipient."

Show comments for Requisition +

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | **Add recipient**

Diana Higgins (Prepared by, Approved) <dhiggins@lcsc.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name

expand | clear

saved, i.e., the note is truncated.
accessible from the History tab of the

5 Type the last name of your approver to search for their name.

TEST

Purchase Orders Search (Alt+Q) 0.00 USD

Requisition • 4042912

Summary Comments Attachments History

Records found: 0

ADD COMMENT

1000 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

File Name

File

User Search

Last Name

First Name

User Name

Email

Role

Results Per Page 10

Summary Pending

Total (375.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 375.00

375.00

What's next?

Workflow

Show skipped steps

Submitted 6/12/2024 2:18 PM Diana Higgins

Level 1 Approval Active

Create PO Future

Finish

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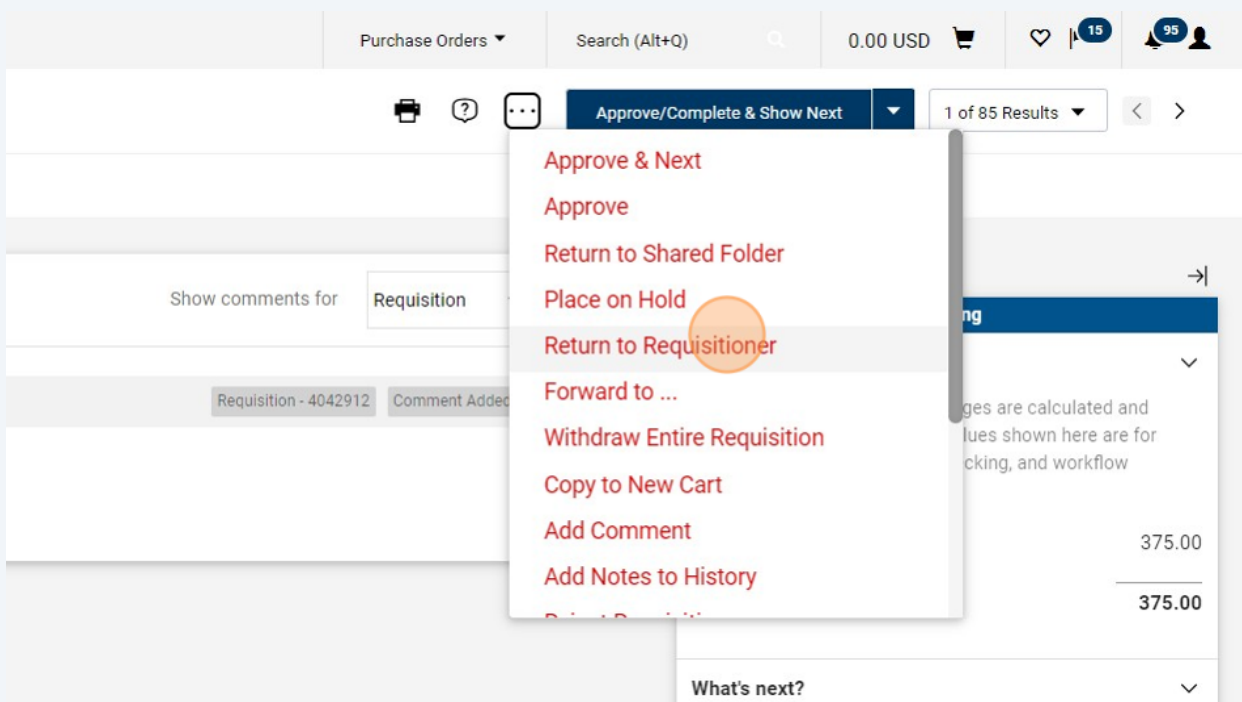
6 Click the + to select.

The screenshot shows a 'User Search' modal window. At the top, there is a search input field labeled 'New Search'. Below it is a table with the following columns: Name, User Name, Email, Phone, and Action. The first row contains the name 'Waddington, Jessica', user ID '0322254', and email 'jwaddington@lcsc.edu'. An orange circle highlights a '+' icon in the Action column, with a tooltip that says 'Select Jessica'. A 'Close' button is located at the bottom right of the modal. The background shows a blurred view of a requisition page with a comment form and a workflow section.

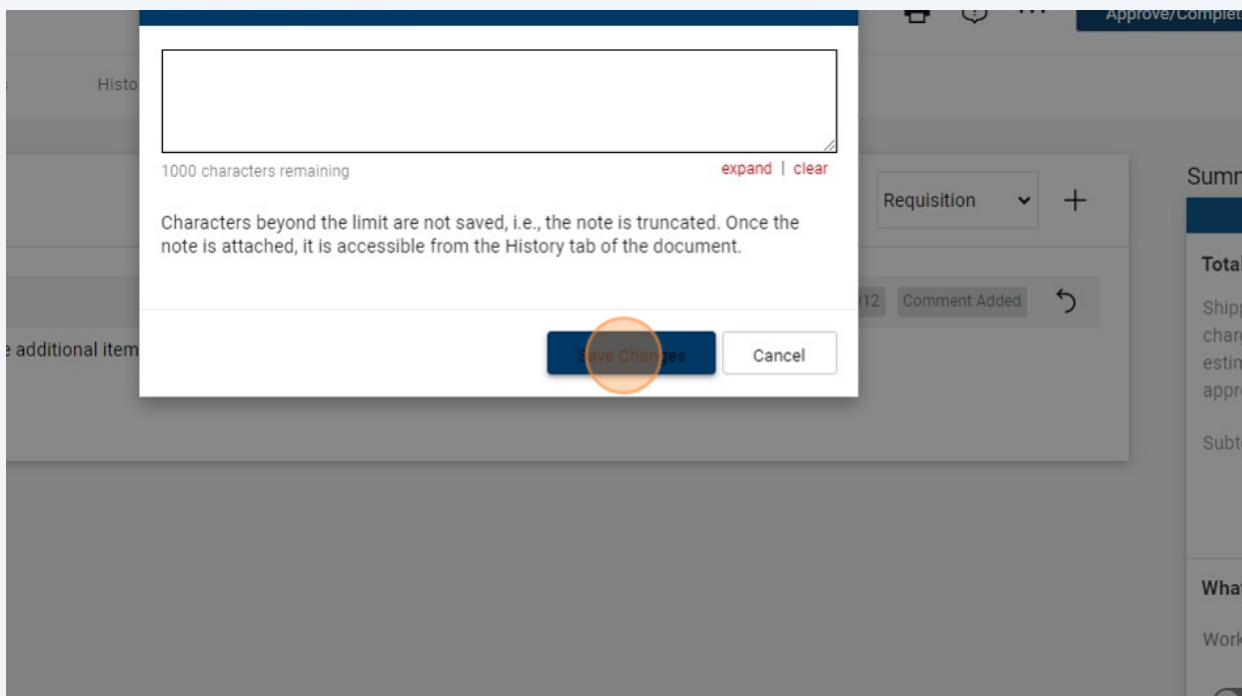
7 Type your note to your approver.

The screenshot shows a requisition page for 'Requisition • 4042912'. The 'Comments' tab is active. A modal titled 'ADD COMMENT' is open. The modal has a text area containing the text: 'Please return req to me so that I can add the line for the additional items. Thanks!'. An orange circle highlights a checkmark icon in the top right corner of the modal. Below the text area, there is a recipient selection section with a checked box for 'Waddington, Jessica <jwaddington@lcsc.edu>'. There is also an 'Attach file (optional)' section with radio buttons for 'File' and 'Link/URL', and a 'File Name' input field. A 'Choose File' button and an 'Upload your file' button are also present. The background shows a blurred view of the requisition summary and workflow sections.

8 The APPROVER will return the req to the Requester.



9 (The APPROVER can make a note here for the Requester, or leave blank, then hit Save Changes to send back.)



10 The Requester will click "Notifications" to find the returned req.

The screenshot shows a web application interface. At the top, there is a navigation bar with "Purchase Orders" and a search bar labeled "Search (Alt+Q)". The current cart value is "0.00 USD". A notification bell icon shows "15" notifications. Below the navigation bar, there is a "1 of 85 Results" dropdown and an "Activate Cart" button. The main content area is split into two sections. On the left, there is a comment box with a "Show comments for" dropdown set to "Requisition" and a "+" icon. Below this, there is a comment for "Requisition - 4042912" with a "Comment Added" status and a refresh icon. On the right, there is a "Summary" section with a "Draft (returned)" header. The summary includes a "Total (375.00 USD)" and a note: "Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals." Below this, the "Subtotal" is listed as "375.00" and the total is "375.00". At the bottom of the summary, there is a link for "What's next for my order?".

11 Select the returned req from the drop-down.

The screenshot shows the same web application interface as in step 10, but with the "Notifications" dropdown menu open. The dropdown menu has a dark blue header "Notifications" and a right-pointing arrow. Below the header, there is a section titled "Shopping, Carts & Requisitions" containing a notification: "A Requisition You Submitted Has Been Returned" dated "Jun 12" with a close icon "x". The notification text includes "4042912 - 375.00 USD Returned By Diana Higgins", where "Higgins" is circled in orange. Below this, there is a section titled "Administration & Integration" containing four "PO Export Failure Notification" entries, each dated "Jun 10" with a close icon "x". The notification texts are: "PJT00928 - Submitted By Diana Higgins", "PJT00925 - Submitted By Diana Higgins", "PJT00919 - Submitted By Diana Higgins", and "PJT00923 - Submitted By Diana Higgins". The background of the page is dimmed, showing the same comment box and summary section as in step 10.

12 Click this button.

The screenshot shows a software interface with a table and a summary panel. The table has columns for 'aging', 'Unit Price', 'Quantity', and 'Ext. Price'. A row is highlighted with a unit price of 15.00, a quantity of 25 EA, and an extended price of 375.00. An orange circle highlights a button labeled 'Supplier Actions for ArtBeat Inc' in a tooltip. The summary panel on the right shows a 'Draft (returned)' status, a total of 375.00 USD, and a 'What's next for my order?' section with a next step of 'Level 1 Approval' and approvers 'Higgins, Diana' and 'Waddington, Jessica'.

aging	Unit Price	Quantity	Ext. Price
	15.00	25 EA	375.00

Supplier Actions for ArtBeat Inc

Summary

Draft (returned)

Total (375.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 375.00

What's next for my order?

Next Step Level 1 Approval

Approvers Higgins, Diana
Waddington, Jessica

Workflow

13 Click "Add Non-Catalog Item" to add another line.

The screenshot shows the same software interface as in step 12, but with an orange circle highlighting a button labeled 'Add Non-Catalog Item' in a tooltip. The table and summary panel are identical to the previous screenshot.

aging	Unit Price	Quantity	Ext. Price
	15.00	25 EA	375.00

Add Non-Catalog Item

Summary

Draft (returned)

Total (375.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 375.00

What's next for my order?

Next Step Level 1 Approval

Approvers Higgins, Diana
Waddington, Jessica

Workflow

Show skipped steps

14 Add your line item.

Accounts Payable

Suppliers

Reporting

Administer

Setup

Fulfillment Address

103 Main St - 103 Main St, Lewiston, Idaho 83501 United States

PO Purchase Order Address - 103 Main St, Lewiston, US-ID 83501 United States

Item

Product Description ★	Catalog No.	Quantity ★	Price Estimate ★
<input type="text"/> 254 characters remaining	<input type="text"/>	<input type="text"/>	<input type="text"/>

Additional Details

Commodity Code

Add Internal Attachments

15 Click "Save"

Packaging

EA

Save Save And Add Another Close

375.00

375.00

Future

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16 Note: To change an existing line, click on the red text to open it up for editing.

The screenshot shows a software interface with a dark blue sidebar on the left containing 'Reporting', 'Administer', 'Setup', and 'Menu Search'. The main content area displays two 'ITEM DETAILS' sections. The first section shows 'Contract: no value' and 'Commodity Code: no value'. Below this is a line item '2' with a refresh icon, the text 'sweatshirts' (circled in orange), and 'EA' packaging. The second 'ITEM DETAILS' section also shows 'Contract: no value' and 'Commodity Code: no value'. On the right side, there are buttons for 'Internal Note', 'Internal Attachments', 'External Note', and 'Attachments'.

17 Make your edits.

The screenshot shows a software interface with a light blue header bar containing the address '3 Main St - 103 Main St, Lewiston, Idaho 83501 United States' and a 'Purchase Order Address' field. Below this is a table with the following columns: 'Product Description', 'Catalog No.', 'Quantity', 'Price Estimate', and 'Packaging'. The table contains one row with the following values: 'sweatshirts', an empty field, '25' (circled in orange), '20.00', and 'EA'. Below the table is a section for 'Additional Details' with a 'Commodity Code' field and a search icon. At the bottom, there is a section for 'Internal Attachments'.

18 When you've made all of your edits/additions, click "Activate Cart."

The screenshot shows a purchase order interface. At the top, there is a navigation bar with 'Purchase Orders' and a search bar. The total amount is '0.00 USD'. On the right, there are icons for a heart, a notification bell with '15', and a user profile with '95'. Below the navigation bar, there are icons for an eye, a printer, a question mark, and a menu. The 'Activate Cart' button is highlighted with an orange circle. The main content area is split into two columns. The left column is titled 'Billing' and contains 'Bill To' information for Lewis-Clark State College, including the address and 'Billing Options' with an 'Accounting Date' of 6/12/2024. The right column is titled 'Summary' and shows a 'Draft (returned)' status. It includes a 'Total (875.00 USD)' section with a note about shipping, handling, and tax charges. Below this, a 'Subtotal' is listed as 875.00. At the bottom of the summary, there is a 'What's next for my order?' section.

19 Click "Place Order" to resubmit it to the workflow.

The screenshot shows the same purchase order interface as in step 18, but with the total amount updated to '875.00 USD'. The 'Activate Cart' button is no longer highlighted. Instead, the 'Place Order' button is highlighted with an orange circle. The 'Billing' section on the left remains the same. The 'Summary' section on the right now includes a warning message: 'Be aware of these issues. You may review and proceed.' with a red 'Empty: Project ID' error message. The 'Total (875.00 USD)' and 'Subtotal 875.00' are still present.