

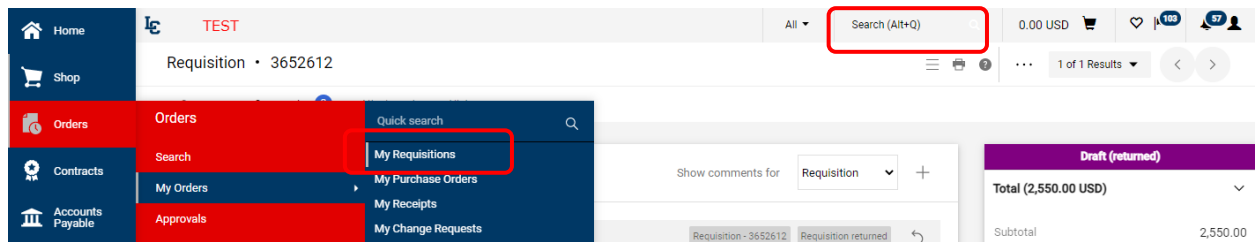
## Jaggaer eProcurement System: Process Guides

### How to Edit a Requisition or PO

Overview: Requesters may need to edit a requisition that has been submitted. If the requisition has not been fully approved and a PO created, the Requester can ask the Approver to send it back to them. If a Requisition has been fully approved and a PO created, a Change Order can be used to make and request certain changes on the PO .

#### Editing Requisitions

1. Navigate to the Jaggaer site.
2. Access the requisition that needs to be edited.
  - a. Type the requisition number in the search bar at the top left of the screen.
  - b. Or access the Orders menu, My Orders, then My Requisitions. Select the requisition by clicking on the Requisition Number link.



#### My Requisitions

Submitted Date: Last 90 days | Quick search | Add Filter

Prepared For: Requester, Roger | X

1-56 of 56 Results

<input type="checkbox"/>	Requisition Number	Supplier	Requisition Name	Requisition Status
<input type="checkbox"/>	3650016	NW Engraving Services LLC 4imprint Inc.	2022-11-11 Requester 02	Completed



- 3. In the requisition screen, click on the **Comments** tab. Click the **+ button** to add a comment.
- 4. The comments section will open, and Requesters can add a message. By clicking on the Add Recipient link, the Requester can search for and select the Approver to send the message to.

**ADD COMMENT** ✓ ✕

Please send this requisition back to me so I can update the cost center. |

927 characters remaining expand | clear

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**

Roger Requester (Prepared by, Approved) <jlwaddington@lcsc.edu>

Attach file (optional)

Attachment Type  File

**User Search** User Search ✕

Last Name

First Name

User Name

Email

Role

Results Per Page

1-8 of 8 Results 10 Per Page ▼

Name ↑	User Name	Email	Phone	Action
Approver, Carolina	CarolinaApprover	jlwaddington@lcsc.edu		<input checked="" type="button" value="+"/>
Approver, Contract	ContractApprover	jcevetello@hcg.com		<input type="button" value="+"/>



- 5. Once the message has been entered and the Approver selected, click the checkmark icon to submit the comment. The comment is now saved in the Comments tab of the Requisition and a notification email is sent to the Approver to alert them of the comment.

ADD COMMENT  X

Please send this requisition back to me so I can update the cost center.

927 characters remaining expand | clear

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

Roger Requester (Prepared by, Approved) <jlwaddington@lcsc.edu>

Waddington, Jessica <jlwaddington@lcsc.edu>

Attach file (optional)

- 6. The notification email sent to the Approver includes the comments that the Requester added, and a link to quickly access the requisition.

Comment added to requisition 3652612

support@sciquest.com  
To Jessica L. Waddington

↩ Reply↩ Repl

Re: COMMENT ADDED TO REQUISITION #: 3652612  
Cart Name: 2022-11-15 0322254 04  
Prepared for: Jessica Waddington  
Prepared by: Roger Requester

Dear Jessica Waddington,

Roger Requester has commented on Requisition 3652612

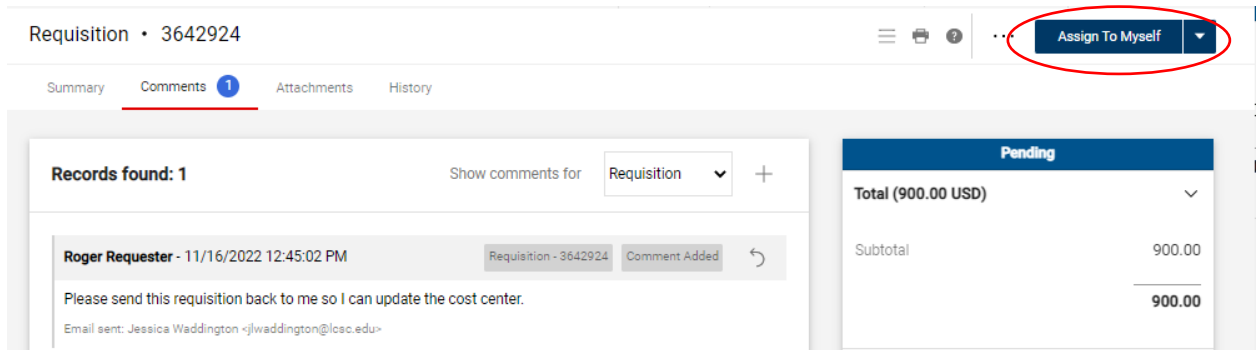
Comment: Please send the requisition back so I can update the cost center.

To reply to this comment click on the following link

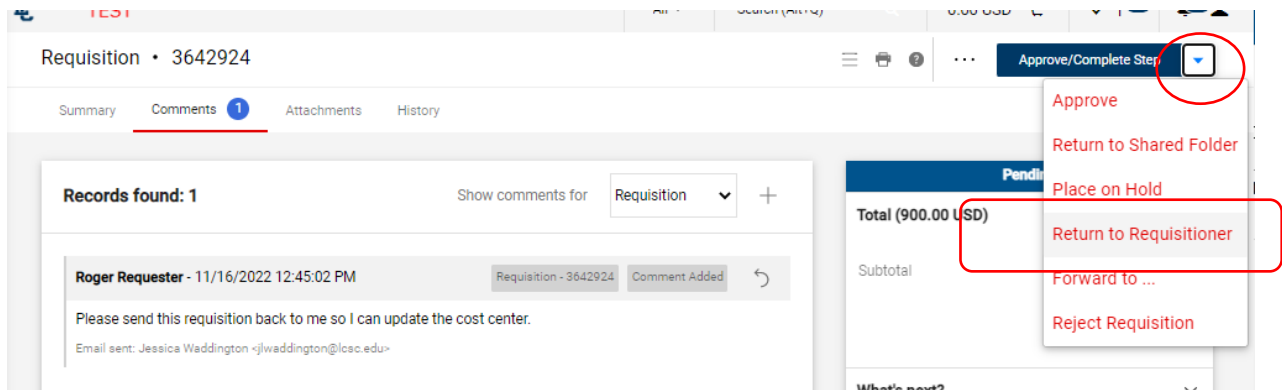
[View Comment](#)

Support Team Contact Information:

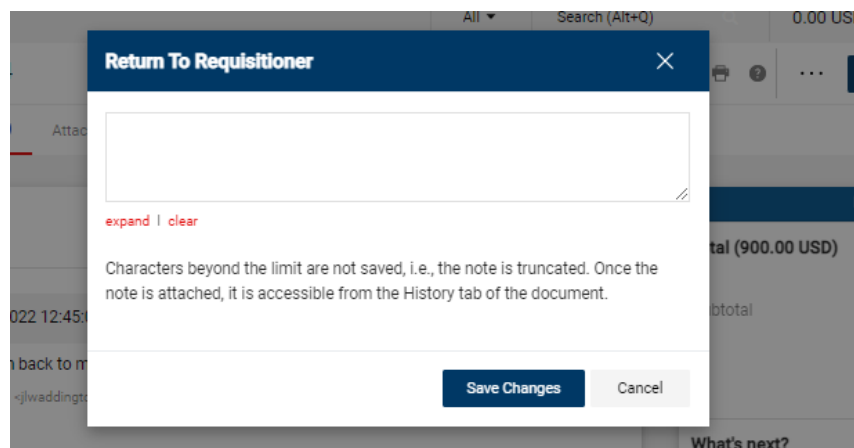
- Once the Approver clicks on the View Comment link in the email, they will be routed directly to the requisition in Jaggaer. To return the requisition to the Requester, the Approver will click on the Assign to Myself button.



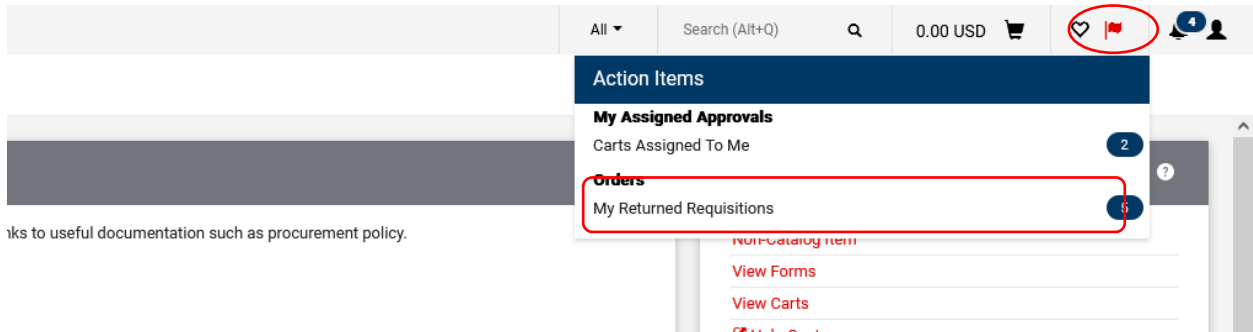
- Then, the Approver will click on the down arrow button to the right of the Approve/Complete Step button and select the Return to Requisitioner option.



- The Approver can add comments if desired, then click the Save Changes button to complete the return.



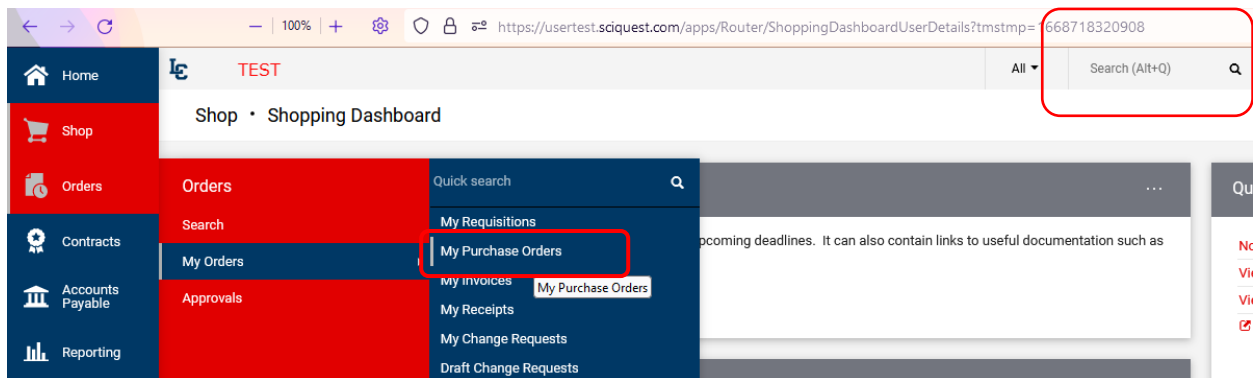
- The Requester can access the requisition by clicking on the **Action Item** flag in the top right corner of the screen. The Action Item window will open. Click on the **My Returned Requisitions** link



- The Requester can make edits to the requisition then click the Place Order button to submit the requisition back into the approval workflow.

### Editing PO's

- Navigate to the Jaggaer site.
- Access the PO that needs to be edited.
  - Type the PO number in the search bar at the top left of the screen.
  - Or access the Orders menu, My Orders, then My Purchase Orders. Select the PO by clicking on the PO Number link.



**My Purchase Orders**

Quick Filters My Searches

Created Date: Last 90 days Quick search

PO Owner: Requester, Roger X

1-26 of 26 Results

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PC
... PJ000361	WW Grainger Inc	11/16/2022 1:41:22 PM	Pending	3652860	Ro Re
... PJ000360	Home Depot	11/16/2022 1:41:22 PM	Pending	3652860	Ro Re

See More Show More

3. In the PO screen, click on the **3 dots** to open the menu, then select **Create Change Request**.

ons LLC • PJ000323 Revision 0

0.00 USD

6 of 26 Results

Document Status

A/P status Open

Workflow Completed

- Add Comment
- Create Change Request
- Add Notes to History
- Create Quantity Receipt
- Print Fax Version

4. From the Create Change Request window, click the Add Recipient link. The Requester can search for and select the Approver to send the message to.

**Create Change Request**

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | Add recipient

✓ Roger Requester (Prepared by, Prepared for) <jlwaddington@lcsc.edu>

User Search
User Search
✕

Last Name ●

First Name ●

User Name ●

Email ●

Role ●

Results Per Page 10

New Search

1-8 of 8 Results 10 Per Page ▼

Name ↑	User Name	Email	Phone	Action
Approver, Carolina	CarolinaApprover	jlwaddington@lcsc.edu		<span style="border: 2px solid red; border-radius: 50%; padding: 2px 5px;">+</span>
Approver, Contract	ContractApprover	jcevettelto@hcg.com		+

Search
Close

5. Add comments in the **Change Request Reason** section, add attachments if needed, and click **Create Change Request**.

Change Request Reason

1000 characters remaining expand | clear

Attach file to this change request (optional):

Attachment Type  File  Link/URL

File Name

File Choose File Upload your file

Create Change Request
Close

6. The Requester can make certain edits to the PO then click the Submit Request button to submit the PO back into the approval workflow.
  - a. The Cost Center, Object code, cost and line item quantity can be edited. **Note: Quantity and cost cannot be revised on a Punchout Catalog PO.**
  - b. If the entire PO needs to be closed, route the PO to Purchasing.



- 7. To route to Purchasing, select an Ad-Hoc Approver **before** submitting the PO back into the workflow.
  - a. Click on the Ad-Hoc Approver **Select** link, and the Ad-Hoc Approver window will open. Important: keep the selection for **After** as “**Submission**”. Enter a Purchasing Department user name, and add comments specifying what changes need to be made. Click Save.

The screenshot shows a 'General' tab on the left with fields for Cart Name, Description, Prepared by, Prepared for, Ad-Hoc Approver, Buyer Code, and Bank Code. The 'Ad-Hoc Approver' field contains a red 'Select' button. On the right, an 'Ad-Hoc Approver' modal window is open. It has a dropdown menu set to 'Submission', a search field with 'Higgins, Diana' entered, and a text area with the comment 'Please change the unit price on line item 1 to \$25.' The 'Save' button is highlighted with a red box.

- 8. The PO will route to the Purchasing Ad-hoc approver that was selected first, allowing the requested edits to be made before the PO routes to the approvers.
- 9. Click **Submit Request** to submit the PO into the workflow.

The screenshot shows a purchase order workflow screen. At the top right, a 'Submit Request' button is highlighted with a red box. Below, the 'Shipping' and 'Billing' sections are visible. On the right side, a 'What's next for my order?' section shows the next step as 'Level 1 Approval' with the approver 'Waddington, Jessica'. Below this, a workflow diagram shows a 'Draft' status followed by 'Ad-hoc 1' and 'Level 1 Approval', both with 'Future' dates. The 'Ad-hoc 1' and 'Level 1 Approval' steps are highlighted with a red box.