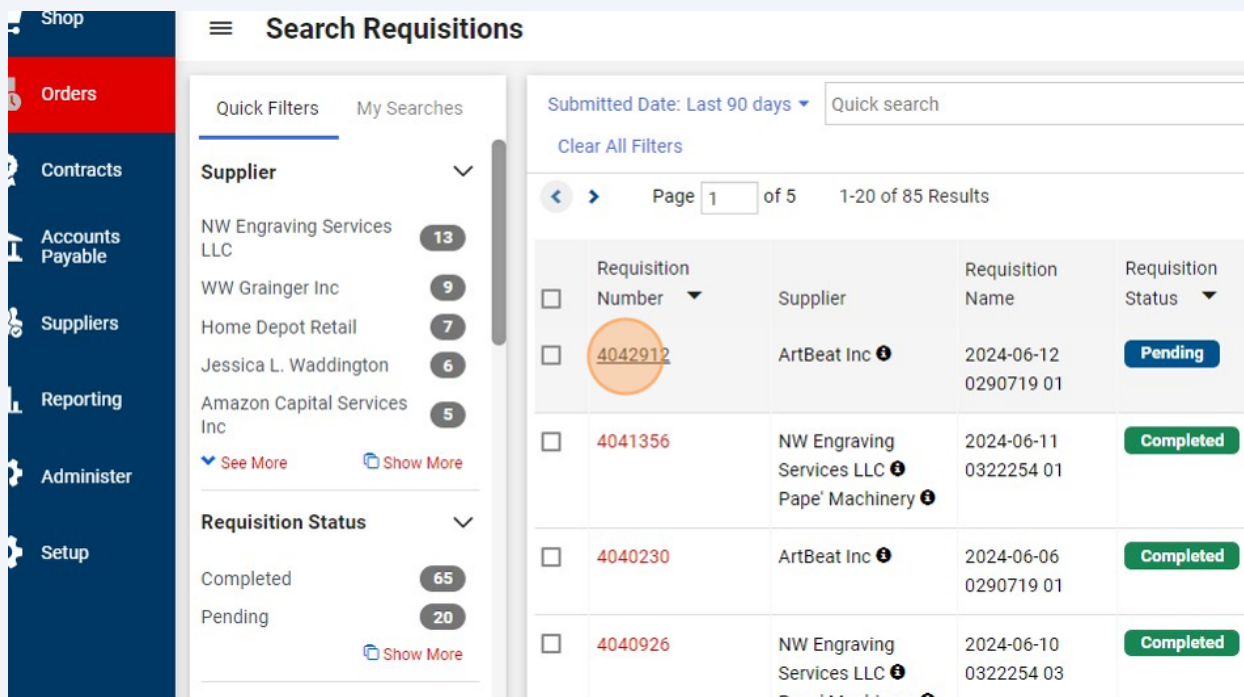


How to Edit a Requisition Before it Becomes a PO

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 shows 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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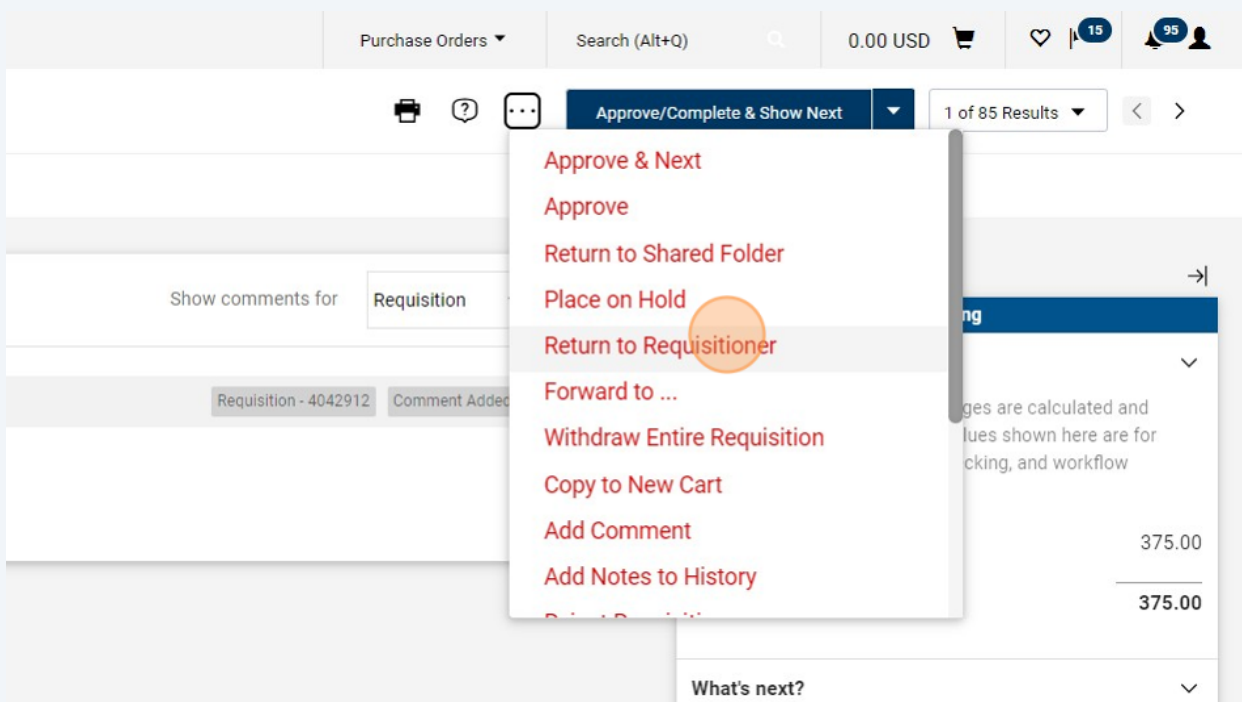
6 Click the + to select.

The screenshot shows a 'User Search' modal window. At the top, there is a search bar 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.

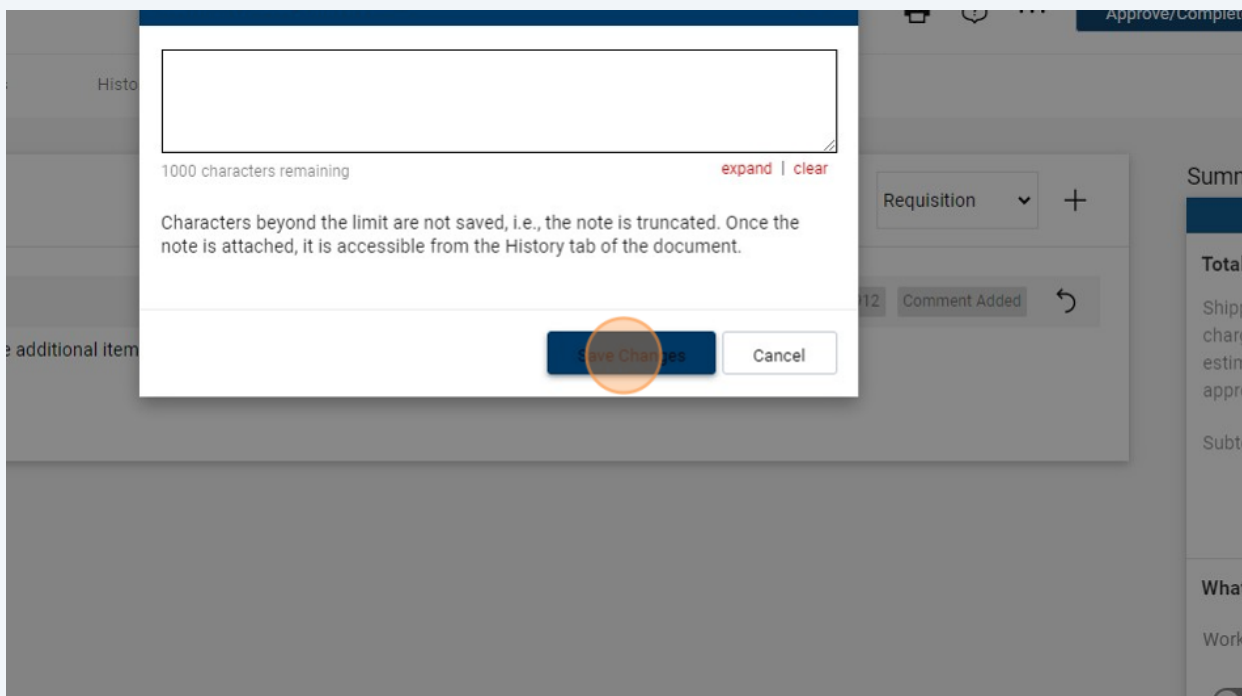
7 Type your note to your approver.

The screenshot shows a requisition page for 'Requisition • 4042912'. The 'Comments' tab is active, showing 'Records found: 0'. An 'ADD COMMENT' form is displayed. The form 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 form. 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' (selected) 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. The main content area is divided into two sections. On the left, there is a comment box with a dropdown menu set to "Requisition" and a plus sign. Below it, a comment for "Requisition - 4042912" is visible with a "Comment Added" button. On the right, there is a "Summary" section with a purple header "Draft (returned)". Below this, the "Total (375.00 USD)" is displayed, followed by 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 the note, the "Subtotal" is listed as 375.00, and the total is 375.00. At the bottom of the summary, there is a link "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 are several notification items. The first item is "Shopping, Carts & Requisitions". The second item is "A Requisition You Submitted Has Been Returned" with a date of "Jun 12" and a close button "x". The text "4042912 - 375.00 USD Returned By Diana Higgins" is circled in orange. Below this, there is a section header "Administration & Integration". The following items are "PO Export Failure Notification" with dates "Jun 10" and close buttons "x". The text "PJT00928 - Submitted By Diana Higgins" is visible. Below that, another "PO Export Failure Notification" with date "Jun 10" and close button "x", with text "PJT00925 - Submitted By Diana Higgins". This is followed by another "PO Export Failure Notification" with date "Jun 10" and close button "x", with text "PJT00919 - Submitted By Diana Higgins". The final item is "PO Export Failure Notification" with date "Jun 10" and close button "x", with text "PJT00923 - Submitted By Diana Higgins".

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. A tooltip 'Supplier Actions for ArtBeat Inc' is visible over a button in the table. The summary panel on the right shows 'Draft (returned)', 'Total (375.00 USD)', and 'What's next for my order?' 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 a button labeled 'Add Non-Catalog Item' highlighted over the table. 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 and the text 'sweatshirts' circled in orange. To the right of this line item are buttons for 'Internal Note', 'Internal Attachments', 'External Note', and 'Attachments'. A second 'ITEM DETAILS' section is visible below the line item, also showing 'Contract: no value' and 'Commodity Code: no value'.

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 - 103 Main St, Lewiston, US-ID 83501 United States'. Below the header 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 titled 'Additional Details' with a 'Commodity Code' field and a search icon. At the bottom is a section titled 'Internal Attachments' with a dotted line separator.

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 cart total is '0.00 USD'. On the right, there are notification icons for 15 items and 95 messages. Below the navigation bar, there are icons for eye, printer, help, 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 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 is a 'Subtotal' of 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 cart total updated to '875.00 USD' and the notification icons updated to 16 items and 95 messages. The 'Place Order' button is now highlighted with an orange circle. The 'Billing' section remains the same. The 'Summary' section 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' of 875.00 are still present.