PeopleSoft Purchasing
Advice of Change
College Requisition (CR) or Subcontract Requisition (SC)
# Purchasing Advice of Change

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Purchasing Overview

Purchase Orders/Change Orders are generated from on-line requisitions. The Origin Field will indicate the type of Requisition being processed. Departments will be able to process an on-line requisition resulting in one of the following documents:

- College Requisition (CR)
- Internal Vendor Purchase Order (IV)
- Limited Value Purchase Order (LV)
- Subcontract Purchase Order (SC)

**A (CR) College Requisition is processed when the purchase is:**

1. In excess of $5,000
2. Blanket Orders (External Vendors and Internal Vendors)
3. Commodities and/or Services that are prohibited on a Limited Value Purchase Order (see section 2.16 of the URI Purchasing Manual)
4. Change Order (Advice of Change) to a PO issued as a result of a prior CR. Note: Change orders cannot be processed to a LVPO or IV.

**A (LV) Limited Value Requisition is processed when:**

1. The purchase is $5,000 or less (inclusive of all costs; i.e. shipping and handling)
2. The commodity and/or service is an allowable purchase on a LVPO (see section 2.16 of the URI Purchasing Manual)
3. The purchase is a one-time delivery, one-time payment situation
4. The purchase is within the current fiscal year only.

**A (IV) Internal Vendor Requisition is processed when:**

1. The purchase is from a URI Internal Vendor and is a one-time delivery, one-time payment situation (see section 2.12 of the URI Purchasing Manual)

**A (SC) Subcontract Requisition is processed when:**

1. A Research Subcontract exists between URI and a subrecipient to perform part of the statement of work in a URI sponsored research project.
2. An Advice of Change is required to an existing Subcontract Purchase Order

For additional information on Subcontract Purchase Orders please visit the Office of Sponsored Projects Review at: http://web.uri.edu/researchcondev/sponproj/
Requisition Workflow Terminology

1) **Approval Levels** with associated Roles.
   i) Pre-Approval - (Requester Role)
   ii) Level 1 – (Signatory from Signature Authorization)
   iii) Level 2 – (Final Review from Signature Authorization)
   iv) Level 3 – (Administrative Approvals i.e. Grant/Research and Foundation.)

2) **Approver** – User who Approves Requisition or Chartfield String (CFS).

3) **Category Code** – Used to categorize the item that is being purchased. Users should select the Category code that most closely matches the item(s) they are purchasing. The Account Code is defaulted based on the Category selected.

4) **Denied Requisition** – Requisition that is sent back to Requester for correction or cancellation.

5) **Final Review** – 2nd Level Approver for the CFS – (Optional Approval Level)

6) **Hold from Further Processing Checkbox** – When checked: the Requisition is on hold, when Unchecked: the Requisition is available for processing.

7) **Origin** – Type of Requisition – Indicates to the system and users how the Requisition is processed. The two letter alpha code should be used for Requisitions. The origins are listed below.
   i) CR – College Requisition: Routed to Purchasing for completion.
   ii) IV – Internal Vendor Requisition: Purchase order auto generated directly from Req.
   iii) LV – Limited Value Requisition: Purchase Order auto generated directly from Req.
   iv) SC – Subcontract Requisition: Routed to the Research Office for completion.

8) **Originator** – A user who enters a Requisition but does not have Pre-Approval authority.

9) **Pre-Approval Process** – Requisition is entered by an Originator who must have a Requester Approve the Req. The Requester Pre-Approves the Req by clicking the Green Pre-Approve Check which changes the status from Open to Pending to facilitate workflow processing.

10) **Requester** – User who has been granted the authority to Pre-Approve Req. The Requester will be the primary contact Requisitions and/or Purchase orders.

11) **Routing** – The process of electronically moving work.

12) **Ship To Location** – Address where the Item’s final delivery is shipped.

13) **Ship To Control** – Determines where the shipped item is first sent.

14) **Ship To Comments** - Field used to Add the Attn: (Person’s Name) whom the item will be sent to.

15) **Workflow** – Paperless On-Line work routing system

16) **Worklist** – Approvers work queue, where users manage/review Requisition(s).
Components of a Requisition

This manual explains how to enter each component of a requisition, and how they relate to each other.

In PeopleSoft Requisitions consist of five components:

1. **Requisition Header** – This includes the Requester name, Requisition date, Origin, Accounting Date and Header Comments.

2. **Requisition Defaults** – Where general information pertaining to the entire requisition is entered. This includes data such as the Vendor, Category (if all items are of the same category), Ship To, Due Date

3. **Lines** – Where the description, Unit Of Measure (UOM), Price, Category and Quantity for each item you are ordering.

4. **Schedule** – Where the Due Date, Ship To Address and Unit Price are stored for each item on the requisition.

5. **Distribution** – Where accounting information (i.e. Chartfield String) is entered. The Chartfield String includes the Account, Fund, Department, Program and Project and Budget Date.
Log into PeopleSoft using your e-Campus UserID and Password here:

https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&
To Add a New Requisition

From the Main Menu, choose Purchasing:

Then choose Requisitions:

Then choose Add/Update Requisitions:

To add a new Requisition, Click

The Requisition ID (Requisition number) will auto generate the next number once the requisition has been saved

All text should be entered in upper/lower case
Requisition Header

Requester - defaults based on your logon.
Requisition Date - defaults to the current date.
Origin defaults to ONL - Change to: CR = College Requisition (OR SC if you are processing a change to a Subcontract) - Click the and Select CR or SC.

Click on the Requisition Defaults Hyperlink.

It is IMPORTANT that you access the Requisition Defaults page and enter the following fields prior to entering any information on the lines which will be discussed later.

PLEASE NOTE: ANY INFORMATION ENTERED IN THIS SCREEN WILL POPULATE TO ALL LINES.

Requisition Defaults

Buyer – Leave Blank
Unit of Measure – Leave Blank
Vendor – Select the vendor by clicking on the Vendor Lookup hyperlink.

Select the same Vendor as the original Purchase Order.
Vendor Lookup/Search

Type the vendor name or a portion of the vendor name. If the vendor is an individual, type the last name first.

Click Search

Select the vendor from the Search Results by typing a check (v) on the box at the beginning of the line. If there are multiple locations select the “MAIN” Location.

Note: If there are multiple locations beginning with MAIN, preview the address for each and select the appropriate “MAIN” location.

Click OK

Once the vendor is selected, the Vendor number and Location will populate onto the screen.

Click here to preview address
Choose a Category

Category –

Use the same Category that was used for the PO that is being changed.

For example, in the below PO, the category is 406A.

Enter the Category here:

Please Note: all CRs utilizing Category Code 669A (Account Code 9669) for Components >$5K with Fabrication numbers require that a FAB number is entered on the Distribution page. See page 19 to enter FAB number(s).
Ship To Location

Ship to – Select the same Ship To Location as on the PO that you are changing.

If you know the four-digit Department Number where the goods/services are being delivered you may enter that number in the Ship To: field, click and select from the Search Results;

OR

Search by the Department Name by clicking the next to the Ship To field, type the Department Name in the Description field, click and select from the Search Results.

If the Ship To Location on the PO was an OFFSITE address, Select OFFSITE. The following message will appear:

By selecting the Offsite ShipTo location, your requisition will automatically be flagged for audit.

The complete Ship To address will need to be entered as a Comment in the Requisition Header Comments section and is described on page 25.
When processing an Advice of Change, the Distribution will be entered on the Line. Do not enter the Distribution(s) in Requisition Defaults.

If the Due Date is 30 days in the past or 30 days in the future, the following message will appear:

Click **OK**
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Quantity –
When increasing or decreasing a dollar amount on a Blanket PO, the Quantity will typically be 1. However, if you are processing a change to increase a quantity, enter the actual quantity. If you are decreasing the quantity enter 1 and indicate in the Description the actual quantity decrease.

UOM –
The UOM on changes to a Blanket PO or a decrease to a Standard PO will typically be TOT. Otherwise, enter the appropriate UOM or click to select.

All Advice of Change Orders require a detailed breakdown of the reason(s) for the change. Depending on the circumstances, the reason may be included as a Comment or as an Attachment. If additional information needs to be added, it can be added as a Line Comment, which will be described on page 47.

On the main Requisition page:

Description –
The Description on all Advice of Changes Reqs should read: Advice of Change to PO # (reference po #).
The Description also needs to indicate if this is an increase or a decrease and the actual amount of the increase or decrease.
Price Notes:

- When “increasing” a Purchase Order, enter the actual amount of the increase.
- When “decreasing” a Purchase Order, enter an amount of 1 (DO NOT ENTER A NEGATIVE AMOUNT, DO NOT ENTER 0)
- When “transferring” funds from one Chartfield String to another Chartfield String, enter the actual dollar amount of the increase on a Line and then type a separate Line for the Chartfield String that is being reduced, with an amount of one dollar.
- When “changing” a Date only enter an amount of 1

STOP

Category – Note the Category has populated from the Requisition Defaults. 
DO NOT CHANGE.
When done entering the Line information, click the Schedule -

- Ship To
  - Defaults from the Requisition Defaults page.
- Ship To Control
  - The default Ship To Control is “K” for Kingston Central Receiving.

When the default Ship to Control is accepted the Ship To address that will print on the Purchase Order will include URI, Central Receiving, Kingston, RI. 02881.

  - To Change the default Ship to Control, click
Change the Ship To Address

Select “G” for GSO Central Receiving
Select “D” for Direct Delivery to the department (non-Central Receiving)

If delivery is to be made to the Alton Jones Campus or FCCE select “D” for Direct Delivery.

Note: This action only needs to be performed on line 1/Schedule 1.

When selecting “K” or “G”, the ship to address will read URI, Central Receiving followed by the City, State, Zip, department name and address - i.e.:

Ship To: URI Central Receiving
         Kingston, RI 02881
         Department of Chemical Engineering
         16 Greenhouse Rd., 205 Crawford Hall
         Attention: Emma Harrold

If you have selected a ship to of “OFFSITE”, change the Ship to Control to “D”. The complete ship to address will be entered in a comment field on the requisition header comments. If you have chosen an OFFSITE ship to location do not access the Add Ship To Comments.

Ship to Comments

When processing an Advice of Change, DO NOT enter a Ship To Comment.
Entering Distributions on the Line

- Click on the Distribution tab on the Schedule page.

When Distributing by more than one Chartfield String, click + to add the desired number of rows.

Enter the desired number of rows. For example, if the purchase is being charged to 2 Chartfield Strings, click OK to add 1 row.
Initially, the Category Account Number that was chosen on the Requisition Defaults page will populate the Account Number to the first Distribution line. When more lines are added, the same Category Account Number will populate in the Account field. DO NOT CHANGE THE ACCOUNT #

Enter the Percent or Amount for each Distribution Line along with Fund, Dept, Program and if the Chartfield String contains a Project and an Activity, select the PC Bus Unit (URIPS) by clicking and type the Project and Select the Activity by clicking .

NOTE: The Budget Date defaults to the current date. Therefore, when processing an Advice of Change that affects a future Fiscal Year, the Budget Date must be changed in order to pre-encumber the funds in the appropriate Fiscal Year. Change the Budget Date, if necessary, and click OK.

STOP

If you are done entering all of the ChartField Strings and Lines in Distributions and DO NOT need to enter a Fabrication number (FAB number – using Category Code 669A for Components >$5K),

Click OK to return to the Schedule page and continue on page 21.

If you are using Category Code 669A, you must enter a Fabrication number (FAB number – using Category Code 669A for Components >$5K) on the Distribution page following the instructions below:
Entering Fabrication Numbers for Research Projects

All College Requisitions utilizing Category Code 669A (Account Code 9669) for Components >$5K with Fabrication (FAB) numbers will now require that the FAB number is entered into PeopleSoft.

The FAB number will then print on both the Requisition and the Purchase Order in the area where the ChartField String prints. This will eliminate the need for Departments to have to add a comment to the Requisition and for the need to ensure that the number is also printed on the PO.

When utilizing Category Code 669A, you will need to enter the FAB number in the Distribution Page for each Line Item that is using this Category Code.

On the Distribution Page, Click on the Tab to access the Fab number Field.

Enter the FAB Number in the appropriate field.
If you have not entered the FAB number and proceed to Save the Requisition, you will get the following message reminding you to do so.

Go back and enter the FAB number(s).

Once the Requisition is saved, the FAB Number will print on the Requisition in the Distribution section of the CR.

Once a PO is issued, the FAB number(s) will print near the PO Type on the bottom of the PO.
Click the hyperlink Return to Main Page

This will return you to the Main Requisition page.

To add additional Line Items, see page 23.

When all lines are complete, Click Save

This message will appear:

Click OK

A Requisition ID has been assigned. The Requisition ID is for internal use only. (This is not the Purchase Order Number)
Requisition ID has been assigned. The Requisition ID is for internal use only. (This is not the PO number)

Most Advice of changes will be one line item, however, if there are additional lines click to add the desired number of rows and follow the same procedures as above for entering line information including the distribution(s).

Once all of the Lines have been added, Header Comments and/or Attachments may be added by clicking on the Add Comments hyperlink.
To Add Additional Line Items

If you need to add any additional Line Items, Click

Enter the desired number of rows (lines) to add.

For example if the requisition is for a total of 3 lines, enter 2.

Click OK
Note: The Category will automatically populate from the Requisition Defaults page once you have entered a Description, DO NOT CHANGE. If the Chartfield String(s) Distribution was entered on the Requisition Defaults page it will automatically populate on each line. If the Chartfield String(s) Distribution was not entered in the Requisition Defaults it will need to be entered on each Line as described above including the Budget Date, if necessary.

If there are no more items to add click
Adding Header Comments

To add a Header Comment(s), Click on the hyperlink **Add Comments**

If an “OFFSITE” Ship To Location was chosen, enter the entire Ship To Address in the Header Comment field as follows:

- URI, Dept. Name
- c/o Company Name
- Street Address
- Attention:
- City, State, Zip

Check the box **Send to Vendor**

To add additional Header Comments, Click **+**
To add Standard Comments, click on the hyperlink.

The Standard Comments box will appear.

Click on the Comment Type Search icon.

REQ will populate into the Comment Type box. Next, Click on the Comment ID Search icon.

BLKT will populate into the Comment ID box and the entire comment will populate into the Comments box.

Click OK to return to the Header Comments.

In this example, when the comment is brought into the Header Comment, please remember to update the Blanket Requirement dates.
➢ Adding Attachments

To add an Attachment(s), click in the Header Comments box.

Click Browse...
The name of the file will pop up in a window.

Click to attach the file

Double-click on the file you want to attach to the Requisition
To View All Comments click on the hyperlink. Once you are in the “View All” mode you can either scroll down to the last Comment, to add another Comment or insert Comments in between other Comments.

The Attachment will be listed on the Comment.

If you would like the Attachment to be included with the resulting Purchase Order, check the box.

If the Attachment is for internal use only do not check the box.

For example, if the Attachment includes a Sole Source Justification the e-mail check box will not be checked.

To view the Attachment, Click. The Attachment will pop up in a new window. After checking for accuracy, close the new window to return to the Requisition.
Continue Attachments by clicking

Click OK when done.
This will bring you back to the main Requisition screen.

Click on **Save** to save all of your changes to the Requisition.

This message will appear:

Click **OK**

➤ You are now ready to Print your Requisition.
Print the Requisition

To View and/or print a copy of the requisition, click the View Printable Version hyperlink on the main Requisition screen.

This message will appear:

Click Yes

The following message will appear:

Click OK

➢ A new window will open in PeopleSoft and will display the Printable Version of the Requisition. Check it for accuracy.
A second tab will open as the Printable Version queues and then prints to the screen.

Proofread this copy to make sure all information is correct.

If any changes need to be made, close this tab and go back to the Add/Update Requisitions tab to make and save changes to the Requisition and then Click View Printable Version again.
To print the Requisition, choose either the 'File' in the upper left of the screen or the printer icon in the upper right of the screen.

The Print box window comes up; choose where to Print your Requisition and Click

Once you have previewed and printed the Requisition, close the second window by clicking

On the following pages, you will find instructions on how to proceed for both:
- Originator (page **); or
- Requester (page **)
ORIGINATOR Procedures:

When the requisition is Complete and if you are an “Originator”, uncheck the box and click Save.

Note: The Requisition will remain in open status until the Requester submits the Requisition for approval.

The Requester will receive an e-mail informing them that a Requisition is pending and needs to be submitted for approval:

This e-mail is to notify you that College Requisition: 0000019893, entered by bettyg is in open status and needs to be submitted for approval.

If you are a “Requester” and you have received an e-mail regarding submitting a Requisition for approval, log on to PeopleSoft and retrieve the Requisition via the following navigation:
(Purchasing>Add/Update Requisitions>Find an Existing Value).

Enter the Requisition ID and click Search.

Once you have reviewed the Requisition, follow the above steps to change the status from open to pending.

The Requisition has now entered the Workflow Approval Process.

Once this happens the Requisition cannot be retrieved.
REQUESTER Procedures:

When the requisition is Complete, if you are a “Requester” and you have entered the Requisition, uncheck the Box.

Then Click on the icon to Submit for Approval (the status changes from Open to Pending).

Click .

The Requisition has now entered the Workflow Approval Process.

*Once this happens the Requisition cannot be retrieved.*
Workflow Approval Process

Level 1 - Signatory for Signature Authorization
Level 2 - Final Review from Signature Authorization
Level 3 - Administrative Approvals; i.e.:
  - Foundation Office when using Foundation Funds
  - Sponsored and Cost Accounting when using Research Funds
  - Business Services when using Bond Funds
Level 4 - Administrative Approvals which are based on the Category/Account Code
  - Controller’s Office for Prepaid Costs, Revolving Loan Costs and Service Charges
  - Capital Projects for Construction-related expenses
  - Public Safety for Radioactive Materials and Safety Supplies
  - Property Department for Capital Equipment on fund 500

The Approver(s) (Level 1) will receive this e-mail:

This e-mail is to notify you that College Requisition: 0000019893, Requester: bettyg, is seeking level 1 approval for Chartfield String: URIPS10840550000, and has been added to your e-Campus Financials Worklist.

The Approver(s) can either Approve or Deny the Requisition.

Note: All Approval Levels have the authority to Approve or Deny a Requisition.

If the Requisition is Denied, the Requester will receive an e-mail informing them that the Requisition has been Denied. If the Approver indicated a reason it will appear as a Comment:

This e-mail is to notify you that College Requisition: 0000019893 entered on 01/30/2012 has been denied by OPRID: bettyg

Comments: Please hold off on this purchase until next fiscal year.

Once a Requisition has been Denied, the Requester can retrieve the Requisition (use this Navigation: Purchasing>Add/Update Requisitions>Find an Existing Value).

Enter the Requisition ID and click Search.

Make necessary changes, pre-Approve and Click .

Upon saving the Requisition, the Workflow Approval Process, will begin again.

If a Requisition needs to be Canceled please see “Canceling a Requisition” on page 46.

If the Approver(s) (Level 1) Approve the Requisition and any other Approvals that may be required; i.e. (Level 2) Final Review, (Level 3) Foundation Office (if Foundation Funds are being used, Sponsored and Cost Accounting if Research Funds are being used, etc.), (Level 4) based on
Category/Account, the Requester will receive an e-mail indicating that the Requisition has been Approved:

```
This e-mail is to notify you that College Requisition: 0000019889 entered on 01/30/2012 has been approved.
```

Once the requisition has been approved by all levels the budget checking process will automatically be initiated.

Upon successful completion of the budget checking process, the requisition will be routed to:
- URI Purchasing, if the Origin is “CR”
- URI Research Office, if the Origin is “SC”

If the Requisition fails Budget Checking, the Requester will receive an e-mail:

```
This e-mail is to notify you that College Requisition: 0000019889 has budget errors.
```

Because the Requisition did not pass Budget Check, the Requester is able to access the Requisition and determine the cause of the Budget Error and either process a Budget Transfer and/or make the necessary changes:

Retrieve the Requisition (Nav:Purchasing>Requisitions>Add/Update Requisitions).
Click on the tab
Enter the Requisition Number in the Requisition ID field
Click
When you retrieve the Requisition you will notice that the Budget Status: = Error and the Requisition has automatically been placed back on hold.

Click on the Error hyperlink to determine the cause of the budget error.

In this particular instance, the Budget Error Exception is the result of “Exceeds Budget Tolerance”
If a Budget Transfer is necessary to support the purchase, you will first need to make the Budget Transfer.

Once the Transfer has been made:

- Uncheck the box; and
- Click .
- In this example, the Requisition will not require Re-Approval and will invoke the Budget Process again.

If there are changes to the distributions, i.e.: change the Chartfield String or change the Price, the Workflow Approval Process will start again once the Requisition is taken off Hold, Submitted For Approval and Saved.

Other examples of Budget Error Exceptions include, but are not limited to:

Budget Date Out of Bounds - This Budget Exception typically occurs when using a Fund 500. If you receive a budget error of this type you will need to contact the appropriate accountant in the Sponsored & Cost Accounting Office.
When all is correct:

If you have processed a CR for an Advice of Change to a Purchase Order, the URI Purchasing Department will issue an Advice of Change Purchase Order and will e-mail a copy to:

- **Vendor** – This is the Vendor’s authorization to proceed
- **Requisitioning Department** – This is the Department Receiving Report Copy

If you have processed a SC for an Advice of Change to a Subcontract Purchase Order, the Research Office will issue an Advice of Change Purchase Order and will e-mail a copy to:

- **Vendor** – This is the Vendor’s authorization to proceed
- **Requisitioning Department** – This is the Department Receiving Report Copy

If there are any attachments, they will be a separate .PDF file. For example, the PO is one .PDF and the Attachment(s) are a separate .PDF.

---

**Purchase Order 0000017109**

URI Purchasing@uri.edu  
**Sent:** Tue 9/14/2010 8:19 AM  
**To:** betty@uri.edu

This e-mail is to notify you that Purchase Order 0000017109 from the University of Rhode Island has been issued. To view the purchase order, click on the PDF file attached to this e-mail. If you have any questions please contact the URI Purchasing Department at 401-874-2171.
Sample Purchase Order:

The Purchase Order number is located in the top right-hand corner.

Once the goods/services are received, the Department copy of the Purchase Order is to be signed by the individual who has signature authorization for “Receiving Reports” and forward to the URI Accounts Payable Office.

Note: Payment cannot be made until the URI Accounts Payable Office receives the invoice from the vendor and the signed receiving report copy of the PO.
A College Requisition submitted to Purchasing requiring additional information, specifications, documentation, etc. may be returned. When a Requisition is returned from Purchasing, the requester will receive an e-mail stating the reason for return.

Returned Requisitions will not require Re-Approval through the Workflow Approval Process unless there is a change to the Chartfield String or Price. For example, if a Requisition is returned for detailed specifications, the Requester will retrieve the Requisition (see instructions above to retrieve the Requisition), attach the specifications, and click [Resubmit]. Once the Resubmit button has been clicked, the Requisition will automatically route back to Purchasing.

If there is a change to Quantity, Price or Chartfield String, a Change Order to the Requisition will be created and the Requisition will require Re-Approval. Once a change is made to one of the above Fields, you will receive the following message:

This action will create a change order. Continue? (10:20-0,27)

The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.

Click [Yes]

Click [Save]

Uncheck [Hold From Further Processing]
Click on

![Status: Open](image)

The Status will change from Open to Pending

Click

![Save](image)

The Requisition has now entered the Workflow Approval Process. Once this happens the Requisition cannot be retrieved.

➢ Canceling a Requisition

Requesters can cancel a College Requisition when the following conditions exist:

- **Status: Open/Budget Status**: Not checked and the Hold From Further Processing is Checked. For example, if you prepare a Requisition and decide you no longer need the goods/services, it is your responsibility to cancel the Requisition.
- **Status: Denied/Budget Status**: Not checked
- **Status: Returned Requisitions - Approved/Budget Status**: Valid

Example of Denied Requisition:
Example of Returned Requisition:

If the Hold From Further Processing box is checked, you must uncheck the box before cancelling the requisition.

To cancel a requisition click on the ✗.

Click Yes

Click Ok

Successful Cancellation

The requisition has been canceled, you must click ok to finalize the cancellation.

Ok
**PLEASE NOTE THESE TIPS:**

*Comments* – Comments can either be a typed Header Comment(s); a typed Line Comment(s); or an attached Document(s).

- **Comments or information pertaining to the purchase** may be used for comments for the Vendor, or internal comments.
- **For the Comments to print on the Advice of Change Purchase Order**, you must check ☑ Send to Vendor. If the Comments are for internal use only, do not check the box.
- **All Requisition “comments” will print on the Requisition but will not print on the Purchase Order** unless you have checked ☑ Send to Vendor.
- **The Send to Vendor option** applies to comments in the comment text box only, not to the documents attached.

*All documentation relating to the Advice of Change MUST* be attached to the electronic Requisition. This includes but is not limited to; explanation/justification for increase/decrease, etc.

- **Attachments, for the most part, must first be scanned and saved to a location where you will retrieve them and attach to the requisition.** The naming convention for Attachments is as follows: Requisition Origin (CR), Requisition ID_ followed by the type of Attachment; i.e.: explanation, for example, CR123_Explanation.

- **Any Attachment that is to be sent to the vendor** along with the resulting Advice of Change Purchase Order will need to be scanned and attached separately and not combined with any internal documentation.
- **In order for the Attachment to be sent with the Requisition**, remember to check the Email box.
The Line Comment is a space to further explain and/or give details that only apply to that particular line.

To add a Line Comment, choose the line you would like the Comment to be associated with by Clicking on the talk bubble icon on that line.

**DO NOT ATTACH ANY ATTACHMENTS TO A LINE COMMENT.**
To add an attachment, follow the instructions on Page 27.

Once in the Line Comments section, you can type your detailed information about that line here:

Check the box as well.
Click when done.

You will then be returned to the main Requisitions screen and can continuing to enter the Line information.
If You Have to Make a Change in the Defaults Screen

If you need to change something in the Requisition Defaults screen, after you make the change and Click [OK], a “Retrofit Field Changes…” screen will appear.

On this screen, you must check off the Fields that you would like this change to affect.

For example, if you change the Ship To from Purchasing to Central Receiving, this message will pop up.
You have to choose which Field(s) to apply this change to by checking the box or boxes:

When you are done selecting the correct box or boxes, Click on **OK** to return to the main Requisitions screen and **Save** the Requisition to save your changes.