

# Updating Requisition Distributions in e-Procurement Job Aid

## Overview

This Job Aid entails the procedures for updating Requisition distributions in e-Procurement. The Manage Requisitions page will be used in this Job Aid. This Job Aid will outline the procedures for managing Requisitions in the following processes:

- Updating requisition information
- Reinitializing the workflow approval process

## Background Information

Remember requesters can only manage their own requisitions and those for which they have authorization.

## Navigation

e-Procurement > Manage Requisitions

### Step 1

Enter the 10 digit requisition ID you want to update.

Click: **Search**

### Step 2

Select "Edit Requisition" on the requisition "Select Action" dropdown box.

Click: **Go**

**Manage Requisitions**

Search Requisitions  
To locate requisitions, edit the criteria below and click the Search button.

Business Unit: F5U01    Requisition Name:    Request Status: Pending    Budget Status:     
Requisition ID: 0000212242    Date From: 11/07/2006    Date To: 11/14/2006    Entered By:    PO ID:     
Requester:   

Search    Clear

Requisitions  
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

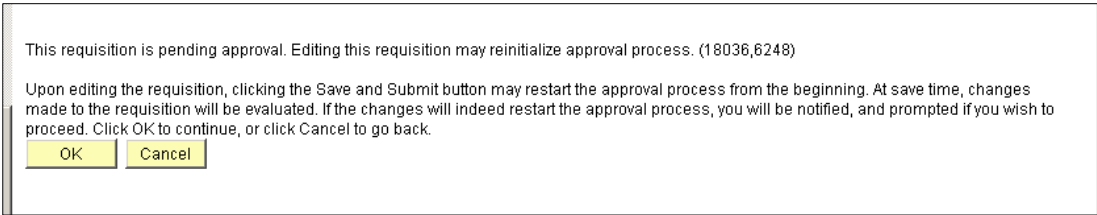
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000212242	SUGGEST A VENDOR	F5U01	11/14/2006	Pending	Valid	14.00 USD	<Select Action...> Go

<Select Action...>  
Cancel Requisition  
Edit Requisition  
View Approvals

Create New Requisition    Inquire Change Request    Inquire Receipts    Requisition Report

If your requisition is in "Pending" status you will receive the following message alerting you that editing the requisition will reinitialize the approval process.

Click: **OK**



**Note:**

The Define Requisition step 1 applies the defaults to future lines not yet created.

The Modify Line/Shipping/Account button in step 3 applies the defaults to past lines already created.

**Step 3**

Only make changes to a Requisition from the "3. Review and Submit" page.

Click "Select All" to insure distribution change will be applied to all lines of the Requisition. You may select only the lines you wish to update.

Click on the "Modify Line/Shipping/Accounting" button. If you click on the "Load Values From Defaults" link, it will load the values from your Define Requisition page. Once the default values have loaded, you can review them and make any necessary modifications. Alternatively, you can simply make the changes in the Accounting Information section. Once you have made your changes click "Apply".

**Edit Requisition**



Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: FSU01 Florida State University  
Requester: EPRO21 EPRO21 \*Currency: USD  
Requisition Name: 0000207897 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	PENCILK	OFFICE DEPOT	1.0000	Each	20.000	20.00
<input checked="" type="checkbox"/> Select All / Deselect All						Total Amount: 20.00 USD
Add to favorites <input checked="" type="checkbox"/> Modify Line / Shipping / Accounting Delete						

Justification/Comments

Send to Vendor  Show at Receipt  Show at Voucher

Check Budget Budget Checking Status: Valid

Save as Template

Save & submit Save & preview approvals Cancel Changes Find more items



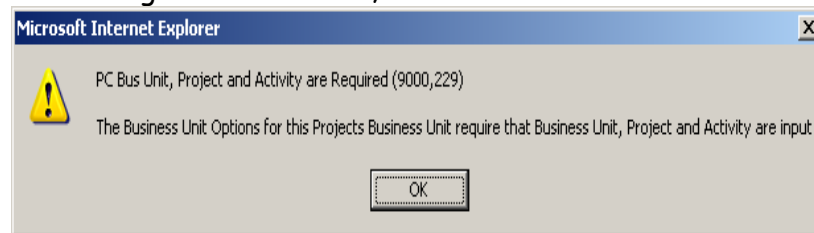
**Note:** If you are using eMarket *do not use* "Load Values From Defaults", only enter new data in the field needing to be updated. Loading these values for eMarket orders will erase pertinent vendor or item data required for the order and it will be sent back to you for correction.

#### Step 4

Clicking on the "Load Values From Defaults" link will load the values from your Define Requisition page. Once the default values have loaded, you can review them and make any necessary modifications. Once you have made your changes click "Apply".

**Note:**

- **All Distribution Lines** applies to all that you checked in step 3. (use this one)
- **Matching Distribution Lines** will do the same as the previous.
- **Replace Distribution Lines** should be used when you are updating from a project to a non project budget to remove and replace or when you get this error message and can't save, remove PC business unit:



Click: **OK**

#### Step 5

Click the "Check Budget" button. This will update the workflow approval process if you have changed any budget information.

**Create Requisition**

**Modify Line / Shipping / Accounting**

**Line Information**

**Note:** The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID:  Vendor Location:

Buyer:  Category:

**Shipping Information**

Ship To:  [Modify Shipping Address](#)

Due Date:  Attention:

**Accounting Information**

Chartfields1 Chartfields3 Details Asset Information

Location Code	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Source Type	Category	Subca
<input type="text"/>	<input type="text"/> FSU01	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

**Distribution Change Options**

For the selected requisition lines, apply distribution changes to

**All Distribution Lines**  
Apply changes to all existing distribution lines.

**Matching Distribution Lines**  
Apply changes to each existing distribution line by matching the distribution line numbers.

**Replace Distribution Lines**  
Remove the existing distribution lines and replace with the distribution lines changes.



## Step 6

Once you receive a "Valid" budget checking status, click "Save & Submit" to reinitiate the approval process.

### Edit Requisition

[1. Define Requisition](#) [2. Add Items and Services](#) [3. Review and Submit](#)

Review the details of your requisition, make any necessary changes, and submit it for approval.

**Business Unit:** FSU01 Florida State University  
**Requester:** EPRO21 EPRO21 \*Currency: USD  
**Requisition Name:** 0000207897 **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	PENCILK	OFFICE DEPOT	1.0000	Each	20.000	20.00

Select All / Deselect All **Total Amount:** 20.00 USD

Add to favorites  Modify Line / Shipping / Accounting  Delete

#### Justification/Comments

Send to Vendor  Show at Receipt  Show at Voucher

Check Budget

Save as Template

[Find more items](#)

