PROCUREMENT

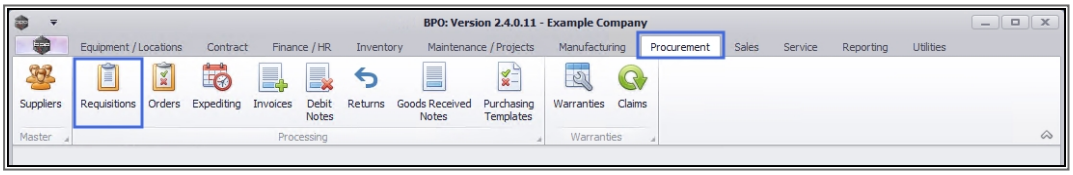
ADD / EDIT / DELETE ITEMS

Once you have created your Purchase Requisition, you may be required to **add** or **remove** items, or **make changes** to these items for example, edit the quantity or price.

A Purchase Requisition can only be edited in the **New** status.

If a requisition has already been **released for approval**, remove it from approval by putting it on **Hold**. It will then be moved from the **Released** status back to the **New** status and can then be edited. The requisition can be released again once the new changes have been saved.

Ribbon Access: *Procurement > Requisitions*



1. The ***Purchase Requisition Listing*** screen will be displayed.

Select the Site and Status

2. Select the ***Site***.
    - This screen will open by default with the Site filter set to ***All Sites***. Click on the drop-down arrow and select the site that you wish to work in.
3. Select the ***Status***.
    - The ***Status*** will open by default with the filter set to ***New.*** Purchase Requisition can only be edited in the ***New*** status.

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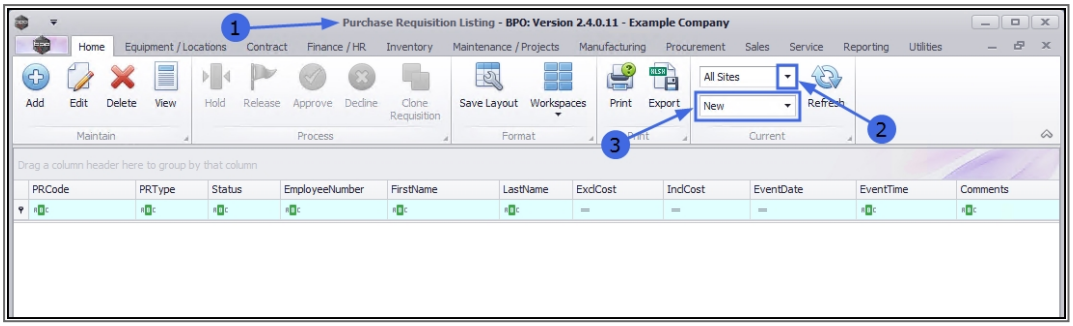

NOTE ON EDITING 'RELEASED' REQUISITIONS

If the requisition that you require cannot be found in the ***New*** status - it may already have been ***Released***, in which case you will need to move it from this status ***back*** to New.

A reasons for editing a requisition that has already been ***released for Approval*** could be; an item price may have changed. It will then need to be brought back to the ***New*** status for price editing.

REMOVE REQUISITION FROM RELEASED STATUS TO ENABLE EDITING

1. In the ***Purchase Requisition Listing*** screen,
2. Ensure that you have selected the correct ***site*** and the status is set to ***Released***.
3. Select the ***row*** of the ***Purchase Requisition*** that you wish to move back into the ***New*** status, for editing.
4. Click on ***Hold***.

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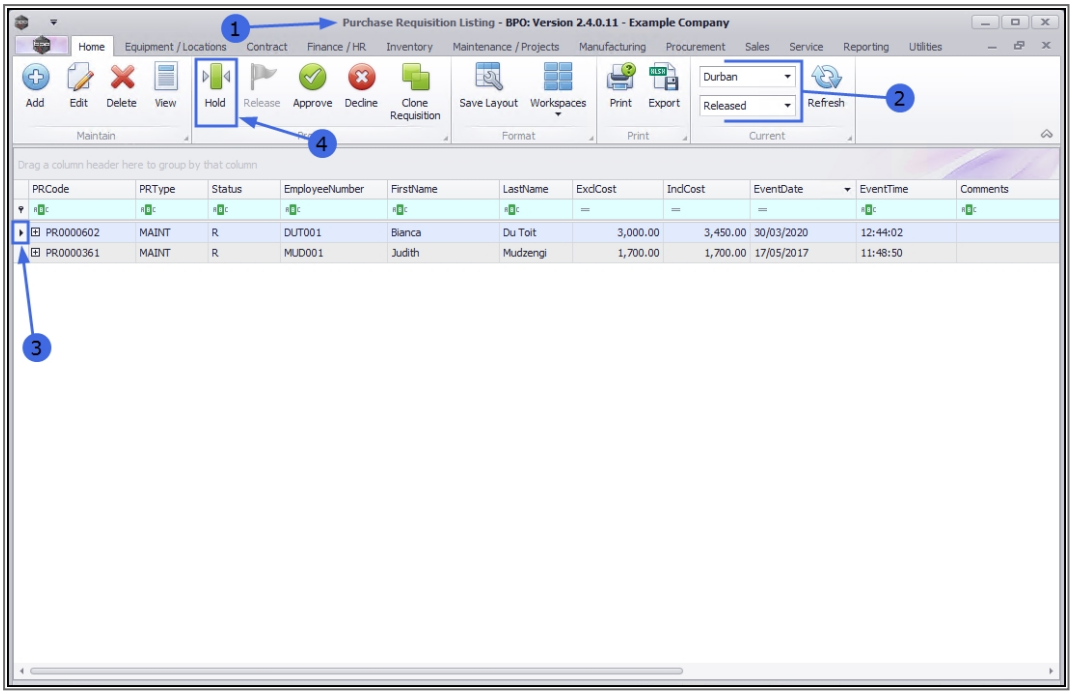

1. A ***Hold Comment*** message box will pop up.
2. Type in the ***reason*** for placing the Requisition on Hold. For example you can type in:
    - "Requisition recalled for item price changes."
3. Click on ***Save***.

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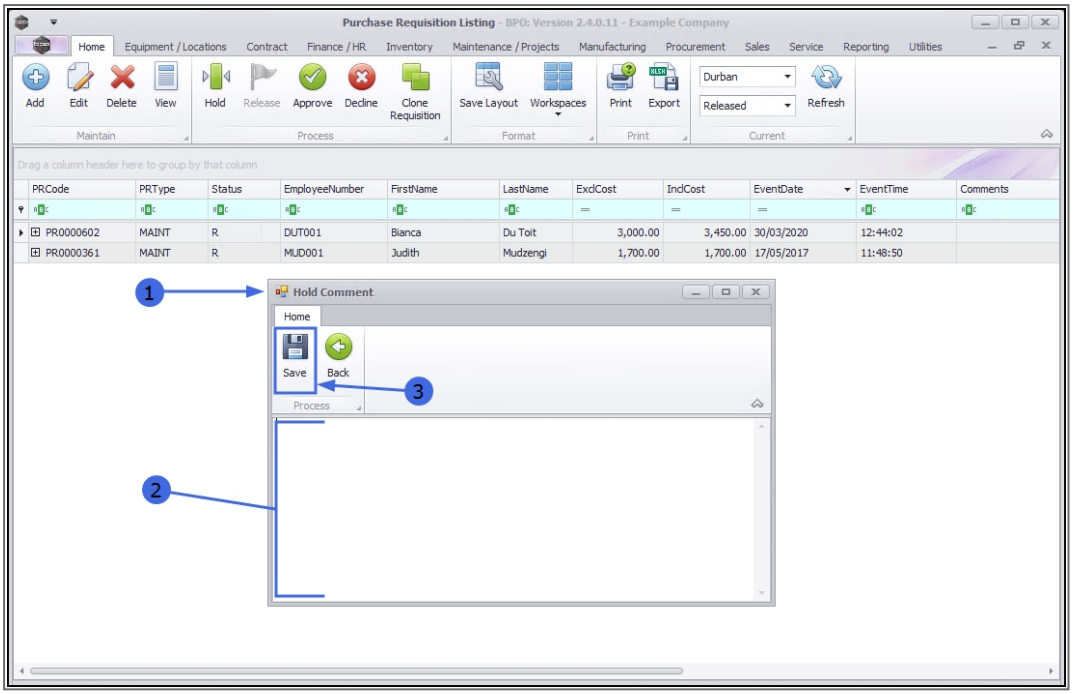
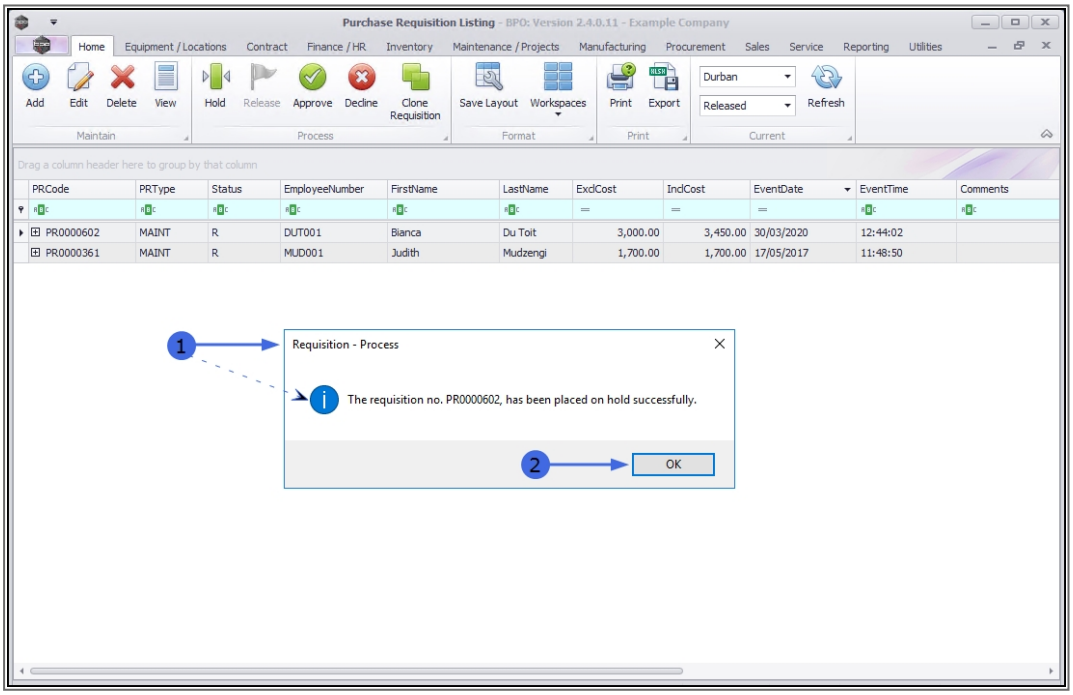


1. A ***Requisition - Process*** message box will pop up informing you that;
    - *The requisition no. [ ] has been placed on hold successfully.*
2. Click on ***OK***.



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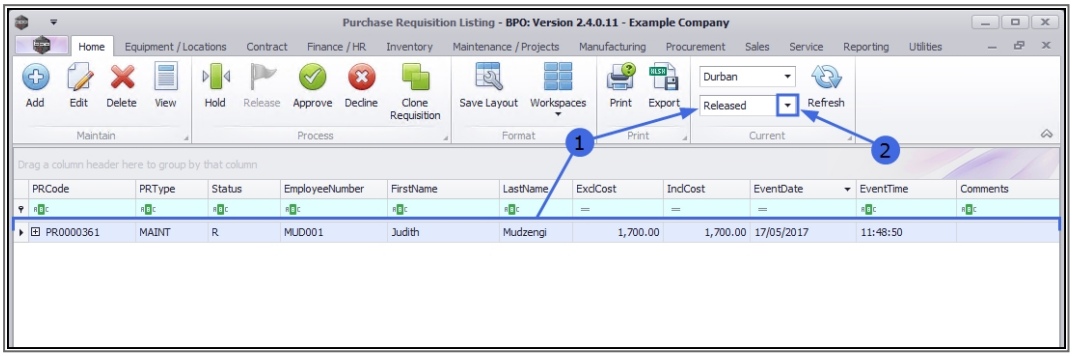
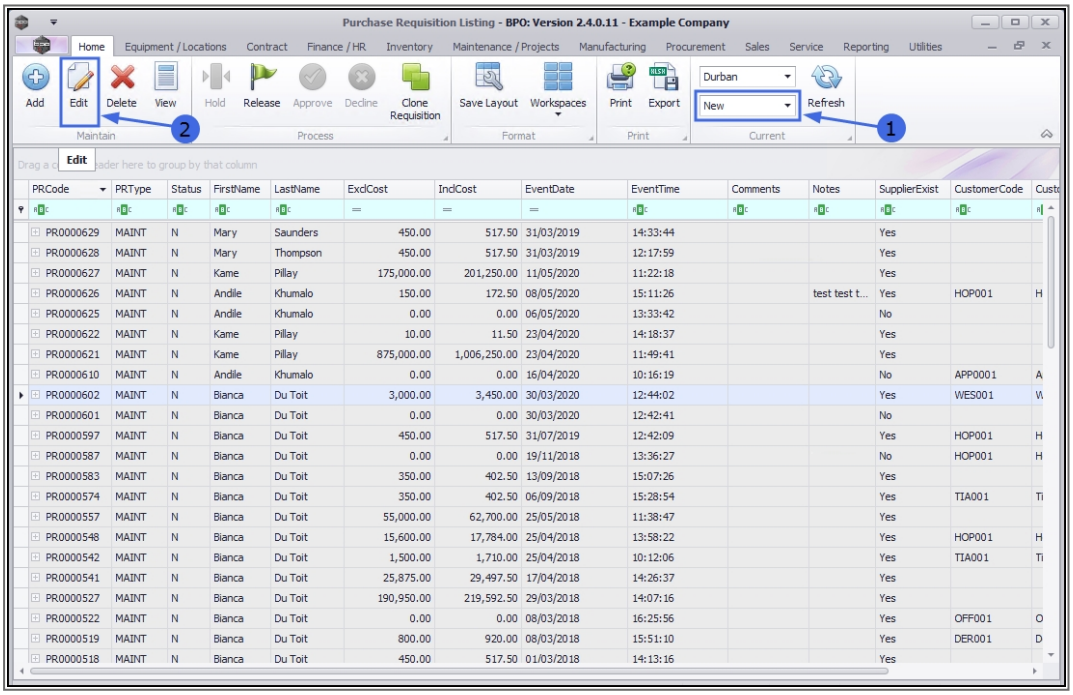
1. The requisition will be ***removed*** from the listing screen where the status is set to ***Released***.
2. Change the screen status to ***New***.



EDIT REQUISITION ITEMS

1. The requisition can now be found in the ***Purchase Requisition Listing*** screen where the status is set to ***New***.
    - Now you will be able to ***edit*** the requisition.
2. Click on ***Edit***.



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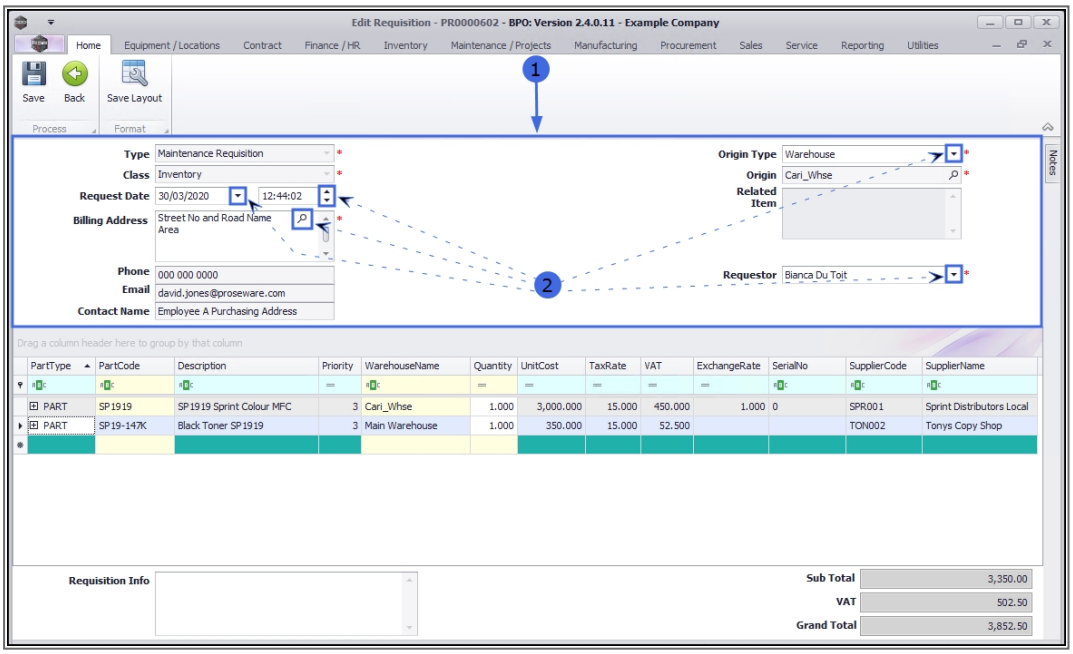
The ***Edit Requisition*** screen will be displayed.

EDIT REQUISITION HEADER INFORMATION

1. In the ***Requisition Header*** frame, you have to the ability to edit the following fields:
    - Request Date and Time
    - Billing Address
    - Origin Type and Origin
    - Requestor
2. Either use the drop-down ***arrow*** or the ***search*** button in the relevant field to open a ***list*** or a '***Select...***' screen from which you can pick an alternative field entry.



EDIT REQUISITION ITEMS FRAME

In the Items Frame, you can edit the following:

Add Item

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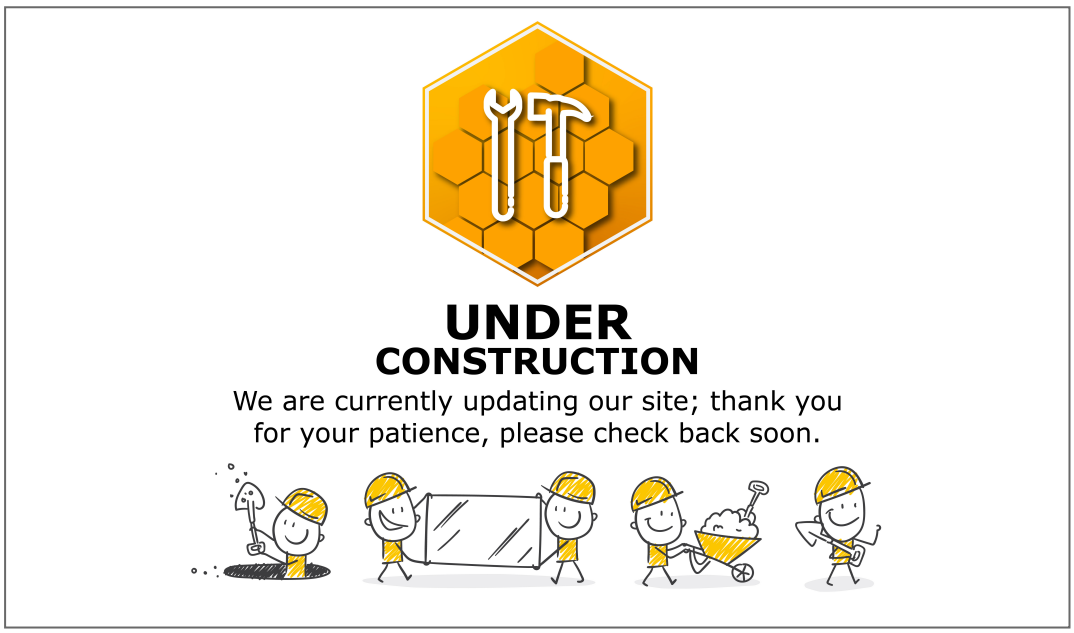
Edit Item

Edit Item Supplier

Delete Item

...

This Topic page is currently being updated, thank you for your patience. Please check back soon.



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