

How To Edit a Submitted Requisition

If you have submitted a requisition and need to make additional edits, the steps below will show you where and how to do so. You will be shown how to change Chartfield codes, product/service amounts, and add more attachments.

Edits cannot be made if a purchase order has been issued from the requisition – in that case, please reach out to your <u>buyer partner</u> or submit a service request via <u>service.kennesaw.edu/ofs</u> for assistance.

- 1. Log in to PeopleSoft via <u>https://www.usg.edu/gafirst-fin/</u>by clicking GeorgiaFIRST Financials under Core Users on the right of the page. You will be prompted to log in using Duo.
- 2. Click the compass icon at the top right of the page. This opens the NavBar menu.
 - a. NOTE: Do not click the *GFM Shopper Access* tile to get to the marketplace. It routes you through "Window Shopper" mode, through which you will not be able to complete your order.



- 3. In the NavBar menu, click Navigator > eProcurement > Manage Requisitions.
- 4. On the new page, clear out Date To/From, Request State, and Origin.

Manage Requisitions					
Requisition Search Keyword Search					
Search Requisitions					
To locate requisitions, edit the criteria be	elow and click th	e Search button.			
Business Unit 43000	Q	Requisition Name			Q
Requisition ID	Q	Request State	~	Budget Status	~
Date From	31	Date To	1	Origin	Special Reques 🗸
Requester	Q	Entered By	Q	PDID	
					Marketplace Requisition
Search Clear		Show Advanced Search			Special Request

- 5. Enter the **Requisition ID** of the requisition you need to edit and press **Search**. The requisition information will show up below.
- 6. At the right of the requisition listing, there is a dropdown menu. Click it and select **Edit**, then press **Go**. You will get a message about the requisition pending approval, press **OK**.

Requisitions (2)									
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	Request State	Budget	Total		
•	0000535673	Capital Restoration/CY	43000	10/11/2019	Pending	Not Chk'd	1,253.88 USD Edit	Go	



- 7. For the three most common types of edits, follow the below instructions:
 - a. Edits to Chartfield information:
 - i. To change codes (Account, Fund, Dept, etc.), click the grey triangle next to the line item (you'll be able to change the **Ship To code** in this dropdown area). Next, click the grey triangle next to Accounting Lines.

Item ID	Supplier		Quantity	UOM		Price	Total	Details	Comments	De
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Address			Add One Time Ad	Inments Idress Price	Price	Price 526.7500	Price Adjus			
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Due Date		B								
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Accounting Lines					Personalize	Find View All	🗷 🔜 🛛 Firs	🛞 1 of 1	East	
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*Account	Fund	Dept		Program		Class	Budget Referen	ce		
	-								_	
	Item ID -Ship To Address Attention To Dee Date Saip Via resignt Form Counting Lines -Distributory Accounting Lines Datemark	tem ID Supplier Office Interiors, Inc. *Ship To Address Attention To Due Date Ship Via Preight Terms Poistribung/ 2/97 → Si Accounting Lines Chartfletds1 Chartfletds2 Chartfletds3 Account	Item ID Supplier Office Interiors, Inc. - Ship ToQ Address Address Address Ship Via Freight Terms - COB DEST - Distributiony ZrySpeedChart Accounting Lines - Distributiony ZrySpeedChart Accounting Lines - ChartheldasChart	Item ID Supplier Ouantity Office Intentors, Inc. 10000 -Ship To	Item ID Supplier Outantity UOM Office interiors, Inc. 10000 Each "Ship To	Item ID Supplier Outanity UOM Office Interiors, Inc. 10000 Each *Ship To Ship To Ship To Casantity Address Ship To Casantity Other Time Address Address Ship To Casantity Price Address Ship To Casantity Price Address Ship To Casantity Price Ship Via VENDOR Ship Via Price Accounting Lines Freight Terms FOR DEST Q Accounting Lines Personalize Personalize Charthelds1 Charthelds2 Charthelds3 Details Accounting Lines Freight Terms For Sanatize Charthelds1 Charthelds2 Charthelds3 Charthelds1 Charthelds3 Petails Account Fund Dept	Item ID Supplier Outantity UOM Price Office Interiors, Inc. 10000 Each 528 7500 *Ship To	Item ID Supplier Quantity UOM Price Total Office interiors, Inc. 10000 Each 528 7500 526 75 - Ship To Q Ship To Q CommentLikRachments Address Price 528 7500 Price Agus Price 528 7500 Price Agus Price 528 7500 Price Agus Pregong Vin Attention To Price Sector Price Sector Price Agus Pregong Vin Attention To Price Sector Price Agus Price Sector Price Agus Pregong Vin Accounting Lines Presonatice Find View All [D] [N First Pristikhol Agus Charthedga2 Chart Agus Details Details 2 Asset Information 2 Budget Information Account Find Dept Program Class Bidget Information	Rem ID Supplier Quantity UOM Price Total Details Office Interiors, Inc. 10000 Each 528 7500 528.75 Image: Control of Con	Nem ID Supplier Quantity UOM Price Total Details Comments Office interiors, Inc. 10000 Each 528.750 528.75 Immovestight Immovestight *Ship To Ship To Ship To Quantity 10000 Each 528.750 Price Adjustment Address Ship To Comments/Atachments Address Price Adjustment Price Adjustment Address Ship To Operation Details Comments/Atachments Price S28.7500 Price Adjustment Price Adjustment Price Adjustment Price Adjustment Price Adjustment Price Adjustment Obs Date Ship To SpeedChart Price Adjustment Price Adjustment Accounting Lines Presonatice [Find] View All [A] First 1 of 1 © Last Charthelds1 Charthelds2 Price Adjustment motion Program Accounting Lines Price Adjustment motion Program Last

- ii. Click the **Chartfields2** tab to edit account codes and the budget reference (fiscal year). Click the **Chartfields3** tab to edit the project code.
- b. Edits to amount:
 - i. To change the amount of the requisition, please confirm a Purchase Order has not yet been issued. If the requisition is still in the approvals stage, you can edit it.
 - ii. Instead of clicking the grey triangle, you will click the description of the line under **Description**. This will bring you to a familiar screen, in which you can edit the amount, supplier information, additional information, etc.

Expand lines to review shipping and accounting details					Add More Item	IS				
Requisition	Lines 👔									
Line D	Description	Item IT	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ 🗆 1 👷 <mark>⊦</mark>	IP Color LaserJet Pro MFP /479		hern Computer phouse	2.0000	Each	419.8700	839.74	R.	🖗 Edit	
Select	t All / Deselect All	Select lines to:	🍺 Add to Favorites	Add to Template(s)	Delete Selected	1	Mass Change			

c. Add **attachments**:

i. On line one, click the comments chat bubble to add more comments/attachments.

Expand lines to review shipping and accountin	g details	Add More Items					
Requisition Lines ②							
Line Description	Item ID	Supplier	Quantity	UOM	Price Details Comments	Delete	
HP Color LaserJet Pro MFP M479		Southern Computer Warehouse	2.0000	Each	419.8700 🖉 Edit		
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected	Mass Change		

8. When you've completed your edits, click Save & Submit.