1. Editing Cart Items

As a Requisitioner you can edit any or all of the information in the cart, or you can choose to send it back to the Shopper to make the changes.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the <strong>Action Items</strong> link.</td>
<td></td>
</tr>
<tr>
<td>Click the <strong>Requisitions to Approve</strong> link under My Assigned Approvals</td>
<td></td>
</tr>
<tr>
<td>Open the Requisition you wish to address</td>
<td></td>
</tr>
<tr>
<td>If you decide to change a detail on an item or items in the cart, you can…</td>
<td></td>
</tr>
<tr>
<td>Click the check box <strong>✓</strong> next to the item/s. Then,</td>
<td></td>
</tr>
<tr>
<td>Use the drop down menu (found on top right of page) listing the BuyWays available Edit/change actions</td>
<td></td>
</tr>
</tbody>
</table>

6. Select an action from the list.

For example, if you want to change the **Commodity code** of an item/s in a cart. To do this, you would…

7. **Select** the **Change Commodity Code** action option followed by the **Save** button.

A message then appears letting you know that the action was Successful. Your final step is to…

8. Click the **Update** button.

**NOTE:** You may want to practice the other edit functions to complete your understanding of this function in UMass BuyWays.
2. Acting On Returned Requisitions

An Approver can return a requisition to a Requisitioner for edits. Typically the Approver will leave a comment indicating why the requisition is being returned.


2. Click the Shopping Cart Name link

3. Click the tab to view the comments added by the Approver.

For this example, the Approver wants the cart owner to change the commodity codes for the line items.

4. Click the tab and scroll down to the line item that needs to be changed.

5. Click the view/edit by line item link button.

6. Select the correct commodity codes from the drop-down menu.

7. Click the button.
### 3. Viewing Cart Approvals

You can view the approvals and workflow steps that a requisition needs to pass through before the order is sent to the vendor.

Begin by accessing the cart you wish to view.

1. Click the **Carts > Active Cart** link.
2. Click the **button**.
3. Click the **link**.

The **Workflow** graphic appears. The **Workflow** indicates the steps required before a Purchase Order can be created. Each step requires approval.

To view the list of **Approvers** assigned to each step,

4. Click on the **view approvers** links located on each workflow Approvers step. When done,
5. Click the **button** followed by…
6. Clicking the **link** to return to the requisition screen.

### 4. Populating Line Item Details

In a requisition, various details such as, **account codes** and **speedtypes** values are often entered at the header level and apply to the whole requisition. However, the Requisitioner can modify the values – **per line item** – as required. This ability ensures that each line item in the requisition has the appropriate information associated with it.

Start from the **home/Shop** screen.

1. Click the **Carts Assinged to Me** link
2. Locate the shopping cart you want to modify.
3. Click on the Shopping Cart Name in the requisition list.
4. Click on the **button**.
5. Click the **Summary** tab.

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*Populating procedure continued on page 4*
4. Populating Line Item Details - Continued

5. Click on the link.

A summary screen appears. The detail tabs across the top of the requisition are used to change line item details within the requisition.

To change the Accounting Codes on a line item,

6. Click the Accounting Codes detail tab.

7. Scroll to the line item you want to modify.

8. Click the button

An Accounting Codes overlay screen appears.

9. Click the link for Speedtype value.

The Custom Field Search screen appears.

10. Click in the Description field box and type your campus name, e.g. Amherst.

11. Click the button and select the appropriate value for the line item.

12. Click the Select from all values... for Account value. This time,

13. Click the Search button only and select the appropriate value. When you have finished populating the line item.

14. Click the Save button.

15. Repeat steps 10 – 15 for the remaining line items on the requisition.