Introduction
This guide explains how to amend a requisition when it is in workflow (i.e. it has been rejected by the Checker or Approver and has been returned to you in task manager).

This guide covers how to:
A. Amend the requisition details or GL analysis (coding) in the Requisition approval screen.
B. Add new lines or cancel/close off lines in a requisition

A requisition cannot be amended once it has been approved by the Approver, and the purchase order (PO) generated and sent to the supplier. To amend or cancel items on a PO follow the instructions in guide P2P04 – Receiving & returning goods and services.

Audience
Staff who have the Requisitioner role in Business World and are therefore responsible for purchasing goods and services.

A. Steps to amend the requisition details or GL Analysis (coding)
Most details in the Requisition details or GL Analysis sections can be edited in the Requisition approval screen. Things you will typically amend here include:

- Quantity
- Price
- Description
- Subproject
- Tax code

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<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1.</td>
<td>Click the Task icon to display your tasks awaiting action</td>
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<tr>
<td>2.</td>
<td>Click the Requisition rejected task. The Requisition approval screen opens.</td>
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Note: if you have more than one rejected requisition, select the relevant one from the list in the left hand pane.

Information icon
3. Review each line in the **Requisition details** section e.g. line one (highlighted in blue):
   1. Review the Checker/Approver’s comment
   2. Amend the details accordingly
   3. Check the box to select the line you have amended
   4. Click **Approve** to “approve” your changes. The status of the line is marked “Approve”
   5. If required, add a comment for the Checker/Approver.

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Only lines that have been rejected by the Checker/Approver are edit-able. Lines that have been approved will display but are read-only.

4. Repeat step 3 for each line in the **Requisition details** section.
5. Once you have processed all lines click **Save**. A success message is displayed.

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**What happens next?**
The revised requisition is sent back to the Checker/Approver for approval.

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**B. Steps to add new lines or to cancel/close off lines in your requisition**

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<tr>
<td>1.</td>
<td>Follow steps 1-2 in the previous section.</td>
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<tr>
<td>2.</td>
<td>At step 3, review the Checker/Approver’s comment. If you need to add or close off (remove) lines from your requisition, close the <strong>Requisitions approval</strong> window and return to the <strong>Procurement</strong> page.</td>
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<td>3.</td>
<td>Select <strong>Requisitions&gt;Requisitions marketplace</strong></td>
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<td>4.</td>
<td>Click <strong>Open</strong> at the bottom of the screen.</td>
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<tr>
<td>5.</td>
<td>In the <strong>Value lookup</strong> window click <strong>Search</strong>. A list of your requisitions “in progress” will be displayed.</td>
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</table>
6. Click the requisition line. The requisition opens on the Requisition entry tab.

7. Go to the Requisition details tab.

8. To add a new line click Add then enter the details.

9. To temporarily close off a line:
   a. Check the box on the left to select the line
   b. Click Park.
   c. The Status of the line changes to Parked. The Quantity and Amount are unchanged.

Note: Click Reset to un-park the line.
10. To permanently close off a line:
   a. Check the box on the left to select the line
   b. Click Close.
   c. The Status of the line changes to Closed. The Quantity and Amount set to 0.00 and the line is greyed out (read-only)

11. Click Save to save your changes and send your requisition back to the Checker/Approver.

What happens next?

The revised requisition is sent back to the Checker/Approver for approval. Any parked or closed lines are read-only.

Where to go for help

If you need help with the system contact businessworld@bbk.ac.uk. If you have questions about the procurement process or need guidance on VAT or tax codes, contact the Procurement Team.