Business World Quick Guide P2P02
Amend or cancel a requisition

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

It covers how to:
A. Amend the requisition details or coding (GL analysis)
B. Add new lines or cancel/close off lines in a requisition
C. Close off all lines/cancel the whole 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. Amend the requisition details or coding (GL Analysis)
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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Task icon to display your tasks awaiting action</td>
</tr>
<tr>
<td>2.</td>
<td>Click the Requisition rejected task. The Requisition approval screen opens.</td>
</tr>
</tbody>
</table>

Rejected Sales Order Order No: 30000001 CustomerID: 100157 Purch...

Rejected supplier request (2)
Requisition rejected
Go to Task management
Note: if you have more than one rejected requisition, select the relevant one from the list in the left hand pane.

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 (in this case change the quantity)
   3. Check the box on the left to select the line
   4. Click Approve to “approve” your changes. The status of the line is marked “Approve”
   5. Add a comment for the Checker/Approver.

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

4. Repeat step 3 for each line that needs to be amended.
5. Once you have processed all lines click Save. A success message is displayed.

What happens next?
The revised requisition is sent back to the Checker/Approver for approval.
B. Add new lines or cancel/close off lines in a requisition

<table>
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<tr>
<td>1.</td>
<td>Follow steps 1-2 in Section A.</td>
</tr>
<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 Requisitions approval window and return to the Procurement page.</td>
</tr>
<tr>
<td>3.</td>
<td>Select Requisitions &gt; Requisitions marketplace</td>
</tr>
<tr>
<td>4.</td>
<td>Click Open at the bottom of the screen.</td>
</tr>
<tr>
<td>5.</td>
<td>In the Value lookup window click Search. A list of your requisitions “in progress” will be displayed.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the requisition line. The requisition opens on the Requisition entry tab.</td>
</tr>
<tr>
<td>7.</td>
<td>Go to the Requisition details tab.</td>
</tr>
<tr>
<td>8.</td>
<td>To add a new line click Add then enter the details.</td>
</tr>
</tbody>
</table>
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.

   ![Diagram](image)

   Note: To unpark the line, check the box on the left and click **Reset**.

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 becomes read-only.

   ![Diagram](image)

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

   ![Diagram](image)

What happens next?
The task disappears from your task list. The revised requisition is sent back to the Checker/Approver for approval. Parked or closed lines are still listed in the **Requisition details** section but have been removed from the workflow and do not need to be actioned.
C. Close off all lines/cancel the whole requisition

<table>
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<tr>
<td>12.</td>
<td>Follow steps 1-2 in Section A.</td>
</tr>
<tr>
<td>13.</td>
<td>At step 3, review the Checker/Approver’s comment. If you need to cancel the whole requisition (i.e. close off all the lines), close the <strong>Requisitions approval</strong> window and return to the <strong>Procurement</strong> page.</td>
</tr>
<tr>
<td>14.</td>
<td>Select <strong>Requisitions&gt;Requisitions marketplace</strong></td>
</tr>
<tr>
<td>15.</td>
<td>Click <strong>Open</strong> at the bottom of the screen.</td>
</tr>
<tr>
<td>16.</td>
<td>In the <strong>Value lookup</strong> window click <strong>Search</strong>. A list of your requisitions “in progress” will be displayed.</td>
</tr>
<tr>
<td>17.</td>
<td>Click the requisition line. The requisition opens on the <strong>Requisition entry</strong> tab.</td>
</tr>
</tbody>
</table>
| 18.  | Go to the **Requisition details** tab.  
To cancel the requisition:  
d. Check the box to the left of each line  
e. Click **Close**.  
f. The **Status** of each line changes to **Closed**. The **Quantity** and **Amount** set to 0.00 and the lines become read-only. |
| 19.  | Click **Save** to save your changes. |
What happens next?
The task disappears from your task list. The whole requisition is removed from workflow. The workflow status changes to ‘No Workflow’...

...and the **Ordered** quantity and **Amount** for the whole requisition is set to 0.00.

Where to go for help
If you need help with the system raise an ASK query. If you have questions about the procurement process or need guidance on tax codes, contact the Procurement Team.