Introduction
This guide explains how procurement Checkers and Approvers approve or reject a requisition.

Audience
Staff who have been assigned the procurement Checker or Approver role.

Process
Here is the basic workflow for raising a requisition.

- The Checker is only involved in the workflow if the value of the requisition is greater than £25K.
- The Checker role is optional but the role has to be populated to ensure the workflow works.
- In some departments the Approver and Checker are different people. In other departments they are the same person.

For more information about the Checker and Approver roles, read the User Roles in Business World guide on the Business World website.

Steps to approve or reject a requisition

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1.</td>
<td>Click the Tasks icon in the application toolbar.</td>
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<tr>
<td>2.</td>
<td>Click the task to open it. The Requisition approval screen opens.</td>
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<td>3.</td>
<td>Each line in the requisition needs to be approved or rejected. Starting with line one, review the requisition details in the Requisition details section, and the coding in the GL Analysis section below.</td>
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</table>
Always check the GL Analysis section for each line in the Requisition details section, as the costs may be split between different subprojects. See appendix for further information.

4. To approve the line
   a. Check the box on the left
   b. Click Approve.
   c. “Approve” is displayed in the Status column.

5. Now click line two in the Requisition details section, and repeat steps 3 & 4.

6. To reject the line:
   a. Check the box on the left
   b. Click Reject back to requisitioner.
   c. “Reject back to requisitioner” is displayed in the Status column.
7. Enter a comment in the comment box to explain why you are rejecting the line.

It is good practice for Approvers and Checkers to also add a comment to lines they are approving to indicate they have reviewed the requisition and agree with the purchase. This is particularly important for requisitions over £50K in value, where secondary approval is required.

8. If required, click the Document Library icon to view any attachments (e.g. supplier quotes).

Note: the paperclip icon is blue when there are documents attached.

9. When you have approved or rejected all the lines in the Requisition details section, click Save at the bottom of the screen. A success message is displayed.

10. Click OK.

- Only Requisitioners and Checkers can edit requisitions.
- If you are an Approver only (i.e. are not also a Checker) you cannot edit a requisition. You need to return it to the Requisitioner or Checker for amendment.

What happens next?
If all lines are approved the requisition is approved and automatically converted into a purchase order then sent to the supplier.

If any of the lines are rejected the whole requisition is routed back to the Requisitioner for amendment. Only rejected lines can be edited. Approved lines will be read-only.

Where to go for help
If you need help with the system please raise a query in ASK to the Business World Support team. If you have questions about the procurement process or need guidance on tax codes, raise a query in ASK to the Procurement Team.
Appendix: Approving requisitions charged to different subprojects

A. Approving requisitions where the costs of an item are split between different subprojects

In this example, you can see from the GL Analysis that the costs for the line in the Requisition details section have been split between two different subprojects. This is what the approver for subproject 100892-10 sees.

Because the costs are split, the approver approves the line in the GL Analysis section. This is indicated by the black Map icon. The other line in the GL Analysis section is approved by the approver for subproject 100953-10, so is read-only here.

B. Approving a multi-line requisition where items are charged in full to different subprojects

In this example, there are multiple lines in the requisition, each being charged in full to a different subproject. This is what the approver for subproject 100892-10 sees.

The approver approves the line in the Requisition details section. This is indicated by the black Map icon. The other lines in the Requisition details section are approved by the approvers for the other subprojects, so are read-only here.