**Business World Quick Guide P2P06**

**Approve a requisition**

**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.

- **Requisitioner**
  - Creates requisition in Business World

- **Checker** (if value > £25K)
  - Checks requisition

- **Approver**
  - Approves requisition

- PO number

- Purchase order auto-generated and sent to supplier

- 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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<tr>
<td>1.</td>
<td>Click the <strong>Tasks</strong> icon in the application toolbar.</td>
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<tr>
<th>Your tasks</th>
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<tr>
<td>REQ - Cost centre approval</td>
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<th>Group by</th>
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<td>Go to Task management</td>
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| 2.   | Click the task to open it. The **Requisition approval** screen opens. |

| 3.   | 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. |
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 is 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.