



Amending Requisitions

Navigate: iProcurement Home page > Requisitions Tab

Amendments can only be made to requisitions that have not yet been created into a purchase order, so this must be checked first.

Pre-Requisite

Check whether the requisition has not yet been created into a purchase order

Click on Requisitions Tab and find the requisition. If there is no number in the Order field then it has not yet been created into a purchase order and you are fine to make changes.

If a requisition has been created into a purchase order no changes or cancellations can be made by the requisitioner. The requisitioner must contact the buyer to advise of the amendments to be made and the buyer will amend the order accordingly

Requisition not yet approved, Incomplete status:

If the requisition is incomplete, you cannot cancel it. You will need to complete it, which will put the lines back into your shopping cart, and then use the bin icon to delete the lines.

Requisition Approved, Approved status:

If the requisition has been approved the requisitioner can cancel the entire requisition, a line or make any changes, as long as there is no associated purchase order number.

Requisition Rejected, Rejected status:

If a requisition has been submitted for approval but it is incorrect the approver will reject it with a reason why and the requisitioner will receive an e-mail notification. If a rejected requisition was coded to a grant, funds will still be reserved against the grant. The requisitioner must either resubmit the requisition with the required amendments to the approver, or cancel it.

Request Information, In Process status:

A requisition may appear in My Notifications as the approver requires further information before they proceed with the approval. The requisitioner will receive an e-mail notification as well advising of this.

The next page will guide you through how to cancel a line, requisition make a change and re-submit a requisition.

Deleting an incomplete requisition

1. Select the relevant requisition and click on **Complete**. The lines from the requisition will display in your shopping cart, where you can click on the bin icon for each of the lines.

Shop | Requisitions | Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: All My Requisitions [Go]

Indicates requisition with a pending change request.

Select Object: [Copy To Cart] [Cancel Requisition] [Change] [Complete]

Select	Requisition	Description	Status	Order
<input checked="" type="radio"/>	689711	Officeteam Essentials Box File, Blue, Foolscap, 208100061	Approved	
<input type="radio"/>	689710	Centrifuge Tube With Flat Top Cap Polypropylene 15ML 8400 X G Max Corning	Incomplete	
<input type="radio"/>	689702	Centrifuge Tube With Flat Top Cap Polypropylene 15ML 8400 X G Max Corning	Approved	1739231

Canceling an entire requisition or line

1. From the **Requisitions Tab**, **Find** and then **Select** the requisition.

Remember if there is a number in the order field then you cannot cancel from this screen. Refer to separate guidance on 'cancelling orders'.

Shop | Requisitions | Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: All My Requisitions [Go]

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<input checked="" type="radio"/>	689711	Officeteam Essentials Box File, Blue, Foolscap, 208100061	Approved	
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2. Click **Cancel Requisition**.

All lines of the requisition will display.

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Cancel Requisition 689711 (99.75 GBP): Select Lines

[Return] [Cancel Entire Requisition] [Continue]

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price	Amount (GBP)	Select
[Show]	1	Officeteam Essentials Box File, Blue, Foolscap, 208100061	Purchase	28-Jan-2014 00:00:00	Each	1	8.61	GBP 8.61	<input type="checkbox"/>
[Show]	2	Officeteam Essentials Box File, Yellow, Foolscap, 206100080	Purchase	28-Jan-2014 00:00:00	Each	1	91.14	GBP 91.14	<input type="checkbox"/>

[Return] [Cancel Entire Requisition] [Continue]

3. You can either:
 - a. select a line and click **Continue** to cancel that line only or

- b. click on **Cancel Entire Requisition**.
4. Click **Submit** on the Review and Submit screen.
5. A message will display advising you that the cancellation has been submitted for processing.
6. Click **Return to Requisition Status**. Any lines that you have cancelled will be a nil value and will have the cancelled indicator icon 
7. The line or requisition will no longer be able to be created into a purchase order.

Withdrawing a requisition to make changes

1. Find the requisition and click on the **requisition number**.

Remember if there is a number in the order field then you cannot withdraw the requisition.
2. Click **Change**.
3. The system will advise you that you are withdrawing it from the approval process. Click **Yes**.
4. Items will be back in your shopping cart.
5. You cannot make changes to the quantity or price if the item is from the Marketplace. If you need to change either of these then **delete the line**, click **Shop**, go back into the Marketplace, search for the item and add it to your cart.
6. If it is a Non-Catalog item then you can amend the quantity and price.
7. Click **Checkout** to complete the process making any relevant changes as you proceed.
8. If the requisition is within your approval limit, click **Submit**
9. If the requisition is outside your approval limit, click **Next** (the name of the approver will default in, amend if you are sending it to another approver) and **Submit**.

Amending a rejected requisition

1. Find the rejected requisition in My Requisitions.
2. Click on the **Rejected** status to find out why and click **OK**.

- Follow the process on 'Withdrawing a requisition to make changes' and make the relevant change to correct the rejection. Remember funds are still reserved if a Grant code was entered when checking out!

Requisition has been returned to you

Before your requisition is created into a purchase order it sits in a requisition pool for your department awaiting creation into a purchase order. Your requisition can still be returned to you at this stage.

If this happens you will receive an email notification advising of the return. You would then follow the steps to **Change** the requisition. A screen similar to that on the next page will display.

Shop: Stores >
Requisition 689873

Copy To Cart Cancel Requisition Change Receive

Description **multi line various supplier**
Created By **Delegate290, Del**
Creation Date **06-Mar-2014 13:42:04**
Deliver-To
Justification

Requisition Status **Returned**
Change History **No**
Attachment **None**
Note to Buyer

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (GBP)	Details	Order
1	R-Kive System Transfer File, Capacity 123mm, 01805	13-Mar-2014 00:00:00	LB	Each	5	35.37 GBP	176.85		1739442
2	R-Kive System Transfer File, Capacity 78mm, 01800 268052	13-Mar-2014 00:00:00	LB	Each	6	33.17 GBP	199.02		1739439
3	R-Kive System File Store Module, 530mm(W) x 380mm(H) x 290mm(D), 01880	13-Mar-2014 00:00:00	LB	Each	3	79.79 GBP	239.37		1739439
4	BOX, FILE, YEL; Colour:Yellow; Material:Recycled Paper; Paper Size:A4	13-Mar-2014 00:00:00	LB	Each	10	3.66 GBP	36.60		
5	FILE BOX, PLASTIC, YEL	13-Mar-2014 00:00:00	LB	Each	3	9.48 GBP	28.44		
6	R-Kive System Transfer File, Capacity 123mm, 01805	13-Mar-2014 00:00:00	LB	Each	5	35.37 GBP	176.85		
7	R-Kive System Transfer File, Capacity 78mm, 01800 268052	13-Mar-2014 00:00:00	LB	Each	6	33.17 GBP	199.02		1739443
8	R-Kive System File Store Module, 530mm(W) x 380mm(H) x 290mm(D), 01880	13-Mar-2014 00:00:00	LB	Each	3	79.79 GBP	239.37		1739441
9	BOX, FILE, YEL; Colour:Yellow; Material:Recycled Paper; Paper Size:A4	13-Mar-2014 00:00:00	LB	Each	10	3.66 GBP	36.60		1739445
10	FILE BOX, PLASTIC, YEL	13-Mar-2014 00:00:00	LB	Each	3	9.48 GBP	28.44		1739440
Total							1,360.56		

Return Copy To Cart Cancel Requisition Change Receive

What you will notice is that all the lines from the requisition will display.

- If there are any lines with a hyperlinked purchase order number then those lines have been created into an approved order and therefore submitted to the supplier.
- If there is a purchase order number that is not hyperlinked then that line has been created into an order but the order is not yet approved. If this is the case, you will be unable to make any changes to the remaining requisition lines until that order is approved, contact your buyer and ask them to approve the order.

From here you would click on **Change** and your shopping cart will display and an icon will be displayed in any line that has been created into an order and approved.

iProc Detailed Procedure Amending Requisitions

Shopping Cart

Indicates that line has been placed on an order.

Line	Item Description	Unit	Quantity	Price	Amount (GBP)	Delete
1	R-Kive System Transfer File, Capacity 123mm, 01805	Each	5	35.37 GBP	176.85	
2	R-Kive System Transfer File, Capacity 78mm, 01800 268052	Each	6	33.17 GBP	199.02	
3	R-Kive System File Store Module, 530mm(W) x 380mm(H) x 290mm(D), 01880	Each	3	79.79 GBP	239.37	
4	BOX, FILE, YEL; Colour:Yellow; Material:Recycled Paper; Paper Size:A4	Each	10	3.66 GBP	36.60	
5	FILE BOX, PLASTIC, YEL	Each	3	9.48 GBP	28.44	
6	R-Kive System Transfer File, Capacity 123mm, 01805	Each	5	35.37 GBP	176.85	
7	R-Kive System Transfer File, Capacity 78mm, 01800 268052	Each	6	33.17 GBP	199.02	
8	R-Kive System File Store Module, 530mm(W) x 380mm(H) x 290mm(D), 01880	Each	3	79.79 GBP	239.37	
9	BOX, FILE, YEL; Colour:Yellow; Material:Recycled Paper; Paper Size:A4	Each	10	3.66 GBP	36.60	
10	FILE BOX, PLASTIC, YEL	Each	3	9.48 GBP	28.44	
Total					1,360.56	

Click on **Checkout** to display the checkout requisition information screen. Once you click on **Edit Lines** only the lines not yet created into an order will be listed for you to amend as need-be.

Shop | Requisitions | Receiving

Requisition Information Approvals Review And Submit

Requisition Information: Edit Lines

* Indicates required field

Delivery | Billing | Accounts | Attachments

Select Lines:

[Select All](#) | [Select None](#)

Select Line	Description	Need-By Date	Requester	Deliver-To Location
<input type="checkbox"/> 4	BOX, FILE, YEL; Colour:Yellow; Material:Recycled Paper; Paper Size:A4	13-Mar-2014	Delegate290, Del	LB
<input type="checkbox"/> 5	FILE BOX, PLASTIC, YEL	13-Mar-2014	Delegate290, Del	LB
<input type="checkbox"/> 6	R-Kive System Transfer File, Capacity 123mm, 01805	13-Mar-2014	Delegate290, Del	LB

TIP Click on the Split icon in the Accounts or Billing tab to Track as Asset or to allocate costs to multiple projects.

Once amendments have been made either submit if it's within your limit or forward for approval.