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 **Delete.** A message will display asking you to confirm you wish to delete the requisition.

Cancelling 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'*.

2. Click **Cancel Requisition.**

   All lines of the requisition will display.

Cancel Requisition 2089528 (5,000.00 GBP): Select Lines

Details	Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (GBP)	Select	Reason
▶	1	Microscope	Purchase		03-Nov-2021 00:00:00	EA	1	5000 GBP	5,000.00	☐	

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 with 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 <u>cannot</u> 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. Complete the **Checkout** 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, add an 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**.

3. 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.

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 any items which have not been autocreated into a purchase order will display in the checkout.

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