



## Business World User Guide

Title	Requisition Approval – Non Schools
Summary	<p>A requisition is a document that is created by the Requesting Officer and saved on the Business World system. Consider this the part of the process where you get the thumbs up to purchase the goods and services you want. You're not actually ordering anything; you're just getting the approval to do so. Therefore, the requisition is for internal use only and is a method of checking and approval before the purchase order or number of purchase orders are automatically created.</p> <p>In certain circumstances, but not all, the requisition will be sent to the Procurement Service (referred to as the Buying Team in this document) and will always be sent to the Cost Centre approver for action, checking and approval. The Buying Team is responsible for the buying activity (including sourcing appropriate suppliers for your requirement) for any spend above £10,000 that is not based on products from Contracted Suppliers. The Cost Centre authoriser is responsible for agreeing the spending from their budget.</p> <p>Every requisition will require the Cost Centre Authoriser to give a reason for the purchase/spend. A pop-up comments box will become available after clicking on the approval button. This is a free text box for you to complete as much detail as required regarding the reason for the purchase. This is an important step as once approved the requisition may route to the Cost Control Panel for further approval.</p> <p>Requisitions once raised by the Requesting Officer will be forwarded in workflow and will arrive in the Business World tasks of the person who is the approver of the cost centre and the Buying Team if applicable.</p> <p>This document is for all approvers of requisitions with the exception of schools approvers and will show you how to approve or reject tasks.</p> <p>Prior reading: <a href="#">Business World: Getting Started guide</a>.</p>
Audience	Cost Centre Approvers and The Buying Team Approvers
Content	<ol style="list-style-type: none"> <li>1. <a href="#">Requisition Approval</a></li> <li>2. <a href="#">Further information</a></li> </ol>

## 1. REQUISITION APPROVAL

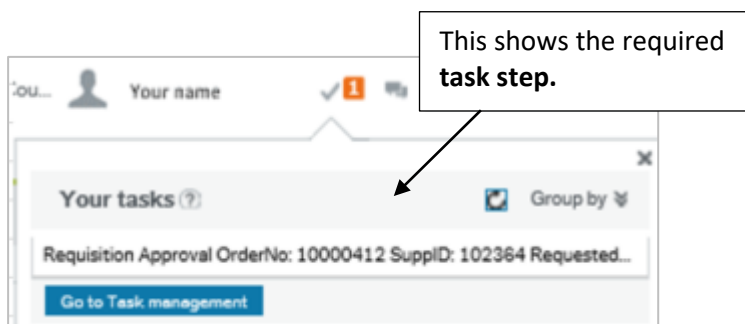
Requisitions will route to you as the Cost Centre authoriser and will be found in your Business World **Tasks**

When you receive a requisition for approval there are several actions that you can take which are listed below:

- Approve the whole requisition and give a reason the goods or service is required.
- Reject the whole requisition back to the Requesting Officer to either request more information, to request that they add some documentation or close the requisition line(s) as it is no longer required.
- Approve part of the requisition and give a reason the goods or service is required/or reject part of the requisition back to the Requesting Officer to either request more information, to request that they add some documentation or close the requisition line as it is no longer required. Any lines that have been approved, aggregated to a supplier will move on in the workflow.

Workflow tasks that you are required to do are found in the Tasks button in the top right of your screen. This will show a number in orange if there is something to do.

1.1. To look at your tasks, click on the orange box – a **Your tasks** pop-up will appear.



1.2. You can now either click on **Go to Task management** or **Requisition Approval** in the **Your tasks** pop-up.

A window like the one shown below will be displayed:

The workflow log shows the requesting officer an audit trail of how the document has progressed (in this example the name has been removed)

The screenshot shows the 'Requisition approval' window. It includes a 'Requisition information' section with fields for 'Your name', 'Requisition number' (10000412), 'Updated' (21/09/2019), and 'Deliv. addr.'. A 'Workflow log (row 1)' section shows a log entry for '21/09/2019 19:21' with the action 'Distributed'. Below this is a 'Requisition details' table with columns for Map, Status, Funds check, Currency, Curr. amount, Quantity, Unit, Price, Product, Product description, Supplier, Responsible, Delivery date, and Status.

Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product	Product description	Supplier	Responsible	Delivery date	Status
			GBP	201.50	10.00	EA	20.15	LY101679	LYRECO HPC3...	102364		21/09/2019	Active
			GBP	312.60	30.00	EA	10.42	LY105104	LYRECO BLAC...	102364		21/09/2019	Active
			GBP	84.00	100.00	BOX	0.84	LY103596	LYRECO PLAIN...	102364		21/09/2019	Active

In the example above there are three requisition lines. Use the vertical and horizontal scroll bars to move around the window.

If you move further down the window, you can see the **Product text** section. This is where you will see any additional text that has been entered on the requisition line.

The screenshot shows the 'Additional information' section with a 'Product text' field. Below it is the 'GL Analysis' table with columns for Map, Status, Funds check, Account, Costo, Analysis, Legentity, Tax code, Tax system, Percentage, and Amount.

Map	Status	Funds check	Account	Costo	Analysis	Legentity	Tax code	Tax system	Percentage	Amount	
			A40100	AT0030		SO	P1		100.00	201.50	
									Σ	100.00	201.50

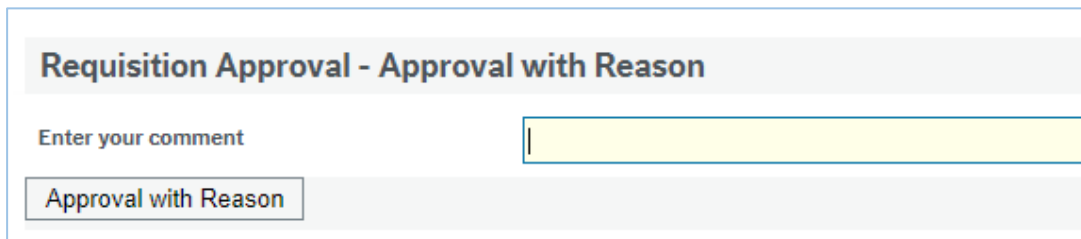
You will also see the **GL Analysis** section where you can view the coding

In the bottom left-hand corner of the window there are two buttons that you can use to action the requisition, and these are listed in the table below:

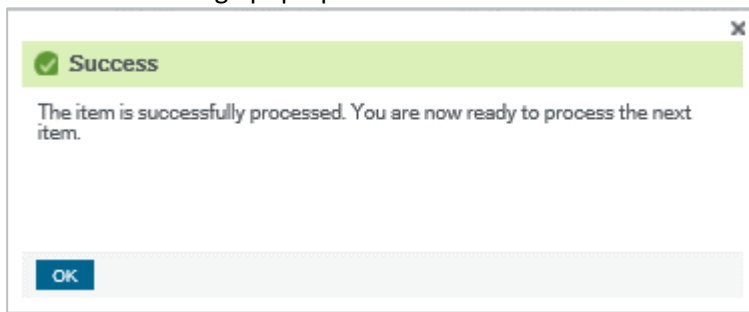
Approval with Reason	Will approve the whole requisition. A pop-up box will become available, and you must enter a comment to give the reason the goods or service are required. The requisition will then move on in workflow
Reject	This will reject the whole requisition which will be routed back to the Requesting Officer
Advanced Mode	Takes you to a window where you can approve or reject part of a requisition. A pop-up box will become available, and you must enter a comment to give the reason the goods or service are required.

### Approval with Reason

- 1.3. To approve the whole requisition, click on the **Approval with Reason** button. The following pop-up window will be available where you should enter the reason that the goods or services are required:



- 1.4. Once you have entered the reason click on the **Approval with Reason** button again and click **OK** to the message pop-up.



- 1.5. Click **OK**.

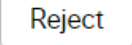
- 1.6. If you have completed all your approvals, click X to leave the Requisition approval window.

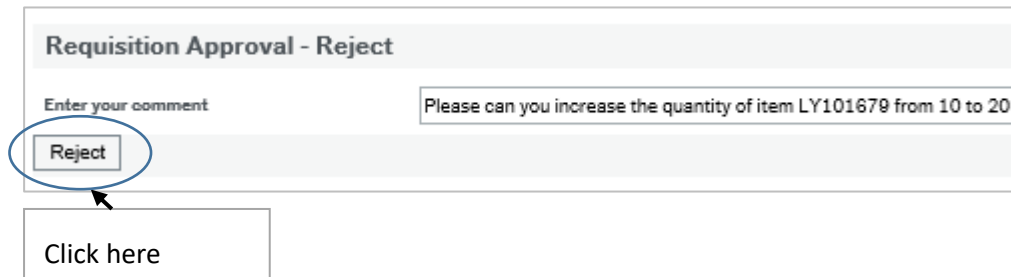


The requisition will now move forward in the workflow and will route to the Cost Control panel, if the value is over £500, for further approval. Once approved it will be converted to a purchase order and sent to the supplier automatically or it will be returned to the Requesting Officer to send on to the supplier.

## 2. REQUISITION APPROVAL

2.1 If you have received a requisition in your tasks and you want to reject it all, follow from steps 1.1 and 1.2 above.

2.2 To reject the document, click on the  button in the bottom left-hand corner. A rejection reason box will pop up and you will need to enter a reason you are rejecting the document, so the Requesting Officer knows what to do when it is returned to them.

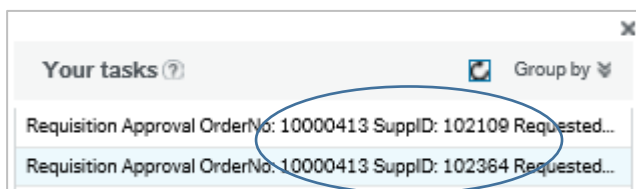


The requisition will now be returned to the Requesting Officer.

## 3. APPROVING PART OF A REQUISITION

3.1 If you have received a requisition which has requests for goods and services and it is to more than one supplier, you may want to approve part of it and/or reject part it. You can do so by following the process below:

3.2 Open the requisition from your Tasks to view it. You can tell that a requisition has been raised to more than one supplier as it is shown more than once in your Tasks. When you open it, all lines to all suppliers will be shown on the one requisition.



In the example below you can see there are four lines and two supplier id's.

Requisition details											
<input type="checkbox"/>	Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product	Product descripti...	Supplier
<input type="checkbox"/>				GBP	201.50	10.00	EA	20.15	LY101679	LYRECO HP C3...	102364
<input type="checkbox"/>				GBP	312.60	30.00	EA	10.42	LY105104	LYRECO BLAC...	102364
<input type="checkbox"/>				GBP	84.00	100.00	BOX	0.84	LY103596	LYRECO PLAIN...	102364
<input type="checkbox"/>				GBP	50.00	1.00	UN	50.00	QA40100	Equipment Purc...	102109
$\Sigma$					648.10						

Advanced mode

3.3 In order to approve part of the requisition you will need to click on the button in the bottom left-hand corner of your window. The button will now show as **Simple Mode**, but you are now in the **Advanced mode** (and if you click back on **Simple Mode**, it will take you back to the original window).

3.4 To approve or reject only some of the lines, you will need to click on the line(s) to tick them for selection.

Requisition details									
<input type="checkbox"/>	Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product
<input checked="" type="checkbox"/>				GBP	201.50	10.00	EA	20.15	LY101679
<input checked="" type="checkbox"/>				GBP	312.60	30.00	EA	10.42	LY105104
<input type="checkbox"/>				GBP	84.00	100.00	BOX	0.84	LY103596
<input type="checkbox"/>				GBP	50.00	1.00	UN	50.00	QA40100
Σ					648.10				
Kit components		Approval with Reason		Reject	Undo				

Once you have selected the required lines you can click here for lines you wish to approve

The status on the lines should show the word **Approval with reason** in green lettering.

Requisition details									
<input type="checkbox"/>	Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product
<input type="checkbox"/>		Approval wit...		GBP	201.50	10.00	EA	20.15	LY101679
<input type="checkbox"/>		Approval wit...		GBP	312.60	30.00	EA	10.42	LY105104
<input type="checkbox"/>				GBP	84.00	100.00	BOX	0.84	LY103596
<input type="checkbox"/>				GBP	50.00	1.00	UN	50.00	QA40100

3.5 Repeat the process above by highlighting the line you want to reject this time and click the **Reject** button.

Requisition details									
<input type="checkbox"/>	Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product
<input type="checkbox"/>		Approve		GBP	201.50	10.00	EA	20.15	LY101679
<input type="checkbox"/>		Approve		GBP	312.60	30.00	EA	10.42	LY105104
<input type="checkbox"/>		Reject		GBP	84.00	100.00	BOX	0.84	LY103596
<input type="checkbox"/>		Reject		GBP	50.00	1.00	UN	50.00	QA40100
Σ					648.10				
Kit components		Approval with Reason		Reject	Undo				

3.6 You should then enter the reason you are rejecting the lines in the **Workflow log** which is shown in the top right of the window:

Workflow log (row 1)

19/07/2023 1:24 PM CL.

Rejecting this line as we no longer require this service

Copy

Message from user

Annual Purchase order - service failure

3.7 If you have made a mistake on any of the lines, select the line(s) and click **Undo**.

3.8 Once you have completed the lines you want to approve and/or reject click **Save**.

Kit components Approval with Reason Reject Undo

Save

3.9 Now click on the **Simple Mode** button to take you back to the original window and click **Approval with Reason** button. The following pop-up window will be available where you should enter the reason that the goods or services are required:

Requisition Approval - Approval with Reason

Enter your comment

Approval with Reason

3.10 Once you have entered the reason click on the **Approval with Reason** button again and click **OK** to the message pop-up.

Success

The item is successfully processed. You are now ready to process the next item.

OK

The requisition will now move forward in the workflow and will route to the Cost Control panel, if the value is over £500, for further approval. Once approved it will be converted to a purchase order and sent to the supplier automatically or it will be returned to the Requesting Officer to send on to the supplier.

Note: even though you are clicking on **Approve** in this final stage it will only approve those lines you selected and will reject the lines you rejected

#### FURTHER INFORMATION

If you have any further questions, please do not hesitate to contact the Business World inbox at [BW.help@southampton.gov.uk](mailto:BW.help@southampton.gov.uk).