

## WEBREQ10: Amending/Closing a Requisition

In Agresso the option to Amend/Close a requisition must follow a particular process.

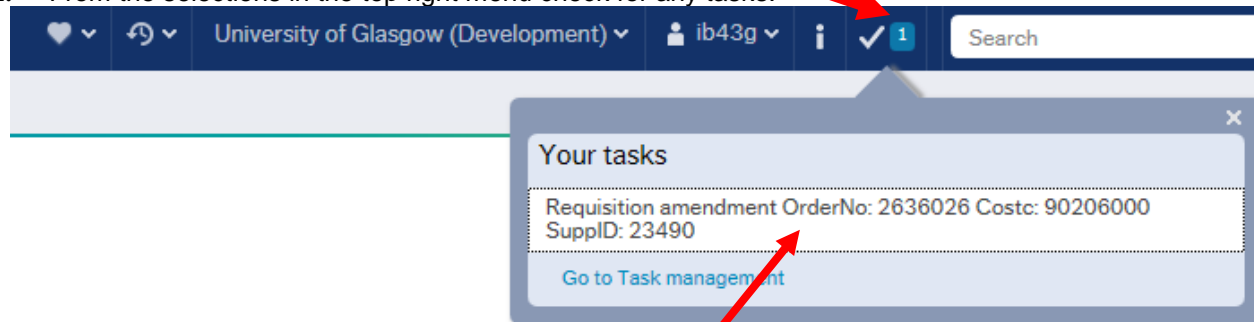
1. Before the requisition is Amended/Closed it **MUST** be rejected back to the person who raised the requisition.
2. The person who raised the requisition will get a requisition amendment email reminder letting them know they will have an amendment task.
3. This will allow them to Amend/Close the Requisition using the instructions below.

Any attempts to Amend/Close the requisition during the approval process can lead to system errors.

Once the requisition is closed it cannot be re-opened.

### WEBREQ10.1: Closing the Requisition

1. From the selections in the top right menu check for any tasks:

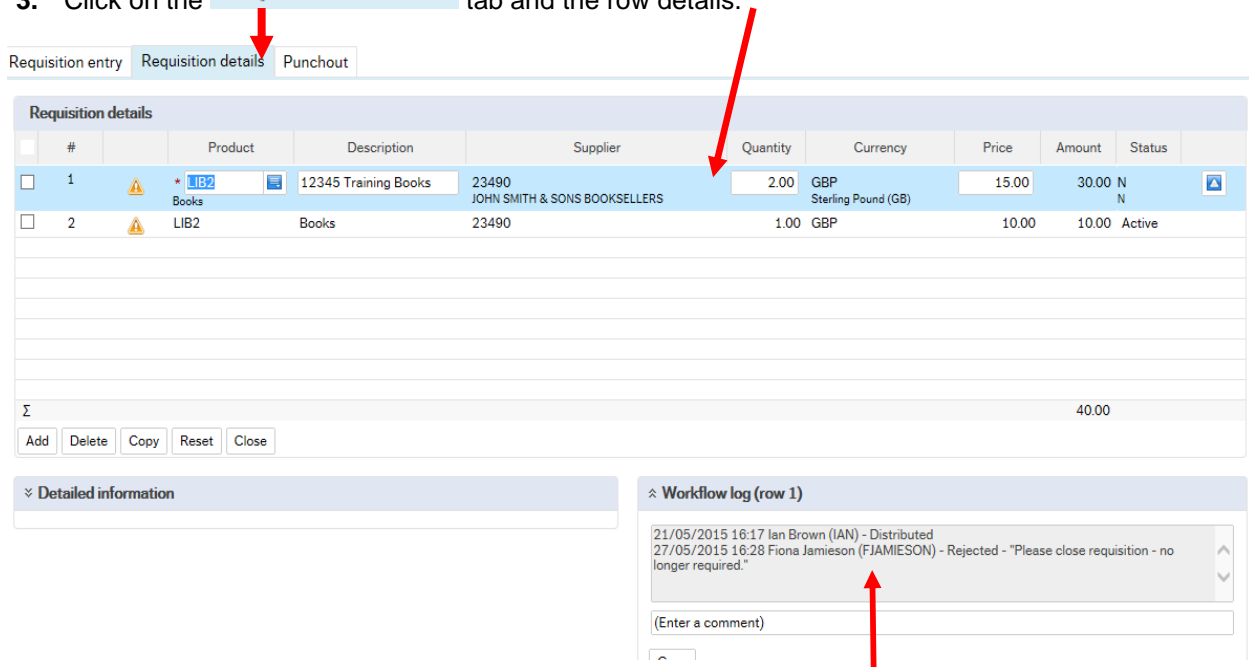


The screenshot shows the top navigation bar of the Agresso system. On the right side, there is a notification icon with a checkmark and the number '1'. A red arrow points to this icon. Below the navigation bar, a 'Your tasks' popup window is displayed, containing the text: 'Requisition amendment OrderNo: 2636026 Costc: 90206000 SupplID: 23490' and a blue link 'Go to Task management'. A red arrow points from the notification icon to the popup window.

2. Select the required requisition to review from the tasks

The following screen will appear:

3. Click on the **Requisition details** tab and the row details.



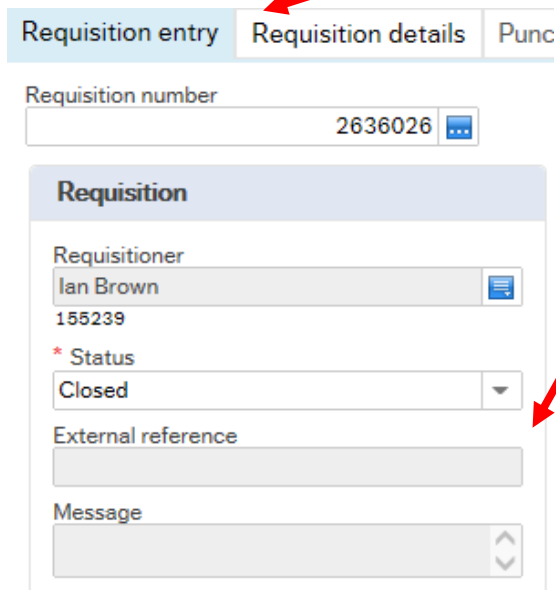
The screenshot shows the 'Requisition details' screen. At the top, there are three tabs: 'Requisition entry', 'Requisition details' (which is highlighted with a red arrow), and 'Punchout'. Below the tabs is a table with the following columns: #, Product, Description, Supplier, Quantity, Currency, Price, Amount, Status. The table contains two rows of data:

#	Product	Description	Supplier	Quantity	Currency	Price	Amount	Status
1	* LIB2 Books	12345 Training Books	23490 JOHN SMITH & SONS BOOKSELLERS	2.00	GBP Sterling Pound (GB)	15.00	30.00	N
2	LIB2	Books	23490	1.00	GBP	10.00	10.00	Active

Below the table, there is a summary row with a total amount of 40.00. At the bottom of the screen, there is a 'Workflow log (row 1)' section. A red arrow points to the workflow log, which contains the following text: '21/05/2015 16:17 Ian Brown (IAN) - Distributed' and '27/05/2015 16:28 Fiona Jamieson (FJAMIESON) - Rejected - "Please close requisition - no longer required."'. Below the workflow log is a text input field labeled '(Enter a comment)'.

4. Check the Workflow log to see what changes are required for the Requisition.

5. To close the requisition - Go the Requisition entry Tab and change the status to closed and TAB out the field. The rest of the fields should go grey.



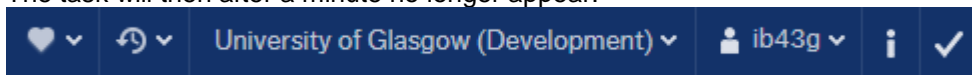
6. To Save the Changes on the Save button at the bottom of the screen

Save

Your changes will be confirmed:

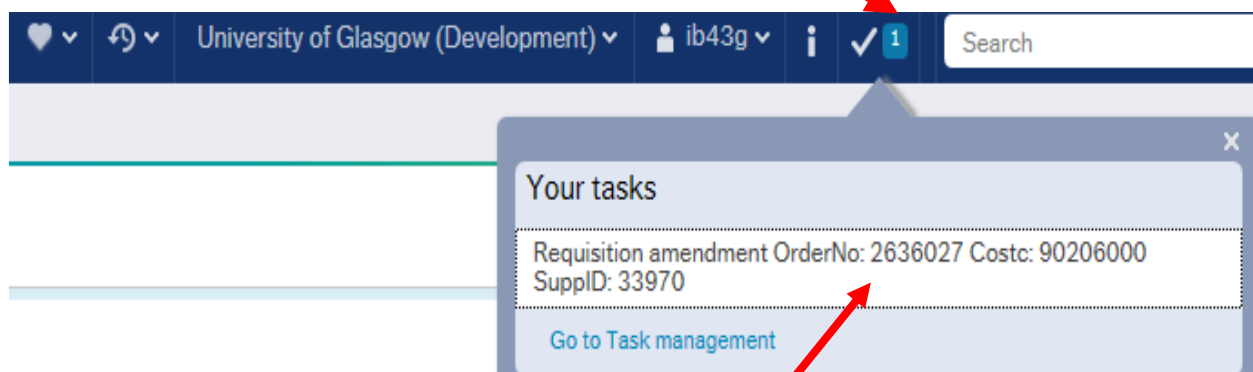
✓ Changes on requisition 2636026 have been saved

7. The task will then after a minute no longer appear:



## WEBREQ10.2: Amending the Requisition

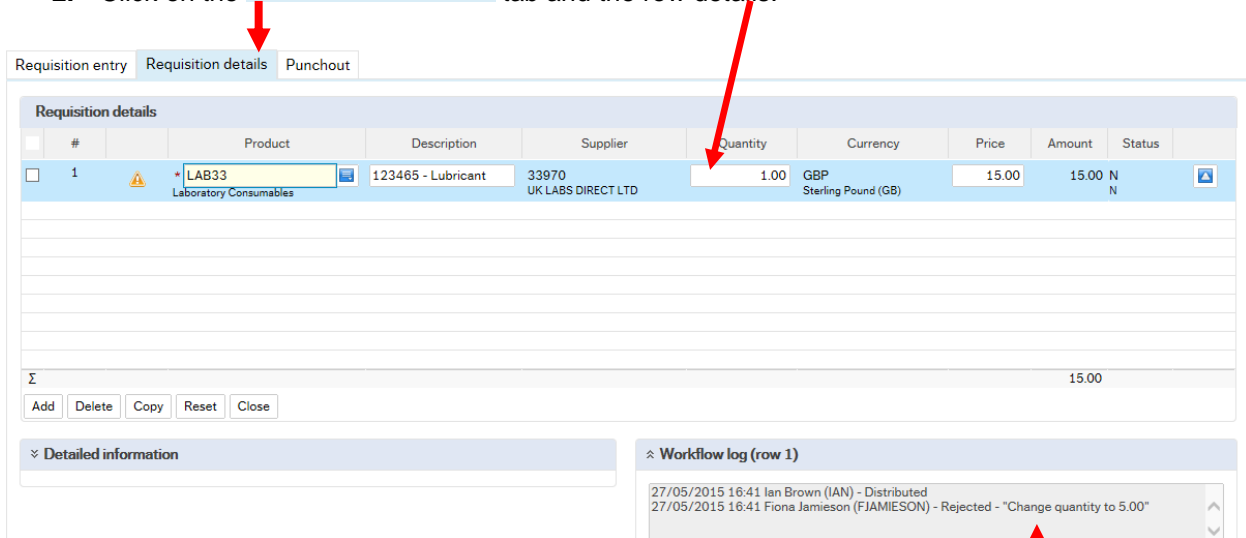
1. From the selections in the top right menu check for any tasks:



2. Select the required requisition to review from the tasks

The following screen will appear:

- Click on the **Requisition details** tab and the row details.



- Check the Workflow log to see what changes are required for the Requisition.

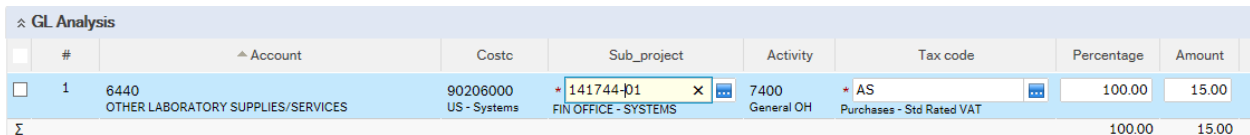
- Amend the details as required:

- Any information can be amended on the required row. **Please note only the VAT code can be amended for E-procurement requisitions.**

- Any rows that are no longer required the status should be changed to closed. Close

- If required - rows can be added by clicking add Add

- If you need to change the Sub-Project this must be done in in the GL Analysis.



- If the supplier needs amended the requisition will have to be closed off using the instructions in Section 10.1 above.

- To Save the Changes on the Save button at the bottom of the screen Save.

Your changes will be confirmed:

✓ Changes on requisition 2636027 have been saved

- The task will then after a minute no longer appear:

