

Step-by-Step Guide

Returning/Rejecting Requisitions



In This Guide

- ✓ Differentiate between returning/rejecting
- ✓ Return a requisition
- ✓ Reject a requisition
- ✓ Add comments
- ✓ Forward a requisition an approver

Procedure

1. From the home screen, there are two ways to view documents in need of review. You can either select the **Requisitions** link within the **Approvals** section of the **Action Items** window (shown to the right), or select the **Requisition** tab under the **Approvals** window.



2. The **Requisition** tab under the **Approvals** window displays all documents awaiting your review/approval. As an approver, your approval queues are based on the organization specified on the transaction as shown in the following example:

The screenshot shows a web interface for "My Requisition Approvals". It includes a "Results per page" dropdown set to 10, "Requisitions Found: 0", and "Page of 0". Below this is a table with columns: Requisition No., State, Priority, Req Date/Time, Requisitioner, Amount, and Action. A "Click to sort ascending" button is present. Below the table is an "Apply Action to Selected Requisition(s)" dropdown set to "Assign" and a "Go" button. Below this is a sub-section for "Department Level 1 Approval 04A2" with "Results per page" set to 10, "Requisitions Found: 1", and "Page 1 of 1". This sub-section contains a table with the following data:

| Requisition No. | Approver | State | Priority | Req Date/Time | Requisitioner | Amount | Action |
|-----------------|----------|--------------|----------|-------------------|---------------|--------------|--------|
| 769543 | | Not Assigned | Normal | 5/4/2012 10:59 AM | Joan Ferguson | 1,500.00 USD | Assign |



When requisitions are routed to a queue for approval, they are in an "unassigned" state, as multiple approvers can be assigned to a single queue.

3. To move a transaction to the "My Requisition Approvals" queue, where you are the only approver who can edit/approve the transaction, select the [Assign](#) link from one of your approval queues.

| My Requisition Approvals | | | | | | | |
|--|----------|-----------------------|---------------|-------------------|---------------|--------------|------------------------|
| Results per page | 10 | Requisitions Found: 0 | | | Page of 0 | | |
| Requisition No. | State | Priority | Req Date/Time | Requisitioner | Amount | Action | |
| Click to sort ascending Apply Action to Selected Requisition(s) Assign Go | | | | | | | |
| Department Level 1 Approval 04A2 | | | | | | | |
| Results per page | 10 | Requisitions Found: 1 | | | Page 1 of 1 | | |
| Requisition No. | Approver | State | Priority | Req Date/Time | Requisitioner | Amount | Action |
| 769543 | | Not Assigned | Normal | 5/4/2012 10:59 AM | Joan Ferguson | 1,500.00 USD | Assign |

4. The transaction is moved to the "My Requisition Approvals" queue, preventing other approvers in the same queue from either approving the transaction or assigning it to their personal approval queue.

| My Requisition Approvals | | | | | | | |
|--------------------------|-------|-----------------------|---------------|-------------------|---------------|-------------------------|-------------------------|
| Results per page | 10 | Requisitions Found: 1 | | | Page 1 of 1 | | |
| Requisition No. | State | Priority | Req Date/Time | Requisitioner | Amount | Action | |
| 769543 | | Active | Normal | 5/4/2012 10:59 AM | Joan Ferguson | 1,500.00 USD | Approve |
| Cart Name: | | 2012-05-04 ab7093 02 | | Suppliers: | | American Dance Festival | |
| Cart Description: | | | | | | | |
| No. of line items: | | 1 | | | | | |

5. To view transaction details, select the [Transaction ID](#) link.

| My Requisition Approvals | | | | | | | |
|--------------------------|-------|-----------------------|---------------|-------------------|---------------|-------------------------|-------------------------|
| Results per page | 10 | Requisitions Found: 1 | | | Page 1 of 1 | | |
| Requisition No. | State | Priority | Req Date/Time | Requisitioner | Amount | Action | |
| 769543 | | Active | Normal | 5/4/2012 10:59 AM | Joan Ferguson | 1,500.00 USD | Approve |
| Cart Name: | | 2012-05-04 ab7093 02 | | Suppliers: | | American Dance Festival | |
| Cart Description: | | | | | | | |
| No. of line items: | | 1 | | | | | |

6. From within the transaction, you can review the transaction. If the transaction needs to be either sent back to the requestor or forwarded on to another approver, select from one of the following actions:

Forward: Send the document to another approver for review. This action allows the approver to select another authorized approver, enter a note and forward the document for approval.

Return to Shared Folder: Place the selected document(s) back into the current shared folder associated with the workflow step. This action removes the assignment to the current approver and the document is available to any other approver with access to the shared folder.

Place Req on Hold: Change the status of the document to "On Hold" in order to review the document at a later time. The status is displayed to other approvers to indicate that the document is awaiting additional investigation or will be reviewed later. The approver can enter a reason for the action that is stored in the document's history.

Return to Requisitioner: Select this action to return the requisition to the requisitioner for modifications to the requisition. This action will cause the requisition to go back to a draft cart and when submitted will restart to the first step of workflow.

Reject Requisition: This action will reject all line-items on the document at once and complete the workflow process. Once a document has been rejected, it cannot be un-rejected, reopened or resubmitted.



If a requisition is returned to the requestor, they have the option to copy the contents of the requisition to a new cart and resubmit for approval. If a requisition is rejected, the requestor would have to reinitiate the cart from scratch in order to resubmit for approval.

7. Select the **Return to Requisitioner** option from the **Available Actions** menu.

The screenshot shows the WayneBuy interface with the 'Available Actions' menu open. The menu items are: Reject Requisition, Approve/Complete Step, Return to Shared Folder, Place Req on Hold, **Return to Requisitioner** (highlighted), Forward to..., Add Comment, Add Notes to History, Copy to New Cart, and Reject Requisition. The main requisition details are visible in the background, including the status 'Pending' and the 'Ship To' address: Attn: Joan Ferguson, Rm: #415, GORDON H SCOTT HALL, 540 E CANFIELD ST, DETROIT, MI 48201-1928, United States.

8. A comments box is displayed requesting you provide the requisitioner a basis for the return. Enter comments and select the **Return to Requisitioner** icon. *Note, this same box is displayed if you select the **Reject Requisition** option.*

Return to Requisitioner ? X

Return the requisition to the requisitioner as a draft cart so they can correct errors and resubmit for approval.

Reason for return

Please provide additional supporting documentation for the request.

933 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Return to Requisitioner
Cancel

9. The transaction is returned to the requestor. The requisition is updated to reflect your action.

| Current Workflow Status | Requisition Number | Workflow Step | My Action | Requisition Name |
|-------------------------|--------------------|-------------------------------|----------------------|----------------------|
| 🔄 | 769543 (returned) | Department Approval Level - 1 | Requisition returned | 2012-05-04 ab7093 02 |

You have successfully returned a requisition.