Rejecting and Returning Requisitions in UD Exchange
What’s different in UD Exchange?

Rejecting line items

- In webforms, an approver would have to reject or return an entire webform
- In UD Exchange, an approver can reject a single line item and approve the rest of the requisition
Returning and Rejecting Requisitions

• To deny the requisition as is, you will either return or reject the requisition.
• **Returned requisitions** are sent back to the Requester.
  – The Requester can then *update and resubmit* the requisition.
• **Rejected requisitions** are cancelled and therefore *cannot be updated*.
  – If appropriate, the Requester can *create and submit a new requisition* for processing.
• Note: Approvers *do not* have the ability to change information such as account codes or SpeedTypes on requisitions, so you will need to return the requisition or reject items back to the Requester if changes need to be made.
On the home page, navigate to requisitions awaiting your approval: **Orders > Approvals > Requisitions to Approve**
Click the requisition number you want to review.
When you review the requisition, you may find that there is a line item that you do not want to approve.

To perform any action other than approval, if you have not already done so, you must first assign the requisition to yourself.

Select **Assign to Myself** if it is showing in the top right.
Rejecting a Line Item on a Requisition

- Reject a line item to keep the rest of the requisition moving through workflow without that line.
- If the line should be paid another way, you may also want to return the requisition for editing and resubmission, but then everything will wait for the revised requisition.
Select the line item you want to reject back to the Requester
Select **Reject Selected Items** from the **Selected Line Item Actions** drop-down menu.

You won’t see this option if you haven’t Assigned it to yourself first!
Enter the reason for rejecting the line item, and click OK
After you reject the selected line item, you can select Approve from the Document Actions drop-down menu to approve the remaining line items and return to your required approvals folders.

Note the total has adjusted to the amount without the rejected line.
Returning a Requisition

• Return a requisition if a value on the requisition needs to be edited.
• If an approver has forgotten an attachment, it may be easier to comment to the originator to ask them to reply back in a comment with the attachment.
• Returning a requisition makes it go through all workflow again. This is especially important if workflow would change depending on the edits needed (e.g., SpeedType, wrong account code needing commodity review, etc.)
After assigning the requisition to yourself, select **Return to Requisitioner** from the **Actions** drop-down menu.

You won’t see this option if you haven’t Assigned it to yourself first!
Enter the reason that you are returning the requisition and click **Save Changes**.
Rejecting a Requisition

- Rejecting a requisition should be used judiciously.
- Examples of rejecting a requisition might be if you know it was already paid, or if the wrong form was used (e.g., non-catalog instead of bid waiver or NPOP).
- If the requisition can be easily edited and resubmitted, it is wiser to return than reject.
- A rejected requisition can be copied to a new cart but it will not retain the history of the rejected requisition like a returned requisition will.
Select **Reject Requisition** from the Document Actions menu.
Enter the reason that you are rejecting the requisition and click **Reject Requisition**.

**Note:** Once you **reject** a requisition, it **cannot** be reinstated. The shopper will have to create a new requisition if appropriate.
Resources

Procurement Services
procurement@udel.edu
See also, “Approving Requisitions in UD Exchange”