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 account codes or SpeedTypes on requisitions, so you will need to return 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, you must first assign the requisition to yourself.

Select Assign to Myself from the Document Actions drop-down menu.
Rejecting a Line Item on a 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.
Enter the reason that you are rejecting the line item, and click **Reject Line Item**
After you reject the selected line item, you can select **Approve/Complete & Show Next** from the **Document Actions** drop-down menu to approve the remaining line items and return to your required approvals folders.
Returning a Requisition
After assigning the requisition to yourself, select **Return to Requisitioner** from the **Document Actions** drop-down menu.
Enter the reason that you are rejecting the line item and click **Save Changes.**
You will see an alert stating that you are not allowed to view the requisition since you have returned it and it is back to being a shopping cart. It is no longer in requisition workflow.
Rejecting a Requisition
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.
You will see an alert stating that you are not allowed to view the requisition since you have rejected it and it is no longer in your workflow.
Resources

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