9.2 Editing a Denied Requisition

Purpose: Use this document as a reference when editing a denied Requisition in ctcLink.

Audience: Purchasing staff.

- You must have at least one of these local college managed security roles:
- <there are no college-assignable roles>

You must also set these User Preference Definitions:

- User Preferences: Requisition Entry
- <u>Requester Setup</u>

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

There's two options to update the approval routing when a pending Requisition is denied:

Option #1 - Current Approver in the Approval Workflow denies requisition.

On the Pending Approvals page, the Approver selects the **Deny** button.

< Pending Approvals		Requisition		â	۲	:	۲
Request for Con. Electrical_Custodial_OPEN 1,179.67 USD				Approve	Deny	Mon	3
1 line(s) are pending your approval							
Summary							1
Business Unit WA260		Requisition ID	000000066				
Routed Date March 17, 20	022	Requisition Date	March 15, 2022				
Requester Heidi		Entered by	Heidi				
		Budget Header Status	Valid				
			Edit Requisition				
More Information							
Header comments and attachments	>						
View Printable Version	>						
✓ Lines							
Pending All							
						1 row	
						_	/
Select Line Number	Item Description		Merchandise Amount			1	
0 1	Lamps/Lighting, Interior and Exterior		1,179.67 USD		>	\mathcal{Q}	

The requisition's approval status changes to Denied, prior routing is canceled.

C Employee Self Service			Add/Update Rec	quisitions			
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Maintain Requisitions							
Requisition							
Business Unit	WA260		Sta	atus Denied	×		
Requisition ID	00000		View Appro	vals			×
Requisition Name	Con. E	🥐 🖪 😯 🌣 🖬					Help 🔺
▼ Header ⑦							
*Requester	101053	Business Unit	WA260	Nu	mber of Lines	1	- 1
*Requisition Date	03/15/2	Requisition ID	000000066		Total Amount	1,179.67 USD)
Origin	ONL	Requisition Name	Con. Electrical_Custodial_OPEN				- 1
e e i		Requested For	Heidi				- 1
Currency Code	03/15/2	Status	Denied				- 1
Accounting Date	00/10/2	Budget Status	Valid				- 1
	Requisit Requisit	Department Manag	er Approval				
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Add Items From ⑦		Lamps/Lighting, Inte	erior and Exterior				- 1
	Purch	Procurement Dept	Approval		-		- 1
	nom e	Con. Electric	cal_Custodial_OPEN:Denied				- 1
Line (2)							- 1
			Apply Approval Changes				- 1
			Apply Apploval changes				
Details Ship To/Due	Date	Return					Ŧ

PeopleSoft requires a denied requisition to have one of the following fields changed to prompt reapproval routing: Quantity, Price, or Merchandise Amount. *While editing a pending requisition, the **Price** field will be editable.

Example of restarting a denied requisition:

1. Decrease the Denied Requisition's Line Price by one penny.

- 2. Input edits, such as changing the chartfield string values, as needed.
- 3. Save. The Approval Status changes from Denied to Pending.

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Requisition ID	000000066			Bud	get Status	Not Ch	кd	rig 💭	
Requisition Name	Con. Electrical_Custodia	I_OPEN				- Hold	I From Furth	er Processing	
• Header ⑦								-	
*Requester	101053706 Q	Heidi Davis							
*Requisition Date	03/15/2022	Requester Info							
Origin	ONL Q	On Line Entry							
*Currency Code	USD Q	Deller	Amount Sumn	nary 🤊		-			
Accounting Date	03/15/2022	Donar	Tota	al Amou	nt		1,179.66	USD	
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Line Item		Description			Quantity		MOU	Category	Price
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- 4. Immediately **change** the price back to the original value.
- 5. Select Save.
- 6. Note the Requisition remains in Pending Status.
- 7. Budget check as needed.

Q Approval routing is updated based on current values.

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	Business Uni	t WA260					Status	Pending			
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Ac	counting Date	03/15/2022	Dollar	r	To	tal Amo	int	1.1	79.67	USD	
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8. Process complete.

Option #2 - An AWE Administrator can use the Monitor Approvals screen to 'Restart' approval.

() Users assigned the ZZ_AWE_ADMIN_(xxx) role are AWE Administrators.

The requester updates the requisition as needed (for example the distribution/ chartfield string values) and saves.

The AWE admin would then use the Monitor Approvals screen to search for and select the requisition, then Restart the approval routing. (See <u>Monitor Approvals QRG</u> for detailed instructions).

itor Approvals				
Approval Process	Requisition		Definition ID	WA260
Business Unit	WA260		Requisition ID	0000000066
Requisition Date	2022-03-15		Requester	101053708
Comment				
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Details				
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		Business Unit	Requisition ID	Line Number
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Restarting the approval results in the cancellation of the prior routing:

Approval History			
Approval Process	Requisition	Definition ID	WA260
Business Unit	WA260	Requisition ID	000000066
Department Mana	ger Approval		
Line 1:Terr	minated		
Department Manager A	pproval		
X Rec-Dept Mgr-L 03/17/22 - 1:39	ine Level PM		
Procurement Dep	t Approval		
Con. Elect	rical_Custodial_C	OPEN:Terminated	
Procurement Dept Appr	roval		
Multiple App Req Purchasing	provers Review		

The approval routing is updated based on the requisition's current values.

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Approval Process	Requisition		Definition ID	WA260
Business Unit	WA260		Requisition ID	000000086
Requisition Date	2022-03-15		Requester	10105:
Approver		~		
Comment		<u> </u>		
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e Details				
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		Business Unit	Requisition ID	Line Number
1	2	WA260	000000066	1
assign Pending Ta	asks			
The selected approve	er does not currently	y have an alternate ap	prover selected in t	heir user
rofile. You must man	nually select an alte	ernate approver to rea	ssign pending tasks	L.
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