

Step-by-Step Guide

Returning Requisitions to Requesters



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- ✓ Returning requisitions to requesters

This guide demonstrates how to return a requisition to the requester along with comments explaining the reason for the return.

Occasionally, an approver may want to return a requisition to the requester for updates. This procedure allows approvers to **return** instead of *rejecting* a requisition. Requisitions can be returned at any point in the requisition approval process.

When a requisition is returned it becomes a draft cart and is no longer visible as a requisition (via history or document search).

Workflow Notes

The returned requisition can be updated by the requester and resubmitted into workflow. All previous approval information and comments will be available via history. The returned requisition will restart workflow from the beginning regardless of the step from which it was returned.

Procedure

1. From the OK Corral homepage, access your pending requisition by navigating to the **Action Items** section and clicking **+ View Approvals/Assigned Carts** ⇒ **Requisitions**.
2. Click the **Assign** link, located in the **Action** column, to assign the requisition to yourself for review.
3. In the **My PR Approvals** section click on the requisition number to open the requisition.

The screenshot shows the 'Approvals - Requisitions' interface. At the top, there is a search bar for 'Catalog No. (SKU)'. Below the search bar, there are navigation tabs: 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', 'document search', and 'more >>'. The 'approvals' tab is selected. Underneath, there are sub-tabs: 'requisition', 'purchase order', 'requisition outbox', and 'purchase order outbox'. The 'requisition' sub-tab is active. The main content area shows a table of requisitions. The table has columns: 'Requisition No.', 'State', 'Priority', 'PR Date/Time', 'Requisitioner', 'Amount', and 'Action'. One requisition is listed: '683589', 'Active', 'Normal', '12/10/2011 8:52 PM', 'Roger Requestor', '100.00 USD'. Below the table, there is a section for 'Cart Name: 2011-12-10 roger_requestor 01' and 'Suppliers: A. Daigger & Co.'. The 'My PR Approvals' section is expanded, and the requisition number '683589' is highlighted in a red box.

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- Return the requisition to the requester by selecting **Return to Requisitioner** from the **Available Actions** list.
- Click the **Go** button.



- Enter a return reason in the **Return to Requisitioner** pop-up window.
- Click the **Return to Requisitioner** button.

Return to Requisitioner

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

Reason for return
Please enter correct accounting codes.

962 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](#)

This note will be available via the **Comments** and **History** tabs and will be sent in the email notification to the requester.

The OK Corral sends an email notification of the returned requisition to the requester.

You have successfully returned a requisition to the requester.