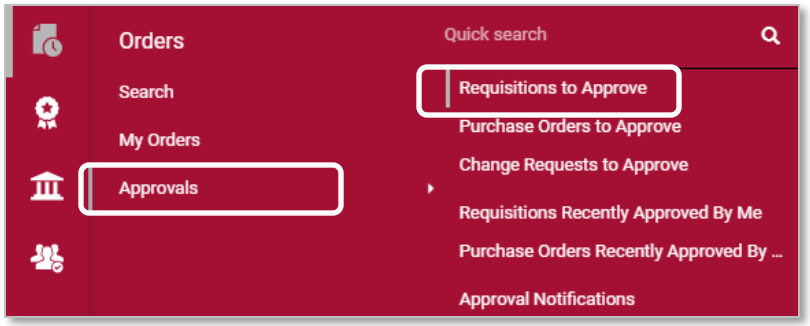
Returning and Rejecting Requisitions

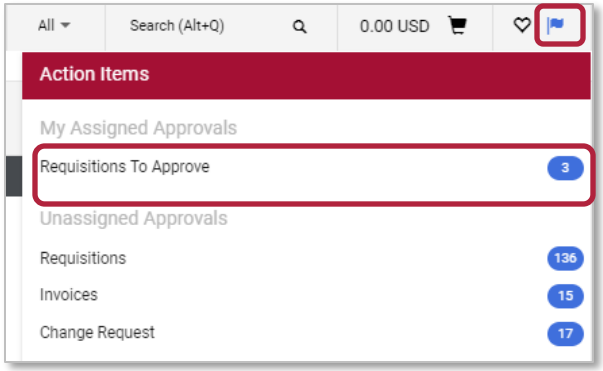
Approvers can return or reject requisitions.

- **Returning** allows the Requestor to make edits to the original requisition and resubmit the request under the same requisition number
- **Rejecting** cancels the requisition in its entirety
  - Rejected requests do not return to an editable draft request, and the requisition number cannot be reused
  - Rejecting a requisition should be reserved for requests that are not compliant with funding restrictions, inadequate budget, or unnecessary requests for goods and services

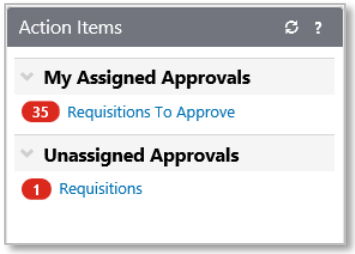
1. There are several options for navigating to your approvals:
   Option 1: Click **Orders → Approvals → Requisitions to Approve.**



Option 2: Click the **Action Items** icon at the top of the screen, and select **My Assigned/Unassigned Approvals.**



Option 3: In the Action Items section of the dashboard, click the links under **My Assigned Approvals** or **Unassigned Approvals**.

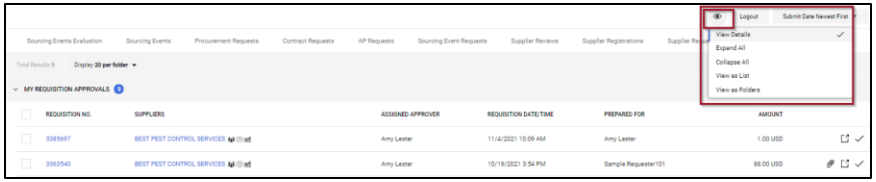


Tip: You can also access your approvals from the **Shortcuts** menu under **Document Search**.

2. Expand the **My Requisition Approvals** folder to view details of requisitions assigned to you.

   Note: You can also click the other approval folders to access <u>unassigned</u> requisitions that reside in your shared department queue. You need to **assign** the requisition to yourself in order to return or reject it.

   You can use the eye icon to expand and collapse as well as show and hide details of requisition



3. To preview the requisition, click on the click quick view icon ↗ on the right side of the requisition line.

4. If you do not want to use the preview function, you can view the requisition by clicking the requisition number.

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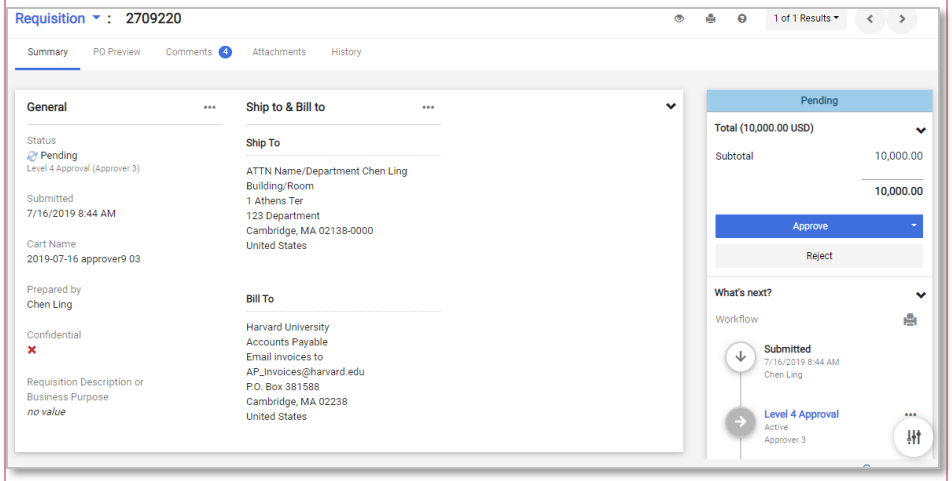
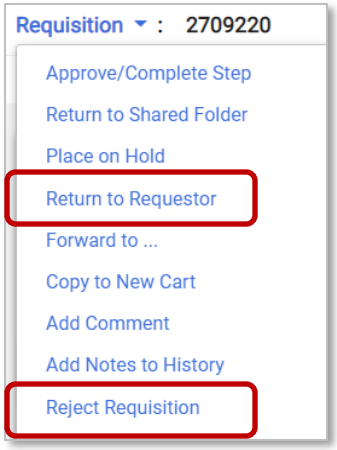
5. On the Requisition page, note the following sections:



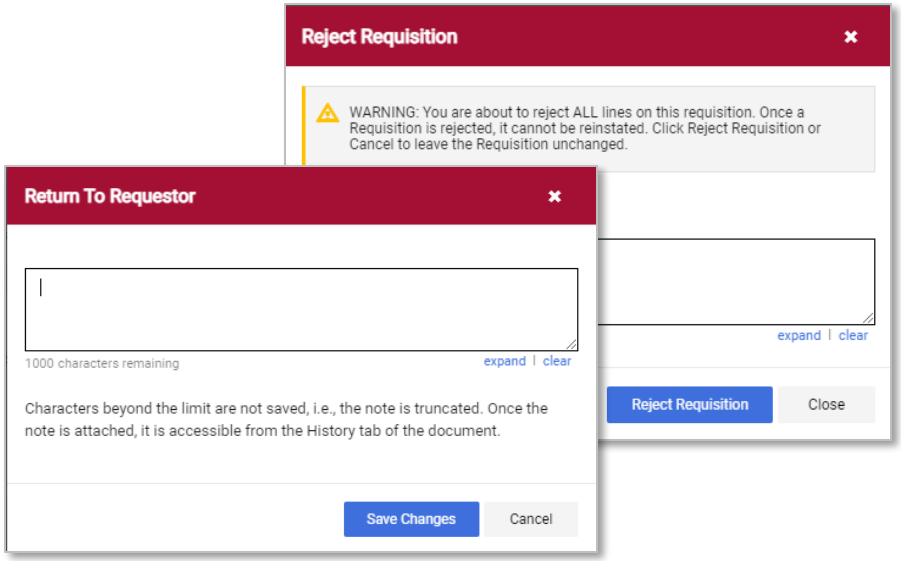
- **Summary** tab: contains sections on General details, Shipping and Billing Addresses, Accounting Codes, Notes and Attachments, Special Handling information, Ad-Hoc Approvers, and the Supplier and Line Item information
- **What's Next?** section on the right shows the details of the approval workflow, including current position within the workflow
- **PO Preview** tab: Preview of Purchase Order
- **Comments** tab: View and add comments. All comments are delivered to the recipient's Harvard email address. The comment is time/date stamped and historically recorded with the requisition
- **Attachments** tab: All attachments associated with the requisition, both internal and external
- **History** tab: Record of all actions taken on the requisition

Note: Approvers can only change certain fields on a requisition during the approval process. Click here to access the FAQ on the B2P Website for more information.

6. After you have conducted a sufficient review of the requisition, click on **Requisition** to open the actions menu and select either **Return to Requestor** or **Reject Requisition**.



7. You will be prompted to provide a reason for your return or your rejection. This comment will be included in the notification back to the Requestor.



8. Click the **Save Changes** or **Reject Requisition** button to finalize your action. An email notification is automatically delivered to complete your return or rejection.