CSU The California State University

Approve, Return, or Reject a Requisition

CSUBUY

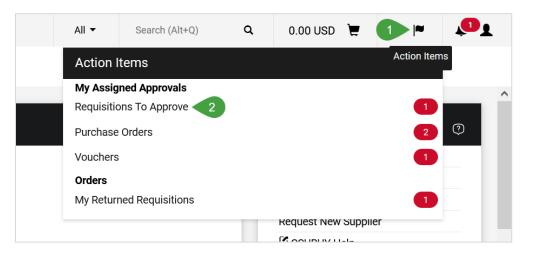
Learn how to make various requisition actions.

TAKE ACTION ON A REQUISITION

- 1. Navigate to Requisitions to Approve using either of the following methods:
 - a. Orders > Approvals > Requisitions to Approve.

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1	Shop • Shopping Home	e Pa	ge				
Í.	Orders		Quick search	۹			
	Search	3	Requisitions to Approve				
	My Orders	Purchase Orders to Approve Change Requests to Approve Procurement Requests to Approve					
	Approvals						
			Requisitions Recently Approved By Me				

b. Select **Action Items** from the Notification Menu. The Action Items pop-up window will appear. Select **Requisitions To Approve**.



2. Open the requisition.

QUICK REFERENCE GUIDE

3. Select the drop-down menu next to Approve/Complete button to take action on the requisition.

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						Summar Re	Summar Return to Shared Folder		
General Inf	formation 💉 ···	Shipping Information	<u>ب</u>	Billing Information	¢ ∨		ace on Hold		
General Information Ship To			Bill To			Return to Requisitioner			
Status C Pending Wait for Validation 2 (Janelle		Contact: Janelle Gieseke 1801 East Cotati Ave.		Accounts Payable 1801 East Cotati Ave.		addr Forward to			
Cart Name	Gieseke) 2023-07-17 jgieseke 01	Rohnert Park, CA 94928 United States		Rohnert Park, CA 94928 United States		Shipping Withdraw Entire Requisitio			
ourriturile	2020 07 17 jgleseke 01	Delivery Information		PO Details		C te Re	eject Requisition		

- a. To approve the requisition, select **Approve**.
- b. To return the requisition to the requester, select **Return to Requisitioner**.
 - In the pop-up window, enter the reason for the return and select Save Changes. This note will be available via the Comments or History tab and the requisitioner will be notified.
 - ii. The requisitioner can access the requisition from the Draft Carts screen (Shop > My Carts and Orders > View Carts > Draft Carts), where the Type column will indicate that the requisition is returned. From there the cart can be opened, updated, and resubmitted back into the workflow.
- c. To reject the entire requisition, select **Reject Requisition**. You can only reject a requisition that has been assigned to you.

Note: This action is not reversible. Only reject a requisition if it should not progress. If more information is required return the requisition and add comments instead. The best practice is to return a requisition for a user to make edits and resubmit.

- i. Enter the reason for the rejection in the pop-up window.
- ii. Select **Reject Requisition** to save the comment and reject the requisition.