

## How To Restart a Denied Requisition

Following these instructions are vital to properly resubmitting a denied requisition. If not followed, the requisition will not show up in the queue of the Procurement Office – preventing it from being processed.

When denied, PeopleSoft has a quirk that requires a requisition to have **something changed on each line item, then changed back, to properly resubmit it**. This job aid will show you the best methods of doing so. If you have any questions, please submit a service request via <u>service.kennesaw.edu/ofs</u>.

- 1. Log in to PeopleSoft via <u>https://www.usg.edu/gafirst-fin/</u>by clicking GeorgiaFIRST Financials under Core Users on the right of the page. You will be prompted to log in using Duo.
- 2. In the NavBar menu, click **Navigator** > **eProcurement** > **Manage Requisitions**.
- 3. On the new page, clear out Date From/To, Request State, and Origin.

## Manage Requisitions

Requisition Search Keyword Search	1				
Search Requisitions					
To locate requisitions, edit the criteria b	elow and click the	Search button.			
Business Unit 43000	Q	Requisition Name			Q
Requisition ID	Q	Request State	~	Budget Status	~
Date From	<b>F</b>	Date To	81	Origin	Special Reques 🗸
Requester	Q	Entered By	Q	PDID	
					Marketplace Requisition
Search Clear		Show Advanced Search			Special Request

- 4. Enter the requisition number next to **Requisition ID** and press **Search**. The requisition will show up below.
- 5. At the right of the listing, click the dropdown menu and select **Edit**. Then press **Go**. Select **OK** for the message that pops up about the requisition pending approval.

Requisitions (?)										
To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.										
	Req ID	Requisition Name	BU	Date	Request State	Budget	Total			
Þ	0000535673	Capital Restoration/CY	43000	10/11/2019	Pending	Not Chk'd	1,253.88 USD	Edit 🗸	Go	

- 6. From here you have a few options. Each will require you to change something on each line, click **Save for Later**, change it all back, then click **Save & Submit**. This will start the approval process over.
- 7. If your requisition has **one** line:
  - a. Change the Quantity If the quantity box is active for editing, this is the easiest method to use.



Requisition Lin	ies 🕐										
Line Des	cription	Item ID	Supplier	<u> </u>	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ □1 👷 Mov Rm4	e (6) data cables from 44		The Constran Group		1.0000	JOB	400.0000	400.00		뗽 Edit	Î
Select Al	I / Deselect All	Select lines to:	👍 Add to Favorites	😡 Add to Te	emplate(s)	🗊 Delete Selected		📇 Mass Change			

- i. Change the quantity by adding one (i.e. if the quantity is 1.0000, change it to 2.0000).
- ii. Press Tab for the change to load.
- iii. Click Save for Later.
- iv. <u>Change the line item back to its previous quantity</u> (i.e. if you changed 1.0000 to 2.0000, you would change it back to 1.0000).
- v. Complete the requested changes to the requisition (per the reason it was denied).
- vi. Click Save & Submit. Approvals will restart.
- b. Change the Account Code <u>If the quantity cannot be edited</u>, we recommend changing the account code.

equisition Lines 🕐											
Line Discription	Item ID	Supplier		Quantity	UOM		Price	Total	Details	Comments	De
Cont Source Mesh		Office Interiors, Inc.		1.0000	Each		526.7500	526.75	<b>P</b>	🖗 Edit	Û
Shipping Line 1	*Ship To		٩	ShipTo	hmente	Quantity	1.0000			+	
	Address			Add One Time Ad	Idress	Price	526.7500	Price Adjust	ment		
								Pegging Inq	uiry		
								Pegging Wo	rkbench		
Les:	Attention To										
	Due Date		1								
	7 Ship Via	VENDOR	Q								
	Freight Terms	FOB:DEST	٩								
	*Distribut. By	aty ~	SpeedChart	٩							
	Accounting Lines				F	Personalize	Find   View All	🗐 🔣 🛛 First	④ 1 of 1	🛞 Last	
	Chartfields1 Chartfie	elds2 Chartfields3	Details I	Dețails 2 Asset li	nformation	Asset Infor	mation 2	udget Information			
Second and second second	Account	Fund	Dept		Program		Class	Budget Referen	:e		
and the second se	714105	0 10000	0 1007079	0	15300	0	11000	0 2020	0		

- i. Click the grey triangle on the left of the line's listing. Information for the accounting lines will drop down.
- ii. In the dropdown information, click the grey triangle next to **Accounting** Lines. This drops down the chartfield entry area.
- iii. Click the Chartfield2 tab.
- iv. Take note of your account code, you will need to remember it. Change the account code to something else, then click **Save for Later** at the bottom of the page.
- v. Change the account code back to the correct one, then complete the requested changes to the requisition (per the reason it was denied).
- vi. Click Save & Submit. Approvals will restart.



- 8. If your requisition has **multiple** lines:
  - a. Change the Quantity If you have a reasonable amount of lines to manually edit, this option is still the best method to use. Follow the above instructions, <u>making sure to</u> <u>change each line before clicking Save for Later</u>.
  - b. **Mass Change** This option allows you to change multiple lines with one command we recommend changing the **Account code**.

Requisitio	Requisition Lines 🛞											
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete		
▶ 🗹 1 🥐	Data closet in Building B - LV		S&S Flooring Company, Inc.	1.0000	JOB	414.0000	414.00	ŀ	🎾 Edit	Î		
▶ 🗹 2 🐕	Data closet in Building B - re		S&S Flooring Company, Inc.	1.0000	JOB	45.5000	45.50		🖓 Add	Î		
▶ 🗹 3 👷	Data closet in Building B - ru	-	S&S Flooring Company, Inc.	1.0000	JOB	40.0000	40.00	1	∽ Add	Î		
🗹 Sel	lect All / Deselect All	Select lines s to:	Թ Add to Favorites	Add to Template(s)	1	De ete Selected	🔚 Mass Change					

- Take note of what account code or codes are used for each line. Write down which lines use which codes. You can follow the steps above (#7, step b, Change the Account Code) to view them.
- ii. At the bottom of the Requisition Lines list there is an option to Select
  All/Deselect All. Click the check box to select all lines, then click Mass Change.
  A popup will appear.

13	ta										
	Edit Lines/Shipping/Accourt	nting for Selecte	d Lines			×					
	Line Information ②										
	Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.										
eed	Supplier ID	Q	Supplier Locat	ion	Q						
	Buyer	Q	Categ	ory	٩						
<u>D</u> e	Shipping Information					_					
	Ship To Location	Q		Add One 1	lime Address						
	Due Date	81	Atten	tion							
	Ship Via	Q	Freight Ter	ms	Q						
	Comments										
d li	Accounting Lines					_					
	Please enter GL Business Uni	t before selecting o	ther chartfield values								
	Accounting Information	it before selecting o	Percenali	To L Find L	Eirot 4 1 of 1 D Loot						
	Chartfields1 Chartfields	2 Chartfields3	Details Asset Info	rmation							
-	Dist Percent	Location	GL	Unit	Account						
	1		Q 430	00 Q	, 7						
					Account Description	Account Ty					
d C	OK Cancel F	Refresh			702100 Purchases for Resale 702101 Purch For Resale-Text Books 702102 Purch For Resale-New Books 702103 Purch For Resale-Used Book	E E E S E					
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- iii. Enter the **GL Unit** of **43000** and **press Tab**. This will activate the account code box.
- iv. Enter an account code that is not being used for this requisition (if you're unsure what to use, enter a number and a list of numbers will pop up).
- v. Click **OK**. A message will pop up, choose "All Distribution Lines" and click **OK** to only change the account number.
- vi. Click Save for Later.
- vii. If all lines had the same account number, you can use Mass Change to change them all back. If there were different account codes, make sure to select the individual lines to edit before using Mass Change or manually edit them each.
- viii. Complete the requested changes to the requisition (per the reason it was denied).
- ix. Click Save & Submit.
- 9. There have been a few instances where a denied requisition is still "invisible" to the Procurement Office despite being resubmitted properly. Please keep an eye on any requisitions that have been denied and let us know if the requisition has been pending Buyer Approval for more than two days at service.kennesaw.edu/ofs.