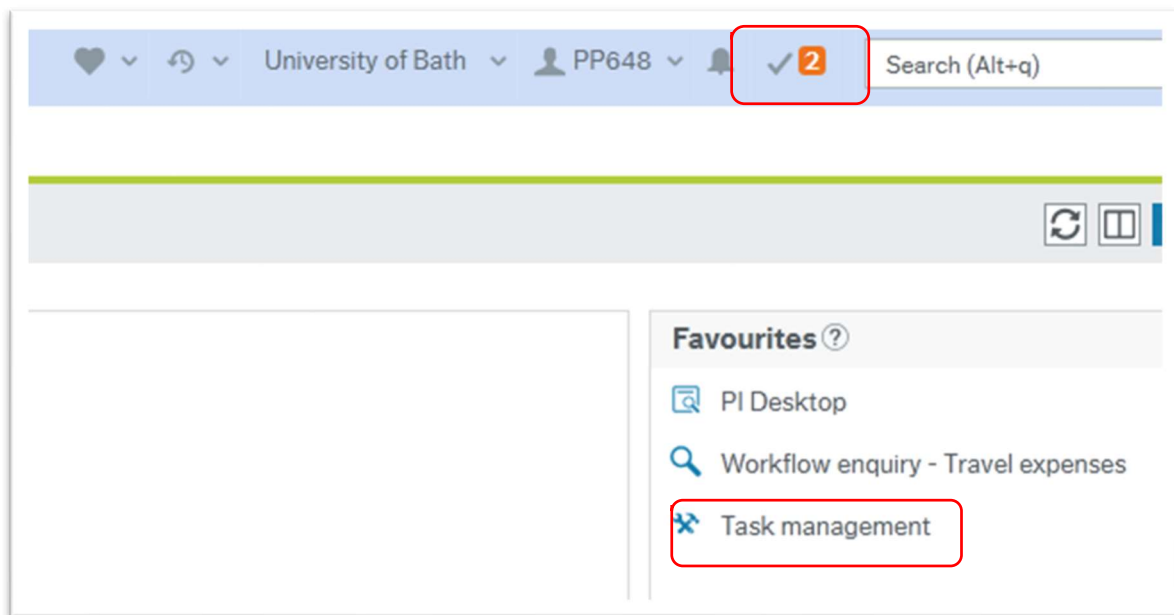


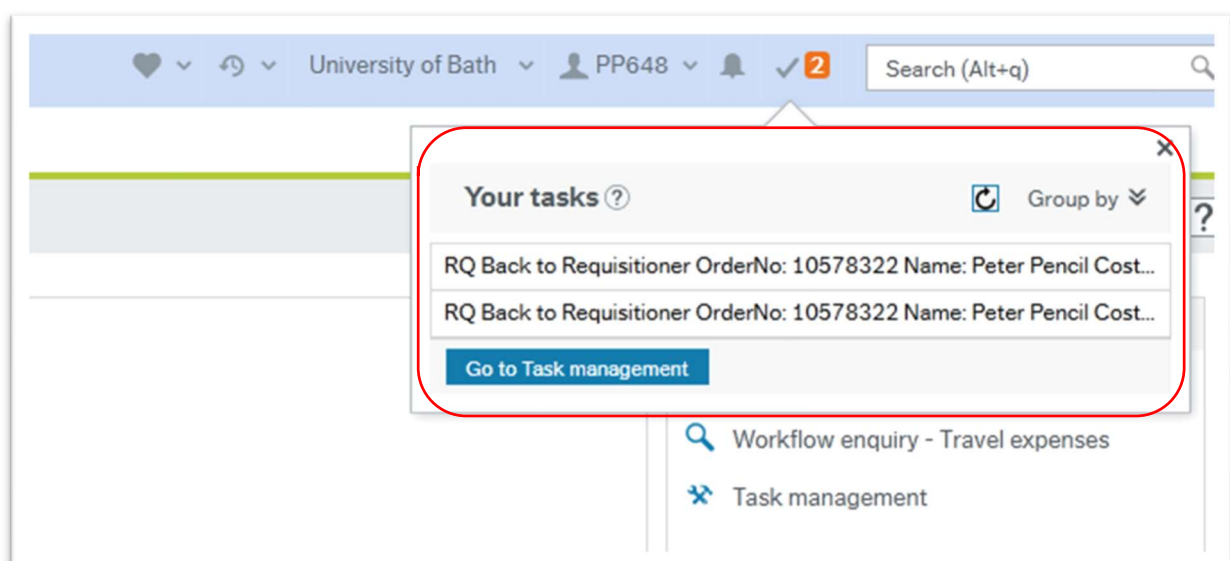
View Comments after Req is rejected - Workflow step “Back to Originator”

Log into Business World On (Agresso) via link on University of Bath Staff home page with your userID and password.

Click on the Task Icon representing by a Tick or alternatively go to Task management in Favourites section.



When you click on the Task Icon a pop up will appear showing all your tasks, either double click on the specific tasks in your list or click on the blue button Go to Task Management. Look for task called RQ Back to Requisitioner.



Select your task and new screen Requisitions - advanced will pop up.

Task management x Task management x

Search for tasks

Task description

Client: UB, Workflow step: RQ Back to Requisitioner, Process name: Requisition Approval, OrderNo: 10578322, Name: Peter Pencil, Cost Centre: MEYY, Supplier Name: Lyreco UK Ltd

Requisitions - advanced

Requisition entry Requisition details Marketplace

Requisition number: 10578322

Requisition

Requisitioner* Peter Pencil B*

Status* Active

Period 202008

External reference

Message: Leave Supplier ID and Project code BLANK if doing marketplace order

Default supplier & contract

Supplier Contact

Default GL analysis

Cost: Project

#25 employment Employment status assessment reference

Delivery contact

Delivery date: 04/03/2021

Delivery contact: HMD01 - Home Delivery Option (Delivery)

Delivery address: Home Delivery (TP Lyreco ONLY) OAMS Blackwell ONLY See DELIVER TO

Delivery Building/Room*: 318

Delivery Contact Name*: Peter

Save Clear Open Print Export Log book Copy requisition Start from template Save as template

Go to second tab called Requisition details. Click on the individual line with orange triangle, in example below all three lines of requisitions were rejected back to Originator.

Task management x Task management x

Search for tasks

Task description

Client: UB, Workflow step: RQ Back to Requisitioner, Process name: Requisition Approval, OrderNo: 10578322, Name: Peter Pencil, Cost Centre: MEYY, Supplier Name: Lyreco UK Ltd

Requisitions - advanced

Requisition entry Requisition details Marketplace

Requisition details

#	Product	Description	Unit	Supplier	Delivery date	Quantity	Currency	Price	Amount	Status
1	FC-12	(ST)Rectangular Folding Leg Table 1600x800mm Walnut - Del...	EA	163135	04/03/2021	1.00	GBP	245.89	245.89	Active
2	SZ-00	(ST)Durable Desk Mat With Contoured Edges 50X70Cm Black	EA	163135	04/03/2021	1.00	GBP	4.77	4.77	Active
3	SZ-00	(ST)Lyreco Desk Mat Refill Pad 590x420mm 25-Sheets	EA	163135	04/03/2021	1.00	GBP	3.98	3.98	Active

Σ 254.64

Add Delete Copy Reset Park Close

Detailed information Workflow log (row 1)

GL Analysis

#	Account	Costs	Project	Product	Budget_category	Vat_recovery	Tax code	Tax system	Percentage	Amount
Split row										

Save Clear Open Print Export Log book Copy requisition Start from template Save as template

Read carefully message displayed on right side in Workflow log section.

The screenshot shows the 'Task management' interface. On the left, there is a sidebar with 'All tasks', 'Today', 'Tomorrow', 'Overdue', and 'RQ Back to...'. The main area has a 'Task description' section with details: Client: UB, Workflow step: RQ Back to Requisitioner, Process name: Requisition, Approval OrderNo: 10578322, Name: Peter Pencill, Cost Centre: MEYY, Supplier Name: Lyreco UK Ltd. Below this is a 'Detailed information' section. To the right of this section is a 'Workflow log (row 1)' section, which is highlighted with a red box. It contains two entries: '03/03/2021 12:17 Cyril Compas (CC543) - Rejected - "Hello, please amend project code on line1. Thank you!"' and '03/03/2021 12:12 Peter Pencill (PP648) - Distributed'. Below the workflow log is a 'GL Analysis' section, which is a table with columns: #, Account, Costo, Project, Product, Budget_cate, Vat_recovery, Tax code, Tax system, Percentage, Amount. The table has one row with data: 1, 6220, MEYY, BA-ME1GNL, P-FC-12, BR60 General, PR, P2, STD, 100.00, 245.89. Below the table is a 'Split row' button. At the bottom of the interface are buttons: Save, Clear, Open, Print, Export, Log book, Copy requisition, Start from template, and Save as template.

Task management x Task management x

Search for tasks

Task description

Client: UB, Workflow step: RQ Back to Requisitioner, Process name: Requisition, Approval OrderNo: 10578322, Name: Peter Pencill, Cost Centre: MEYY, Supplier Name: Lyreco UK Ltd

Workflow log (row 1)

03/03/2021 12:17 Cyril Compas (CC543) - Rejected - "Hello, please amend project code on line1. Thank you!"
03/03/2021 12:12 Peter Pencill (PP648) - Distributed

(Enter a comment)

Copy

GL Analysis

#	Account	Costo	Project	Product	Budget_cate	Vat_recovery	Tax code	Tax system	Percentage	Amount
1	6220	MEYY	BA-ME1GNL	P-FC-12	BR60 General	PR	P2	STD	100.00	245.89

Split row

Save Clear Open Print Export Log book Copy requisition Start from template Save as template

Go to GL Analysis section. If details are not visible, it may be that the GL Analysis is collapsed. Expand the section by clicking on the small arrow on the left.

Amend details as appropriate and save your changes by clicking on the Save button.

This screenshot is similar to the first one, but the 'GL Analysis' section is expanded. The 'Workflow log (row 1)' section is still visible. The 'GL Analysis' table is now fully visible, showing the same data as before. The 'Save' button at the bottom left is highlighted with a red box. The 'Split row' button is also visible below the table.

Task management x Task management x

Search for tasks

Task description

Client: UB, Workflow step: RQ Back to Requisitioner, Process name: Requisition, Approval OrderNo: 10578322, Name: Peter Pencill, Cost Centre: MEYY, Supplier Name: Lyreco UK Ltd

Workflow log (row 1)

03/03/2021 12:17 Cyril Compas (CC543) - Rejected - "Hello, please amend project code on line1. Thank you!"
03/03/2021 12:12 Peter Pencill (PP648) - Distributed

(Enter a comment)

Copy

GL Analysis

#	Account	Costo	Project	Product	Budget_cate	Vat_recovery	Tax code	Tax system	Percentage	Amount
1	6220	MEYY	BA-ME1GNL	P-FC-12	BR60 General	PR	P2	STD	100.00	245.89

Split row

Save Clear Open Print Export Log book Copy requisition Start from template Save as template

Success message will pop up and your requisitions will go back to workflow for further approval. Click OK to close the window.

