Request Ownership

Last updated: August 26, 2022

In eRequest a request has an Originating Group and User and a current Group and User. When a request is created the Originating Group and User are filled in and remain the same for the duration of the request. When a Request is submitted the current group and user change as the request is submitted up the approval tree. Only the current user of a request can make changes to the request.

Once the request is approved it can no long be edited by any users. It is then transferred to a PO in GP. However if there is a problem with this transfer eg. The request cannot be transferred to PO because of an issue with something entered on the request. There is no way for the request to be altered to correct the problem.

The ‘Take Ownership’ and ‘Return Ownership’ functionality addresses this problem. Any user who is an ‘Administrator’ can open a request and ‘Take Ownership’ this changes the Current User of the request to the administrator user. They can then edit the request as required; this allows ‘Approved’ requests to be edited. If the request is not Approved, editing is as normal, lines can be added and remove and the normal editing rules apply. If the request is Approved, existing lines can be edited but lines cannot be added or removed.

A line can only be edited if it has not been transferred to GP, and is not in the process of being transferred. But a line which hasn’t been attempted or has been attempted but has failed it can be edited.

The administrator cannot do any actions with the request, other than save it. In which case it can be reopened and editing can continue. Once the amendments are complete, the administrator can click on the ‘Return Ownership’ button. The administrator must then pick which user will become the new current user, from the users in the requests current group.

Using this functionality requests can be moved from one user to another within the same group. When the administrator has the request no other user can edit it. The ‘administrator’ must return the request to a normal user to allow it to continue processing.