Returning Requisitions to Shared Approval Folders and Placing Requisitions on Hold
What’s different in UD Exchange?

**Approval Routing to multiple people**

- In webforms, a submitter would choose one person to approve the webform from a list of possible approvers.
- In UD Exchange, multiple people can share an approval queue. They “check out” an item to work on it and “return” it if they want to allow someone else access instead.

**Placing Requisitions on Hold**

- In webforms, there was little ability to communicate why an approver was not acting on a requisition.
- In UD Exchange, if an approver is not ready to approve, they can put the requisition on hold with a comment as to what they need before they can proceed.
Returning Requisitions to Shared Approval Folders

• As an Approver in UD Exchange, there may be situations where you have assigned a requisition to yourself, but need to return it to the Shared Approval Folder for a different approver to review and process
• This allows people to work more efficiently and not hold up a requisition because a single person is unavailable.
Use the navigation bar on the left side of your screen and go to Orders > Approvals > Requisitions to Approve.
If a Requisition is assigned to you, you will see your name in the **Assigned Approver** column.
1. Check the box in the column next to the item.
2. Click in the Select an Action dropdown at the bottom.
3. Select Return to Shared Folder from the menu.
You can also return the document from within the requisition when reviewing, by choosing **Return to Shared Folder** from the Approval dropdown.
Placing Requisitions on Hold

• As an Approver in UD Exchange, there may be situations where you are not ready to approve a requisition because you are waiting on more information, such as a meeting or an adjacent review like a technology request.

• In this instance, you don’t want to approve the request, but you don’t want another approver to take action from the shared folder.

• Putting the requisition on hold will let everyone know why you are not taking action and also stop daily reminder emails about the pending approval.
Use the navigation bar on the left side of your screen and go to **Orders > Approvals > Requisitions to Approve**.
If a Requisition is assigned to you, you will see your name in the **Assigned Approver** column.
1. Check the box in the column next to the item.
2. Click in the Select an Action dropdown at the bottom.
3. Select **Place PR on Hold** from the menu.
You can also return the document from within the requisition when reviewing, by choosing **Place on Hold** from the Approval dropdown.
In either situation, the action will require a comment as to why the requisition is on hold which will become part of the Comments.
The Approvals Queue, the Workflow, and the Comments will all indicate that the requisition is on hold. Any subsequent action – approval, return to shared folder, return to requisitioner, etc. – will remove the hold.
Resources

Procurement Services
procurement@udel.edu
See also, “Approving Requisitions in UD Exchange”