Returning Requisitions to Shared Approval Folders and Placing Requisitions on Hold
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Returning Requisitions to Shared Approval Folders

- In UD Exchange, multiple Approvers can share an approval folder. This feature allows for greater work efficiency and reduces delays when a single Approver is unavailable.

- 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.
Use the navigation bar on the left side of your screen

Select Orders > Approvals > Requisitions to Approve
If a Requisition is assigned to you, your name will appear in the **Assigned Approver** column.
Check the box in the column next to the item.

Click the **Select an Action** menu

Select **Return to Shared Folder** from the menu.
You can also return the document from within the requisition when reviewing:

Click the **Approval menu**.

Select **Return to Shared Folder**.
Placing Documents on Hold

• As an Approver in UD Exchange, there may be situations where you are not ready to approve a document because you are waiting for more information.

• In the following example, you don’t want to approve the requisition yet, and you also don’t want another approver to take action from the shared approval folder.

• Placing the requisition on hold with a comment will let everyone know why you are not taking action yet and will 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, your name will appear in the **Assigned Approver** column.
Check the box in the column next to the item.

Click the **Select an Action** menu

Select **Place PR On Hold** from the menu.
Placing **Vouchers** on hold works the same way. Remember, you can only work with documents not already assigned to another Approver.
You can also place the requisition on hold from within the requisition when reviewing.

Click the **Approval menu**.

Select **Place on Hold**.
With either method, you will be prompted to insert a **Hold Reason** as to why the requisition has been placed on hold.

Click **Place On Hold**.
Your Approvals Queue, the Requisition Workflow, and the Comments Tab 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.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Approving Requisitions in UD Exchange