

UNIVERSITY OF DELAWARE[®] EXCHANGE

Returning Requisitions to Shared Approval Folders
and Placing Requisitions on Hold

Revised 04/17/23

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.





- Orders
- Search
- My Orders
- Approvals

- Quick search
- Requisitions to Approve
- Change Requests to Approve
- Procurement Requests to Approve
- Requisitions Recently Approved By Me
- Change Requests Recently Approved By ...
- Procurement Requests Recently Approv...
- Assign Substitute Approvers-Requisitions
- Assign Substitute Approvers-Procureme...
- Approval Notifications

Action Items

There are no Action Items to display.

My Resources

Product Release Library | procurement@udel.edu
Site Map

Quick Links

- UD Exchange How To Guides
- How Do I Buy _____ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix

Use the navigation bar on the left side of your screen
Select Orders > Approvals > Requisitions to Approve

Catalog & Forms Showcase (Under Review)

Procurement Forms

Non-PO Payment Request

Honorarium Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

NSB Customer Setup

NEW Waiver of Bid Request

My Draft Carts

Showing Results 1 - 1 of 1

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3652672	Kathryn Kuhnert	My Drafts	11/16/2022	0.00 USD

Approvals

- Requisitions 9
- Purchase Order
- Change Requests
- Vouchers 10
- Procurement Requests
- Contract Requests
- AP Requests
- Sourcing Event Requests
- Supplier Requests

Your Selections

Date Range: All Dates

View Approvals For: My Approvals

Filters

- SUPPLIER
 - LOWE'S HOME CENTERS INC 2
 - FASTENAL COMPANY 1
 - 3DFORTIFY INC 1
 - NCURA 1
 - PHILIP ROSENAU COMPANY INC 1
- DEPARTMENT
 - PROCUREMENT SERVICES (04750) 6
 - No Department 2
 - FACILITIES-BLDG MAINT & OPER (05848) 1

Showing Results 1 - 9 of 9 Display 20

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3100253	NCURA	Margot Martin	10/30/2020 3:07 PM	Rachel Requester	190.00 USD
3089544	PHILIP ROSENAU COMPANY INC	Margot Martin	10/30/2020 9:57 AM	Kristen Pickering	406.07 USD

Check the **box** in the column next to the item.
Click the **Select an Action** menu
Select **Return to Shared Folder** from the menu.

This PR has notes ✓

<input checked="" type="checkbox"/>	3100253	NCURA	Margot Martin	10/30/2020 3:07 PM	Rachel Requester	190.00 USD
Requisition Name		NCURA Membership Dues	Folders	872 Days in folder [My PR Approvals]		
No. of line items		1				
This PR has notes		✓				
<input type="checkbox"/>	3089544	PHILIP ROSENAU COMPANY INC	Margot Martin	10/30/2020 9:57 AM	Kristen Pickering	406.07 USD
Requisition Name		test hosted	Folders	[My PR Approvals]		
No. of line items		3				

1 ITEMS SELECTED

- Select an action
- Assign
- Approve/Complete
- Forward...
- Return to Shared Folder
- Place PR On Hold
- Add Notes to History
- Assign CV2 Code

Requisition • 3100253

Approve/Complete & Show Next 3 of 9 Results

Summary PO Preview Comments Attachments 1 History

General Shipping Billing

Status Pending COA Approver (Margot Martin) Ship To University of Delaware Bill To Accounts Payable

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

Unit	UNIVERSITY OF DELAWARE		
Requested Delivery Date		Requested Delivery Date	no value
Payment Term Override	×		
eBuilder Process Instance		eBuilder Process Instance	no value
Ad-Hoc Approver	Select		
Multi-Invoice/Payment	×		
After-The-Fact Purchase	×		

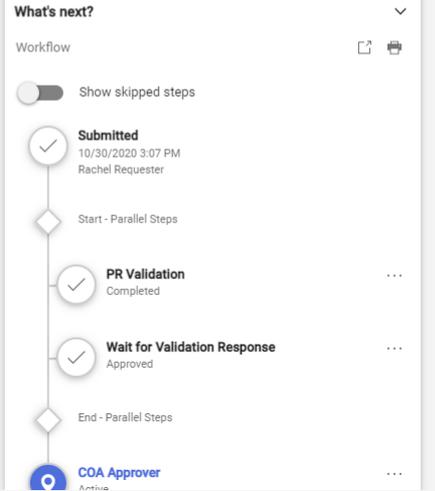
Buyer Information

- Approve & Next
- Approve
- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Reject Requisition

Total (190.00 USD)

Shipping, Handling, and Tax charges are shown by each supplier. The values shown are subject to budget checking, and workflow approval.

Subtotal 190.00



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.



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Action Items

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My Resources

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[Site Map](#)

Quick Links

- [UD Exchange How To Guides](#)
- [How Do I Buy _____???](#)
- [Commodity Code-Account Crosswalk](#)
- [Non-PO Payment Matrix](#)
- [Non-Catalog Item](#)
- [NEW Waiver of Bid Form](#)
- [Request Contract](#)

Use the navigation bar on the left side of your screen and go to:
Orders > Approvals > Requisitions to Approve.

Non-PO Payment Request

Honorarium Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

NSB Customer Setup

NEW Waiver of Bid Request

My Draft Carts

Showing Results 1 - 1 of 1

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3652672	Kathryn Kuhnert	My Drafts	11/16/2022	0.00USD

Office/Misc Supplies

Approvals

Submit Date Newest First

- Requisitions **9**
- Purchase Order
- Change Requests
- Vouchers **10**
- Procurement Requests
- Contract Requests
- AP Requests
- Sourcing Event Requests
- Supplier Requests

Your Selections

Date Range
All Dates

View Approvals For
My Approvals

Showing Results 1 - 9 of 9 Display 20

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3523210	TRI-STATE CARPET INC	Margot Martin	5/19/2022 2:54 PM	Jennifer Simms	9,880.00 USD
Requisition Name Non Catalog Test No. of line items 2 This PR has notes		Folders	340 Days in folder [My PR Approvals]		
		Margot Martin	5/5/2022 4:21 PM	Kristen Pickering	600.00 USD
		Folders	360 Days in folder [My PR Approvals]		
3100253	NCURA	Margot Martin	10/30/2020 3:07 PM	Rachel Requester	190.00 USD
Requisition Name NCURA Membership Dues No. of line items 1 This PR has notes		Folders	872 Days in folder [My PR Approvals]		
3089544	PHILIP ROSENAU COMPANY INC	Margot Martin	10/23/2020 9:57 AM	Kristen Pickering	406.07 USD
Requisition Name test hosted No. of line items 3		Folders	843 Days in folder [My PR Approvals]		
3087701	3DFORTIFY INC	Margot Martin	10/22/2020 11:38 AM	Kristen Pickering	5,330.00 USD

If a Requisition is assigned to you, your name will appear in the **Assigned Approver** column

Filters

- SUPPLIER**
- LOWE'S HOME CENTERS INC
 - FASTENAL COMPANY
 - 3DFORTIFY INC 1
 - NCURA 1
 - PHILIP ROSENAU COMPANY INC 1
 - [See all Supplier | Select Multiple](#)
- DEPARTMENT**
- PROCUREMENT SERVICES (04750) 6
 - No Department 2
 - FACILITIES-BLDG MAINT & OPER (05848) 1
 - [Select Multiple](#)



Approvals

- Requisitions 9
- Purchase Order
- Change Requests
- Vouchers 10
- Procurement Requests
- Contract Requests
- AP Requests
- Sourcing Event Requests
- Supplier Requests

Your Selections

Date Range
All Dates

View Approvals For
My Approvals

Filters

- SUPPLIER
- LOWE'S HOME CENTERS INC 2
 - PHILIP ROSENAU COMPANY INC 1
 - TRI-STATE CARPET INC 1
 - 3DFORTIFY INC 1
 - TRIDIM FILTER CORPORATION 1
- DEPARTMENT
- PROCUREMENT SERVICES (04750) 6
 - No Department 2
 - FACILITIES-BLDG MAINT & OPER (05848) 1

Showing Results 1 - 9 of 9 Display 20

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3523210	TRLSTATE CARPET INC	Margot Martin	5/19/2022 2:54 PM	Jennifer Simms	9,880.00 USD
				en Pickering	600.00 USD

Check the **box** in the column next to the item.
Click the **Select an Action** menu
Select **Place PR On Hold** from the menu.

<input checked="" type="checkbox"/>	3100253	NCURA	Margot Martin	10/30/2020 3:07 PM	Rachel Requester	190.00 USD	
Requisition Name		NCURA Membership Dues	Folders	872 Days in folder [My PR Approvals]			
No. of line items		1					
This PR has notes		✓					
<input type="checkbox"/>	3089544	PHILIP ROSENAU COMPANY INC	Margot Martin	9:57 AM	Kristen Pickering	406.07 USD	
Requisition Name		test hosted	Folders	folder [My PR Approvals]			
No. of line items		3					

1 ITEMS SELECTED

- Select an action
- Assign
- Approve/Complete
- Forward...
- Return to Shared Folder
- Place PR On Hold
- Add Notes to History
- Assign CV2 Code



VOUCHER NO.	SUPPLIER VOUCHER NO.	SUPPLIER NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.	MATCH STATUS
<input checked="" type="checkbox"/>	IT000801	12345-002	MARYLAND UNIV OF - EASTERN SHORE	Kristen Pickering	11/10/2021 7:56 PM	UDRT000049 Matched

Due Date: 12/2/2021 No. of Lines: 2

Placing **Vouchers** on hold works the same way.
Remember, you can only work with documents not already assigned to another Approver.

<input checked="" type="checkbox"/>	IT000793	monthly-11	HEISLER BROTHERS PROPERTIES LLC	Not Assigned	11/1/2021 1:23 AM	UDP0000069 Matched
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Due Date: 11/1/2021 No. of Lines: 1

Voucher Name: 2021-11-01 University of Delaware
Type: PO Voucher
Voucher Source: Recurring

<input type="checkbox"/>	IT000792	I0000497-12	HEISLER BROTHERS PROPERTIES LLC			UDP0000070 Unmatched
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- Select an action
- Assign
- Approve/Complete
- Forward...
- Return to Shared Folder
- Place Voucher On Hold**
- Add Notes to History

2 ITEMS SELECTED



Requisition • 3100253

Approve/Complete & Show Next 3 of 9 Results

Summary PO Preview Comments Attachments 1 History

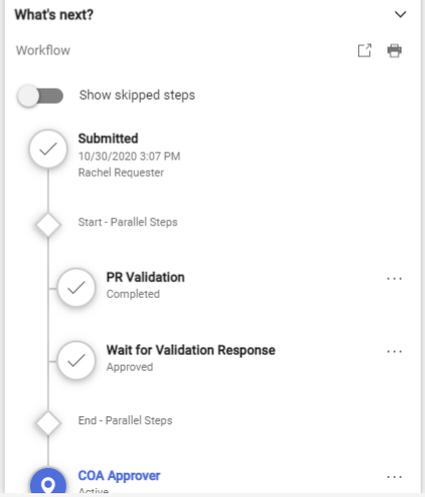
General Shipping Billing

Status Pending COA Approver (Margot Martin) Ship To University of Delaware Bill To Accounts Payable

You can also place the requisition on hold from within the requisition when reviewing.
Click the **Approval** menu.
Select **Place on Hold**.

- Approve & Next
- Approve
- Return to Shared Folder
- Place on Hold**
- Return to Requisitioner
- Forward to ...
- Reject Requisition

Total (190.00 USD) Shipping, Handling, and Tax ch... d by
each supplier. The values show... es,
budget checking, and workflow
Subtotal 0.00
190.00



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Requisition • 3100253

Summary PO Preview Comments Attachments 1 History

General **Shipping**

Status **Pending**
COA Approver (Margot Martin)

Submitted 10/30/2020 3:07 PM

Cart Name NCURA Membership Dues

Description *no value*

Priority Normal

Prepared by Rachel Requester

Prepared for Rachel Requester

Purchasing Business Unit UOD01
UNIVERSITY OF DELAWARE

Payment Term Override

eBuilder Process Instance *no value*

Ad-Hoc Approver **Select**

Multi-Invoice/Payment

After-The-Fact Purchase

Buyer Information

Ship To
University of Delaware
Attn: Requester Sean
Room: 123
222 SOUTH CHAPEL STREET
GENERAL SERVICES BUILDING
Newark, DE 19716
United States

Delivery Options

Expedite

Ship Via **Best Carrier-Best Way**

Requested Delivery *no value*

Billing Options

Accounting Date *no value*

Tax Flag

Place On Hold

Hold Reason

Waiting for Requester to add backup documentation.

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Place On Hold Cancel

Pending

Total (190.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 190.00

190.00

What's next?

Workflow

Show skipped steps

Submitted
10/30/2020 3:07 PM
Rachel Requester

Start - Parallel Steps

PR Validation
Completed

Wait for Validation Response
Approved

End - Parallel Steps

COA Approver
Auntus

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

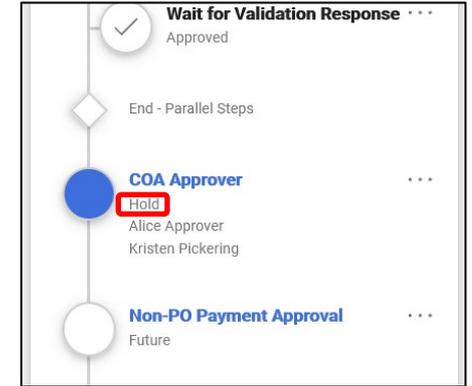
Click **Place On Hold**.



▼ MY PR APPROVALS 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER
<input type="checkbox"/> 3229813 	CHRISTINA SCHOOL DISTRICT	Alice Approver

Requisition Name	Non-PO Payment Test	Folders
No. of line items	1	
This PR has notes	✓	



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.

Alice Approver - 11/10/2021 7:26:24 PM

Requisition - 3229813 **Requisition put on hold** ↻

Waiting for Requester to add backup documentation.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Approving Requisitions in UD Exchange](#)

