Tip for the Day!

**Question:** How do I put an approved requisition’s status on hold?

**Purpose:** You cannot put a requisition on hold, but placing a requisition’s status to Open will achieve the same thing. Placing a requisition in a status of Open will prevent a requisition from becoming approved and allow a Requester to continue working on a requisition at a later time. This can only be done for requisitions that have a status of Pending (i.e. one or more approvals are pending) or Approved.

**Note:**
A. For requisitions with an Approved status, this procedure will not work once the requisition has been sourced. **Sourcing** refers to the point at which the requisition lines are being processed into an inventory order, PO, or RFQ (depends on the requisition type). Once lines are sourced for a General Stores requisition, you must contact General Stores for assistance. For a Basic or Direct Connect requisition, you must contact PurchAdmin@uthscsa.edu for assistance.
B. Many of the following steps can also be used to edit an Approved or Pending requisition for other purposes such as adding and deleting lines. The same limitations apply regarding sourced lines.

**Below are the steps to take in the event you need to place a Requisition’s status to Open.**

1. Search for the requisition in Manage Requisitions. In this example, we’ll select an approved requisition that has not been sourced.

**Manage Requisitions**

![Manage Requisitions](image)

**Note:** We can tell no lines have been sourced for this requisition because the requisition hasn’t yet been approved yet. Had it been approved, we’d make certain the appropriate icon in the requisition lifespan was still gray. For example, if this were a General Stores requisition, we’d look at the Inventory icon. For a Basic or Direct Connect requisition, we’d confirm that the Purchase Orders icon was still gray.
2. From the Select Action box, click **Edit Requisition**, and then click the **Go** button.

3. The following message appears. Click **OK**.

```
This requisition is approved. Editing this requisition will restart the approval process. (13036.6249)

Upon editing the requisition, clicking the Save and Submit or Save and Preview button will restart the approval process from the beginning. Click OK to continue, or click Cancel to go back.
```

4. Click **Requisition Defaults**.
5. Click the **Continue** button.

6. The following message appears. Click **Yes**.

   Do you want to add a new line? (20302,23)
   Click **Yes** to re-trigger approvals for this requisition. Click **No** to Submit the requisition.

   Yes   No
7. Leave this page blank and click **Review and Submit**.

8. Click the **Save & Preview Approvals** button.
9. The following message appears. Click OK. Do not continue with submitting the requisition for approval. You can exit the system or to confirm the changed status, access Manage Requisitions.

```
Saving modifications to this requisition will cause the approval process to be terminated. (18036,827)

The requisition you are saving has already entered the approval process. By clicking OK, any previous approvals will be void and the approval process will terminate, leaving this requisition in 'Open' status. To go back to the requisition, click Cancel.
```

![OK Cancel button]

10. At this point, the requisition will have an **Open** status. You can confirm this in Manage Requisitions.

![Manage Requisitions screenshot]

To locate requisitions, edit the criteria below and click the Search button:

- **Business Unit**: HSCSA
- **Requisition Name**:
- **Request Status**: All but Complete
- **Budget Status**:
- **Date From**: 11/25/2010
- **Date To**: 12/09/2010
- **Entered By**: DOEJ
- **Department**:

To view the lifespan and line items for a requisition, click the Expand triangle icon.

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Status</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000502198</td>
<td>0000502198</td>
<td>HSCSA</td>
<td>12/09/2010</td>
<td>Open</td>
<td>Not</td>
<td>10.00USD</td>
</tr>
<tr>
<td>0000502197</td>
<td>0000502197</td>
<td>HSCSA</td>
<td>12/09/2010</td>
<td>Open</td>
<td>Valid</td>
<td>10.00USD</td>
</tr>
</tbody>
</table>