

# UNIVERSITY OF DELAWARE EXCHANGE

Approving Vouchers  
*Last revised 6/4/2023*

# Voucher Approval in UD Exchange

- Vouchers may require approval prior to payment based on dollar amount
- Vouchers route to the **PO Owner** for approval
  - The PO Owner does *not* need to have the Approver Role in their UDX profile
- The PO Owner will receive email notifications and reminders about vouchers to approve.
- The PO Owner will review the voucher to ensure that the goods or services being invoiced were received
- Once approved, the voucher will be queued for payment
  
- This guide illustrates:
  - Where to find your voucher approvals
  - How to assign a substitute approver to vouchers
  - Additional voucher actions and features



Shop · Shopping Home Page

Organization Message

Welcome to the University of Delaware Exchange Test Site!

Here you'll find the goods and services you need. The greatly expanded University of Delaware Exchange provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers.

Please note: As you use this site for training and testing, you may see small differences from guides where the administrators test new solutions before moving to production and while building new procurement@udel.edu if you have specific questions; chances are we are working on it!

Quick Links

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

Action Items

**My Assigned Approvals**

- Vouchers 2
- Orders
- My Returned Requisitions 1

From the Homepage:  
 Click the **Action Items** flag.  
 Select **Vouchers**.

Product Release Library | procurement@udel.edu

Site Map

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request	Subaward Request	NIIMBL Subaward Request	RFX Request (Option 2)
Waiver of Bid Request			

My Draft Carts

Draft Cart Type: Drafts Assigned To Me

No results found



Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

of Delaware Exchange provides a familiar online search for items by keyword or item number. When you can't find what you need, click on the Non-

ances from guides and the production site. This is building new guides. Please email on it!

Quick Links

- UD Exchange How To Guides
- How Do I Buy \_\_\_\_\_ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- Request New Supplier
- Request Contract

My Resources

My Resources  
Product Release Library | procurement@udel.edu  
Site Map



- Accounts Payable
- Vouchers
- Receipts
- Approvals

- Quick search
- Vouchers to Approve
- AP Requests to Approve
- Vouchers Recently Approved By Me
- AP Requests Recently Approved By Me
- Assign Substitute Approvers-Vouchers
- Assign Substitute Approvers-AP Requests
- Approval Notifications

Alternatively, you can navigate to **Accounts Payable>Approvals>Vouchers to Approve**

Catalog & F

Procurement Forms

- Non-PO Payment Request
- Subaward Request
- NIIMBL NIIMBL Subaward Request
- RFX Request (Option 2)
- Waiver of Bid Request

Draft Drafts Assigned To Me

Cart Type

No results found



# Approvals

Requisitions 10 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**
  - HERC RENTALS INC 6
  - ROY'S ELECTRICAL SERVICE 4
  - Select Multiple
- DEPARTMENT**
  - PROCUREMENT SERVICES (04750) 10
- CURRENT WORKFLOW STEP**
  - PO Owner Approval 10
- MATCHING STATUS**
  - Matched 10

Total Results 10 Display 20 per folder

### MY VOUCHER APPROVALS 10

VOUCHER NO.	SUPPLIER VOUCHER NO.	SUPPLIER NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.	MATCH STATUS	AMOUNT	
<a href="#">IT000674</a>	41633	ROY'S ELECTRICAL SERVICE	Margot Martin	4/22/2021 9:21 AM	UDBT000076	Matched	1,880.00 USD	
Due Date		4/20/2021	No. of Lines:		1			
Voucher Name		2021-04-22 702619730 04	Folders		759 Days in folder [My Voucher Approvals]			
<a href="#">IT000673</a>	41370	ROY'S ELECTRICAL SERVICE	Margot Martin	4/22/2021 9:16 AM	UDBT000076	Matched	1,880.00 USD	
Due Date		1/1/2021	No. of Lines:		1			
Voucher Name		2021-04-22 702619730 03	Folders		759 Days in folder [My Voucher Approvals]			
Type		PO Voucher						
Voucher Source:		Manual						
<a href="#">IT000672</a>	41261	ROY'S ELECTRICAL SERVICE	Margot Martin	4/22/2021 9:11 AM	UDBT000076	Matched	1,880.00 USD	
Due Date		11/27/2020	No. of Lines:		1			
Voucher Name		2021-04-22 702619730 02	Folders		759 Days in folder [My Voucher Approvals]			
Type		PO Voucher						
Voucher Source:		Manual						
<a href="#">IT000671</a>	41239	ROY'S ELECTRICAL SERVICE	Margot Martin	4/22/2021 9:07 AM	UDBT000076	Matched	1,880.00 USD	

Click the **Voucher Number** to open and view the voucher.



Summary

The **Summary** tab of the Voucher contains the information for review.

General		Addresses		Note/Attachments							
Voucher Type	Voucher	<b>Remit To</b>		External Note	<i>no value</i>						
Pay Status	In Process	PO BOX 178 543 MAIN STREET CHESWOLD, Delaware 19936-0178		Internal Note/Business Justification	<i>no value</i>						
Voucher Number	IT000674	United States Address Id 1		External Attachments	<a href="#">Add</a>						
Supplier Invoice No.	41633	<b>Bill To</b>		Internal Attachments	<table border="1"> <thead> <tr> <th>Internal Attachments</th> <th>Date</th> <th><a href="#">Add</a></th> </tr> </thead> <tbody> <tr> <td><a href="#">41633.pdf</a></td> <td>4/22/2021</td> <td>...</td> </tr> </tbody> </table>	Internal Attachments	Date	<a href="#">Add</a>	<a href="#">41633.pdf</a>	4/22/2021	...
Internal Attachments	Date	<a href="#">Add</a>									
<a href="#">41633.pdf</a>	4/22/2021	...									
Supplier Name	<a href="#">ROY'S ELECTRICAL SERVICE</a>	Accounts Payable accounts payable@udel.edu 222 South Chapel Street Newark, DE 19716 United States		<b>Discount, Tax, Shipping &amp; Handling</b>							
Voucher Date	3/21/2021	<b>Requested Payment Override</b>		Discount, tax, shipping & handling							
Discount Date	<i>no value</i>	Accounting Date	4/22/2021	Allocation	Sum of All						
Due Date Override	✗	Payment Message	<i>no value</i>	Terms Discount	0.00 USD						
Due Date	4/20/2021	Payment Hold Reason	<i>no value</i>	Discount	0.00 USD    0.00 USD						
Terms	0% 0, Net 30	Separate Payment	✗	Tax 1	0.00 USD    0.00 USD						
Terms Discount	0.00 USD	Payment Handling Code	<i>no value</i>	Tax 2	0.00 USD    0.00 USD						
Voucher Name	2021-04-22 702619730 04	Withholding Override	<i>no value</i>	Shipping	0.00 USD    0.00 USD						
Purchasing Business Unit	UOD01 UNIVERSITY OF DELAWARE										
Ad-Hoc Approver	<a href="#">Select</a>										
Multi-Invoice/Payment	✓										
After-The-Fact Purchase	✗										

**Pending**

**ROY'S ELECTRICAL SERVICE** ▼

Supplier Invoice No. 41633

Voucher Image [41633.pdf](#) ...

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**Total (1,880.00 USD)** ▼

Subtotal	1,880.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	<b>1,880.00</b>

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**Related Documents** ▼

[Purchase Order: UDBT000076](#) 🖨️

[Requisition: 3251400](#) 🖨️

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**What's next?** ▼

Workflow 📄 🖨️

Show skipped steps

✓

**Submitted**  
4/22/2021 9:23 AM  
Zipporah Lee



Summary Matching Supplier Messages Comments Attachments 1 History

General Addresses Note/Attachments

Voucher Type	Voucher	<b>Remit To</b>	External Note	no value
Pay Status	In Process	PO BOX 178	Internal	no value
Voucher Number	IT000674	543 MAIN STREET	Note/Business	
		CHESWOLD, Delaware 19936-0178	Justification	

The invoice should be viewable in the sidebar as a link called **Voucher Image**.  
 Clicking the **link** will open the invoice image side-by-side with the voucher.

Due Date	no value	Newark, DE 19716	
Due Date Override	✗	United States	
Due Date	4/20/2021	<b>Payment Information</b>	
Terms	0% 0, Net 30	<b>Requested Payment Override</b>	
Terms Discount	0.00 USD	Accounting Date	4/22/2021
Voucher Name	2021-04-22 702619730 04	Payment Message	no value
Purchasing Business Unit	UOD01 UNIVERSITY OF DELAWARE	Payment Hold Reason	no value
Ad-Hoc Approver	Select	Separate Payment	✗
Multi-Invoice/Payment	✓	Payment Handling Code	no value
After-The-Fact Purchase	✗	Withholding Override	no value

<b>Discount, Tax, Shipping &amp; Handling</b>		
Discount, tax, shipping & handling	Allocation	Sum of All
	Header-level	Sum of lines
Terms Discount	0.00 USD	
Discount	0.00 USD	0.00 USD
Tax 1	0.00 USD	0.00 USD
Tax 2	0.00 USD	0.00 USD
Shipping	0.00 USD	0.00 USD

**Pending**

**ROY'S ELECTRICAL SERVICE**

Supplier Invoice No. 47055

Voucher Image

[41633.pdf](#)

**Total (1,880.00 USD)**

Subtotal	1,880.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>1,880.00</b>

**Related Documents**

[Purchase Order: UDBT000076](#)

[Requisition: 3251400](#)

**What's next?**

Workflow

Show skipped steps

**Submitted**  
4/22/2021 9:23 AM  
Zipporah Lee



☰ 👁️ 🖨️ 🔍 ⋮ Approve/Complete & Show Next 1 of 10 Results ◀ ▶

Summary Matching Supplier Messages Comments Attachments 1 History

General	Addresses	Note/Attachments
Voucher Type: Voucher Pay Status: In Process Voucher Number: IT000674 Supplier Invoice No.: 41633 Supplier Name: ROY'S ELECTRICAL SERVICE Voucher Date: 3/21/2021 Discount Date: no value	<b>Remit To</b> PO BOX 178 543 MAIN STREET CHESWOLD, Delaware 19936-0178 United States Address Id 1 <b>Bill To</b> Accounts Payable accounts payable@udel.edu 222 South Chapel Street Newark, DE 19716 United States <b>Payment Information</b> Requested Payment Override	External no value Note Internal no value Note/Business Justification External Attachment s Add Internal Attachments Date Add 41633.pdf 4/22/2021 Discount, Tax, Shipping & H...

You can now validate the information that was used to create the voucher.

Clicking on the **eyeball** lets you narrow down what you are looking at, such as Line Items Only.

Discount	Hold Reason	Discount	Amount	Unit
Voucher Name	2021-04-22 702619730 04	Separate Payment	0.00 USD	C
		Tax 1	0.00 USD	C

☰ BuyerInvoiceOCREmbedDownload 1 / 1 76% + 🖨️ 🔍

**ROY'S ELECTRICAL SERVICE, INC.**  
 P.O. BOX 178 - 543 MAIN STREET  
 CHESWOLD, DELAWARE 19936-0178  
 (302) 674-3199 - FAX (302) 674-3062

**Invoice**  
 Invoice No.: 41633  
 Page 1 of 1  
 Customer No.: UNOFDE

**Bill To:** University of Delaware  
 ELECTRIC SERVICES  
 200 ACADEMY ST.  
 Newark, DE 19716

**Ship To:** University of Delaware  
 ELECTRIC SERVICES  
 GEN. & F.P. CHECKS

Date	Ship Via	F.O.B.	Terms			
03/02/21	MONTHLY FP/IGEN CKS		Net 30			
Purchase Order Number	Order Date	Sales Person	Our Order Number			
UDBT000076	03/02/21	TECH TL				
Quantity	Shipped	B.O.	Item Number	Description	Unit Price	Amount
1	1			FEBRUARY 2021 MONTHLY CHECKS AND INSPECTIONS OF (20) GENERATORS AS PER AGREEMENT	1700.00	1700.00
2	2			FEBRUARY 2021 CHECK AND INSPECTION OF 2 FIRE PUMPS @ CHRISTIANA TOWERS AND MORRIS LIBRARY	90.00	180.00
					Invoice subtotal	1880.00
					Invoice total	1880.00

We appreciate your business.

SIGN \_\_\_\_\_

PRINT \_\_\_\_\_

DATE \_\_\_\_\_





Voucher • ROY'S ELECTRICAL SERVICE • IT000674

Summary Matching Supplier Messages Comments Attachments 1 History

General Addresses Note/Attachments

Voucher Type Voucher Remit To External Note no value

**The actions menu offers you the following options:**

- Approve & Next** - To approve this voucher and automatically open the next voucher in your queue.
- Approve** - To approve this voucher only and remain on the current screen.
- Return Voucher** - To return the voucher to Accounts Payable for corrections/edits.
- Place Voucher on Hold** – This action will temporarily halt reminder emails if you need time to investigate your next steps. You will be prompted to add a comment documenting the reason for the hold.
- Forward** - To send the voucher to a different Approver.
- Reject Voucher** - To reject a voucher because the vendor should **not** be paid. **NOTE:** If this action is taken, the voucher is then cancelled, making it **unavailable for future edits of any kind.**

Select your desired action from the menu.

Approve/Complete & Show Next 1 of 10 Results

Approve & Next  
Approve  
Return Voucher  
Place Voucher on Hold  
Forward...  
Reject Voucher

ROY'S ELECTRICAL SERVICE  
Supplier Invoice No. 133  
Voucher Image 41633.pdf  
Total (1,880.00 USD)  
Subtotal 1,880.00  
Discount 0.00  
Tax1 0.00  
Tax2 0.00  
Shipping 0.00  
Handling 0.00  
1,880.00  
Related Documents  
Purchase Order: UDBT000076  
Requisition: 3251400  
What's next?  
Workflow  
Show skipped steps  
Submitted  
4/22/2021 9:23 AM  
Zipporah Lee

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# Assigning a Substitute Voucher Approver

- If you will be out of the office, you may need to assign a substitute Approver to review and approve vouchers on your behalf.
- The following slides illustrate how to assign a Substitute Approver for vouchers.



Organization Message

Welcome to the University of Delaware Exchange Test Site!

Accounts Payable

Vouchers

Receipts

Approvals

- Quick search
- Vouchers to Approve
- AP Requests to Approve
- Vouchers Recently Approved By Me
- AP Requests Recently Approved By Me
- Assign Substitute Approvers-Vouchers
- Assign Substitute Approvers-AP Requests
- Approval Notifications

Quick Links

- UD Exchange How To Guides
- How Do I Buy \_\_\_\_\_ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- Request New Supplier
- Request Contract

My Resources

**My Resources**  
 Product Release Library | procurement@udel.edu  
 Site Map

Catalog & Forms Showcase (Under Development)

Procurement Form

Non-PO Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

Waiver of Bid Request

Navigate to Accounts Payable>Approvals>Assign Substitute Approvers

My Draft Carts



Assign Substitute to All Vouchers Folders

End Substitute for All Vouchers Folders

Showing 1 - 1 of 1 Results

All Folder Results

Substitution Actions

**Search Details**

Filtered by  
Type: Vouchers

Results Per Page: 20 Sort by: Folder name ascending Page 1 of 1

Folder Name	Approver	Substitute	Action
My Voucher Approvals	Margot Martin		<b>Assign</b>

**Refine Search Results**

Type  
Vouchers

View Approvals For  
My Approvals

Approver  
Margot Martin (1)

Most likely, you will have only one Voucher Approval folder (called My Voucher Approvals). Click either **Assign** or **Assign Substitute to All Vouchers Folders**.

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Accounts Payable > Approvals > Assign Substitute Approvers-Vouchers

Showing 1 - 1 of 1 Results All Folder Results

Results Per Page 20 Sort by: Folder name ascending

Folder Name	Approver	Substitute	Action
My Voucher Approvals	Margot Martin		<input type="checkbox"/> Assign

### Assign Substitute

Include Date Range for Substitution

Substitute Name \* Pickering, Kristen

\* Required

Search Details: Filtered by Type: Vouchers

Refine Search Results: Type: Vouchers

View Approvals For: My Approvals

Approver: Margot Martin (1)

Assign Substitute to All Vouchers Folders | End Substitute for All Vouchers Folders

Substitution Actions | Page 1 of 1

Logout

Search for and select the name of the UD employee you want to act as your substitute, then click **Assign**.

Unlike requisitions, users do *not* need an Approver role to approve vouchers. All users have the permission to approve vouchers.

Assign Substitute to All Vouchers Folders **End Substitute for All Vouchers Folders**

Showing 1 - 1 of 1 Results All Folder Results Substitution Actions

Results Per Page 20 Sort by: Folder name ascending Page 1 of 1

Folder Name	Approver	Substitute	Action
My Voucher Approvals	Margot Martin	Kristen Pickering	<b>Remove</b>

**Search Details**

Filtered by  
Type: Vouchers

**Refine Search Results**

Type  
Vouchers

View Approvals For  
My Approvals

Approver  
Margot Martin (1)

Substitute  
Kristen Pickering (1)

When the Substitute is no longer needed, click **End Substitute for All Vouchers Folders** or the **Remove** button.

Note: When a substitute is named for voucher approvals, the voucher routes to that person, *not to both* people. If your substitute is not removed, your voucher will stay with them until they take action on it.



# Additional Voucher Actions & Features

The following sections of this guide illustrate additional voucher actions and features:

- Viewing Related Documents
- Viewing Comments on Related Documents
- Rejecting Line Items
- Placing Vouchers on Hold
- Adding Ad hoc Approvers
- Approving via E-mail



Voucher • IT000807



1 of 3 Results



Approve &amp; Next



Summary

Matching

Supplier Messages

Comments

Attachments

History

1 1 test 5,100.00 Qty: 1 5,100.00

Procurement Request: Waiver of Bid Request

## Viewing Related Documents:

In the **Line Item Details** section of the **Summary** tab, click the **Show** link to view related documents (invoices, vouchers, credits, receipts).

Related Documents

3 Hide

Other Vouchers/Credits

Voucher No	Quantity	Ext. Price
<a href="#">12345(10000639)</a>	1	1,450.00 USD
<a href="#">12346(10000640)</a>	1	1,450.00 USD
<a href="#">12347(10000641)</a>	1	1,530.00 USD

Previous Receipts

none

## ITEM DETAILS

PO Number

12344

PO Department

5,100.00

Voucher Owner

0.00

Substitute Item



Internal Line Attachments

Taxable



Capital Expense



Line Match Status

Matched

Matching Summary

	Ordered	Received
Quantity	1	-
Ext. Price	30,000.00 USD	-

Related Documents

3 Show

Account Code

141213  
MEDICAL ACCESSORIES AND SUPPLI

Tax1

0.00

Tax2

0.00

Shipping

0.00

Handling

0.00

**5,100.00**

## Related Documents

[Purchase Order: UDBT000065](#)[Requisitions: 3193720](#)

## What's next?

Workflow

**Submitted**11/11/2021 6:43 PM  
Kristen Pickering



Voucher • IT000807



1 of 3 Results



Approve &amp; Next

Summary Matching Supplier Messages **Comments** Attachments History

Records Found: 0

No comments have been added

Show comments for

All

Requisition

Purchase Order

Voucher

Receipt



## Viewing Comments on Related Documents:

From the **Comments** tab of the voucher, you can view comments made on the voucher, as well as on related documents such as the **Requisition**, **Purchase Order**, and **Receipt**.

You can also add a new comment via the + icon button.

### Pending

#### TURF PRO

Supplier Invoice No. 12344

#### Total (5,100.00 USD)

Subtotal	5,100.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	<b>5,100.00</b>

#### Related Documents

[Purchase Order: UDBT000065](#)[Requisitions: 3193720](#)

#### What's next?

Workflow

**Submitted**

11/11/2021 6:43 PM

Kristen Pickering



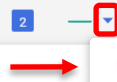
Voucher • IT000806

Summary Matching Supplier Messages Comments Attachments History

9 Lines

UDST000893

Status	PO Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	4	21G PEARL MARCHING BASS DRUM COVER - GREY 18	PEA-MDCG18	EA	32.00	Qty: 1 EA	32.00	... <input type="checkbox"/>
2	5	21G PEARL MARCHING BASS DRUM COVER - GREY 20	PEA-MDCG20	EA	35.00	Qty: 1 EA	35.00	.. <input checked="" type="checkbox"/>
3	6	21G PEARL MARCHING BASS DRUM COVER - GREY 22	PEA-MDCG22	EA	35.00	Qty: 1 EA	35.00	.. <input checked="" type="checkbox"/>
4	7	21G PEARL MARCHING BASS DRUM COVER - GREY 24	PEA-MDCG24	EA	39.00	Qty: 1 EA	39.00	... <input type="checkbox"/>



Reject Selected Items

After you have rejected specific lines, you will still need to approve the voucher for the remaining lines to be paid.

**Total (\$13.00 USD)**

Subtotal	
Discount	
Tax1	
Tax2	
Shipping	
Handling	0.00
<b>Total</b>	<b>813.00</b>

**Related Documents**

JDST000893	
3833	

11/17/2021 6:33 PM  
Kristen Pickering

**To Reject Specific Line Items:**

- Check the box(es) on the right-hand side of the item(s).
- Select **Reject Selected Line Items** from the drop-down menu.
- A scenario where you may need to use this action is if a shipment was incomplete.



Voucher • IT000806



2 of 3 Results

Approve &amp; Next

Summary Matching Supplier Messages Comments Attachments History

## General

Voucher Type Voucher

Pay Status In Process

Voucher Number IT000806

## Addresses

## Remit To

2324 WYANDOTTE ROAD  
WILLOW GROVE, Pennsylvania 19090-1206

## Note/Attachments

External Note *no value*Internal Note/Business Justification *no value*

## Placing Vouchers on Hold:

If you are not yet ready to approve a voucher, best practice is to place it on hold until you are.

From the **Available Actions** drop-down, select **Place Voucher on Hold**.

Due Date 11/5/2021

Terms 0% 0, Net 0

Terms Discount 0.00 USD

Voucher Name 2021-11-11 700456604 03

Purchasing Business Unit UOD01  
UNIVERSITY OF DELAWARE

Ad-Hoc Approver [Select](#)Multi-Invoice/Payment ✗

## Payment Information

## Requested Payment Override

Accounting Date 11/11/2021

Payment Message *no value*Payment Hold Reason *no value*Separate Payment ✗Payment Handling Code *no value*

## Discount, Tax, Shipping &amp; Handling

## Discount, tax, shipping &amp; handling

	Allocation	Sum of All	
			Header-level Sum of lines
Terms Discount		0.00 USD	
Discount		0.00 USD	0.00 USD
Tax1		0.00 USD	0.00 USD

Pending

## STEVE WEISS MUSIC INC.

Supplier Invoice No.

## Total (813.00 USD)

Subtotal	813.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	<b>813.00</b>

## Related Documents

[Purchase Order: UDST000893](#)
[Requisitions: 3163833](#)

## What's next?

Workflow

**Submitted**

11/11/2021 6:33 PM  
Kristen Pickering

Approve

Return Voucher

Place Voucher on Hold

Forward...

Reject Voucher




**Add Note** [X]

Covers arrived damaged - they will replace this week.

947 characters remaining [expand](#) [clear](#)

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 Voucher On Hold**

## Placing a voucher on hold requires a comment.

- Provide a reason you are not yet approving the voucher in the comment box.
- Click **Place Voucher on Hold**.

Voucher • IT000806

2 of 3 Results Approve & Next

Summary Matching Supplier Messages Comments Attachments History

Records Found: 1

Show comments for Voucher

Sammy Substitute - 11/11/2021 6:56:21 PM

Voucher - IT000806 Voucher on Hold

Covers arrived damaged - they will replace this week.

When you are ready to approve, proceed as usual from the approval menu

The voucher now indicates that it is on hold and the comment is part of the voucher record. You will no longer receive daily reminders to approve the voucher.

Requisitions: 3163833

What's next?

Workflow

Submitted 11/11/2021 6:33 PM Kristen Pickering

PO Owner Approval Hold Sammy Substitute

Invoice Budget Check Future

OK to Pay



Voucher • I0000619

Summary Matching Supplier Messages Comments Attachments 1 History

General

**Adding Ad-Hoc Voucher Approvers:**  
Occasionally, you may want to have more than one approver on a voucher; for instance, if someone else needs to take verify that goods were received, apply an asset tag, or add a packing slip for documentation. This can be accomplished with an Ad-Hoc approver.

Voucher Type  
Pay Status  
Voucher Number  
Supplier Invoice No.  
Supplier Name

Voucher Date 2/9/2021  
Discount Date no value  
Due Date 2/9/2021  
Accounts Payable  
accounts payable@udel.edu  
222 South Chapel Street  
Newark, DE 19716  
United States

Terms 0% 0, Net 0  
Terms Discount 0.00 USD

Voucher Name 2021-02-09 700456604 07

Purchasing Business Unit UOD01  
UNIVERSITY OF DELAWARE

Ad-Hoc Approver [Select](#)

Multi-Invoice/Payment

Invoiced By Kristen Pickering

Payment Information ... Discount, Tax, Shipping & Handling ...

Requested Payment Override Discount, tax, shipping & handling

Accounting Date	2/9/2021	Allocation	Sum of All
Payment Message	no value		
			Sum of lines

Click the blue **Select** link next to Ad-Hoc Approver

Separate Payment	<input checked="" type="checkbox"/>	Discount	0.00 USD	0.00 USD
Payment Handling Code	no value	Tax 1	0.00 USD	0.00 USD
Withholding Override	no value	Tax 2	0.00 USD	0.00 USD

**Pending**

**ATLANTIC TRACTOR LLC**

Supplier Invoice No. invoice3

---

**Total (301.01 USD)**

---

**Related Documents**

[Purchase Order: UDB0000059](#)

[Requisition: 3170528](#)

---

**What's next?**



Summary Matching Supplier Messages Comments Attachments 1 History

General	Addresses	Note/Attachments
Voucher Type: Voucher	Remit To: 2688 PULASKI HIGHWAY NEWARK, Delaware 19716 United States Address Id 7	External Note: no value Internal Note/Business: no value
Pay Status: In Process	Bill To: Accounts Payable accountspayable@uod01.universityofdelaware.edu 222 South Chapel Street Newark, DE 19716 United States	Date: 2/9/2021
Voucher Number: I0000619	Payment Information: [blurred]	
Supplier Invoice No.: invoice3	Requested Payment: [blurred]	
Supplier Name: ATLANTIC TRACTOR LLC		
Voucher Date: 2/9/2021		
Discount Date: no value		
Due Date: 2/9/2021		
Terms: 0% 0, Net 0		
Terms Discount: 0.00 USD		
Voucher Name: 2021-02-09 700456604 07	Accounting Date: 2/9/2021	Allocation: Sum of All
Purchasing Business Unit: UOD01 UNIVERSITY OF DELAWARE	Payment Message: no value	
Ad-Hoc Approver: Select		
Multi-Invoice/Payment: ✓		
Invoiced By: Kristen Pic...		

### Ad-Hoc Approver

After: PO Owner Approval

Ad-Hoc Approver: Approver, Alex

Comments: Please add the packing slip and approve to confirm receipt

942 characters remaining

Save Close

**Pending**

ATLANTIC TRACTOR LLC

Supplier Invoice No. invoice3

**Total (301.01 USD)**

Related Documents

Unlike requisition approvals, every UDX user has the permission to approve vouchers as part of their role.

Select the approver from the list of users.  
Enter any comments about why you are adding the approver.  
Click **Save**.



Voucher • 10000619



1 of 2 Results

Approve/Complete &amp; Show Next

Summary Matching Supplier Messages Comments 1 Attachments 1 History

Each approver can add only one ad hoc approver, directly after their workflow step. This approver has added Alex and cannot add another, but Alex will have the ability to add an ad hoc approver also.

The Ad-Hoc Approver is now shown on the requisition and in future workflow. Once you approve the voucher, it will move to the Ad-Hoc Approver for approval.

Supplier Name ATLANTIC TRACTOR LLC

Voucher Date 2/9/2021

Discount Date no

Due Date 2/9/2021

Terms 0%

Terms Discount 0.00 USD

Voucher Name 2021-02-09 700456604 07

Purchasing Business Unit UOD01  
UNIVERSITY OF DELAWAREAd-Hoc Approver Alex Approver  
[Change](#)Multi-Invoice/Payment 

## Addresses

## Remit To

2688 PULASKI HIGHWAY  
NEWARK, Delaware 19702-3915United States  
Address Id 7

## Bill To

Accounts Payable

## Requested Payment Override

Accounting Date 2/9/2021

Payment Message no value

Payment Hold Reason no value

Separate Payment 

Payment Handling Code no value

Withholding Override no value

## Note/Attachments

External Note no value

Internal Note/Business  
Justification no value

## External Attachments

[Atlantic Tractor Quote.pdf](#) 2/9/2021

## Internal Attachments

## Discount, tax, shipping &amp; handling

Allocation	Sum of All	
	Header-level	Sum of lines
Terms Discount	0.00 USD	
Discount	0.00 USD	0.00 USD
Tax 1	0.00 USD	0.00 USD
Tax 2	0.00 USD	0.00 USD

## Pending

## ATLANTIC TRACTOR LLC

Supplier Invoice No. invoice3

## Total (301.01 USD)

## Related Documents

[Purchase Order: UDB0000059](#)[Requisition: 3170528](#)

## What's next?

Workflow

**Submitted**  
2/9/2021 8:06 PM  
Kristen Pickering

**PO Owner Approval**  
Active  
Rachel Requester

**Ad-hoc 1**  
Future

**Invoice Budget Check**  
Future

**OK to Pay**  
Future





UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

All Search (Alt+Q) 0.00 USD

My Profile > User's Name, Phone Number, Email, etc.

### Alice Approver

User Name testapprover

User Profile and Preferences <

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation

Update Security Settings <

- Change Password
- Change Email Approval Code
- Change Security Question or Answer

Default User Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

### User's Name, Phone Number, Email, etc.

First Name Alice

Last Name Approver

Phone Number +1 302-831-2163 ext. International phone numbers must begin with +

Mobile Phone Number International phone numbers must begin with +

E-mail Address \* udexcha

Department PROCURE

Position -

Reports To -

Authentication Method Local

User Name \* testapprover

#### Change Email Approval Code

Email Approval Code .....

Save Changes Close

Vouchers can also be approved by email. This feature is not enabled until you have set your approval code in your profile as shown above. For more information, please refer to the [Initiating Email Approvals](#) guide.

# Future Enhancements

- As we open our supplier portal, our suppliers will have the ability to communicate with approvers through the “Supplier Messages” tab.
- Enabled suppliers will be able to log in and enter their own invoices against open purchase orders and view payment status against processed invoices.
- We may reach out to your department financial leadership to determine whether additional workflow is desired for supplier-portal-entered vouchers (such as review at any dollar level if entered by supplier).



# Troubleshooting

If you have a PO owner who is out of the office without setting a substitute and cannot approve a voucher in workflow, you may choose one of two options:

- The Department Purchasing Specialist can submit the UDX Access Request form to request that administrators name an Emergency Substitute Approver for the PO owner. This option is the best for an extended period of time.
- Someone else can add a comment on the voucher with Procurement Help as the recipient indicating that they are approving the voucher in the PO owner's place.
  - A system administrator will then move the voucher through to the next workflow step. This option is best for one-off voucher approvals.



# Troubleshooting

If a PO owner leaves the University or department prior to the purchase order being fully invoiced, they should request a new PO owner be named to the PO.

The PO owner, their supervisor, or the Department Purchasing Specialist add a comment on the PO with Procurement Help as the recipient and name a new PO owner to approve any future vouchers.

- If this action is not taken and a future voucher requires approval after the PO owner has become inactivated by HR, it will stall in workflow.
- The PO owner's supervisor may receive a comment from an administrator asking to approve via comment and name a substitute PO owner for future vouchers.



## Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

## Resources:

- [Procurement Services Website](#)
- [How to Attach a Packing Slip to a Voucher](#)
- [Initiating Email Approvals](#)

