



Assigning and Removing Substitute Approvers

Revised 04/10/23



# Assigning Substitute Requisition Approvers

- In UD Exchange, you can designate another Approver as your substitute in the event you are going to be out of the office or need assistance managing your approval volume.
  - Note: The employee you assign as your substitute Approver must already be an Approver in UD Exchange. If you search for their name and they are not available to select, contact your Department Purchasing Specialist to request that the Approver role be added to their UDX Profile.
- Your substitute can be assigned to all approval folders or specific approval folders.
- Once your substitute is assigned to an approval folder, new requisitions approval in that folder will route to your substitute.
- You will still need to complete the approval process for any requisitions that were pending your approval (assigned to you) before your substitute was selected.



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Shop • Shopping Home Page

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 Me

Procurement Requests Recently Approved By Me

Assign Substitute Approvers-Requisitions

Assign Substitute Approvers-Procurement

Approval Notifications

Action Items

There are no Action Items to display.

My Resources

My Resources

Product Release Library | [procurement@udel.edu](mailto:procurement@udel.edu)

Site Map

Quick Links

UD Exchange How To Guides

How Do I Buy ???

Commodity Code-Account Crosswalk

Using your side navigation bar, go to:

- **Orders > Approvals > Assign Substitute Approvers - Requisitions**

Catalog

Procurement

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



Showing 1 - 5 of 5 Results

All Folder Results

Substitution Actions ▾

Results Per Page 20 ▾

Sort by: Folder name ascending ▾

Page 1 of 1 ?

## Search Details

## Filtered by

Type: Requisitions

## Refine Search Results

## Type

Requisitions ▾

## Approver

[Alice Approver \(4\)](#)[George Walueff \(1\)](#)

## Substitute

[Alice Approver \(1\)](#)

Folder Name	Approver	Substitute	Action	
Automobiles	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>
DPS - VPFN - Procurement Services	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>
My PR Approvals	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver	<a href="#">Assign</a>	<input type="checkbox"/>
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>

To assign a substitute Approver for specific approval folders:

- Click **Assign** to the right of an individual folder.



The **Assign Substitute** window will appear.

Enter search criteria such as first name, last name, or email address, to find the Approver you want to assign as your substitute Approver.

### Assign Substitute

☐ Include Date Range for Substitution

Substitute Name \*

appro  
Approver, Alex  
Approver, Alice  
Approver, Training

\* Required

UDX will only show names of people with the Approver role.

A list of results will appear as you enter your **Substitute Name**.

Select the appropriate substitute Approver by clicking on the individual's name.

UNIVERSITY OF DELAWARE  
EXCHANGE  
TEST SITE

Orders ▸ Approvals ▸ Assign Substitute Approvers-Requisitions

Assign Substitute to All Requisitions FoldersEnd Substitute for All Requisitions Folders

Showing 1 - 5 of 5 ResultsAll Folder ResultsSubstitution Actions ▾

Results Per Page 20Sort by: Folder name ascendingPage 1 of 1?

Folder Name	Approver	Substitute	Action	
Automobiles	Alice Approver		Assign	<input type="checkbox"/>
DPS - VPFN - Procurement Services	Alice Approver		Assign	<input type="checkbox"/>
My PR Approvals	Alice Approver		Assign	<input type="checkbox"/>
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES) (All Values)	George Walueff	Alice Approver	Assign	<input type="checkbox"/>
Purpose: PURC175116 (R/E CONT	Alice Approver		Assign	<input type="checkbox"/>

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions ▾

Approver

Alice Approver (4)

George Walueff (1)

Substitute

Alice Approver (1)

Assign Substitute

☐ Include Date Range for Substitution

Substitute Name \* Approver, Alex

★ Required

Assign

Close

Click Assign.

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Showing 1 - 5 of 5 Results

All Folder Results

Substitution Actions ▾

Results Per Page 20 ▾

Sort by: Folder name ascending ▾

Page 1 of 1 ?

## Search Details

## Filtered by

Type: Requisitions

## Refine Search Results

## Type

Requisitions ▾

## Approver

[Alice Approver \(4\)](#)[George Walueff \(1\)](#)

## Substitute

[Alice Approver \(1\)](#)[Alex Approver \(1\)](#)

Folder Name	Approver	Substitute	Action	
Automobiles	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>
DPS - VPFN - Procurement Services	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>
My PR Approvals	Alice Approver		<a href="#">Assign</a>	<input type="checkbox"/>
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver	<a href="#">Assign</a>	<input type="checkbox"/>
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver	Alex Approver	<a href="#">Remove</a>	<input type="checkbox"/>

Your substitute Approver's name now appears in the **Substitute** column.





Assign Substitute to All Requisitions Folders End Substitute for All Requisitions Folders

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions ▾

Approver

[Alice Approver \(4\)](#)  
[George Walueff \(1\)](#)

Substitute

[Alice Approver \(1\)](#)  
[Alex Approver \(1\)](#)

Showing 1 - 5 of 5 Results

All Folder Results

Results Per Page 20 ▾		Sort by: Folder name ascending ▾		Substitution Actions ▾	
Folder Name	Approver	S		Assign Substitute to Selected Folders	Remove Substitute From Selected Folders
Automobiles	Alice Approver			Assign	<input checked="" type="checkbox"/>
DPS - VPFN - Procurement Services	Alice Approver			Assign	<input checked="" type="checkbox"/>
My PR Approvals	Alice Approver			Assign	<input checked="" type="checkbox"/>
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver		Assign	<input type="checkbox"/>
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver	Alex Approver		Remove	<input type="checkbox"/>

To assign a substitute Approver for multiple folders:

- Click in the boxes to select the folders you want to assign.
- Click the **Substitution Actions** drop-down menu.
- Select **Assign Substitute to Selected Folders**.





UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Orders ▸ Approvals ▸ Assign Substitute Approvers-Requisitions

Showing 1 - 5 of 5 Results

All Folder Results

Results Per Page 20 Sort by: Folder name ascending

Assign Substitute to All Requisitions Folders End Substitute for All Requisitions Folders

Substitution Actions

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions

Approver

Alice Approver (4)  
George Walueff (1)

Substitute

Alice Approver (1)  
Alex Approver (1)

Folder Name	Approver	Substitute	Action
Automobiles	Alice Approver		Assign
DPS - VPFN - Procurement Services	Alice Approver		Assign
My PR Approvals	Alice Approver		Assign
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES) (All Values)	George Walueff	Alice Approver	Assign
Purpose: PURC175116 (R/E CONT	Alice Approver	Alex Approver	Remove

### Assign Substitute

☐ Include Date Range for Substitution

Substitute Name \*

The **Assign Substitute** window will appear.

Enter **Substitute Name** (first name, last name, or email address) to find the Approver you want to assign as your substitute Approver.

A list of results will appear as you enter your criteria.





UNIVERSITY OF DELAWARE  
EXCHANGE  
TEST SITE

Orders ▸ Approvals ▸ Assign Substitute Approvers-Requisitions

Assign Substitute to All Requisitions FoldersEnd Substitute for All Requisitions Folders

Showing 1 - 5 of 5 ResultsAll Folder Results

Results Per Page 20Sort by: Folder name ascending

Folder Name	Approver	Substitute	Action
Automobiles	Alice Approver		Assign
DPS - VPFN - Procurement Services	Alice Approver		Assign
My PR Approvals	Alice Approver		Assign
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES) (All Values)	George Walueff	Alice Approver	Assign
Purpose: PURC175116 (R/E CONT	Alice Approver	Alex Approver	Remove

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions

Approver

Alice Approver (4)  
George Walueff (1)

Substitute

Alice Approver (1)  
Alex Approver (1)

Assign Substitute

☐ Include Date Range for Substitution

Substitute Name \* Approver, Training

★ Required

Assign

Close

Select the appropriate substitute Approver by clicking on the individual's name.

Click **Assign**.



You can also include a temporary substitution date range if you know when you will be returning to the office:

**Assign Substitute**

☒ Include Date Range for Substitution

Substitute Name \* Approver, Training

Start Date \* 11/10/2021 12:00 AM

End Date \* 11/15/2021 12:00 AM

\* Required

Assign Close

- Select the **Include Date Range for Substitution** box.
- Click on the **Calendar** icons to select the **Start** and **End Date**.
- Click **Assign**.

Assign Substitute to All Requisitions Folders

End Substitute for All Requisitions Folders

Showing 1 - 5 of 5 Results

All Folder Results

Substitution Actions ▾

## Search Details

## Filtered by

Type: Requisitions

## Refine Search Results

## Type

Requisitions ▾

## Approver

Alice Approver (4)

George Walueff (1)

## Substitute

Training Approver (3)

Alice Approver (1)

Alex Approver (1)

Results Per Page 20 ▾

Sort by: Folder name ascending ▾

Page 1 of 1 ?

Folder Name	Approver	Substitute	Action
Automobiles	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	<a href="#">Remove</a>
DPS - VPFN - Procurement Services	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	<a href="#">Remove</a>
My PR Approvals	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	<a href="#">Remove</a>
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver	<a href="#">Assign</a>
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver	Alex Approver	<a href="#">Remove</a>

Your substitute Approver's name now appears under the **Substitute** column for the specific folders and date ranges you selected.





Assign Substitute to All Requisition Folders End Substitute for All Requisitions Folders

Showing 1 - 5 of 5 Results

All Folder Results

Substitution Actions

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions

Approver

Alice Approver (4)  
George Walueff (1)

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Alice A  
Alex Ap

Results Per Page 20

Sort by: Folder name ascending

Page 1 of 1

Folder Name	Approver	Substitute	Action
Automobiles	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	Remove
DPS - VPFN - Procurement Services	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	Remove
My PR Approvals	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	Remove
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver	Assign
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver	Alex Approver	Remove

To assign your substitute Approver for *all* folders at once:

- Click the **Assign Substitute to All Requisition Folders** button at the top of the page.
- Select your substitute approver and date range as desired in the **Assign Substitute** window.





Assign Substitute to All Requisitions Folders End Substitute for All Requisitions Folders

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions

Approver

Alice Approver (4)  
George Walueff (1)

Substitute

Training Approver (3)  
Alice Approver (1)  
Alex Approver (1)

Showing 1 - 5 of 5 Results

All Folder Results

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

Folder Name	Approver	Substitute	Action
Automobiles	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	Remove
DPS - VPFN - Procurement Services	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	Remove
My PR Approvals	Alice Approver	Training Approver Start Date: 11/10/2021 12:00 AM End Date: 11/15/2021 12:00 AM	Remove
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver	Assign
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver	Alex Approver	Remove

## Ending Approver Substitution:

For All Folders:

- Click **End Substitute for All Requisition Folders** at the top of the page.

For Individual Folders:

- Click **Remove** in the **Action** column to the right of the folder.



# Troubleshooting

- On occasion, an Approver may be out of the office unexpectedly, and has not named a substitute Approver. An example might be a medical emergency of unknown duration.
  - In these instances, the Department Purchasing Specialist can submit the UDX Access Request Form to request that an *emergency* substitute be named for that Approver. More information is available in the [Access Request Form Guide](#).
- **Voucher** approvals do *not* require that a substitute approver be named. A substitute may approve payment by placing a comment and tagging Procurement Help as the comment recipient.
  - Refer to the [Voucher Approval Guide](#) for more information, including how to change the PO Owner for future voucher approvals if the original PO Owner has left UD.



### Questions:

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

### Resources:

- [Procurement Services Website](#)
- [Approving Requisitions in UD Exchange](#)
- [Approving Vouchers in UD Exchange](#)
- [Completing the Access Request Form](#)

