

Assigning and Removing Substitute Approvers
Revised 04/10/23

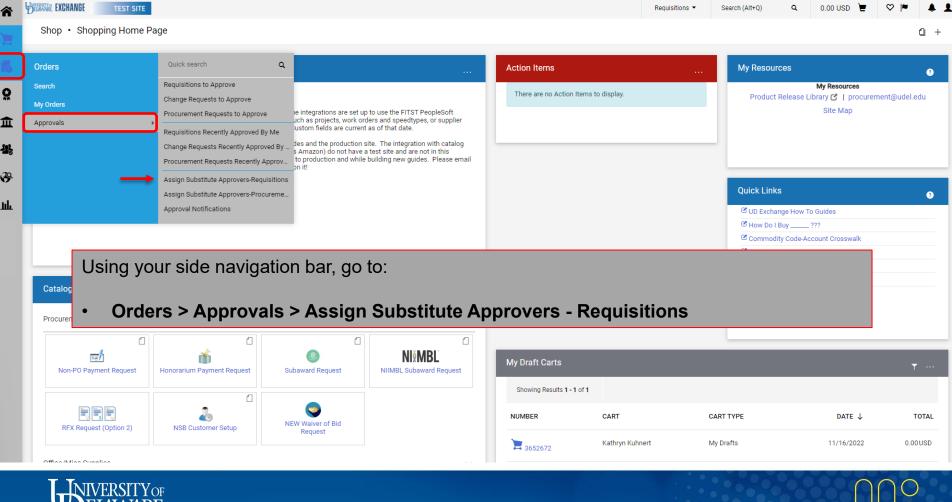


## Assigning Substitute Requisition Approvers

- 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.

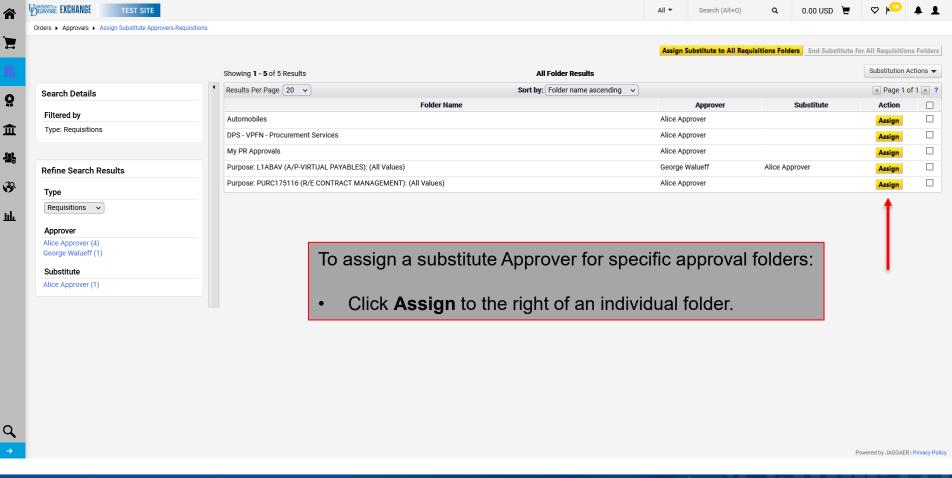






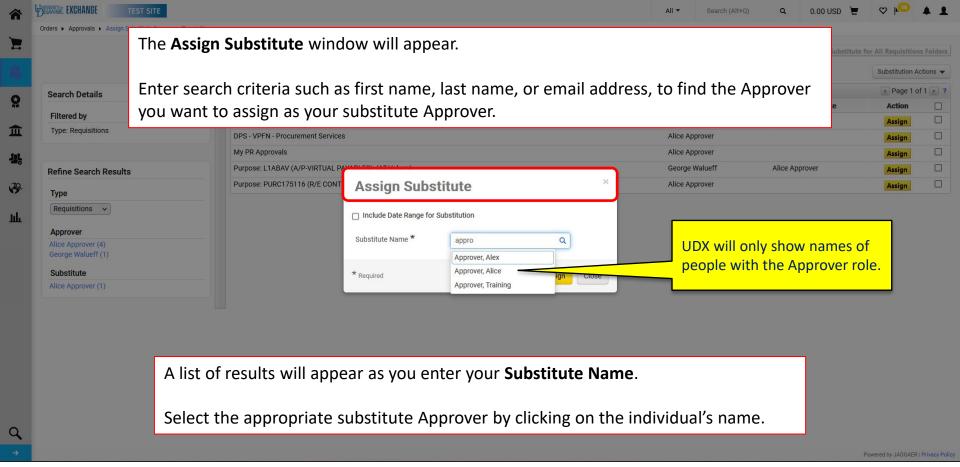






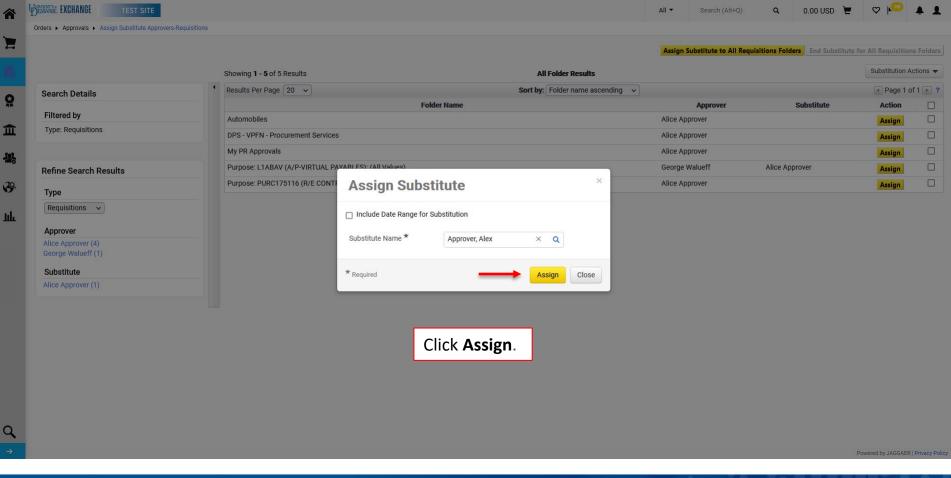






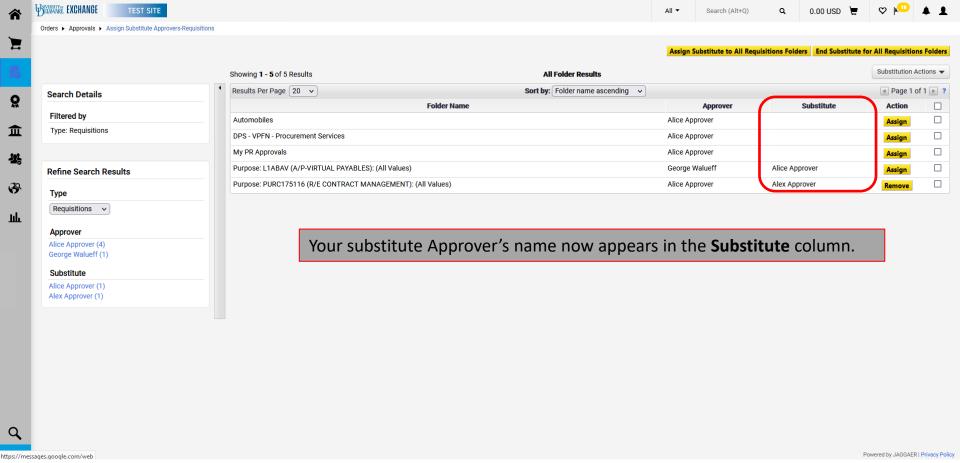






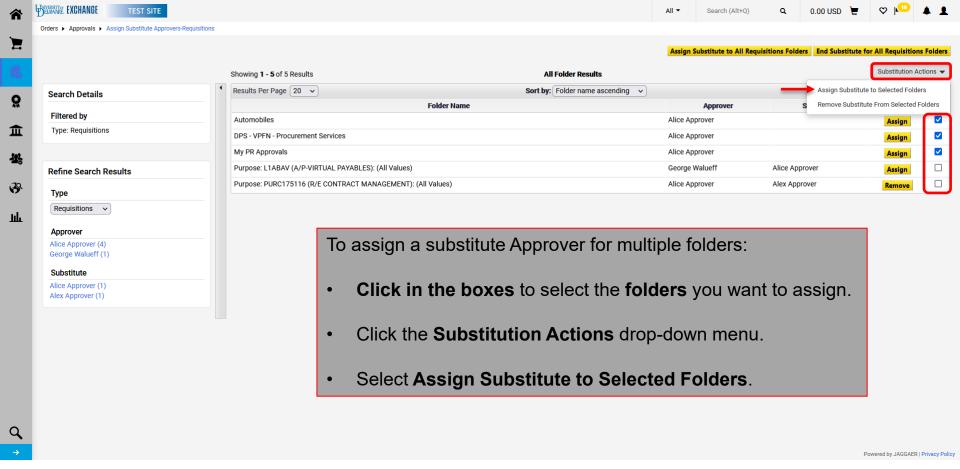






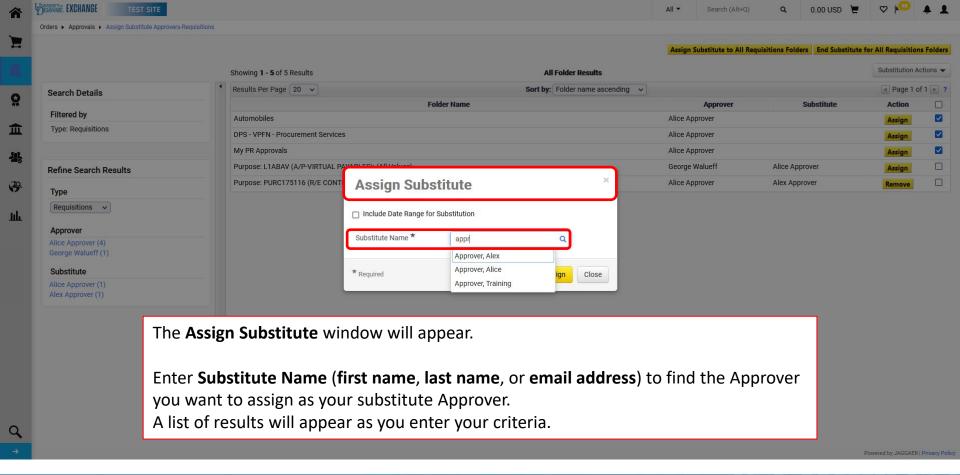






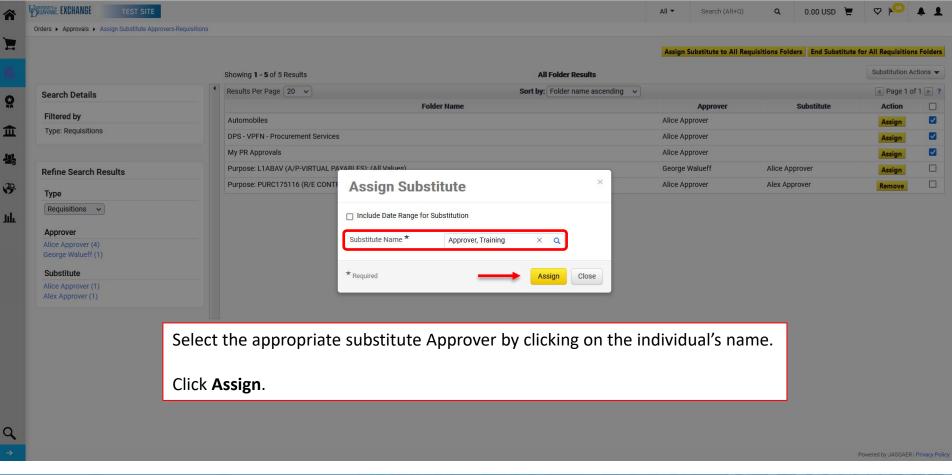






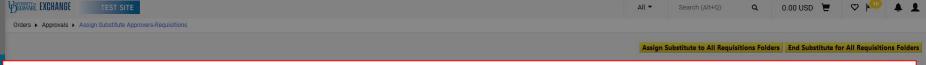




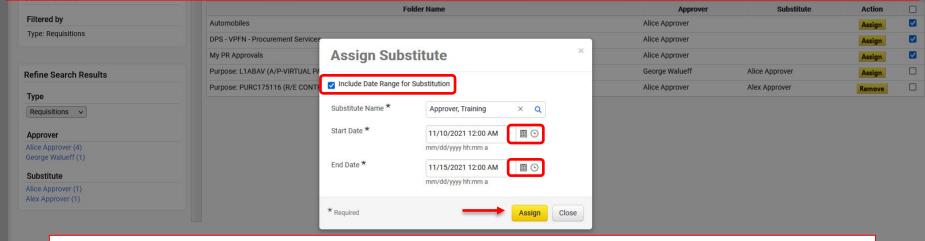








You can also include a temporary substitution date range if you know when you will be returning to the office:

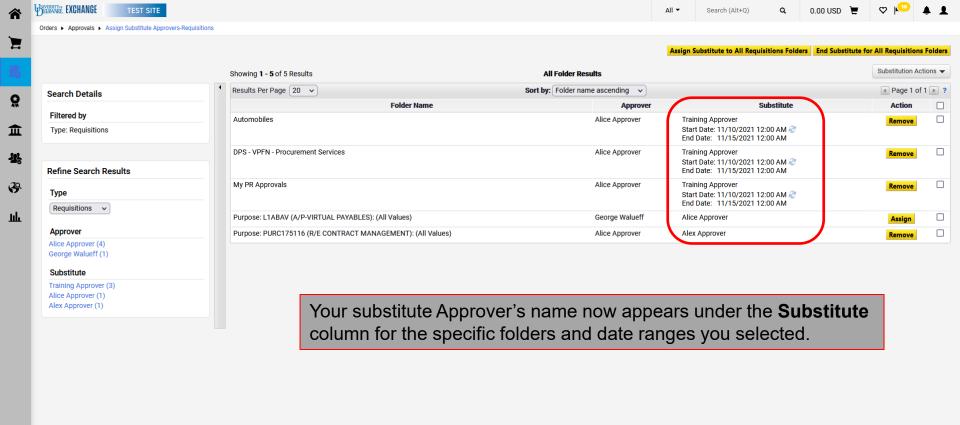


- Select the Include Date Range for Substitution box.
- Click on the Calendar icons to select the Start and End Date.
- Click Assign.



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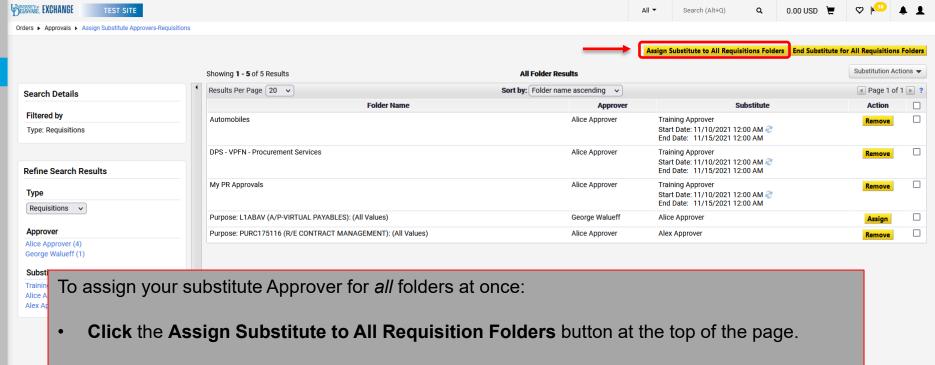








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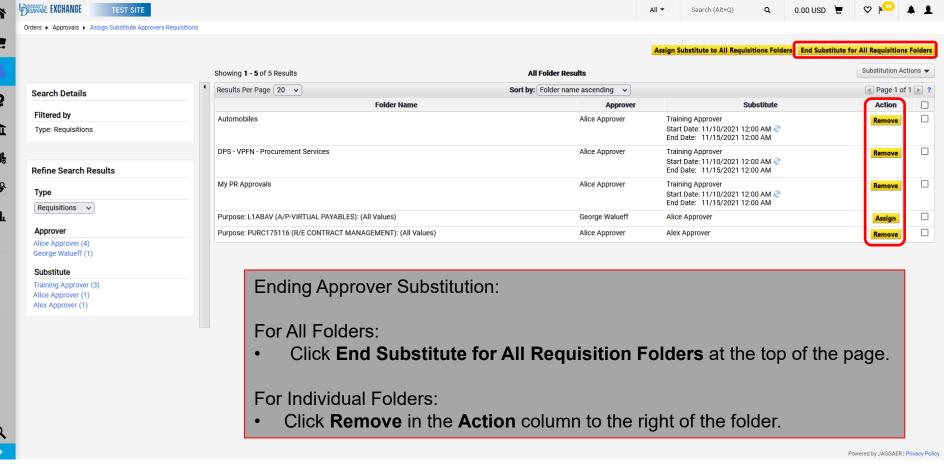


• Select your substitute approver and date range as desired in the Assign Substitute window.





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## 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 <u>Access Request Form Guide</u>.
- 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 <u>Voucher Approval Guide</u> 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

## **Resources:**

- Procurement Services Website
- Approving Requisitions in UD Exchange
- Approving Vouchers in UD Exchange
- Completing the Access Request Form



