Approving Requisitions in UD Exchange

- After a Requester submits a requisition, UDX will route the requisition for financial approval.
- Financial approval is given by an employee who has been assigned the UDX COA Approver role on the SpeedType by his or her department (through coa-finance@udel.edu).
- In order to approve the requisition’s line(s) using their SpeedType, the Approver will need to give approval for the entire requisition. The Approvers for any other SpeedTypes on the requisition will receive the requisition for their own SpeedType review.
- Financial approval is required for all requisitions regardless of dollar amount.
- While the COA is the most common type of Approver in UDX, an employee may have the Approver role to perform commodity approval, DPS approval, or a specialized departmental approval step.
- Approvers will receive an email notification from UDX when a requisition is pending their approval.
To approve a requisition, navigate to:

Orders > Approvals > Requisitions to Approve.
You will see requisitions displayed that are awaiting your approval. If you are an Approver for multiple approval responsibilities, you can filter the requisitions to approve them by similar type.
Click a requisition number to begin your review.
Once you have reviewed the requisition, you can click **Approve**. If you have multiple requisitions to approve, you will be offered the option to **Approve/Complete & Show Next** to open the next requisition for you.
You will also see some additional available actions on the Actions Menu if you have assigned the requisition to yourself.

For example, there may be items on the requisition that you think should be reviewed by a different Approver.

In this case, you can select **Forward to** from the Document Actions drop down menu.

"Forward" means you are **abdicating responsibility** to someone else.
If you want to approve and add someone else as an additional approver, choose **Ad Hoc Approver** on slide 9.
Search for the employee in the **User Search** window using their last name and any additional information.

**Click Search.**
Select the employee from the results list.
Enter a message explaining why you are forwarding the requisition.

Click Forward.

Remember: This action replaces you as the Approver.
There may be situations where you need to add an additional Approver.

For example, a lab manager is making a purchase using a faculty member’s start-up funds, and you want the faculty member to approve purchases made against their start-up funds but they are not part of the automatic UDX approval workflow.

In the **General** section of the requisition **Summary**, click **Select** next to **Ad-Hoc Approver**.
Click the Magnifying Glass in the **Ad-Hoc Approver** field to search for the employee. Enter notes for the Ad-Hoc Approver in the **Comments** field. Click **Save**. Note: Only employees with the Approver role in their UDX profile will be available in search results.
You will now see the selected employee’s name next to **Ad-Hoc Approver**.

Because you are not replacing yourself, but simply adding an additional Approver, you will still need to approve the requisition.

Select **Approve**.
This guide is focused on requisition **approvals**. For details on the other actions available to Approvers in UDX, please see the following guides:

- Returning and Rejecting Requisitions
- Returning Requisitions to Shared Folders and Placing Requisitions on Hold
After you have approved a requisition, you may wish to view where the requisition is in the approval process.

Use the navigation bar on the left side of your screen and go to: **Orders > Approvals > Requisitions Recently Approved By Me.**

Find and click on the requisition you wish to view.
Click on the requisition number you wish to view.
In the sidebar, you can view:
• which approval steps have been **completed/approved**
• which are currently **active**
• which will need to be completed in the **future**

For approval steps that are not automated and must be performed by a UD employee, you can click on the blue link in the approval step to view the name of the Approver.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Initiating Email Approvals
• Assigning and Removing Substitute Approvers
• Returning and Rejecting Requisitions
• Returning Requisitions to Shared Folders and Placing Requisitions On Hold