Approving Requisitions in UD Exchange
What’s different in UD Exchange?

**Webforms vs. UD Exchange**
- A special dropdown in the webform would indicate whether it needed additional review, which always had to be done on a computer.
- Approvers are now driven by commodity or account codes, and approval can be done via email or an app.

**Works/Concur vs. UD Exchange**
- Approval was done after the fact and additional approvers couldn’t be added.
- All approvals are done prior to purchase and any approver can add other approvers.
Approving Requisitions in UD Exchange

• After the Requester submits a shopping cart as a requisition, UD Exchange will route the requisition for financial approval.
• Financial approval is given by an employee who has been granted UD Exchange Approver access on the SpeedType by his or her department (through General Accounting).
• In order to approve the requisition’s line(s) using your SpeedType, you will need to give approval for the entire requisition. The Approvers for any other SpeedTypes will review the requisition for their own SpeedType use.
• You will receive an email notification from UD Exchange when a requisition is pending your approval.
• Financial approval is required for requisitions regardless of dollar amount.
Use the navigation bar on the left side of your screen and go to Orders > Approvals > Requisitions to Approve.
Requisitions pending your approval are organized into folders based on approval reason, such as SpeedType or commodity.

Note: If a single requisition uses multiple SpeedTypes, it will appear in each applicable SpeedType folder for which you are an Approver. If you approve in consecutive steps, you must approve twice.
1. You may see a small blue icon indicating that you are approving as a substitute for someone at that step. They still have the ability to approve.

2. If you want to make sure that you review and approve the requisition, you can click the person icon to assign the requisition to yourself.
Once you assign a requisition to yourself, you will see your name listed in the Assigned Approver column.

When you assign to yourself, the requisition also appears in your “My PR Approvals” folder.
Click the requisition number to begin your review.
If you have NOT assigned the requisition to yourself, you will see only two options in the approval area: Assign to Myself and Approve.

Also, there is no name in the Pending Approval area, only the workflow step.
Once you have assigned the requisition to yourself, you will have some additional actions available to you.

Also, your name now shows in the Pending Approval area with the Workflow Step.
To Return to Shared Folder means to unassign yourself. No one else can take action on the requisition while it is assigned to you, so if you can’t act promptly, this means someone else can assign and take action if other approvers are on the folder.
To **Return to Requisitioner** means you are returning the requisition to the originator’s draft cart to be fixed and resubmitted. Approvers cannot change anything on the requisition, so if something is incorrect, only the Shopper and/or Requester can fix it.
Return to Requisitioner requires a comment for why you are returning. The correction may cause the resubmission to go through different workflow, which is why approvers cannot change information.
To Forward to … means you are abdicating responsibility for approving and sending it to someone else to approve at that step.

This feature is like “Assigning” to someone else and is best used for multiple approvers with one “directing traffic.”
1. Search for the employee in the **User Search** box using any information shown.
2. Click **Search**.
Select the employee from the results list by clicking on the +.

The user must have an approver or DPS role in order to be found in a user search for approvers!
1. Enter a message explaining why you are forwarding the requisition.
2. Click Forward.
This action replaces you as the Approver.
You might assign a requisition to yourself and then see that there is a need to add an additional approver. For example, a purchase is being made on a faculty member’s start-up funds, but the faculty member was not the Shopper or Requester, and you want them to approve this purchase being made against their start-up funds.

Click **Select** next to **Ad-Hoc Approver**.
1. Search for the employee in the **Ad-Hoc Approver** field.
2. Enter notes for the Ad-Hoc Approver in the **Comments** field.
3. Click **Save**.
1. You will now see the selected employee’s name next to **Ad-Hoc Approver** and in workflow. Because you are not replacing yourself, but simply adding an additional Approver, you will still need to approve the requisition.
2. Go to the **Actions** drop-down menu and click **Approve**.
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. From here you may review any requisition you approved.
1. You will be able to view which approval steps have been **completed/approved**, which are currently **active**, and 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.
Resources

Procurement Services