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.
Using your side navigation bar, go to:

- Orders > Approvals > Assign Substitute Approvers - Requisitions
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.

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

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

UDX will only show names of people with the Approver role.
<table>
<thead>
<tr>
<th>Folder Name</th>
<th>Approver</th>
<th>Substitute</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automobiles</td>
<td>Alice Approver</td>
<td>Alice Approver</td>
<td>Assign</td>
</tr>
<tr>
<td>DPS - VPFS - Procurement Services</td>
<td>Alice Approver</td>
<td>Alice Approver</td>
<td>Assign</td>
</tr>
<tr>
<td>My PR Approvals</td>
<td>Alice Approver</td>
<td>Alice Approver</td>
<td>Assign</td>
</tr>
<tr>
<td>Purpose: L1AVAV (AV-VIRTUAL PURCHASES (All Values))</td>
<td>George Waluffe</td>
<td>Alice Approver</td>
<td>Assign</td>
</tr>
<tr>
<td>Purpose: PURC175116 (R/E-CONTINUOUS)</td>
<td>Alice Approver</td>
<td>Alice Approver</td>
<td>Assign</td>
</tr>
</tbody>
</table>

Click Assign.
Your substitute Approver’s name now appears in the **Substitute** column.
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**.
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.
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:

- Select the **Include Date Range for Substitution** box.
- Click on the **Calendar** icons to select the **Start** and **End Date**.
- Click **Assign**.
Your substitute Approver's name now appears under the **Substitute** column for the specific folders and date ranges you selected.
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.

<table>
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<th>Folder Name</th>
<th>Approver</th>
<th>Substitute</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automobles</td>
<td>Alice Approver</td>
<td>Training Approver</td>
<td>Remove</td>
</tr>
<tr>
<td>DPS - VPFN - Procurement Services</td>
<td>Alice Approver</td>
<td>Training Approver</td>
<td>Remove</td>
</tr>
<tr>
<td>My PR Approvals</td>
<td>Alice Approver</td>
<td>George Waluff</td>
<td>Remove</td>
</tr>
<tr>
<td>Purpose: L T A B A V (A/P-VIRTUAL PAYABLES) (All Values)</td>
<td>George Waluff</td>
<td>Alice Approver</td>
<td>Assign</td>
</tr>
<tr>
<td>Purpose: PURC175116 (R/E CONTRACT MANAGEMENT) (All Values)</td>
<td>Alice Approver</td>
<td>Alex Approver</td>
<td>Remove</td>
</tr>
</tbody>
</table>
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

Resources:
• Procurement Services Website
• Approving Requisitions in UD Exchange
• Approving Vouchers in UD Exchange
• Completing the Access Request Form