Assigning and Removing Substitute Approvers
What’s different in UD Exchange?

Ad-Hoc Approvers

Previously, in Works, if an additional Approver was added, they would receive the approval volume for their whole department/group. In Concur, if an additional Approver was added, they would only be added for the specific Expense Report.

UD Exchange allows an existing Approver to request that their Department Purchasing specialist add an Ad-Hoc Approver to one or several of their approval folders (determined by SpeedType). This Ad-Hoc Approver can function as an Approver within UD Exchange without needing to be added as an owner the Purpose Code by the Controller’s Office.
Assigning Substitute Requisition Approvers

• You can designate another requisition Approver as your substitute in the event you will be unable to access UD Exchange, 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 in UD Exchange and they are not available, you may contact your Department Purchasing Specialist to request that they be added as an ad-hoc Approver to UD Exchange.
• Your substitute can be assigned for specific approval folders, or for all of your approval folders at once.
• Once your substitute is assigned to an approval folder, new requisitions pending your approval in that folder will instead route to your substitute.
• You will still need to complete the approval process for any requisitions that were pending your approval before your substitute was assigned.
Using your side navigation bar, go to **Orders > Approvals > Assign Substitute Approvers - Requisitions**
To assign a substitute 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.

The system will only show names of people with the Approver role.

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.
Your substitute Approver now appears under the **Substitute** column.
1. To assign a substitute for multiple folders, select the folders you want to assign.
2. Under the **Substitution Actions** drop-down menu, select **Assign Substitute to Selected Folders**.
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 criteria.
1. Select the appropriate substitute Approver by clicking on the individual’s name.
2. Click Assign.
You can also make your substitute temporary:
1. Select the **Include Date Range for Substitution** box.
2. Click on the **calendar** icons to select the date range needed.
3. Click **Assign**.
Your substitute Approver now appears under the **Substitute** column for the specific folders and date ranges you selected.
To assign your substitute for all of your folders at once, click the **Assign Substitute to All Requisition Folders** button at the top of the page. Then make your substitute approver and date selection as desired in the **Assign Substitute** window.
Ending Substitution

1. To end approver substitution for all of your folders, click End Substitute for All Requisition Folders at the top of the page.
2. To end approver substitution for individual folders, click Remove in the Action column to the right of the folder.
Resources

Procurement Services
procurement@udel.edu
See also, “Approving Requisitions in UD Exchange”