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.
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- 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 Rich McCarthy in 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 SpeedType.

Note: If a single requisition uses multiple SpeedTypes, it will appear in each applicable SpeedType folder for which you are an Approver.
1. You may see a small red icon indicating that there is another Approver listed as an approval option for the requisition.

2. If you want to make sure that you review and approve the requisition, you can click the Assign button to assign the requisition to yourself.
Once you assign a requisition to yourself you will see your name listed in the **Assigned Approver** column.
Click the requisition number to begin your review.
Once you have assigned the requisition to yourself, you will have some additional actions available to you. For example, there may be an item 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 have someone else approve, choose Ad Hoc Approver on slide 12.
1. Search for the employee in the **User Search** box using their last name and any additional information.

2. Click **Search**.
Select the employee from the results list.
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 purchases 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**.

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

2. Go to the **Document Actions** drop-down menu.

3. Select **Approve/Complete Step**.
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. When it opens, select PR Approvals.
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**.

2. For approval steps that are not automated and must be performed by a UD employee, you can click on the blue “**View approvers**” link in the approval step.
Resources

Procurement Services