

UNIVERSITY OF DELAWARE EXCHANGE

Initiating Email Approvals

Revised 04/14/23

Initiating Email Approvals

- Document approvals can be performed either within UD Exchange or via email.
- Before you can approve via email, you must set up an **email approval code** in your UD Exchange profile.
- You will need to enter your approval code every time you approve a document via email, so pick a code you will remember!
- You will still be able to complete your approvals within UD Exchange system even if you have set up an email approval code.



Approvals can also be completed in the Jaggaer app!



Organization Message

Welcome to the University of Delaware Exchange Test Site!

The test site does not create live purchase orders or payments sent to suppliers. The integrations are set up to use the FITST PeopleSoft Instance, which is not dynamically updated for production values of custom fields such as projects, work orders and speedtypes, or supplier active/inactive status. **The last refresh of FITST was completed on April 5, 2023.** Custom fields are current as of that date.

As you use this site for training and testing, you may see small differences from guides and the production site. The integration with catalog suppliers depends on their having a test site for integration; some suppliers (such as Amazon) do not have a test site. The test site is where the administrators test new solutions before moving to production and procurement@udel.edu if you have specific questions; chances are we are working on it!

Action Items

There are no Action Items to display.

Alice Approver

- View My Profile**
- Dashboards
- Manage Searches
- Manage Search Exports
- Set My Home Page

You do not have any recent orders

Logout

To set up your email approval code:

- Click the **Profile Icon**
- Select **View My Profile**

Catalog & Forms Showcase (Under Development)

Procurement Forms

- Non-PO Payment Request
- Honorarium Payment Request
- Subaward Request
- NIIIMBL Subaward Request
- RFX Request (Option 2)
- NSB Customer Setup
- NEW Waiver of Bid Request

Office/Misc Supplies

Quick Links

- UD Exchange How To Guides
- How Do I Buy _____ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- NEW Waiver of Bid Form
- Request Contract

My Draft Carts

Showing Results 1 - 1 of 1

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3652672	Kathryn Kuhnert	My Drafts	11/16/2022	0.00USD

My Profile User's Name, Phone Number, Email, etc.

- Alice Approver**
- User Name testapprover
- User Profile and Preferences
- User's Name, Phone Number, Email, etc.**
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Update Security Settings**
- Change Password
- Change Email Approval Code**
- Change Security Question or Answer
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
- User History
- Administrative Tasks

User's Name, Phone Number, Email, etc.

First Name	<input type="text" value="Alice"/>
Last Name	<input type="text" value="Approver"/>
Phone Number	<input type="text" value="+1 302-831-2163"/> ext.
	<small>International phone numbers must begin with +</small>
Mobile Phone Number	<input type="text"/>
	<small>International phone numbers must begin with +</small>
E-mail Address *	<input type="text" value="udexchange@udel.edu"/>
Department	PROCUREMENT SERVICES (04750)
Position	-
Reports To	-
Authentication Method	Local
User Name *	testapprover

★ Required

[Save Changes](#)

Select **Update Security Settings**

Click **Change Email Approval Code**.



Create an **Email Approval Code**:

- Enter an **Email Approval Code**. Your code must be at least four characters long and may contain letters, numbers, and special characters.
- Click **Save Changes**. Once the Email Approval Code is set, you can approve requisitions via email.

Change Email Approval Code

Email Approval Code

....

Save Changes

Close

Save Changes

FROM	SUBJECT	RECEIVED	SIZE	CATEGORIES	MENTION
UDEExchange@jagg...	New Pending Approval for Requisition# 2984148 <http://userfetest-messages.sdquest.com/app_docs/pics/orgimages/30004044/112839.jpg>	Tue 6/23/2020 11:33 AM	56 KB		
University of Delaw...	Your requisition has been returned. Requisition#: 2984148 <http://userfetest-messages.sdquest.com/app_docs/pics/orgimages/30004044/112839.jpg>	Tue 6/23/2020 11:33 AM	34 KB		

Currently displaying all messages newer than 12 months.

When a requisition requires your approval, you will receive a system generated email notification with the details for your review.

Reply
 Reply All
 Forward
 IM

Tue 6/23/2020 11:33 AM



UDEExchange@jaggaer.com

New Pending Approval for Requisition# 2984148

To: UD Exchange

**Purpose: BISC110000 (BIOLOGICAL SCIENCES): (All Values)
Approval Request for Requisition# 2984148**

Dear Traci Parman,

The requisition listed below has been submitted for your approval.

Summary

Folder:	Purpose: BISC110000 (BIOLOGICAL SCIENCES): (All Values)
Prepared by:	Test2500 Requester
Cart Name:	test email approver
Requisition No.:	2984148
Priority:	Normal
No. of line items:	1

TOTAL: 146.93 USD

Details

W B MASON CO INC

Item 1
Description: Blinding White Copy Paper, 8 1/2 x 11, 98 Bright, 20 lb., 5000/CT



All Unread

By Date

FROM	SUBJECT	RECEIVED	SIZE	CATEGORIES	MENTION
UDExchange@jagg... <http://usertest-messages.sdiquest.com/app_docs/pics/origimages/30004044/112639.jpg>	New Pending Approval for Requisition# 2984148	Tue 6/23/2020 11:33 AM	57 KB		
University of Delaw...	Your requisition has been returned. Requisition#: 2984148	Tue 6/23/2020 11:33 AM	34 KB		

Reply Reply All Forward IM

Tue 6/23/2020 11:33 AM



UDExchange@jaggaer.com

New Pending Approval for Requisition# 2984148

To UD Exchange

Description: Blinding White Copy Paper, 8 1/2 x 11, 96 Bright, 20 lb., 5000/CT
 Catalog Number: BLZ41200
 Quantity: 1
 Unit Price: 146.93 USD
 Ext. Price: 146.93 USD
 Size/Packaging: CT
 Commodity Code: 44000000
 Account Code: 141215 - OFFICE ACCESSORIES AND SUPPLIE

TOTAL: 146.93 USD

Accounting Codes

Work Order Number: N/A - N/A
 SpeedType: BISC110000 - BIOLOGICAL SCIENCES
 Purpose: BISC110000 - BIOLOGICAL SCIENCES

Once you have reviewed the document, Click **Take Action**.

Project ID: -
 User Ref: -

Ready to approve, reject or assign this document to yourself? **Take**

Action

Additional Information



Requisitions: 2984148

Owner:	Test2500 Requester
Total:	146.93 USD
Discount:	0.00 USD
Tax1:	0.00 USD
Tax2:	0.00 USD
Shipping:	0.00 USD
Handling:	0.00 USD
Priority:	Normal
No. of line items:	1

A UD Exchange browser tab will open, displaying the requisition.

- > Shipping
- > Billing
- > Buyer Information
- > Accounting Codes
- > Internal Notes and Attachments
- > External Notes and Attachments
- > Line Items

Actions



Shipping:	0.00 USD
Handling:	0.00 USD
Priority:	Normal
No. of line items:	1
Suppliers:	W B MASON CO INC
Assigned To:	Not Assigned

Navigate to the **Actions** section.

- Enter your email **Approval Code** into the Approval Code field.
- Click **Approve**.

> External Notes and Attachments

> Line Items

Actions

Approval Code *

Comment



Assign to myself



Approve



Requisitions: 2984148

Owner: Test2500 Requester
Total: 146.93 USD
Discount: 0.00 USD

You will receive a message that the requisition has been approved successfully.

Shipping: 0.00 USD
Handling: 0.00 USD
Priority: Normal
No. of line items: 1
Suppliers: W B MASON CO INC
Assigned To: Not Assi

Success
Requisitions has been Approved successfully!

- > Shipping
- > Billing
- > Buyer Information
- > Accounting Codes
- > Internal Notes and Attachments
- > External Notes and Attachments
- > Line Items



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Mobile App Activation](#)

