WERSITYOF EXCHANGE

Mobile App – Navigation



What's different in UD Exchange?

App for Approvals

In Webforms, a user had to log into webforms in a computer browser to review and approve requisitions.

In UD Exchange, which runs on the JAGGAER platform, there is an app for iOS and Android allowing the user to review all aspects of the requisition on a mobile device.



Mobile App Navigation

The Jaggaer mobile app for UD Exchange allows users to perform tasks via a mobile device:

- Shop from hosted catalogs or from your saved favorites.
- Shop from some punchout catalogs.
- Manage documents and shopping carts assigned to you for approval.
- Access your action items and notifications.





Shop

Shop from your hosted catalog and add items from your favorites



Your Cart



Approvals Take action on documents waiting for approval

View your current cart and manage other carts

Receipts

Action Items

All the important stuff that requires your attention is right here

15 Notifications

Short notes to notify you of activity in the system

Logout



On the homepage of the App you will find:

- Shop
- Your cart
- Approvals
- Action Items
- Notifications

Depending on a user's roles and permissions, availability of these tasks will vary.



Shop from your hosted catalog and add items from your favorites



View your current cart and manage other carts



Approvals

Your Cart

Shop

Take action on documents waiting for approval

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Receipts



All the important stuff that requires your attention is right here

Notifications

Short notes to notify you of activity in the system

Shop:

- *Hosted* Catalog Shopping purchase items from their organization's hosted catalogs.
- *Punchout Site* Shopping suppliers with mobile-friendly punchout sites are available for shopping.
- Shopping from *Favorites* Shoppers who can save and access favorites in the desktop application will be able to access those favorites in the mobile app. Items can be selected from the favorites (both personal and shared) for purchase in the mobile app. This includes items from hosted catalogs, punchout items, non-catalog items and completed forms.

4

Logout











Mobile Punchout Shopping:

- 1. Click PunchOuts.
- 2. Select the Vendor
- 3. From the vendor punch out site, shop for the items you want to order.
- 4. Select the quantity you want and click Add to Cart.



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Approvals

Shop

Home



Those who do not qualify will be listed in a separate **Mobile Punchout Not Enabled** section.







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	ï	Your Cart	
÷		View your current cart and manage other c	arts
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Y		Take action on documents waiting for app	Your Cart:
	í.	Receipts	Access to manage your active cart and draft carts as well as create new shopping
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	_	Courses and	The checkout process is similar to checkout on the desktop application.
	4	Action Items All the important stuff that requires your attr here	ention is right
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Logout





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Shop

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Your Cart View your current cart and manage other carts

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Take action on documents waiting for approval



Action Items

Approvals -

Receipts

All the important stuff that requires your attention is right here



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Logout

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Approvals:

Depending on an individual user's roles and permissions, users can approve pending requisitions from the app.

In addition, Approvers can view/add comments, download attachments and view the accounting information.

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	All the important stuff that requires your attention is right here										> Account	ng Codes			0	Forward to	
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4	Short notes to notify you of activity in the system										> External	Notes and Att	tachments			,	
	Logout	A			A			A		•	A		.		Home	Shop Approvals	••• More

Approvals:

- 1. Click Approvals.
- 2. Click **Requisitions.**
- 3. Click My PR Approvals.
- 4. Select the Requisition you want to review.
- 5. Review the Requisition details.
- 6. Scroll down to select the **Action** you want to take:
 - Approve, Return to Requisitioner, Forward to, or Reject/Cancel.





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1 Notifications

Short notes to notify you of activity in the system

Logout

Action Items and Notifications:

Mobile users can access their notifications and action items within the app. These are the same notifications and action items that display in the desktop application.





< Action Items	- 은 1	2 Notifications
My Assigned Approvals		Clear all Notifications
Requisitions To Approve	3 🔊	Shopping, Carts & Requisitions
 Other Action Items My Assigned Approvals 	2	Your Requisition Has Completed Workflow 7/13/2020 1:26 PM 2999373 - 179.99 USD, Submitted By Margot Martin
Carts Assigned To Me	2	Your Requisition Has Completed Workflow 7/9/2020 10:03 PM 2997250 - 211.20 USD, Submitted By Shawn Gagnon
		Your Requisition Has Completed Workflow 7/9/2020 9:27 PM 2999907 - 18.50 USD, Submitted By Margot Martin
		> Other Notifications(Read Only) 1
 Action Items Notifications 	will show open requisitions will show based on the p	ons/shopping carts that require approval. Direferences that you set in the UD Exchange desktop application.
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Home Shop Approx	vals More	Home Shop Approvals More 14

Notes on Using the Mobile App

- Not all suppliers' punchouts are optimized for mobile use. Although some shopping may be able to be done, the requisition must be completed on the computer. Shoppers may assign carts to requesters through the mobile app.
- For departments that do receiving, receipts can also be entered through the mobile app.



Resources

Procurement Services

procurement@udel.edu

See also, "Approving Requisitions in UD Exchange"

"UDX Mobile App – Activation"

