

# UNIVERSITY OF DELAWARE 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**  
View your current cart and manage other carts
-  **Approvals**  
Take action on documents waiting for approval
-  **Receipts**
-  **Action Items**  
All the important stuff that requires your attention is right here
-  **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**  
Shop from your hosted catalog and add items from your favorites



**Your Cart**  
View your current cart and manage other carts

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**Receipts**

**4 Action Items**  
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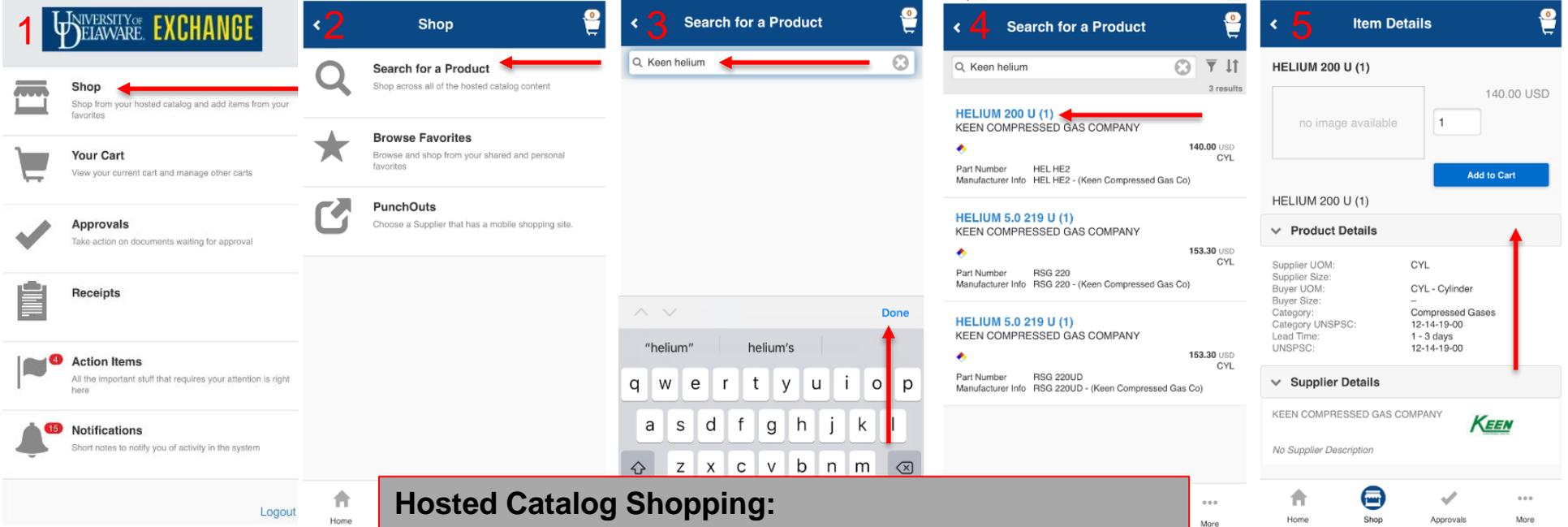
**15 Notifications**  
Short notes to notify you of activity in the system

[Logout](#)

**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.

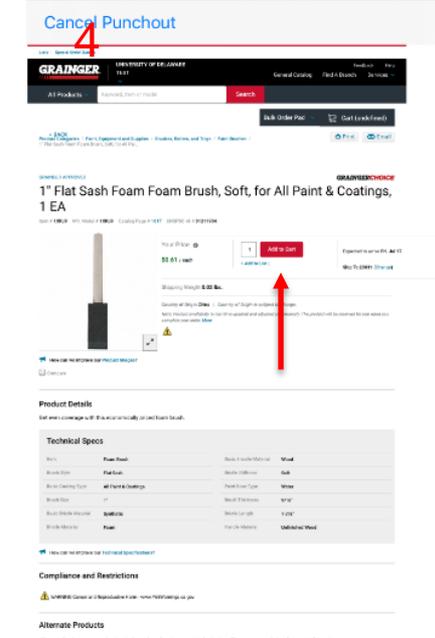
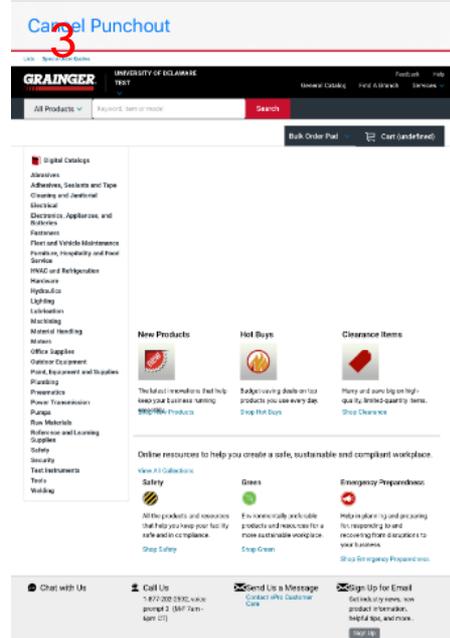
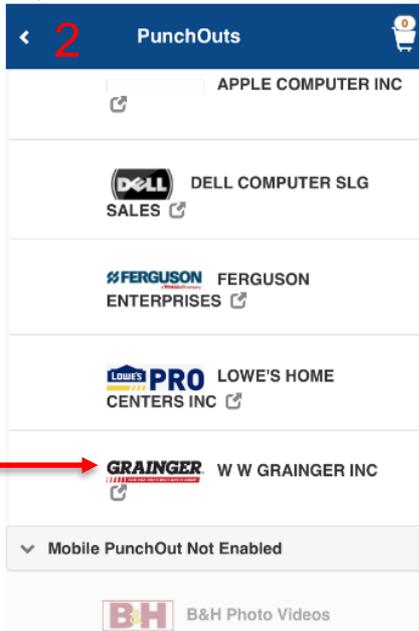
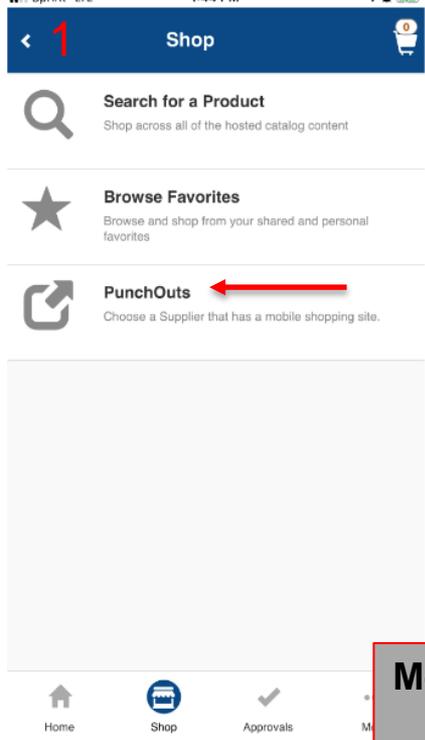




**Hosted Catalog Shopping:**

1. Click **Shop**.
2. Click **Search for a Product**.
3. Enter your search criteria, Click **Done**.
4. Click on the product you want to order.
5. Select your quantity and click **Add to Cart**.

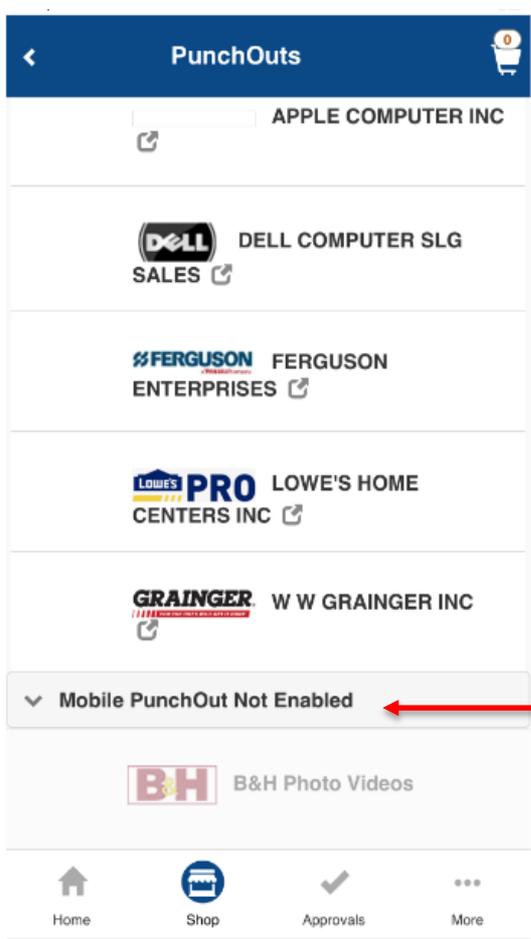




**Mobile Punchout Shopping:**

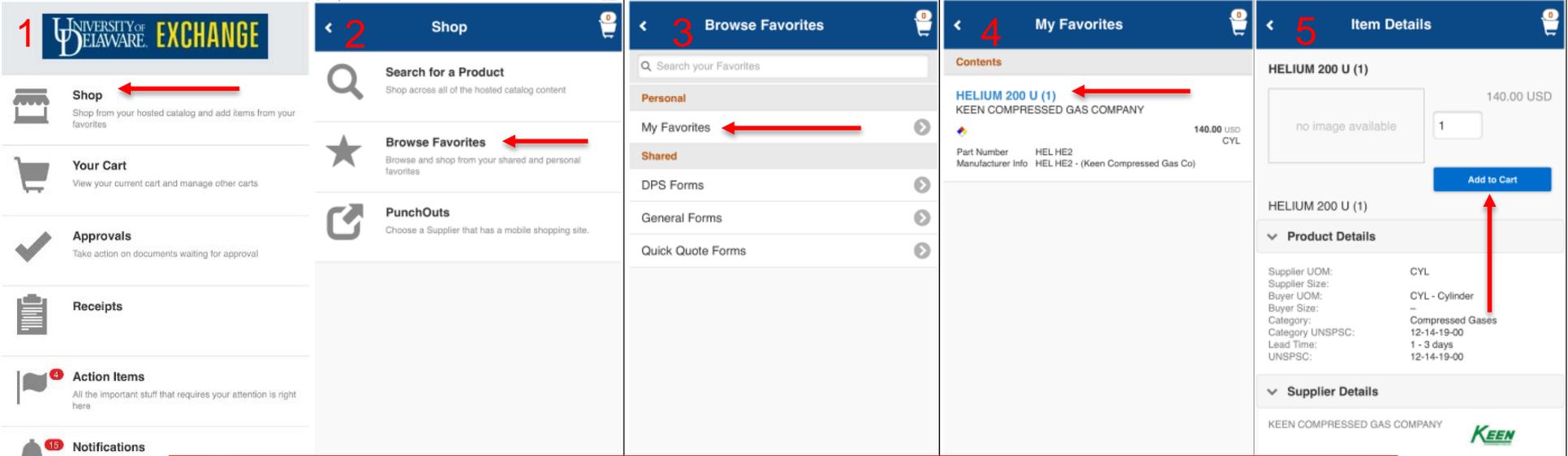
1. Click **PunchOuts**.
2. Select the Vendor
3. From the vendor punch out site, shop for the items you want to order.
4. Select the quantity you want and click **Add to Cart**.





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





## Shopping from Favorites:

1. Click **Shop**.
2. Click **Browse Favorites**.
3. Click **My Favorites**.
4. You will see a list of your “favorited” products from the desktop UD Exchange application. Select the item you want to order.
5. Enter the quantity you want and click **Add to Cart**.





 **Shop**  
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 **Your Cart**  
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 **Approvals**  
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 **Receipts**

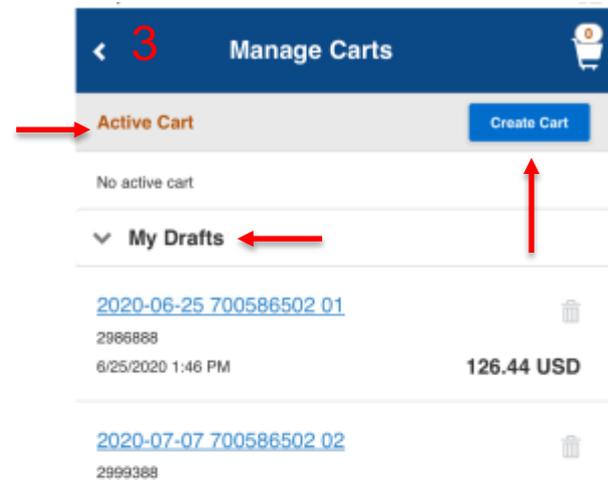
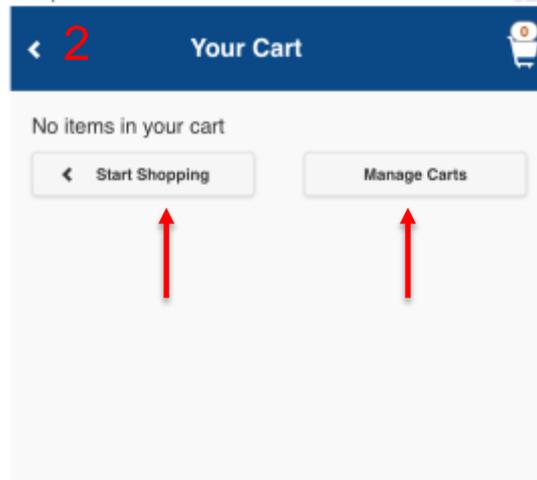
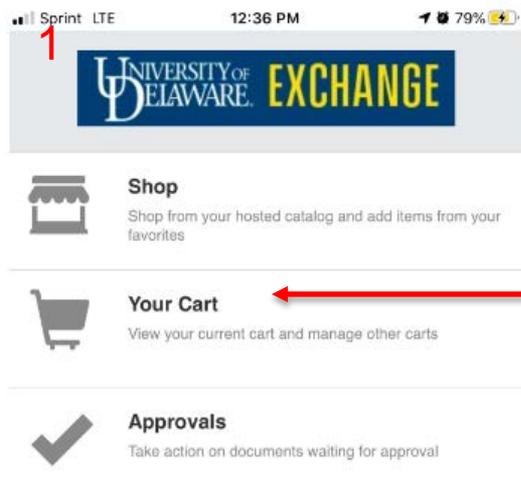
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**Your Cart:**  
Access to manage your active cart and draft carts as well as create new shopping carts.  
The checkout process is similar to checkout on the desktop application.

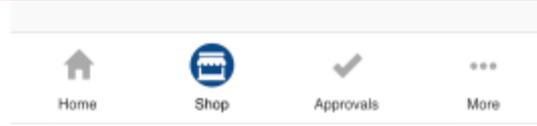
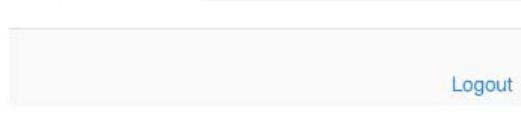
[Logout](#)

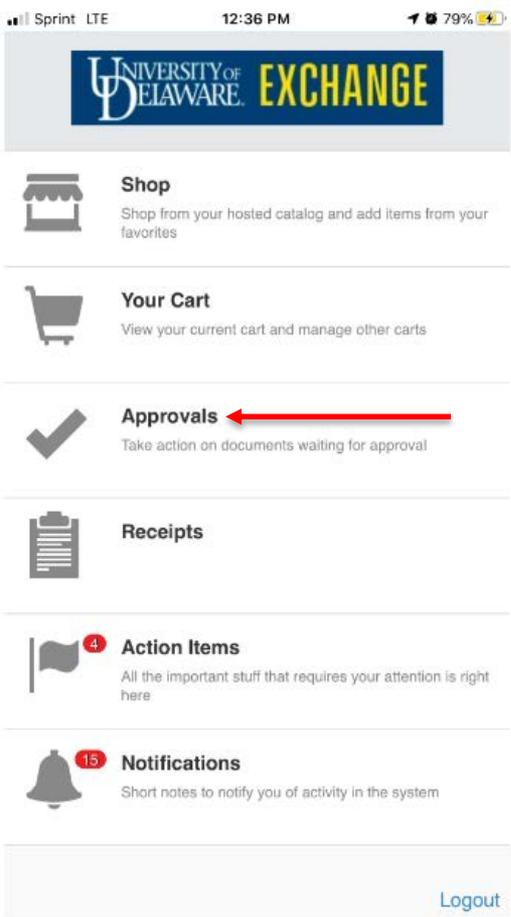




**Your Cart:**

1. Click **Your Cart**.
2. You can either **Start Shopping** or select **Manage Carts**.
3. If you have an **Active Cart**, you will see it listed. If not, you can select one of your **Draft Carts** to make it your active cart, or select **Create Cart** to begin shopping with a new cart.



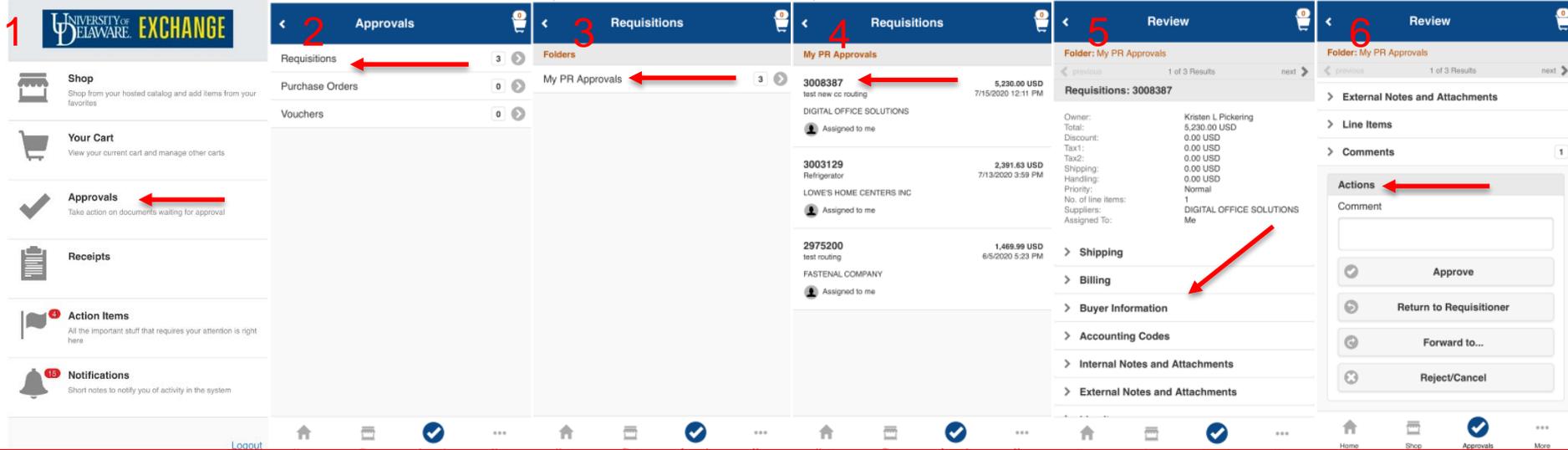


## Approvals:

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.





## 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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### Your Cart

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### Approvals

Take action on documents waiting for approval



### Receipts



4

### Action Items

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15

### Notifications

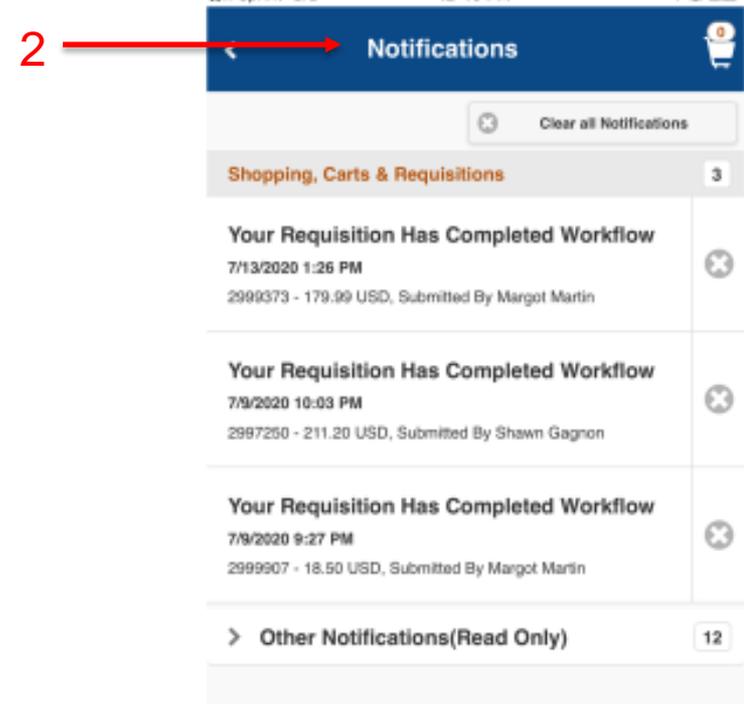
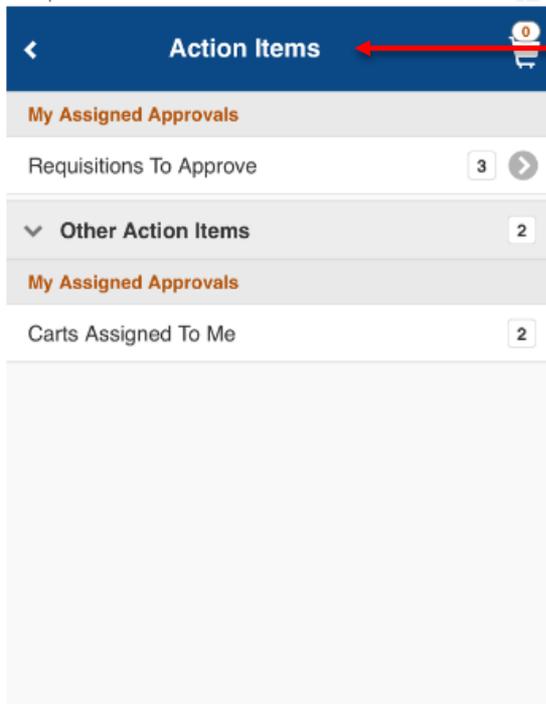
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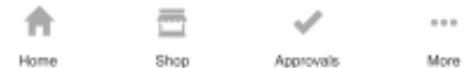
## Action Items and Notifications:

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.





1. **Action Items** will show open requisitions/shopping carts that require approval.
2. **Notifications** will show based on the preferences that you set in the UD Exchange desktop application.



# 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](mailto:procurement@udel.edu)

See also, “Approving Requisitions in UD Exchange”  
“UDX Mobile App – Activation”

