

# UNIVERSITY OF DELAWARE EXCHANGE

Approval Notifications and Reminders

Revised 04/11/23

# Approval Notifications and Reminders

- UD Exchange will send daily reminders to ensure timely approval of requisitions, change requests, and vouchers.
- This guide will illustrate how to manage email notifications you receive *as an Approver*.



# Initial Approval Notification

UDExchange@jaggaer.com  
New Pending Approval for Voucher# I0000603  
nge

Notifications are sent from  
UDExchange@jaggaer.com

Notifications from  
the test site  
looks different from  
the production site in  
image and coloring.

UNIVERSITY OF  
DELAWARE. EXCHANGE

TEST SITE

## Sammy Substitute Approval Request for Voucher# I0000603

Dear Sammy Substitute,

The Voucher listed below has been submitted for your approval.

**WARNING:** Your approval code is not set up in your profile, so you are not allowed to take action on this Voucher via email. Action must be taken in your organization's site. You may log into the application to set the approval code in your user profile.

### Summary

Folder:	Sammy Substitute
Voucher Owner:	Sammy Substitute
Voucher No.:	I0000603
No. of line items:	1

**TOTAL:** 3,120.00 USD

This warning lets you know you cannot approve via email until you set up your approval code in your UDX profile. You will need to log into UDX to approve.

Wording will vary depending on whether approval is required for a requisition, change request or voucher.



# Approval *Reminder* Notifications

Reminder notifications are sent daily at or around 6 AM

Tue 3/2/2021 6:02 AM

UDExchange@jaggaer.com

\*\*\*ATTENTION REQUIRED\*\*\* You have requisition(s) pending for approval



TEST SITE

Re: Reminder for requisition(s) pending approval in workflow step  
Folder: Non-PO Payment Approval

Dear Sammy Substitute,

The following requisition(s) are in a shared folder pending for approval:-

Requisition # 3070274 entry submitted since 10/8/2020

Requisition # 3039845 entry submitted since 9/9/2020

Requisition # 3045984 entry submitted since 9/9/2020

Requisition # 3047308 entry submitted since 9/4/2020

Requisition # 3052200 entry submitted since 9/11/2020

Approvals reminders are “batched”. You will receive one email for requisitions assigned to you for approval, one for all requisitions in a shared approval folder, etc.



# Changing Approval Notifications

## There are two options for reducing approval notifications:

- Placing the document (requisition, voucher, etc.) on hold in UDX disables the Approval **Reminder** Notification for that document. This is the preferred option, ensuring that you receive the initial Approval Notification that will allow you the option to approve via email if you wish.
- Turning off the approval notifications in your UDX Profile disables *both* the **Initial** Approval Notification *and* the Approval **Reminder** Notifications. You will need to adjust your approval notification settings for each type of document (requisition, voucher, etc.). This is only recommended for users who are in UD Exchange for much of their daily work. **Because you will not receive email notifications, you will no longer have the option to approve via email.**



# Placing Documents on Hold

- As an Approver in UD Exchange, there may be situations where you are not ready to approve a document because you are waiting for more information.
- In the following example, you don't want to approve the requisition yet, and you also don't want another approver to take action from the shared approval folder.
- Placing the requisition on hold with a comment will let everyone know why you are not taking action yet and will also stop daily reminder emails about the pending approval.



- Orders
  - Search
  - My Orders
  - Approvals

Quick search

- Requisitions to Approve
- Change Requests to Approve
- Procurement Requests to Approve
- Requisitions Recently Approved By Me
- Change Requests Recently Approved By Me
- Procurement Requests Recently Approved By Me
- Assign Substitute Approvers-Requisitions
- Assign Substitute Approvers-Procurement
- Approval Notifications

Action Items

There are no Action Items to display.

My Resources

Product R

My Resources

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

Notifications can be viewed by clicking the Bell icon.

Use the navigation bar on the left side of your screen and go to:  
**Orders > Approvals > Requisitions to Approve.**

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

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





### Approvals

- Requisitions 9
- Purchase Order
- Change Requests
- Vouchers 10
- Procurement Requests
- Contract Requests
- AP Requests
- Sourcing Event Requests
- Supplier Requests

#### Your Selections

Date Range  
All Dates

View Approvals For  
My Approvals

#### Filters

- SUPPLIER
- LOWE'S HOME CENTERS INC 2
  - PHILIP ROSENAU COMPANY INC 1
  - TRI-STATE CARPET INC 1
  - 3DFORTIFY INC 1
  - TRIDIM FILTER CORPORATION 1
- DEPARTMENT
- PROCUREMENT SERVICES (04750) 6
  - No Department 2
  - FACILITIES-BLDG MAINT & OPER (05848) 1

Showing Results 1 - 9 of 9 Display 20

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
3523210	TRLSTATE CARPET INC	Margot Martin	5/19/2022 2:54 PM	Jennifer Simms	9,880.00 USD
3100253	NCURA	Margot Martin	10/30/2020 3:07 PM	Rachel Requester	190.00 USD
3089544	PHILIP ROSENAU COMPANY INC	Margot Martin	9:57 AM	Kristen Pickering	406.07 USD

1 ITEMS SELECTED

Check the **box** in the column next to the item.  
Click the **Select an Action** menu  
Select **Place PR On Hold** from the menu.



- Select an action
- Assign
- Approve/Complete
- Forward...
- Return to Shared Folder
- Place PR On Hold**
- Add Notes to History
- Assign CV2 Code

Select an action



VOUCHER NO.	SUPPLIER VOUCHER NO.	SUPPLIER NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.	MATCH STATUS
<input checked="" type="checkbox"/>	IT000801	12345-002	MARYLAND UNIV OF - EASTERN SHORE	Kristen Pickering	11/10/2021 7:56 PM	UDRT000049 Matched

Due Date: 12/2/2021 No. of Lines: 2

Placing **Vouchers** on hold works the same way.  
Remember, you can only work with documents not already assigned to another Approver.

<input checked="" type="checkbox"/>	IT000793	monthly-11	HEISLER BROTHERS PROPERTIES LLC	Not Assigned	11/1/2021 1:23 AM	UDP0000069 Matched
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Due Date: 11/1/2021 No. of Lines: 1

Voucher Name: 2021-11-01 University of Delaware  
Type: PO Voucher  
Voucher Source: Recurring

<input type="checkbox"/>	IT000792	I0000497-12	HEISLER BROTHERS PROPERTIES LLC			UDP0000070 Unmatched
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- Select an action
- Assign
- Approve/Complete
- Forward...
- Return to Shared Folder
- Place Voucher On Hold**
- Add Notes to History

2 ITEMS SELECTED



Requisition • 3100253

Approve/Complete & Show Next 3 of 9 Results

Summary PO Preview Comments Attachments 1 History

General Shipping Billing

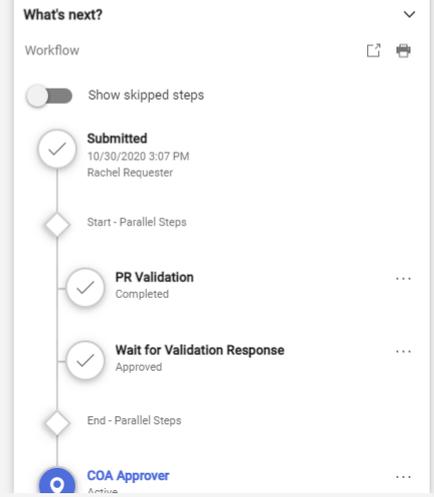
Status Pending COA Approver (Margot Martin) Ship To University of Delaware Bill To Accounts Payable

You can also place the requisition on hold from within the requisition when reviewing.  
Click the **Approval** menu.  
Select **Place on Hold**.

Submitted  
Cart Name  
Description  
Priority  
Prepared by  
Prepared for  
Purchasing Business Unit  
Payment Term Override  
eBuilder Process Instance  
Ad-Hoc Approver  
Multi-Invoice/Payment  
After-The-Fact Purchase

Buyer Information

Total (190.00 USD)  
Shipping, Handling, and Tax charges are shown for each supplier. The values shown are for budget checking, and workflow.  
Subtotal  
190.00



- Approve & Next
- Approve
- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Reject Requisition

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Requisition • 3100253

Summary PO Preview Comments Attachments 1 History

**General** **Shipping**

Status **Pending**  
COA Approver (Margot Martin)

Submitted 10/30/2020 3:07 PM

Cart Name NCURA Membership Dues

Description *no value*

Priority Normal

Prepared by Rachel Requester

Prepared for Rachel Requester

Purchasing Business Unit UOD01  
UNIVERSITY OF DELAWARE

Payment Term Override

eBuilder Process Instance *no value*

Ad-Hoc Approver **Select**

Multi-Invoice/Payment

After-The-Fact Purchase

**Buyer Information**

**Ship To**  
University of Delaware  
Attn: Requester Sean  
Room: 123  
222 SOUTH CHAPEL STREET  
GENERAL SERVICES BUILDING  
Newark, DE 19716  
United States

**Delivery Options**

Expedite

Ship Via **Best Carrier-Best Way**

Requested Delivery *no value*

**Billing Options**

Accounting Date *no value*

Tax Flag

**Place On Hold**

Hold Reason

Waiting for Requester to add backup documentation.

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

**Place On Hold** Cancel

**Pending**

**Total (190.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 190.00

**190.00**

**What's next?**

Workflow

Show skipped steps

**Submitted**  
10/30/2020 3:07 PM  
Rachel Requester

Start - Parallel Steps

**PR Validation**  
Completed

**Wait for Validation Response**  
Approved

End - Parallel Steps

**COA Approver**  
Auntus

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With either method, you will be prompted to insert a **Hold Reason** as to why the requisition has been placed on hold.

Click **Place On Hold**.

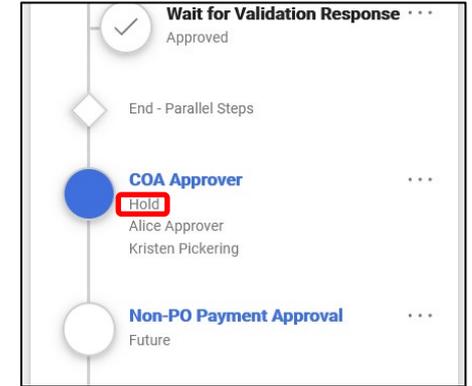


▼ MY PR APPROVALS 1

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER
<input type="checkbox"/> 3229813 	CHRISTINA SCHOOL DISTRICT	Alice Approver

Requisition Name	Non-PO Payment Test	Folders
No. of line items	1	
This PR has notes	✓	



Your Approvals Queue, the Requisition Workflow, and the Comments Tab will all indicate that the requisition is **on hold**. Any subsequent action – approval, return to shared folder, return to requisitioner, etc., will remove the hold.

**Alice Approver** - 11/10/2021 7:26:24 PM

Requisition - 3229813 **Requisition put on hold** ↻

Waiting for Requester to add backup documentation.



# Turning off Approval Notifications in Your Profile

The following slides will guide you through the steps to disable each type of Approval notification.



## 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 and are not in this catalog. The test site is where the administrators test new solutions before moving to production and while building new guides. Please email [procurement@udel.edu](mailto:procurement@udel.edu) if you have specific questions; chances are we are working on it!

- Click the **Profile** icon at the top right of your screen
- Select **View My Profile**.

## Catalog &amp; Forms Showcase (Under Development)

## Procurement Forms

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

## Office/Misc Supplies

## Action Items

There are no Action Items to display.

## My Draft Carts

No results found

Brandon Gabriel-Perez

View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

Search Help For A Solution

My Pending Requisitions

My Recently Completed Requisitions

My Recently Completed Purchase Orders

Logout

[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 Profile ▶ User's Name, Phone Number, Email, etc.

- 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
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences**
- Administration & Integration
- Shopping, Carts & Requisitions
- Change Requests
- Purchase Orders
- Accounts Payable
- Receipts
- Contracts
- Sourcing Director
- Supplier Management
- Form Requests
- User History
- Administrative Tasks

Last Name	<input type="text" value="Approver"/>
Phone Number	<input type="text" value="+1 302-831-2163"/> <input type="text" value="ext."/>
Mobile Phone Number	<input type="text"/>
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

- Use the menu on the left to click **Notification Preferences**
- Select **Shopping, Carts, & Requisitions.**



### Alice Approver

User Name testapprover

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences <
- Administration & Integration
- Shopping, Carts & Requisitions**
- Change Requests
- Purchase Orders
- Accounts Payable
- Receipts
- Contracts
- Sourcing Director
- Supplier Management
- Form Requests
- User History >
- Administrative Tasks >

### Notification Preferences: Shopping, Carts & Requisitions

[Edit Section ?](#)

The in-application notifications are not yet available for all Email Notifications.

Click Edit Section

Prepared By - Cart Assigned Notice ?	Email
Prepared By - PR line item(s) rejected ?	None
Prepared By - PR rejected/returned ?	None
Cart Assigned Notice ?	None
Receive PR and PO notifications for Carts Assigned to Me ?	None
Assigned Cart Processed Notification ?	None
Assigned Cart Deleted Notification ?	None
PR submitted into Workflow ?	None
PR pending Workflow approval ?	None
PR pending Ad-Hoc Workflow approval ?	None
PR Workflow Notification available ?	None
PR Workflow complete / PO created ?	None
PR line item(s) rejected ?	None
Cart/PR rejected/returned ?	None

Pro Tip: If you are not sure what the notification does, click the ? icon to see an explanation.



- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences <
- Administration & Integration
- Shopping, Carts & Requisitions**
- Change Requests
- Purchase Orders
- Accounts Payable
- Receipts
- Contracts
- Sourcing Director
- Supplier Management
- Form Requests
- User History >
- Administrative Tasks >

Prepared By - Cart Assigned Notice ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email
Prepared By - PR line item(s) rejected ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Prepared By - PR rejected/returned ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart Assigned Notice ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Assigned Cart Processed Notification ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Deleted Notification ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
<b>PR pending Workflow approval ?</b>	<input checked="" type="radio"/> Default <input type="radio"/> <b>Override</b>	Email & Notification
PR pending Ad-Hoc Workflow approval ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow Notification available ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Workflow complete / PO created ?	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification

Look for the line that reads **PR pending Workflow approval**.  
Click the **Override** button.



- User Profile and Preferences
- Update Security Settings
- Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings
- Notification Preferences
  - Administration & Integration
  - Shopping, Carts & Requisitions
- Change Requests
- Purchase Orders
- Accounts Payable
- Receipts
- Contracts
- Sourcing Director
- Supplier Management
- Form Requests
- User History
- Administrative Tasks

- In the far-right column of the same line, select the **drop-down** menu by clicking the arrow on the right side of the box.
- Choose **None**.
- Click **Save Changes** at the bottom right corner of the section.

PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR pending Workflow approval	<input type="radio"/> Default <input checked="" type="radio"/> Override	None
PR pending Ad-Hoc Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Sourcing Event created from Requisition	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification
PR created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification
Cart created from an awarded Sourcing Event	<input checked="" type="radio"/> Default <input type="radio"/> Override	Notification

 Save Changes Cancel



User Profile and Preferences >	Draft Change Request Assigned Notice ?	None
Update Security Settings >	Assigned Change Request Processed Notification ?	None
Default User Settings >	Assigned Change Request Deleted Notification ?	None
User Roles and Access >	Change Request Deleted ?	None
Ordering and Approval Settings >	Change Request submitted into Workflow ?	None
Permission Settings >	Prepared By - Change Request Assigned Notice ?	None
Notification Preferences <	Prepared By - Change Request rejected/returned ?	None
Administration & Integration	Prepared By - PR and PO Notifications ?	None
Shopping, Carts & Requisitions	Change Request pending approval in Workflow ?	Email
Change Requests		
Purchase Orders		
Catalog Management		

User Profile and Preferences >	Voucher submitted into Workflow ?	None
Update Security Settings >	Voucher Workflow Notification available ?	None
Default User Settings >	Voucher pending Workflow approval ?	Notification
User Roles and Access >	Voucher pending Ad-Hoc Workflow approval ?	None
Ordering and Approval Settings >	Voucher Workflow complete ?	None
Permission Settings >	Voucher Workflow Step error notice ?	None
Notification Preferences <	Voucher line item(s) rejected ?	None
Administration & Integration	Voucher rejected ?	None
Shopping, Carts & Requisitions	Voucher returned ?	Email & Notification
Change Requests	New Message - Payment ?	None
Purchase Orders		
Catalog Management		
Accounts Payable		

**Repeat as desired for the following:**

*Shopping, Carts & Requisitions:*

- PR Pending Ad-Hoc Workflow Approval

*Change Requests:*

- Change Request pending approval in Workflow

*Accounts Payable:*

- Voucher pending Workflow Approval
- Voucher pending Ad-Hoc Workflow Approval



## Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

## Resources:

- [Procurement Services Website](#)
- [Approving Requisitions in UD Exchange](#)
- [Initiating Email Approvals](#)
- [Updating Notification Preferences](#)

