Approval Notifications and Reminders
What’s different in UD Exchange?

Approval reminders

- Webforms sends a single approval notification when you have a form to approve. If you do not take immediate action, you may forget you need to do so. Concur sends daily reminders and copies supervisors.

- UD Exchange will send daily reminders of outstanding approvals in a digest version, but this can be adjusted. Supervisors are not copied.
Approval Notifications and Reminders

- Since time is of the essence with approvals, approval reminders are sent daily.
- This Guide will illustrate how to control email notifications that you receive as an approver.
Initial Approval Notification

Notifications are sent from UDExchange@jaggaer.com

This “warning” lets the user know they cannot approve via email until they set up their approval code in their profile. They will need to log into UDX to approve.

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

Wording will differ depending on whether approval is required for a requisition, change request or voucher.
Approval Reminder Notifications

Notifications are sent daily at or around 6 AM.

Approvals are “batched” – you will get one email for all requisitions assigned to you, one for all requisitions in a shared folder, etc.

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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
Changing Approval Notifications

There are two options for reducing/eliminating these notifications:

• Placing the document (requisition, voucher, etc.) on hold disables the Approval Reminder Notification for that document. **This is the preferred approach, and necessary if you wish to approve via email.**

• Turning off the approval notifications disables both the Initial Approval Notification and the Approval Reminder Notifications. This would be done on each type of document and is recommended only for users who are in UD Exchange for much of their daily work. **You will no longer have the ability to approve by email.**
Placing Requisitions on Hold

- As an Approver in UD Exchange, there may be situations where you are not ready to approve a requisition because you are waiting on more information, such as a meeting or an adjacent review like a technology request.
- In this instance, you don’t want to approve the request, but you don’t want another approver to take action from the shared folder.
- Putting the requisition on hold will let everyone know why you are not taking action and also stop daily reminder emails about the pending approval.
Use the navigation bar on the left side of your screen and go to Orders > Approvals > Requisitions to Approve.
If a Requisition is assigned to you, you will see your name in the **Assigned Approver** column.
1. Check the box in the column next to the item.
2. Click in the Select an Action dropdown at the bottom.
3. Select **Place PR on Hold** from the menu.
You can also return the document from within the requisition when reviewing, by choosing **Place on Hold** from the Approval dropdown.
In either situation, the action will require a comment as to why the requisition is on hold which will become part of the Comments.
The Approvals Queue, the Workflow, and the Comments 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.
Placing vouchers on hold works the same way. Remember, you can only work with documents not already assigned to another approver.
Turning off Approval Notifications

Follow the steps on the following screens to turn off each type of Approval Notification:
1. Click the **Profile** icon at the top of your screen
2. Select **View My Profile**.
1. Use the menu on the left to click **Notification Preferences**
2. Select **Shopping, Carts, & Requisitions**.
Click Edit Section

Pro Tip: If you’re not sure what the notification does, click the ? icon next to it to see an explanation.
1. Look for the line that reads PR pending Workflow Approval.
2. In the third column of the same line, click the Override button.
1. 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.
2. Choose **None**.
3. Click **Save Changes** at the bottom right corner of the section.

Notifications are found under the Bell icon.
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
Resources

Procurement Services
See also: “Approving Requisitions in UD Exchange,” “Initiating Email Approvals,” and “Updating Notification Preferences.”