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

Notifications are sent from UDExchange@jaggaer.com

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

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.

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.

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 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.
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.
Use the navigation bar on the left side of your screen and go to:

Orders > Approvals > Requisitions to Approve.

Notifications can be viewed by clicking the Bell icon.
If a Requisition is assigned to you, your name will appear in the **Assigned Approver** column.
Check the box in the column next to the item.

Click the Select an Action menu

Select Place PR On Hold from the menu.
Placing **Vouchers** on hold works the same way. Remember, you can only work with documents not already assigned to another Approver.
You can also place the requisition on hold from within the requisition when reviewing.

Click the **Approval menu**.

Select **Place on Hold**.
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.
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.
Turning off Approval Notifications in Your Profile

The following slides will guide you through the steps to disable each type of Approval notification.
• Click the **Profile** icon at the top right of your screen

• Select **View My Profile**.
Use the menu on the left to click **Notification Preferences**

Select **Shopping, Carts, & Requisitions**.
### Notification Preferences: Shopping, Carts & Requisitions

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

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>EMAIL Notifications</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared By - Cart Assigned Notice</td>
<td>Email</td>
<td>None</td>
</tr>
<tr>
<td>Prepared By - PR line item(s) rejected</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Prepared By - PR rejected/returned</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Cart Assigned Notice</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Receive PR and PO notifications for Carts Assigned to Me</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Assigned Cart Processed Notification</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Assigned Cart Deleted Notification</td>
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<td>None</td>
</tr>
<tr>
<td>PR submitted into Workflow</td>
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<td>None</td>
</tr>
<tr>
<td>PR pending Workflow approval</td>
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<td>None</td>
</tr>
<tr>
<td>PR pending Ad-Hoc Workflow approval</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>PR Workflow Notification available</td>
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<tr>
<td>PR Workflow complete / PO created</td>
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<td>None</td>
</tr>
<tr>
<td>PR line item(s) rejected</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Cart/PR rejected/returned</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**Pro Tip:** If you are not sure what the notification does, click the ? icon to see an explanation.
Look for the line that reads **PR pending Workflow approval**.

Click the **Override** button.
• 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.
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

Resources:
• Procurement Services Website
• Approving Requisitions in UD Exchange
• Initiating Email Approvals
• Updating Notification Preferences