Initiating Email Approvals
What’s different in UD Exchange?

Approval Via Email

Previously, Approvers needed to sign into Webforms, Works or Concur to approve goods and services charges assigned to them.

UD Exchange offers an email approval feature that allows Approvers to approve orders assigned to them from their email notifications after a one-time login to UD Exchange to select their own approval code.
Initiating Email Approvals

• The approval process can be performed either within UD Exchange or via email.
• Before you can approve by email, you need to set your email approval code in your UD Exchange profile.
• You only need to set your approval code once, however, you will need to enter your approval code every time you use email to approve.
• You will still be able to approve within the UD Exchange system once you have set your email approval code.
Access your profile.
1. Click the Profile Icon.
2. Click View my Profile.
Access your profile.
1. Select the **Update Security Settings** section.
2. Click **Change Email Approval Code**.
Create and enter your own **Email Approval Code**. You will use this code when you approve requisitions via email. Your code must be *at least four characters long* and may contain letters, numbers, and special characters. Click **Save Changes**. Now that you have an Email Approval Code, you will have the ability to approve via email.
When a requisition requires your approval, UD Exchange will send you an email notification with the details for your review.
Once you have reviewed the document, click Take Action.
A UD Exchange browser tab will open, displaying the requisition.
Navigate to the **Actions** section.

1. Type your email approval code into the **Approval Code** field.
2. Click **Approve**
You will receive a message that the requisition has been approved successfully.
Resources

Procurement Services
procurement@udel.edu
See also, “Mobile App Activation”