UDX Changes in 23.2 Release
23.2 Release Changes

- Jaggaer, the host of UD Exchange, releases three annual updates to their software.
- Update releases happen first in the UDX Test site for review and validation, and then take place in the UDX Live Production site a few weeks later.
- Release dates are marked on the Procurement Events calendar on our website.
- The following slides describe the updates for the 23.2 release.
- Updates released to the UDX Test site on Sunday, June 18, and will release to the UDX Production site on Sunday, July 16.
- Please note that UD Exchange will be unavailable beginning at 8 PM on Friday, July 14 while the update is being deployed.
Cosmetic Changes

The following changes relate to the user experience and layout in UDX.
Currently, Show/Hide sidebar is available from the “hamburger” menu at the top of the page.
With the new release, this will change to a “sidebar display” arrow icon to the right of the sidebar.
Shopping Cart Changes

A new warning is enabled in the sidebar if another Shopper in your department has ordered the same item from the same supplier in the past seven (7) days.
Rachel works in Photographic Services and submitted an order for a Dell printer on June 27.
The next day, Sam Shopper asked Richard Requester to place an order for a Dell printer that is the same model that Rachel ordered.

Sam Shopper and Richard Requester will see a duplicate warning on their draft requisition because Sam and Rachel are in the same department.

Sam and Richard can click the blue warning link for details.
Clicking on the Potential Duplicates warning link provides detail about the previous order containing with the potentially duplicated item.

Please Note:

• The warning will show if the same item has been ordered from the same supplier in the past seven days, **even if the previously placed order is not yet complete**.

• If the Shopper assigns their cart to a Requester in another department, the Requester will still be able to see the potential duplicate warning.

• **However**, clicking the link will **only** return results if that Requester has the Shopper’s HR department in their UDX access (visibility) list.
The warning only shows in the **cart/draft requisition**, so only the Shopper and/or the Requester will see the warning. The warning will not be visible to Approvers.

The warning is based on the “Prepared For” user’s department, so UDX users in other departments ordering the same item will *not* see a warning.
Approval Changes

Ad-Hoc Approvers can now be added *prior* to a requisition being submitted into approval workflow.
Sam Shopper asked Richard Requester to order some janitorial supplies.

Richard knows that Alice Approver wants to sign off on these types of orders.

Before he submits the requisition, he can add Alice to the approval workflow by clicking the blue Select link next to Ad-Hoc Approver in the General section of the Summary tab.
Richard must choose where in workflow he wants Alice to approve.

NOTE: If you choose the Ad-Hoc approver placement after Submission, this step will precede PR Validation and other automated steps designed to return an incorrectly submitted requisition.

After choosing the workflow step, he uses the magnifying glass to find and select Alice and is prompted to add a comment.
Alice now shows as Ad-Hoc Approver and the Ad-Hoc approval step is listed in workflow.
When Alice approves, she will also have the option to add another ad-hoc approver.
On larger orders with complex workflow, there are additional workflow options.
Beta Changes

The following slides describe future changes in development that are currently *optional* for users to try, and will be implemented to all UDX users in some form in a future release.
Wherever Beta access to new features is available, this icon will show in the bottom right of the screen.
Click the icon to expand to display your options. Choose New Search or Classic Search. Click **Save**.
The screen will refresh to display either the New Search or Classic Search option, depending on your choice.

Note that eventually the New Search option will be the only option available.

Until that time, the icon will remain to provide you the option to return to the Classic Search option.
In the 23.2 release, the Enhanced Search layout expands to **Suppliers**, allowing filters on multiple criteria, customization of result columns, and exports.
Future Changes
(Pending Implementation)

The following slides describe future changes that are pending our implementation engagement with Jaggaer.
Approval Changes

Returning a document to a previous Approver (reverting workflow)
Dottie DPS is the pending approver but she wants to return this requisition to a previous approval step since a new attachment has been added that she thinks a previous Approver should review.
From the ellipsis next to Workflow, Dottie selects Revert workflow to a previous step.
Dottie can then select the step at which workflow should restart.
Dottie enters the required comment explaining the reason and clicks Revert.
The reverted workflow will be indicated both in the history of the History tab, and in a message at the top of the requisition.
If the user has the relevant approval notification turned on, they will receive the email that they have a pending approval.

Dear Alice Approver,

You have been assigned as an ad-hoc approver for Requisition #3787129. Requisition #3787129 has been submitted into Requisition workflow and is awaiting your approval.

Use the link below to access the Requisition within the application as appropriate.

[View Requisition]

[Summary]
The revert workflow process functions the same way for voucher workflow.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Approving Requisitions in UD Exchange
• Enhanced Search