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.
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.

Tue 3/2/2021 6:02 AM
UDExchange@jaggaer.com

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

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 Documents on Hold

Follow the steps on the following screens to place a document on hold:
1. Use the menu on the left to navigate to Requisitions to Approve.
2. Check the box to the right of the requisition
3. From the dropdown, choose “Place PR on Hold”
4. Click Go
1. Enter details regarding the reason for the hold
2. Click **Place on Hold**.
Once the document is on hold, this icon indicates that it is being held. It also shows as on hold in Approver workflow.
Taking any other step such as returning to shared folder will take the document off hold.

**Note also:**

The hold comment becomes part of the document’s comments. You may also place the document on hold from within after assigning it to yourself.
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 your name dropdown along 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.
### Notification Preferences: Shopping, Carts & Requisitions

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

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

**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, choose 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.
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.”