



Supplier Onboarding and Transaction
Changes as of January 12, 2026



Today's Agenda

UDX Supplier Portal

- Why Implement a Supplier Portal

Supplier Onboarding

- Key changes effective January 2026
- How to submit a Supplier Request Form
- New Supplier Registration Process Overview

Procurement Transactions

- Overview of Procurement transaction changes
- New Non-PO Payment (NPOP) Forms for students and employees

Q&A, Important Dates

- Questions and answers
- Important dates



UDX Supplier Portal

LAUNCHING JANUARY, 2026



What is the UDX Supplier Portal?

The UDX Supplier Portal (powered by Jaggaer) is a secure, web-based, self-service portal which allows all suppliers to self-register and maintain company record/profile in real time. The portal serves as a communication hub by enabling direct email communication with the supplier.



Why Implement a Supplier Portal?

- **Maintains existing controls** for identity verification, debarment check and banking information
- **Streamlines** supplier onboarding into a single, standardized, and transparent process
- **Strengthens** supplier data security through invitation-only access and password-protected registration
- **Improves** the supplier experience with self-registration, profile management and direct communication with Procurement
- **Increases efficiency** by reducing manual data entry for Procurement staff and **decreases cycle time** for transactions.
- **Maximizes** the use of UD's licensed JAGGAER modules
- **Simplifies** the UD end user experience



How is the End User Experience Simplified?

- **Removes** the end user from the manual data collection process
- **Provides** a consistent, single-channel onboarding experience – no more guessing between tickets or W-9 links
- **Engages** the end user in a transparent journey with ability to track supplier invitation and registration status
- **Enables** submission of a **bulk supplier request form**, making multiple onboarding requests faster and easier
- **Maximizes** end user adoption of UDX – ensuring most purchases and payment requests originate in UDX and reducing reliance on webforms (PTIs)



Supplier Onboarding



Supplier Onboarding Changes as of January 2026

- The UD substitute W9 is no longer live.
- Foreign suppliers do not complete W-8/SDC and end users **do not** submit tickets with these documents.
- All New suppliers are invited to register **using the Supplier Request Form in UDX** before they become active for purchasing activity. End Users now have **full visibility** into where a supplier is in the registration process. This requirement applies to:
 - Domestic individuals and entities
 - Foreign individuals and entities
 - UD affiliated students & employees Students are **no longer** processed through webforms with the exception of refunds, reimbursements and low dollar HSPs
- The Bulk Supplier Request form can be submitted by end users when registering **more than 10 suppliers at once** (e.g. students receiving stipends for a summer program)



Onboarding a New Supplier in UD Exchange:

Quick Steps

1. UD department user searches for a supplier, if supplier does not exist, user submits a supplier request form *If supplier needs an update, email procurement@udel.edu
2. Supplier team reviews/approves the supplier request and invites supplier to register for the UDX portal
3. Supplier completes the registration process
4. Supplier team reviews/approves registration (and communicates with supplier directly if additional information needed)
5. Supplier is onboarded and approved for shopping
6. Self service portal allows supplier to maintain/update record

Track request progress
through **Shopping**
Homepage/My Requests



Onboarding a New Supplier in UD Exchange:

Required Details

Individual & Entities

- Supplier Name (e.g. W.B. Mason)
- Contact Details:
 - First Name
 - Last Name
 - Title/role (optional)
 - Email Address
 - Phone (optional)
 - Website URL (optional)
- Supplier description and reason for onboarding

*This will be the contact who receives the UDX Invitation to complete the supplier onboarding process



Onboarding a New Supplier in UD Exchange Guide

Click [Here](#) for the **Completing the Supplier Request Form** guide



What Happens Next

1. Once supplier is approved, supplier receives an email from udexchange@jaggaer.com and can begin the registration process.
2. Requestor can monitor the supplier's registration status in the same location where they track supplier request status: **Shopping Home→ Suppliers→ Requests→ My Supplier Requests**. Requestor also receives email notifications whenever the supplier's registration status changes.
 - *If request is returned or rejected, requestor can navigate to my supplier requests/supplier/history to see notes from supplier team.
3. Supplier completes the registration process.
4. Supplier team reviews/approves registration (and communicates with supplier directly if additional information needed.)
5. Supplier is onboarded and approved for shopping.
6. Self-service portal allows supplier to maintain/update record.



After Your Request is Approved

-Once your request is approved, the Supplier will receive a registration email from udexchange@jaggaer.com. At this point, the Supplier can begin the registration process.

*If the supplier already has a Jaggaer account (e.g. for another university), the same login information will allow them to access the portal, but they must still register within the UD branded portal.



Supplier Invitation for University of Delaware

Dear Highland Beach Inc,

University of Delaware has invited you to register as a potential supplier. Our supplier network is a best-in-class Supplier Registration and eProcurement system that provides a one-stop, complete solution for buyer and supplier interaction.

Becoming a University of Delaware network supplier is free, easy and it only takes a few minutes to join. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more.

[Register Now](#)

Thank You,

University of Delaware

Lets see what this looks like

If you have any technical questions, please contact procurement@udel.edu or for assistance and identify yourself as registering in the University of Delaware Supplier Network.



Welcome

Company Overview



Business Details



Addresses



Contacts



Insurance



Payment Information



Comments



Certify & Submit

Welcome to Supplier Registration

Thank you for your interest in doing business with the University of Delaware. In order to become an approved supplier, you must:

1. Create your UDX account.
2. Complete your supplier registration including the certification and submission of an IRS W-8 or W-9 form.

The first step of the registration process is to create an account where you will be required to provide [credentials to the Supplier Portal](#).

You will be notified when your supplier registration has been approved by the University, made by logging into the UDX Portal and submitting updates or corrections.

Required to Start Registration

Legal Company Name *

Highland Beach Inc

★ Required to Complete Registration

Your supplier will then begin and complete the registration process. There are eight (8) sections in total, and all are required except the Insurance section. Registration typically takes about 10 minutes.

You will receive an email notification once the supplier has completed registration and is **Active for Shopping**. You can also check the supplier's registration status (see next slide).

TIP: You can remind a supplier to finish their registration at any time by sending them an email with the link to log into their portal account: [UD Portal Log In](#)

Next ›

Save Changes

What Happens During the Supplier Registration Process?

- Once the supplier completes their registration—including all required fields and their W-9 or W-8—the submission is routed to the Procurement Supplier Team for review.
- The Supplier Team verifies all submitted information, including tax documentation and banking details, and screens for any supplier-related sanctions or restrictions.
- If additional information is needed, the Supplier Team will contact the supplier directly via email sent from UDX.
- You can monitor the supplier's registration status in the same location where you track your request status: **Shopping Home → Suppliers → Requests → My Supplier Requests**. You will also receive email notifications whenever the supplier's registration status changes.



My Supplier Requests

userstest.sciquest.com/apps/Router/ManageSupplierRequests?tmstmp=1759231550368

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Suppliers > Requests > My Supplier Requests

My Supplier Requests

Filter Supplier Requests

Requested Supplier, Template Name

Request Status *
☒ Approved
☒ Returned
☒ Incomplete
☒ Under Review
☒ Rejected
☒ Completed

Include public Supplier request form? ☐

Apply

Page 1 of 2 1-10 of 15 Results

Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status
Sunrise Cafe	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Approved	-	-	9/30/2025 6:44 AM	9/30/2025 6:19 AM	Sunrise Cafe	In Progress
Unbelievable Inc	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Returned	-	-	9/29/2025 1:25 PM	9/29/2025 1:22 PM		-
Bike Tours Inc	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Incomplete	-	-	9/28/2025 4:02 PM	9/28/2025 4:02 PM		-
Bike Tours Inc	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Approved	-	-	9/28/2025 3:57 PM	9/28/2025 3:55 PM	Bike Tours Inc	In Progress
Local Summer Brewery	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Returned	-	-	9/28/2025 3:42 PM	9/28/2025 3:38 PM		-
Lilly Vernon	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Under Review	Supplier Request Approval	-	9/24/2025 7:37 PM	9/24/2025 7:34 PM		-
Main Street Toys	Request to Invite New Supplier or Payee to Onboard in UD Exchange	Incomplete	-	-	9/24/2025 7:32 PM	9/24/2025 7:32 PM		-

All Search (Alt+Q) 2,278.00 USD

You can check the Supplier's **Registration Status** from the same place you track the **Request Status** or by looking up the **Supplier by name**

Suppliers→ **Requests**→ **My Supplier Requests**

Registration Status

None: Supplier not yet invited to register
Invited: Invitation has been sent to the supplier but they have not started the registration process
In Progress: Supplier created a portal account but has not completed registration
Complete: Supplier has submitted their registration and it is under review by the supplier team
Approved: Supplier is registered and supplier team has approved and activated for shopping



Procurement Transactions



Procurement Transaction Changes as of January 2026

UD affiliated payees (Employees, Students, & Student Employees) will now be paid via the UD Employee or Student Non-PO Payment form rather than PTI.



- **The NPOP Matrix will be updated.** The following exceptions apply:
 - **Refunds** will remain as a PTI; these are non-taxable payments and to help reduce time & effort, the payee does not need to be onboarded. *Note: UDX can also be used but payee needs to be onboarded*
 - **Reimbursements** will remain as a PTI for Students & Student Employees; and Concur should always be used for Employees. These are non-taxable payments and to help reduce time & effort, the payee does not need to be onboarded. *Note: UDX can also be used for Student/Student Employees but payee needs to be onboarded*
 - **HSP Payments <\$500** will use the PTI; only name & address is required (no more SSN)
 - **HSP Payments ≥\$500** will use the NPOP, UD Employee NPOP or UD Student NPOP





**Notes: 1) Payment requests for Student Employees should be submitted on the UD Student NPOP; 2) PTI payments are only allowable to U.S. based addresses or available for pickup at the Cashier's Office, otherwise UDX NPOP is required for Wire payments*





NEW Student and Employee Non-PO Payment Request Forms

Catalog & Forms Showcase (Under Development) ...





UD Exchange Setups

 Supplier Request Form	 Bulk Supplier Request Form	 NSB Customer Setup	 HCM Vendor Request
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Procurement Forms

 Consultant Form	 Vehicle Sourcing Form
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Non-PO Payment Request Forms

 Non-PO Payment Request	 Honorarium Payment Request	 UD Employee Non-PO Payment	 UD Student Non-PO Payment
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New Employee and Student Non-Pop Forms Now Available from **Shopping Home Page>Procurement Forms**

Employees and Students are classified by the Procurement team when onboarded in UDX. You will see “UD” logo denotes Employees and the “Blue Hen” denotes Students.

Q&A, Important Dates

