

UNIVERSITY OF DELAWARE[®] EXCHANGE

Profile Settings and Options

Revised 05/31/2023

Profile Settings and Options

This guide identifies key areas of your UDX profile including:

- Where to save favorite and default SpeedTypes
- Where to save favorite and default shipping addresses
- Where to save your favorite Requesters (assignees)
- Where to identify approval folders that are assigned to you
- Where to find your permission and notification settings

The resources page at the end of this guide includes links to **detailed** guides on some of the above-listed areas.



Organization Message

Welcome to the University of Delaware Exchange

Here you'll find the goods and services you need. The greatly expanded **University of Delaware Exchange** (also referred to as UD Exchange, or UDX) provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.

System Operational Status: **Impacted**

We are receiving reports of slow system response and disconnects. The vendor has informed us that they are monitoring the issue.

Additionally, while we were informed that the issue where documents were not appearing in users' approval folders had been resolved, we are receiving continued reports of ongoing visibility issues for some records. The record using the transaction number in the related search from the left sidebar menu (not please email procurement@udel.edu, with the transaction number (PO, Requisition results. We would need to provide that to the vendor to open a bug ticket. (updated by WAG 4/11/23)

Supplier Approval Status: UD Exchange supplier request processing time is usually 4/10/2023, or later, may still be in approval workflow. The onboarding of foreign suppliers may still be in business days of when you receive notice that the request is closed from the ticket. (updated 4/11/23 WAG)

NEW!!! UD Exchange now has a form designed solely for Honorarium payment request form is available for use on the UDX homepage. Designed to reduce delay to use form guides UDX users through a series of questions validating the honorarium from the general NPOP form. A [reference guide](#) is available on the [UDX Resources](#)

Please note about attachments: All document attachments to requisitions, purchase orders, vouchers, etc., including copies of email correspondence, should be in **PDF** format. This will allow for them to be accessed without needing the specific program in which they were created. The print function in both Windows and Mac OS systems will allow you to save a document as a PDF file. Thank you. (1/3/23 WAG)

Impact of supplier data cleanup project:

The supplier team is currently working on a project to verify all supplier data in UD Exchange. This includes deactivating suppliers for which we do not have valid tax identifiers, as well as undocumented address information for active suppliers. Please also note that we have implemented more stringent verification processes for validating banking information, and as a result, previous electronic payment methods may no longer be available, and the supplier may be defaulted to receive payment by paper check. If you need to create a requisition with an inactive supplier, or one for which the necessary fulfillment or remittance address is not available, please request that they submit a new online UD substitute W9 form (www.udel.edu/w9), for domestic suppliers, or an IRS W-8BEN/BEN-E and Supplier Data Collection (SDC) form, for foreign suppliers. Please refer to the information about onboarding suppliers on the main page of our website. (updated 12/4/22 WAG)

Payment Vouchers placed on hold with a comment referencing an "ACH Exception":

In some cases, Procurement must validate new or updated banking information provided by a supplier before a payment can be released. This is a measure to mitigate fraud and ensure that accurate banking information is being used. There is *no further action* required by the departmental end user. The process is internal to Procurement, and involves independent verification of the information at our discretion. UD departments should not reach out to their supplier contact in an attempt to provide assistance in resolving the matter, as it interferes with the independent verification process. If ACH payment information is unable to be successfully verified within 14 days, the payment method may be converted to a physical check payment to avoid further disbursement delays.

Action Items

There are no Action Items to display.

From the UD Exchange Home Page:

- Click on the **Profile icon** at the top right.
- Select **View My Profile**.

Brandon Gabriel-Perez

- View My Profile
- Dashboards
- Manage Searches
- Manage Search Exports
- Set My Home Page
- Search Help For A Solution

You do not have any recent orders

Logout

Quick Links

- UDX ConnectingU Training
- UD Exchange How To Guides
- How Do I Buy ____ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Quote Guidance
- NEW Waiver of Bid Request form
- Non-Catalog Item

My Draft Carts

No results found



UNIVERSITY OF DELAWARE EXCHANGE

AllSearch (Alt+Q)0.00 USDLogout

My ProfileUser's Name, Phone Number, Email, etc.

Brandon Gabriel-Perez

User Name702214053

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

User's Name, Phone Number, Email, etc.

First NameBrandon

Last NameGabriel-Perez

Phone Numberext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address *ud-mart@udel.edu

DepartmentPROCUREMENT SERVICES (04750)

Position-

Reports To-

Authentication MethodSAML

User Name *702214053

★ Required

Save Changes

Your basic profile information will be populated for you. To view, navigate to:

Select **User Profile and Preferences > User's Name, Phone Number, Email, etc.**



Brandon Gabriel-Perez

User Name 702214053

User Profile and Preferences ▸

Update Security Settings ▸

Default User Settings ▾

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

User Roles and Access ▸

Ordering and Approval Settings ▸

Permission Settings ▸

Notification Preferences ▸

User History ▸

Custom Field and Accounting Code Defaults ?

Header (int.) Codes **Code Favorites** Internal Information Cart

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes ?

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	Project Type 1	User Ref	Cost Share Project	Project Type 2
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

Add

Buyer Information ?

Buyer Name	Buyer Email	Buyer Phone
no value	no value	no value

Code Favorites for Check Requests & Vouchers

To save your frequently used Purpose Codes and funding splits:

Select **Default User Settings > Custom Field and Accounting Code Defaults**.
Click on the **Code Favorites** tab.
Click **Add** to search and save favorite SpeedTypes.

Brandon Gabriel-Perez

User Name 702214053

User Profile and Preferences

Update Security Settings

Default User Settings

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Default Addresses

No addresses defined in profile.

Ship To

Select an address to edit

Select Addresses for Profile

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname / Address
Text

Results Per Page 10

Search

Addresses Found: 1

Page 1 of 1

Name	Address
<input type="radio"/> NC01	UNIVERSITY OF DELAWARE Attn: Brandon Gabriel-Perez Room: 162 THE GREEN HULLIHEN HALL NEWARK, DE 19716 United States

To add default addresses to your profile:

Select **Default User Settings > Default Addresses**.

Click **Select Addresses for Profile** to enable the Address Search.

Search by keyword or building code in the **Nickname / Address** field.

UNIVERSITY OF DELAWARE EXCHANGE

All Search (Alt+Q) 0.00 USD Logout

My Profile ▶ Cart Assignees

Brandon Gabriel-Perez

User Name 702214053

User Profile and Preferences >

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Cart Assignees

Add Assignee...

My Cart Assignees

Name Action

User Search - Google Chrome

https://solutions.scquest.com/apps/Router/GenericUserSearch?Tmstmp=1681385819795805&returnFunction=setUs...

User Search

Last Name ?

First Name ?

User Name ?

Email ?

Department ?

Role ?

Results Per Page 10

Search

Save frequently used Requesters to assign your carts to:

Select **Default User Settings > Cart Assignees**.

Click **Add Assignee** to generate a **User Search** for UD employees.

Make sure they have the Requester role before you select them!

UNIVERSITY OF DELAWARE EXCHANGE

All ▾

Search (Alt+Q)

0.00 USD

Logout

My Profile ▸ Assigned Roles

Brandon Gabriel-Perez

User Name 702214053

User Profile and Preferences >

Update Security Settings >

Default User Settings >

User Roles and Access <

Assigned Roles

Access

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Assigned Roles

Assigned Roles

PS Auditor

Shopper

To view what roles you have in UD Exchange (Shopper, Requester, Approver, Department Purchasing Specialist, etc.):

Select **User Roles and Access > Assigned Roles**.

Your roles dictate what you can *do* in UDX.

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UNIVERSITY OF
DELAWARE

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Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Administer

Setup

UNIVERSITY OF DELAWARE
EXCHANGE

AllSearch (Alt+Q)3.00 USD57Logout

My ProfileAccess

Margot McCabe

User Name700586502

User Profile and Preferences>

Update Security Settings>

Default User Settings>

User Roles and Access<

Assigned Roles

Access

Ordering and Approval Settings>

Permission Settings>

Notification Preferences>

User History>

Access?

Document Search Access

This page grants search access to documents as defined below. Each selection adds to the visibility of your document search results.

1

- This user's access to organization **orders** in Document Search is defined below.
- This user's access to organization **vouchers** in Document Search is defined below.

Department Assignments:?

Department Name
PROCUREMENT SERVICES (04750)

To see which departments' documents you have access to view in UDX:

Select **User Roles and Access > Access**.

Your access dictates what you can **see** in UDX.

Your default access will be your HR department.

Menu Search

←

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UNIVERSITY OF
DELAWARE

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Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Administer

Setup

UNIVERSITY OF DELAWARE EXCHANGE

All

Search (Alt+Q)

3.00 USD

2

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Logout

My Profile

View Assigned Approval Folders

Margot McCabe

User Name 700586502

User Profile and Preferences

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

User Purchasing and Approval Limit Values

PunchOut Access

Product Views

View Assigned Approval Folders

Permission Settings

Notification Preferences

User History

View Assigned Approval Folders

Showing 1 - 3 of 3 Results

All Folder Results

Assign Substitute to Selected Folders

Go

Results Per Page 20

Sort by: Folder name ascending

Page 1 of 1

Folder Name	Approver	Substitute	Actions
My PR Approvals	Margot McCabe		
Non-Campus Ship-To Review	Margot McCabe		
Review NPOP for Honoraria Only	Margot McCabe		

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions

Approver

Margot McCabe (3)

To view Approval folders assigned to you:

Select **Ordering and Approval Settings > View Assigned Approval Folders**
Filter by **Type**

UNIVERSITY OF
DELAWARE

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Brandon Gabriel-Perez

User Name 702214053

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings <**
- Shopping, Carts & Requisitions**
- Orders
- Approvals
- Sourcing
- Contracts
- Administration
- Accounts Payable
- Supplier Portal
- Custom Fields
- Mobile
- Notification Preferences >
- User History >

Permissions: Shopping, Carts & Requisitions

History ?

Shopping

Show Details

Permission	Value	
Hosted Catalog Search	?	✓
PunchOut	?	✓
View/Use Forms	?	✓
View/Use Non-Catalog Item	?	✓
Non-Catalog Configuration	?	✗
Bypass Non-Catalog Search	?	✓
Add/Edit Trade-Ins	?	✓
Modify Order Distribution Information on Forms & POs	?	✗
Create Free-form Supplier on Form Templates	?	✗
Create/Edit Forms	?	✗
View/Use Personal Favorites	?	✓
Administer Shared Favorites	?	✗
Create Shared Favorites Folders	?	✗
View Product Compare	?	✓

To view your specific UDX Shopping Permission settings:

Select **Permission Settings > Shopping Carts & Requisitions**.
Click the question mark icon for information about each permission.





Cart/Requisition

[Show Details](#)

Permission		Value
Prepare Req for Another User	?	✓
Do not permit Place Order	?	✗
Assign Cart to Another User	?	✓
Edit User's Cart Assignees	?	✓
View other user's draft carts	?	✗
Delete other user's draft carts	?	✗
Manage Assigned Carts	?	✓
Edit PO Number	?	✗
Edit Credit Card	?	✗
Assign CV2 Code	?	✗
Manually Override Pricing	?	✗
Select Credit Card from Profile	?	✗
Header-level internal attachments	?	✓
Header-level external attachments	?	✓

On the same page, scroll down to view your UDX **Cart/Requisition Permissions**.





Brandon Gabriel-Perez

User Name 702214053

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings <
- Shopping, Carts & Requisitions
- Orders
- Approvals
- Sourcing
- Contracts
- Administration
- Accounts Payable
- Supplier Portal
- Custom Fields
- Mobile
- Notification Preferences >
- User History >

Permissions:
Orders[History](#) | ?

My Orders/Organization Orders

[Show Details](#)

Permission	Value	
View My Orders		✓
View Organization Orders		✓
Edit Organization Orders		✗
View My Department Orders		✗
Revise PO		✗
Update Purchase Order Owner		✗
Close purchase orders		✗
Open purchase orders		✗
Resend PO to Supplier		✗
Resend PO to External System		✗
Export Search Results		✓
Create/Manage My Custom Export Templates		✓
Share My Custom Export Templates		✓
Administer All Custom Export Templates		✗
Manage Company Exports		✗
Manage Order Failure Notifications		✗
Search History By Approver		✓
Revise Purchase Order Number		✗
View Sensitive Credit Card Details		✗

To view your visibility of purchase orders and your permissions related to taking action on orders:

Select **Permission Settings > Orders**

Sales Order Fulfillment

[Show Details](#)



On the same page, scroll down to view your visibility of **Change Requests** and your permissions related to taking action on **Change Requests**.

Change Requests

Permission		Value
Send Change Request Comment	?	✗
Create a Change Request for My Orders	?	✓
Create a Change Request for Orders in My Department	?	✓
Create a Change Request for Orders within My Department Access	?	✗
Create a Change Request for Any Order	?	✗
Edit External Communication Settings	?	✗
Delete Draft Change Request on My POs	?	✓
Delete Draft Change Request that is within my Document Search Access	?	✗



My Profile ▸ Permission Settings ▸ Approvals

Brandon Gabriel-Perez

User Name 702214053

- User Profile and Preferences ▸
- Update Security Settings ▸
- Default User Settings ▸
- User Roles and Access ▸
- Ordering and Approval Settings ▸
- Permission Settings ▸**
- Shopping, Carts & Requisitions
- Orders
- Approvals**
- Sourcing
- Contracts
- Administration
- Accounts Payable
- Supplier Portal
- Custom Fields
- Mobile
- Notification Preferences ▸
- User History ▸

Permissions:

Approvals [History](#) [?](#)

▼ **Requisition Approvals** [Show Details](#)

Permission		Value
Edit specific custom fields in Pending Requisitions (My PR Approvals)	?	✗
Edit Pending Requisitions (My PR Approvals)	?	✗
Approve/Reject Requisitions	?	✗
Approve/Reject Requisitions via email	?	✗
Forward Requisitions	?	✗
Order Consolidation	?	✗
Put Requisitions On Hold	?	✗
Expedite Requisitions	?	✗
Assign Substitute Approver for Purchase Requisition Approvals	?	✗
Add Ad-Hoc Approver for Purchase Requisitions Approvals	?	✗
Perform Requisition Ad-Hoc Approvals	?	✗
Add Products to Consolidated Cart	?	✗
Add Lines to Pending Requisitions	?	✗
Restart/Skip Requisition Workflow Steps in Error	?	✗
Edit Pending Requisitions (Any Approval Folder)	?	✗
Approve/Reject Requisitions on behalf of another approver	?	✗
Manage Other Approver's Requisition Approval Folders	?	✗
Expedite requisition through all workflow steps	?	✗

To view your permissions related to approving documents in UDX, including Requisitions and Purchase Orders:

Select Permission Settings > Approvals.

Brandon Gabriel-Perez

User Name 702214053

User Profile and Preferences >

Update Security Settings >

Default User Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences <

Administration & Integration

Shopping, Carts & Requisitions

Purchase Orders

Accounts Payable

Receipts

Contracts

Sourcing Director

Supplier Management

Form Requests

User History >

Notification Preferences:
Shopping, Carts & Requisitions

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

Prepared By - Cart Assigned Notice	None
Prepared By - PR line item(s) rejected	None
Prepared By - PR rejected/returned	None
Cart Assigned Notice	Email
Receive PR and PO notifications for Carts Assigned to Me	None
Assigned Cart Processed Notification	Email & Notification
Assigned Cart Deleted Notification	Email & Notification
PR submitted into Workflow	Email & Notification
PR pending Workflow approval	None
PR Workflow Notification available	None
PR Workflow complete / PO created	Email & Notification

To view and make modifications to default emails and notifications you receive regarding Shopping, Requisitions, and Purchase Orders:

Select Notification Preferences > Shopping, Carts & Requisitions



Brandon Gabriel-Perez

User Name 702214053

User Profile and Preferences ▸

Update Security Settings ▸

Default User Settings ▸

User Roles and Access ▸

Ordering and Approval Settings ▸

Permission Settings ▸

Notification Preferences ▸

User History ▸

View User's History

Add Profile Comment

View User's History

Click to filter history ?

Export CSV

Results Per Page 200 ▾

Records Found: 10

Page 1 of 1 ?

Date ▾	User ▴	Action ▴	Section ▴	Selection ▴	Field ▴	Old Value	New Value
3/27/2023 2:53:35 PM	Kristen Pickering	Role Added	Roles		Shopper		
1/20/2023 3:56:54 PM	Kristen Pickering	Role Added	Roles		PS Auditor		
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	User Settings		Department	empty	04750
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	User Settings		Mobile Phone Number	empty	---
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	User Settings		Phone Number	empty	---
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	User Settings		E-mail Address	empty	bgabriel@udel.edu
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	User Settings		Last Name	empty	Gabriel-Perez
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	User Settings		First Name	empty	Brandon
1/20/2023 3:56:45 PM	Kristen Pickering	Modified	Authentication Method		Local		SAML
1/20/2023 3:56:45 PM	Kristen Pickering	Created	User Settings				

Results Per Page 200 ▾

To view changes and updates made to your user profile and access in UDX:

Select **User History** > **View User's History**



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Adding Default SpeedTypes to Your Profile](#)
- [Setting Up Ship-to Addresses](#)
- [Adding Requesters to Profile](#)
- [Understanding Access in UD Exchange](#)
- [Assigning and Removing Substitute Approvers](#)
- [Updating Notification Preferences](#)

