# ELAWARE. EXCHANGE

Finding Users and User Information for Department Purchasing Specialists ONLY *Revised 6/4/2023* 

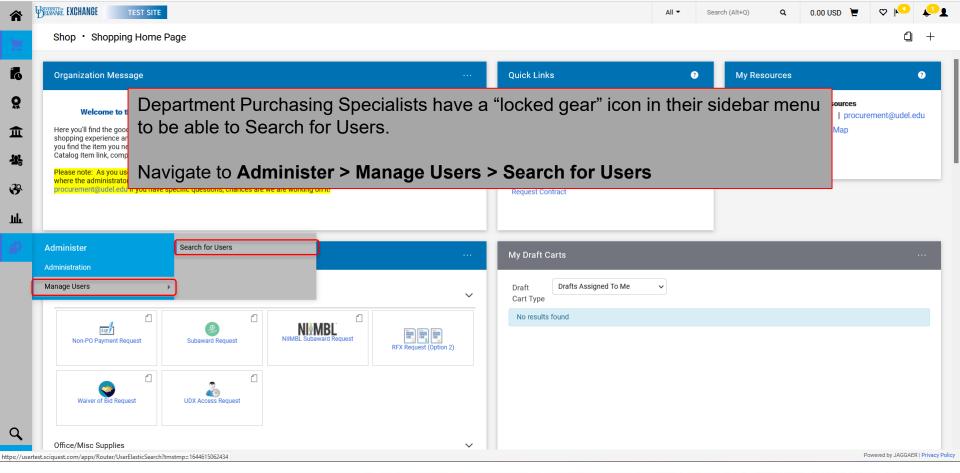


## Viewing User Profiles in UD Exchange

- The Department Purchasing Specialist is responsible for requesting changes to users' roles and access via the UDX Access Request form.
- The DPS can also request changes to workflow and add emergency substitute approvers using this form.
- The DPS can see all profiles of UD employees in order to be able to make an informed request via the form.
- This guide will show how to find basic profile information to support the functionality of your department and users.









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#### **Roles and Access Basics**

- The most common changes to users involve **roles** (what they can **DO** in UDX) and **access** (what they can **SEE** in UDX).
- For more about roles, please refer to the guide <u>Employee Roles in UD Exchange</u>.
- For more about access, please refer to the guide, <u>Understanding Access in UD</u> <u>Exchange</u>.
- Approved updates to roles and access are reflected in UDX through the HR integration twice daily, at 6 AM and 6 PM.





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User Roles and Access							
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Ordering and Approval Settings	>	PROCUREMENT SERVICES (04750)							
Permission Settings	>								
Notification Preferences	>								
User History	>	Rachel's access is limited to Procureme	ent Se	rvices.					
Administrative Tasks	>								
		Therefore, the DPS knows that Rachel	will no	t be able to	o see				
		POs owned by people in departments o	ther th	an Procur	emer	nt			

Rachel has Access to only one department and has no Approver role so she wouldn't be included in approval workflow.

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#### **Roles and Access Scenario**

- Based on information in Rachel's profile, the DPS knows that they will need to complete the UDX Access Request form to update her *role* if they need to give Rachel the ability to approve on behalf of an approver who is not available.
- The DPS would also have to complete the UDX Access Request form to update her *access* if Rachel has the need to view documents outside of Procurement Services (e.g., if she supports departments such as VP Finance or Treasury in any way, node access to the parent node would give Rachel visibility to those users' orders).
- For more about the UDX Access Request Form, please refer to the guide <u>Completing the Access Request Form</u>.



## Approvals and Workflow: Determining Approval Responsibility

- While Department Purchasing Specialists cannot see all workflow at once, they can see the steps of workflow for which a specific approver is responsible
- The DPS can also see whether there are substitutes named on those approval folders.



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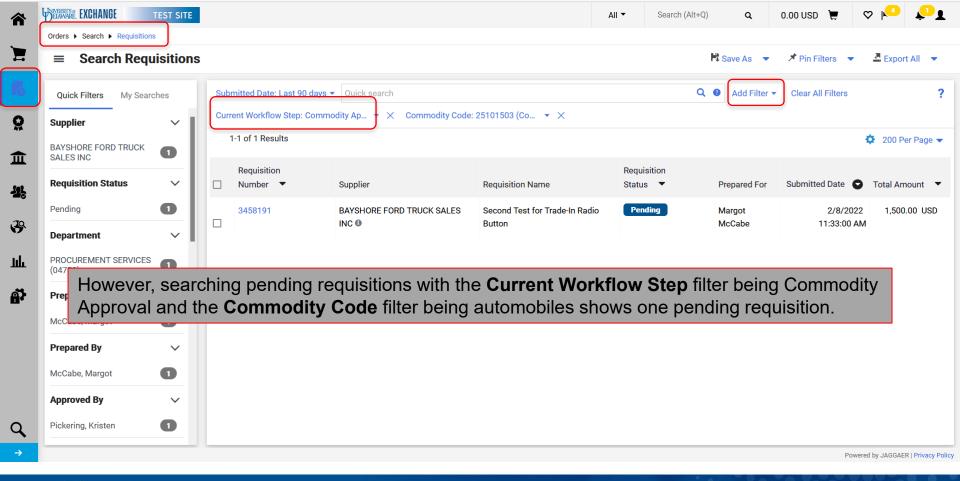
Approvals and Workflow: Visibility of Pending Approvals

- If Alice were suddenly out sick or unavailable, the DPS would know that unless the workflow step has multiple approvers, requisitions needing approval at those specific workflow steps would stall until a substitute approver is named.
- The DPS would not be able to see the requisitions pending Alice's approval unless they are within the DPS's access AND Alice had already assigned herself the requisition.



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#### **Other User Search Features**

- If you have users who are not receiving notifications or wonder why they cannot do or see something another user can, *your* visibility to their profile as a DPS can assist with the explanation.
- You can see if users have set defaults in their profile or set a different UDX home page to use.
- Additionally, you can search and export user data to identify Requesters for Shoppers or evaluate your department's role assignments to ensure you have the right ratio of Requesters for Shoppers.



#### **Notification Preferences:**

ack to Results	1 of 1 Res	ults 🔻 < 🗲							
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Administer 
Manage Users 
Search for Users 
Alice Approver 
View User's History

#### Alice Approver

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User Name testapprover
User Profile and Preferences
Default User Settings
User Roles and Access
Ordering and Approval Settings
Permission Settings
Notification Preferences
User History
View User's History
Administrative Tasks

In the User History section, the DPS can see that Alice herself **View User's History** turned on many of these emails on November 28, 2021, and can guide her back to that area to modify them again.

**Click to filter history** 

Results Per F	Page 20 🗸	•		Records Found: 57			🔳 Pag	je 1 🗸 of 3 🕨 ?
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11/28/2021 4:18:32 PM		Modified	Approval Folder : Requisitions	Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Substitute	e	empty	Alex Approver
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	Cart/PR rejected/returned	Ν	None	Email & Notification <i>(inherited)</i>
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	PR line item(s) rejected	N	None	Email & Notification <i>(inherited)</i>
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11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification	Shopping, Carts & Requisitions	PR pending Workflow approval	N	None	Email & Notification

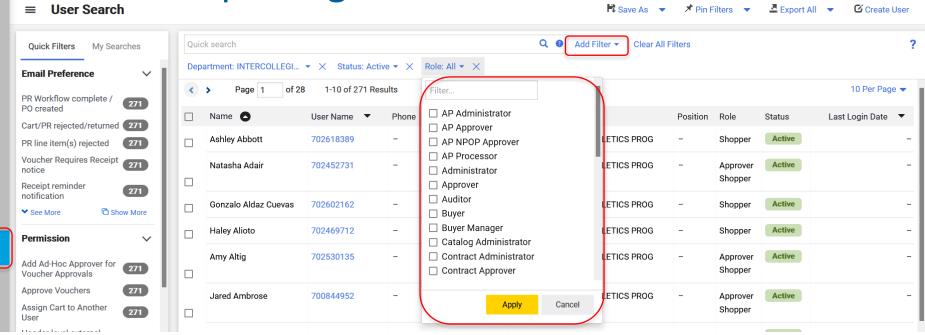


## **Default User Settings:**

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User History	>							
Administrative Tasks								



## **Exporting User Data:**



Returning to the user search home area: **Administer > Manage Users > Search for Users**, the DPS can **filter** by department, status, role, and other filters.



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PR line item(s) rejected 27		Alice Approver	testapprover	+1 302-831-2163	ud-mart@udel.edu	PROCUREMENT SERVICES		Approver	Active	2/11/2022 12:05:24
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#### **Questions:**

• procurement@udel.edu

#### **Resources:**

- Procurement Services Website
- Employee Roles in UD Exchange
- Understanding Access in UD Exchange
- <u>Completing the Access Request Form</u>
- UDX Profile Settings



