UNIVERSITY OF DELAWARE EXCHANGE

Employee Roles in UD Exchange

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Employee Roles in UD Exchange

- A UD Exchange user profile is automatically created for UD employees via an HR file import of active employees. Employee information is updated each business day at 6 AM and 6 PM.

- UD Exchange is accessible through UD Single Sign-On, so there is no need for employees to create separate log-in credentials.

- Employees are assigned roles in UD Exchange based on various factors including their position at UD, their departmental responsibilities, and training completion.

- This guide will outline the following UD Exchange roles: **Shopper, Requester, Approver, and Department Purchasing Specialist (DPS)**

Shopper

- Shopper is the default role for all UD employees.

- Shoppers can search for goods and services on UD Exchange, fill shopping carts, and create draft requisitions.

- Shoppers will need to *assign* their Shopping Cart or draft requisition to an employee with the *Requester* role who will review and submit their order for approval.

- Questions regarding which Requester to select should be directed to the Shopper's department business administrator.

Requester

- A Requester is responsible for reviewing Shopping Carts and draft requisitions assigned to them by Shoppers and submitting them into approval workflow.

- A Requester's review includes verifying correct shipping information, ensuring that the purchase includes a robust business justification, and that the accounting information is complete and correct prior to submitting the order for approval.

- Once their review is complete, a Requester submits the draft requisition for approval.

- Note: A Requester also has the shopping abilities included in the Shopper role.

Approver

There are a few different reasons an employee may need the Approver role in UDX:

- **Cost Object Approver (COA)**
- **Department Purchasing Specialist (DPS)**
- **Commodity and Grants Approvers**
- **Table of Signature Authority**
- **Ad Hoc Approver**

The following slides outline the function of each type of approval.

Cost Object Approver (COA)

The **Cost Object Approver (COA)** is the owner of the SpeedType (Purpose Code) that the purchase is being allocated to.

- COA assignments are established with the Controller's Office (coa-finance@udel.edu) and may have primary and secondary approvals.

- After a Requester submits a shopping cart as a requisition, UD Exchange will route the requisition to the COA for *financial approval*.

- Financial approval is required for all requisitions regardless of dollar amount.

Department Purchasing Specialist

A **Department Purchasing Specialist (DPS)** is responsible for reviewing orders that exceed $5,000.00 or orders that exceed a Requester's purchasing authority.

- A DPS has an approval responsibility in UDX, but also has additional permissions, necessitating a separate role in the system.

- The DPS role has more responsibility than just approval routing and some of these responsibilities include:

  - Performing high level requisition review and approval

  - Accessing and submitting the UDX Access Request form to request role changes in UDX

Commodity Approval

- Commodity approval is triggered by either Commodity Code or Account Code.

- All commodity codes for goods and services POs begin with numbers and are based on the UNSPSC code, segment level.

- Commodity codes with special routing have more detailed numbers and must be selected to trigger commodity approval. For example, 23000000 is a general code for Industrial Manufacturing & Processing Machinery, but 23261507 is the specific code for a 3D printing machine, which needs approval by Environmental Health & Safety.

- Some commodity approval is routed by account code, if the account code applies to more than one commodity (such as Capital Equipment).

Commodity Approval

Below are the codes which currently trigger commodity approval:

Description	Approver	Code to Trigger	Approval/Notification
Automobiles (additions to fleet)	David Fenkel (interim)	CC = 25101503	Approval
3D Printers	EHS	CC = 23261507	Approval
Biocabinet/Hood	Michelle Ferguson	CC = 41103517	Approval
Capital Equipment	Susan Bledsoe	Account = 153100, 153101, 167900	Approval
Copiers	Michael Czerepak	CC = 44101500	Approval
Drones	TBD - EHS	CC = 25132100	Approval
Elec. Generator	William Harris	CC = 26111600	Approval
Fume Hoods	Brian Miani	CC = 41103502	Approval
Intrusion Alarms	Mark Carrow/Ron Beaver	CC = 46171604, 72151703	Approval
Kitchen / Other Use Refrigerators	Brian Miani	CC = 52141501	Approval
Lab Use Refrigerators	Brian Miani	CC = 241315XX, 41103000, 422618XX	Approval
Laser Equipment	William Fendt	CC = 4111XXXX, 42XXXXXX	Approval
Non-Capital Equipment	Susan Bledsoe	Account = 141244	Notification
Printing	Michael Czerepak	CC = 73151900 (account = 144300)	Approval
Radioactive	William Fendt	CC = 26142400, 41106005, 42204XXX	Approval
Software/Hardware/IT Services	IT PMO Office	All IT commodity codes	Approval
X-ray Equipment	William Fendt	CC = 422954XX	Approval

A current list of codes and approvers can be found on the UDX Resources page.

Ad Hoc Approvers

- At any approval step, the Approver that the requisition routed to can add an Ad Hoc Approver if they believe that another employee who is not already in the approval workflow should review and approve the purchase.

- Any employee that has an Approver role in UDX can be selected as an Ad Hoc Approver
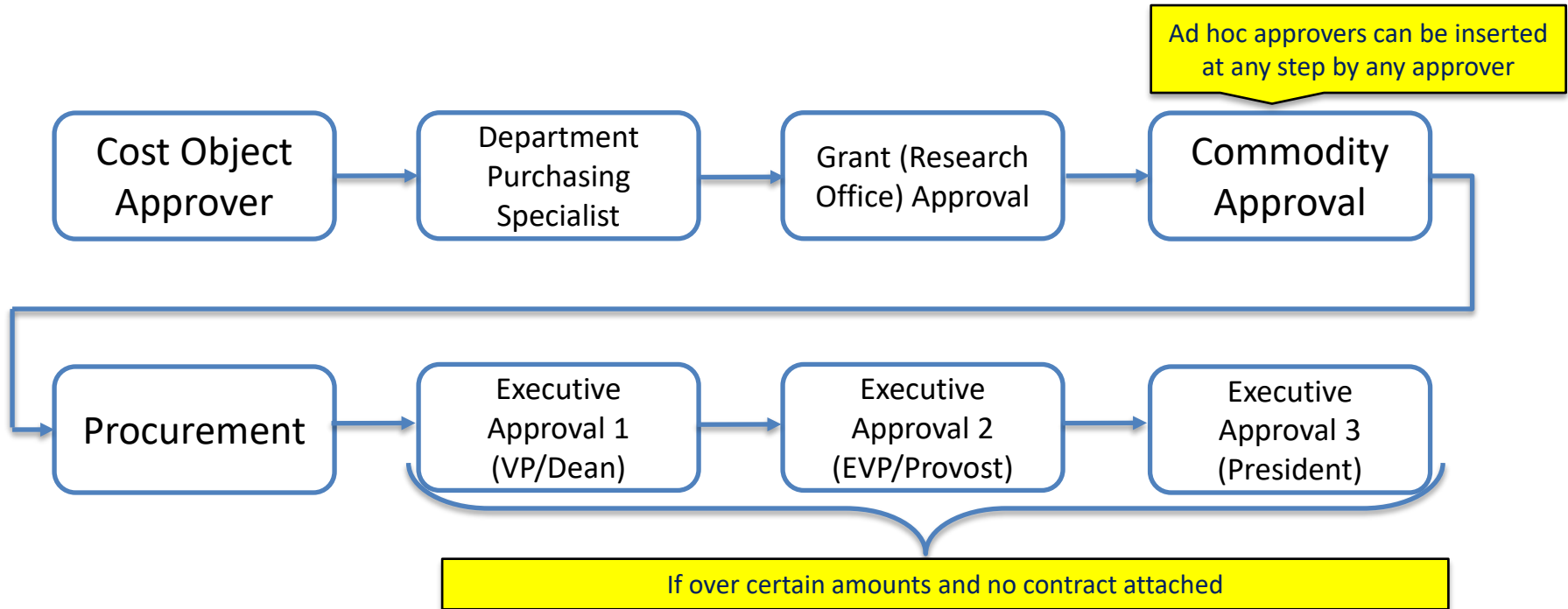
Procurement Approval

- Once a Non-Catalog requisition has received all prior approvals, it is routed to Procurement Services where it will be assigned to a Buyer who will perform a final review and dispatch a PO to the supplier.

- Buyers *do not* review Catalog orders in any amount.

- The Buyers' approval step is *after* the Department Purchasing Specialist but *before* any executive approvals for amounts exceeding $100,000.

- Depending on the dollar amount of the requisition, it may require multiple levels of Procurement approval.

- Executive approvals are skipped if a fully executed contract is attached (from Contracts +) or for certain types of Non-PO payments (benefits, utilities).

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Visual Approval Workflow for Requisitions

Ad hoc approvers can be inserted at any step by any approver

Cost Object Approver → Department Purchasing Specialist → Grant (Research Office) Approval → Commodity Approval

Procurement → Executive Approval 1 (VP/Dean) → Executive Approval 2 (EVP/Provost) → Executive Approval 3 (President)

If over certain amounts and no contract attached

Updating UDX Roles

- **Department Purchasing Specialists** have access to the **UDX Access Request** form on their UDX home page.

- This form can be used to request a role update for another employee.

- Requester and DPS updates require UDX training to be completed in ConnectingU.

‹ Back to Dashboards

UDX Access Request

Form Number	**3283021**
Purpose	**Generic Request**
Status	**Incomplete**

Instructions

Questions ✓

Department Information ✓

Purchasing Use Only ✓

Instructions

Request Actions ▾ | History | ?

Complete this form to request user role and access changes to UD Exchange; formal training is required for users with the roles of Requester and Department Purchasing Specialist (DPS). For assistance, please refer to:

- Access to the UD Exchange training exercises, videos and guides
- A PDF guide to use of this form

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Important to Remember

- Any user can use any SpeedType or work order number available in UD Exchange. There is no restriction by role or access. This is why approvals are important!

- Shoppers can fill a Shopping Cart and complete all required fields in the draft requisition, but they will not have the Place Order button as an option on their draft requisition. They must assign their cart to a Requester who will submit their order for them.

- When Shoppers assign carts and search for an assignee, UD Exchange will return **all** system users as an option, not *just* Requesters. To avoid Shoppers assigning their carts to users who do not have the Requester role, it is best practice for the department to inform Shoppers of their recommended Requesters. Shoppers can also set their preferred Requester in their profile.

- If you have Shoppers who complete all financial information flawlessly and require little review by the Requester, consider elevating them to a Requester role!

Questions:

- procurement@udel.edu

Resources:

- Procurement Services Website
- Completing the Access Request Form
- Adding Requesters (Assignees) to your Profile