



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.



Organization Message

Welcome to t

Here you'll find the good shopping experience and you find the item you need. Catalog Item link, comp

Please note: As you use where the administrator procurement@udel.edu if you have specific questions, chances are we are working on it.

Quick Links

My Resources

Resources

| procurement@udel.edu

Map

Department Purchasing Specialists have a “locked gear” icon in their sidebar menu to be able to Search for Users.

Navigate to **Administer > Manage Users > Search for Users**

Administer

Administration

Manage Users

Search for Users

Non-PO Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

Waiver of Bid Request

UDX Access Request

Office/Misc Supplies

My Draft Carts

Draft Cart Type

Drafts Assigned To Me

No results found



UNIVERSITY OF DELAWARE
EXCHANGE

TEST SITE

All ▾ Search (Alt+Q) 0.00 USD 1 1

Administer ▸ Manage Users ▸ Search for Users

User Search

Quick Filters My Searches

Department

INTERCOLLEGIATE ATHLETICS PROG (02001) 639

CHEMISTRY & BIOCHEMISTRY (02522) 544

CHEMICAL & BIOMOLECULAR ENGR (03110) 536

MECHANICAL ENGINEERING (03140) 507

RES LIFE & HOUSING (06400) 483

See More Show More

Email Preference

Voucher returned 22287

A Panel Questionnaire has been published 22287

Sourcing Event created from Requisition 22287

PR created from an awarded Sourcing Event 22287

Cart created from an awarded Sourcing Event 22287

See More Show More

Permission

Add Ad-Hoc Approver for Voucher Approvals 22285

Approve Vouchers 22285

Quick search

Add Filter ▾ Clear All Filters

10 Per Page ▾

< > Page 1 of 1000 1-10 of 22287 Results ⓘ

<input type="checkbox"/>	Name	User Name	Phone	Email	Department	Position	Role	Status	Last Login Date
<input type="checkbox"/>	Requester (\$1,000)	requester_1000	-	ghawxhur@udel.edu	PROCUREMENT SERVICES	-	Requester 1000	Inactive	11/5/2020 12:34:43 PM
<input type="checkbox"/>	Allen (702507654)	702507654	+1 302-831-8400	joallen@udel.edu	MEDICAL & MOLECULAR SCIENCES	-	Requester 2500	Active	12/21/2021 3:39:32 PM
<input type="checkbox"/>	Sudhanshu .	702621029	-	ud-mart@udel.edu	CIVIL & ENVIRONMENTAL ENGINEER	-	Shopper	Active	-
<input type="checkbox"/>	Carly Aaron	701529423	-	ud-mart@udel.edu	COMMUNICATION SCI & DISORDERS	-	Shopper	Active	-
<input type="checkbox"/>	Jessica Aaron	700815868	-	ud-mart@udel.edu	SPEECH LANG & HEAR CLINIC	-	Shopper	Active	-
						-	Shopper	Active	-
						-	Shopper	Active	-
						-	Shopper	Active	-
<input type="checkbox"/>	Behnam Abasht	701724285	-	ud-mart@udel.edu	ANIMAL AND FOOD SCIENCES	-	Shopper	Active	-
<input type="checkbox"/>	Susanne Abate	702454564	-	ud-mart@udel.edu	SPEECH LANG & HEAR CLINIC	-	Shopper	Active	-

< > Page 1 of 1000 1-10 of 22287 Results ⓘ 10 Per Page ▾

The User Search page will be displayed.
Use the Quick Search field to enter values for an individual.

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Organization Message


Welcome to the University of Delaware Exchange **Test Site!**


Here you'll find the goods and services you need. The greatly expanded **University of Delaware Exchange** 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.


Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email procurement@udel.edu if you have specific questions; chances are we are working on it!


Catalog & Forms Show


Procurement Forms



Non-PO Payment Request


Subaward Request


NIIMBL Subaward Request


RFX Request (Option 2)


Waiver of Bid Request


UDX Access Request

Office/Misc Supplies

Quick Search (Alt+Q)

Users

Rachel Requester (test1000requester)

Requisitions

[UD Excl](#) 3242453

[How Do](#) 3396507

[Commo](#) 3371823

[Non-PO](#)

[Non-Catal](#)

[Request N](#) UDST001117

[Request C](#)

Vouchers

IT000755

You can also enter a user's name or UDID in the search bar on the homepage to return that user record or their documents.

Cart Type

No results found

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TEST SITE

All

Search (Alt+Q)

0.00 USD

Administer > Manage Users > Search for Users > Rachel Requester > User's Name, Phone Number, Email, etc.

< Back to Results

1 of 1 Results

< >

Rachel Requester

User Name test1000requester

User Profile and Preferences

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

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

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

First Name Rachel

Last Name Requester

Phone Number -

Mobile Phone Number -

E-mail Address ★ ud-mart@udel.edu

Department PROCUREMENT SERVICES (04750)

Position -

Reports To

Authentication Method

User Name ★

★ Required

Save Changes

You will be able to see anything in a user's profile that you can see in your own profile, in order to be able to request changes via the Access Form or assist 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 [Employee Roles in UD Exchange](#).
- For more about access, please refer to the guide, [Understanding Access in UD Exchange](#).
- Approved updates to roles and access are reflected in UDX through the HR integration twice daily, at 6 AM and 6 PM.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

Administer > Manage Users > Search for Users > Rachel Requester > Assigned Roles

< Back to Results

1 of 1 Results

< >

Rachel Requester

User Name test1000requester

User Profile and Preferences >

Default User Settings >

User Roles and Access <

Assigned Roles

Access

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

Assigned Roles

Assigned Roles

Requester 1000

Rachel has a Requester 1000 **role**.

Therefore, the DPS knows that Rachel can place an order for herself or another user, and it won't need DPS approval unless it is over \$1,000.

However, Rachel is not an Approver and could not be named as a substitute approver if an approver is out of the office.

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UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

Administer

Manage Users

Search for Users

Rachel Requester

Access

Back to Results

1 of 1 Results

Rachel Requester

User Name test1000requester

User Profile and Preferences

Default User Settings

User Roles and Access

Assigned Roles

Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

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.

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)

Rachel's **access** is limited to Procurement Services.

Therefore, the DPS knows that Rachel will not be able to see POs owned by people in departments other than Procurement.

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 [Completing the Access Request Form](#).



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.





Alice Approver

User Name testapprover

- User Profile and Preferences >
- 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 >
- Administrative Tasks >

View Assigned Approval Folders

Showing 1 - 5 of 5 Results

All Folder Results

Results Per Page 20 ▾

Sort by: Folder name ascending ▾

Page 1 of 1 ?

Folder Name	Approver	Substitute
Automobiles	Alice Approver	
DPS - VPFN - Procurement Services	Alice Approver	
My PR Approvals	Alice Approver	
Purpose: L1ABAV (A/P-VIRTUAL PAYABLES): (All Values)	George Walueff	Alice Approver
Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Alice Approver	

Search Details

Filtered by

Type: Requisitions

Refine Search Results

Type

Requisitions ▾

Approver

[Alice Approver \(4\)](#)
[George Walueff \(1\)](#)

Alice is responsible for approving requisitions at several workflow steps: Automobiles, DPS for Procurement, and one purpose code. She is also the substitute approver for George Walueff on another purpose code.



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.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

AllSearch (Alt+Q)0.00 USD

OrdersSearchRequisitions

Search Requisitions

Save AsPin FiltersExport All

Quick FiltersMy Searches

Manage SearchesMy Recent ApprovalsMy Requisitions

Favorite SearchesYou do not have any favorite searches yet.

Submitted Date: AllQuick search

Pending Approver: Approver, Alice

Add FilterClear All Filters

No results were found to match your search

Try modifying your search criteria or removing filters

Searching requisitions with the “Pending Approver” filter filtered to Alice shows no pending requisitions.

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DELAWARE

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Requisition • 3458191

Summary PO Preview Comments Attachments History

General

Status Pending
Commodity Approval

Submitted 2/8/2022 11:33 AM

Shipping

Ship To

University of Delaware
Attn: Margot Martin

Billing

Bill To

Accounts Payable
accounts payable@udel.edu

Commodity Approval

Active

Capital Equipment

Susan Bledsoe
ud-mart@udel.edu

Alice's name does not appear next to the Commodity Approval Step in the Status field of the General section. This means that Alice has not yet assigned it to herself. A substitute approver would be able to be named to claim it.

Prepared by Margot McCabe

Purchasing UOD01
Business Unit UNIVERSITY OF DELAWARE

eBuilder no value
Process
Instance

Multi-
Invoice/Payment

Delivery Options

Expedite

Ship Via Best Carrier-Best Way

Requested no value
Delivery Date

Accounting no value
Date

PR Validation 2

Future

Wait for Validation Respon...

Future



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:

The screenshot shows the 'Alice Approver' user profile page. The left sidebar contains a menu with 'Notification Preferences' highlighted. The main content area is titled 'Notification Preferences: Shopping, Carts & Requisitions'. A red box highlights a text overlay: 'Alice has told her DPS that she is getting too many emails from UDX, so the DPS check's Alice's notification preferences in her profile.' Another red box highlights the 'Email' column in the notification preferences table, which shows 'Email & Notification' for most items and 'None' for others.

Alice Approver

User Name testapprover

User Profile and Preferences >

Default User Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences <

Administration & Integration

Shopping, Carts & Requisitions

Change Request

Purchase Orders

Accounts Payable

Receipts

Contracts

Sourcing Director

Notification Preferences:
Shopping, Carts & Requisitions

Alice has told her DPS that she is getting too many emails from UDX, so the DPS check's Alice's notification preferences in her profile.

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



Alice Approver

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 >

View User's History

+ Click to filter history

Results Per Page 20 ▾

Records Found: 57

Page 1 ▾ of 3 ?

Date ▾	User ▴	Action ▴	Section ▴	Selection ▴	Field ▴	Old Value	New Value
11/28/2021 4:18:32 PM	Alice Approver	Modified	Approval Folder : Requisitions	DPS - VPFN - Procurement Services	Substitute	empty	Alex Approver
11/28/2021 4:18:32 PM	Alice Approver	Modified	Approval Folder : Requisitions	Automobiles	Substitute	empty	Alex Approver
11/28/2021 4:18:32 PM	Alice Approver	Modified	Approval Folder : Requisitions	Purpose: PURC175116 (R/E CONTRACT MANAGEMENT): (All Values)	Substitute	empty	Alex Approver
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	Cart/PR rejected/returned	None	Email & Notification (inherited)
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	PR line item(s) rejected	None	Email & Notification (inherited)
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	PR Workflow complete / PO created	None	Email & Notification (inherited)
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	PR Workflow Notification available	None	Email & Notification (inherited)
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification Preferences	Shopping, Carts & Requisitions	PR pending Ad-Hoc Workflow approval	None	Email & Notification (inherited)
11/28/2021 2:41:13 PM	Alice Approver	Modified	User Settings : Notification	Shopping, Carts & Requisitions	PR pending Workflow approval	None	Email & Notification

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



Default User Settings:

The screenshot shows the 'University of Delaware Exchange' interface. The top navigation bar includes a 'TEST SITE' button, a search bar, and currency information (0.00 USD). The breadcrumb trail is: Administer > Manage Users > Search for Users > Sam Shopper > Cart Assignees. The left sidebar contains a list of settings for 'Sam Shopper' (User Name: testshopper). The 'Cart Assignees' option is highlighted in blue. The main content area shows 'Cart Assignees' with a table titled 'My Cart Assignees' containing two entries: 'Richard Requester' and 'Alice Approver'. A red box highlights the 'Default User Settings' option in the sidebar. A grey text box with a red border contains the following text:

Any defaults set by the user would be under Default User Settings. The DPS can see that Sam Shopper has two cart assignees (Requesters) saved to his profile, so if one is unavailable, Sam has another Requester who can place an order for him.



Exporting User Data:

The screenshot shows the 'User Search' interface. On the left, there are sections for 'Email Preference' and 'Permission'. The main area has a 'Quick search' bar and filter buttons for 'Department: INTERCOLLEGI...', 'Status: Active', and 'Role: All'. The 'Role' dropdown is open, showing a list of roles including AP Administrator, AP Approver, AP NPOP Approver, AP Processor, Administrator, Approver, Auditor, Buyer, Buyer Manager, Catalog Administrator, Contract Administrator, and Contract Approver. The table below shows user data with columns for Name, User Name, Phone, Position, Role, Status, and Last Login Date. The 'Add Filter' button is highlighted with a red box.

Name	User Name	Phone	Position	Role	Status	Last Login Date
Ashley Abbott	702618389	-	LETICS PROG	Shopper	Active	-
Natasha Adair	702452731	-	LETICS PROG	Approver Shopper	Active	-
Gonzalo Aldaz Cuevas	702602162	-	LETICS PROG	Shopper	Active	-
Haley Alioto	702469712	-	LETICS PROG	Shopper	Active	-
Amy Altig	702530135	-	LETICS PROG	Approver Shopper	Active	-
Jared Ambrose	700844952	-	LETICS PROG	Approver Shopper	Active	-

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





User Search

Quick Filters

My Searches

Email Preference

PR Workflow complete / PO created

27

Cart/PR rejected/returned

27

PR line item(s) rejected

27

Cart Assigned Notice

27

Prepared By - Cart Assigned Notice

27

See More

Show More

Permission

Add Ad-Hoc Approver for Voucher Approvals

27

Approve Vouchers

27

Assign Cart to Another User

27

Header-level external attachments

27

Header-level internal attachments

27

See More

Show More

Save As

Pin Filters

Export All

Create User

Quick search

Department: PROCUREMENT...

Status: Active

Role: Requester 1000...

Page 1 of 3

1-10 of 27 Results

10 Per Page

	Name	User Name	Phone	Email	Department	Position	Role	Status	Last Login Date
<input type="checkbox"/>	Alice Approver	testapprover	+1 302-831-2163	ud-mart@udel.edu	PROCUREMENT SERVICES	-	Approver Requester 1000	Active	2/11/2022 12:05:24 PM
<input type="checkbox"/>	Victor Caruana	30132							
<input type="checkbox"/>	Katie Cooper	702526493	+1 302-831-2856	ud-mart@udel.edu	PROCUREMENT SERVICES	-	Purchasing Specialist Requester 500 TSM Supplier Manager	Active	10/19/2021 3:53:25 PM
<input type="checkbox"/>	Dottie DPS	test2500requester	-	ud-mart@udel.edu	PROCUREMENT SERVICES	-	Purchasing Specialist Requester 2500	Active	2/11/2022 4:28:23 PM
<input type="checkbox"/>	Manjusha Edara	702621896	-	medara@udel.edu	PROCUREMENT SERVICES	-	AP Processor Requester 500	Active	2/8/2022 9:12:04 AM
<input type="checkbox"/>	Anne Farley	702624604	-	ud-mart@udel.edu	PROCUREMENT SERVICES	-	AP Administrator AP NPOP Approver AP Processor	Active	1/18/2022 2:57:06 PM

The DPS can save user searches or export user details for analysis in order to keep department operations running smoothly.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Employee Roles in UD Exchange](#)
- [Understanding Access in UD Exchange](#)
- [Completing the Access Request Form](#)
- [UDX Profile Settings](#)

