



Understanding Access in UD Exchange

Updated 5/31/2023



Understanding Access in UD Exchange

This guide illustrates:

- **What is Access?**
- **How do I see my Access?**
- **Who else sees my documents?**
- **Why is Access important?**
- **How do I give someone else Access?**
- **Department Changes**
- **Other Considerations**



What is “Access” in UDX?

- Access means visibility to documents – requisitions, purchase orders and vouchers
- By default, every employee in UD Exchange has access, or visibility, to all documents owned by other employees *in their HR department*. Access is driven by department tree nodes in the Human Resources tree.
- Shared access across a department allows for collaboration in purchasing and payments and reduces the likelihood of duplicate orders of supplies or payments.



How do I see what Access I have?



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 receiving continued reports of ongoing visibility issues for some records using the transaction number in the related search from the left sidebar, please email procurement@udel.edu, with the transaction number (PO, RFP, etc.) and 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 **4/10/2023**, or later, may still be in approval workflow. The onboarding of new suppliers during business days of when you receive notice that the request is closed from the UD Exchange (updated 4/11/23 WAG)

NEW!!! UD Exchange now has a form designed solely for Honorarium payment requests. Effective Monday, April 3rd, the **Honorarium Payment Request form** is available for use on the UDX homepage. Designed to reduce delays previously caused by returns and holds for clarification, this easy to use form guides UDX users through a series of questions validating the honorarium request. The honorarium payment type has been removed from the general NPOP form. A [reference guide](#) is available on the [UDX Resources](#) page.

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.

Rachel Requester

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

From the UD Exchange Home Page:

Click on the **Profile icon** in the top right corner.
Click on **View My Profile**.

Rachel Requester

User Name testrequester

- 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 >
- 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)

From the profile menu, select **User Roles and Access** to expand options.
Select **Access**.



My Profile ▸ Access

Rachel Requester

User Name testrequester

- User Profile and Preferences >
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Department Name
PROCUREMENT SERVICES (04750)

Your Department Assignments will be listed.

In this example, Rachel's access is limited to 04750.



Who Else Can See My Documents in UDX?

- Your Department ID is established by Human Resources and is visible on your profile.
- By default, every other employee in your HR department can see documents where you are the “Prepared For” user or PO Owner.
- Additionally, employees who have been granted extended access to your department will see documents where you are the “Prepared For” user or PO Owner.



Rachel Requester

User Name testrequester

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](#) >[Administrative Tasks](#) >

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

First Name

Rachel

Last Name

Requester

Phone Number

 ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address ★

 ud-mart@udel.edu

Department

PROCUREMENT SERVICES (04750)

Position

-

For example, Rachel is an employee of Procurement Services, Dept. ID 04750 as displayed in her profile under **User Profile and Preferences > User's Name, Phone Number, Email, etc.**

★ Required

Save Changes





Orders

Quick search



Search

All Orders

My Orders

Requisitions

Approvals

Purchase Orders

Change Requests

Procurement Requests

Vouchers

Receipts

Action Items

There are no Action Items to display.

My Resources

My Resources

Product Release Library | procurement@udel.edu

Site Map

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

If Rachel clicks on Orders > Search > Requisitions...

please email procurement@udel.edu, with the transaction number (PO, Requisition, etc.) as well as a screenshot of your approval queue or search results. We would need to provide that to the vendor to open a bug ticket. (updated by WAG 4/11/23)

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Quick Filters My Searches

35

28

4

1

1

1

28

4

3

[Clear All Filters](#)

She will only see documents where the **Prepared For** user is someone else employed by Dept. ID 04750.

Dottie DPS

User Name testdps

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 ▸

Administrative Tasks ▸

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VP FINANCE & DEPUTY TREASURER (04004) department has been granted to this user via the View My Department Orders permission.

Department Assignments: ?

Department Name

CONTROLLER'S OFFICE (04710)
FINANCIAL ANALYSIS & REPORTING (04711)
GU VP FIN & DEPUTY TREAS (14004)
PROCUREMENT SERVICES (04750)
RISK MANAGEMENT (04601)
TREASURY SERVICES (04007)
UNIVERSITY FINANCE (04005)
VP FINANCE & DEPUTY TREASURER (04004)

Dottie, however, has expanded access to multiple departments due to her role in VP Finance, including her own HR department, Procurement.



Search Requisitions

Save As Pin Filters

Quick Filters

My Searches

Department

PROCUREMENT SERVICES (04750) 35

CONTROLLER'S OFFICE (04710) 10

VP FINANCE & DEPUTY TREASURER (04004) 8

Prepared For

Cooper, Katie 28

Steenkamer, Stephanie 10

Gallup, Kimberly 8

Roeder, Kathy 4

Pickering, Kristen 1

Show More

Show More

Show More

Show More

Submitted Date: Last 90 days Quick search Add Filter Clear All Filters

Page 1 of 3 1-20 of 53 Results

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date
<input type="checkbox"/> 152465238					12/22/2021 8:17:30 AM
<input type="checkbox"/> 152465114					12/22/2021 8:09:52 AM
<input type="checkbox"/> 152465147	FIA CARD SERVICES NATIONAL ASSOCIATION	BOA UD payment	Completed	Katie Cooper	12/22/2021 8:07:05 AM
<input type="checkbox"/> 152464922	FIA CARD SERVICES NATIONAL ASSOCIATION	BOA 1743 payment	Completed	Katie Cooper	12/22/2021 8:04:12 AM
<input type="checkbox"/> 152373467	KPMG LLP	KPMG tax services	Completed	Stephanie Steenkamer	12/17/2021 3:24:31 PM
<input type="checkbox"/> 152367140	MSCI INC	MSCI	Completed	Stephanie Steenkamer	12/17/2021 2:32:51 PM
<input type="checkbox"/> 152285521	MOODY'S ANALYTICS	Moody's Investors Service	Completed	Stephanie Steenkamer	12/15/2021 4:35:38 PM

If Dottie clicks on **Orders > Search > Requisitions**, she will see documents where the **Prepared For** user is anyone employed by the multiple departments listed in her Access.

UNIVERSITY OF DELAWARE
EXCHANGE

AllSearch (Alt+Q)0.00 USD

Shop • Shopping Home Page

Orders

Search

My Orders

Approvals

Quick search

Requisitions to Approve

Purchase Orders to Approve

Change Requests to Approve

Procurement Requests to Approve

Requisitions Recently Approved By Me

Purchase Orders Recently Approved By ...

Change Requests Recently Approved By ...

Procurement Requests Recently Approve...

Assign Substitute Approvers-Requisitions

Assign Substitute Approvers-Purchase O...

Assign Substitute Approvers-Procureme...

Approval Notifications

Requisitions on which I am a Participant

Total Requisitions: 5

Approx. Total Amount: 36,424.77 USD

Requisition Number	Supplier	Requisition Status	Submitted Date	Total Amount
152403450	NAT'L RESOURCES & ENVIR CONTROL DEPT OF	Completed	12/20/2021 1:09:04 PM	20,777.00 USD
151926253	LIFE TECHNOLOGIES CORPORATION	Completed	12/7/2021 11:34:16 AM	7,269.96 USD
150751368	HEISLER BROTHERS PROPERTIES LLC	Rejected	11/12/2021 12:04:00 PM	0.00 USD
149786291	FISHER SCIENTIFIC COMPANY	Completed	10/11/2021 4:24:21 PM	1,377.81 USD
				7,000.00 USD

Additionally, employees who have approved your requisitions or were a participant (such as a Requester/Prepared By user) will continue to have access to your document by searching either in their Approval History, or in the Requisitions on Which I am a Participant menu on the home page, regardless of their HR dept ID.

Cylinder Gases

Powered by JAGGAER | Privacy Policy



Why is Access Important?

- For collaboration – the default settings are to avoid duplicate orders and payments.
- For administrative tasks – preparing change requests, tracking whether payment was made, viewing balances on purchase orders, etc.
 - Centralized units performing tasks on behalf of other departments will need to request expanded access to those departments.
- For data analysis – deep links to documentation come through in UDataGlance records, but only users with access to the source documents will be able to view them.



How Do I Give Someone Else Access?

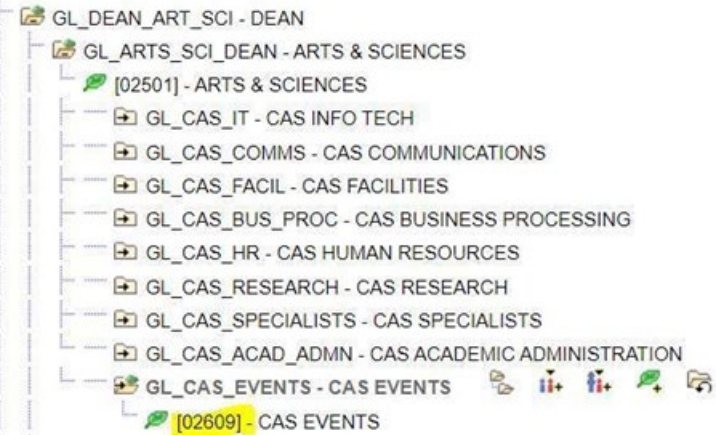
- If someone needs access to other departments, this is assigned through HR tree nodes.
- Department Purchasing Specialists can request access updates through the UDX Access Request Form.
- Procurement then submits the Access Request to UD IT, who applies the node to that employee. All departments within the requested node are imported into the user's access settings with the next 6 AM/6 PM data feed.



When departments are set up in PeopleSoft, they are nested within other departments.

Often, people with the immediate need to view one additional department truly have the need to view multiple additional departments in the same area of the University. This is where nodes come into play.

Here, 02609 CAS Events is part of 02501 Arts and Sciences.



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 >

Administrative Tasks >

1

- This user's access to organization **orders** in Docu
- This user's access to organization **vouchers** in Docu

ARTS & SCIENCES (02501)

department has been granted to this u

Department Assignments:

AMERICAN PHILOSOPHICAL ASSOC (04797)
ARTS & SCIENCES (02501)
CAS ACADEMIC ADMINISTRATION (02608)
CAS BUSINESS PROCESSING (02604)
CAS COMMS (02602)
CAS EVENTS (02609)
CAS FACILITIES (02603)
CAS HR (02605)
CAS IT (02601)
CAS RESEARCH (02606)
CAS SPECIALISTS (02607)
COMPARATIVE LITERATURE (02536)
CTR FOR SCIENCE & CULTURE (02508)

If Access to node 02501 is requested and granted, the user will have access to all the documents in the departments nested under 02501.

Some departments exist ONLY as Nodes, these will show in Access as "Node Only"

Assigned Roles

Access

Ordering and Approval Settings >

Permission Settings >

Department Assignm

A&S DEPARTMENT TREE NODE ONLY (02500)



Department Changes

- The department of the PO Owner/Prepared For user is static on the document at the time it was created. If you placed orders while you were employed with Development through March 31, and then left for a position with Athletics beginning April 1, your colleagues in Development will see your orders up until March 31 *only*.
- For this reason, it is important not to begin working in UD Exchange for your new department before the JED completion sends the new information into UD Exchange – check your profile after the 6 AM/6 PM update to confirm.
- If you perform work for your new department before the update is complete, it is advisable to designate someone else the PO owner for visibility purposes.



Department Changes

This user's move from Procurement to Student Financial Services was completed on March 1, and the system updated that evening. The User History shows what changes were made and when. Requisitions this user creates after 5:56 PM on 3/1/22 will be visible to those in SFS, not Procurement.

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

Results Per Page 100 ▾

Records Found: 37

Date ▾	User ▴	Action ▴	Section ▴	Selection ▴
3/1/2022 5:56:50 PM	System	Modified <i>(via import)</i>	Department Permissions	STUDENT FINANCIAL SERVICES (04708)
3/1/2022 5:56:50 PM	System	Department Added <i>(via import)</i>	Department Permissions	STUDENT FINANCIAL SERVICES (04708)
3/1/2022 5:56:50 PM	System	Department Removed <i>(via import)</i>	Department Permissions	PROCUREMENT SERVICES (04750)
3/1/2022 5:56:50 PM	System	Modified <i>(via import)</i>	User Settings	

Two changes will be shown, one for the Department on the Profile page, and one for Access.



Other Considerations

- If your requisition shows only a “Prepared By” user, then the “Prepared For” user is the same person. The “Prepared For” user can be changed manually on the requisition. The “Prepared By” user *cannot* be changed – it will be whoever clicks “Place Order” on the requisition.
- The PO Owner can be changed by Procurement, both for approval of vouchers, and visibility of the document if necessary. The owner on requisitions and vouchers cannot be changed after they are complete.
- Since the “Prepared For” user/ PO Owner dictates access, use this carefully. Also remember, this user is the one who will need to approve any vouchers over \$5,000 (or lower, if your department has a lower approval limit).



Other Considerations

Search Requisitions

Submitted Date: Last 90 days | Quick search | Add Filter | Clear All Filters

Requisition Number	Prepared For	Department	Dept
152413472	Chris Erickson	CAS ACADEMIC ADMINISTRATION	02510
152335827	Susanne Morganstein	CAS RESEARCH	02573
152334143	Susanne Morganstein	CAS RESEARCH	02573
152332970	Susanne Morganstein	CAS RESEARCH	02573
152249938	Kaylee Olney	CAS ACADEMIC ADMINISTRATION	02574
152249298	Kaylee Olney	CAS ACADEMIC ADMINISTRATION	02574
152232360	Stephanie Lambert	CAS ACADEMIC ADMINISTRATION	03384
152222608	Patrick McMahon	CAS IT	02522
152173817	Richard Bernard	CAS IT	02570
152163715	Chris Erickson	CAS ACADEMIC ADMINISTRATION	02567
152058315	Stephanie Lambert	CAS ACADEMIC ADMINISTRATION	03384
152030381	Stephanie Lambert	CAS ACADEMIC ADMINISTRATION	02502

Department

- CAS BUSINESS PROCESSING (02604) 40
- CAS ACADEMIC ADMINISTRATION (02608) 37
- CAS IT (02601) 14**
- CAS RESEARCH (02606) 6
- ARTS & SCIENCES (02501) 1

Prepared For

- Beeson, Karen 31
- Erickson, Chris 16
- Bernard, Richard 11
- Olney, Kaylee 11
- Lambert, Stephanie 9

In UD Exchange, the “Department” and the “Dept” are different things. “Department” relates to the department of the PO Owner. “Dept” relates to the department associated with the speedtype. Be careful when creating saved searches that you are looking for the correct transactions!



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Completing the Access Request Form](#)

