Understanding Access in UD Exchange

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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?
From the UD Exchange Home Page:

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

Click on **View My Profile**.
From the profile menu, select **User Roles and Access** to expand options.

Select **Access**.
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.
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.
If Rachel clicks on Orders > Search > Requisitions...
She will only see documents where the Prepared For user is someone else employed by Dept. ID 04750.
Dottie, however, has expanded access to multiple departments due to her role in VP Finance, including her own HR department, Procurement.
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.
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.
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.
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”
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.
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.

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

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