

UNIVERSITY OF DELAWARE[®] EXCHANGE

Troubleshooting Tips

Revised 7/16/2024

Common Questions and Issues in UDX

- This guide addresses some common error and issues experienced in UDX as well as answers some common questions
- The table of Contents lists each issue/question. Click on each topic to be taken directly to the slide that addresses your question.



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Can I modify a catalog order?

Some catalog suppliers allow you to return to the cart you assembled on their website and make changes by adding, removing items or quantities.

The **modify** links on the lines in your UDX cart will take you to that shortcut.

NEWEGG INC · 2 Items · 229.94 USD					
▼ SUPPLIER DETAILS MAIN : 17708 ROWLAND STREET, CITY OF INDUSTRY, ... ▼					
Need to make changes? MODIFY ITEMS VIEW ITEMS Item(s) was retrieved on: 11/9/2021 10:29:41 AM					
• G.SKILL Ripjaws V Series 32GB (2 x 16GB) 288-Pin DDR4 SDRAM DDR4 3200 (PC4 25600) Desktop Memory Model F4-3200C16D-32GVK					
Status	Item	Catalog No.	Size/Packaging	Unit Price	
1	 G.SKILL Ripjaws V Series 32GB (2 x 16GB) 288-Pin DDR4 SDRAM DDR4 3200 (PC4 25600) Desktop Memory Mod...	9B20-232-091	EA	114.97	




Can I modify a catalog order?

However, other catalog suppliers do **not** let you access your cart on their site once it has been brought back into UD Exchange, so you will not see “modify” links on the lines.

Removing an item can be done in the UDX cart, but any other changes, including increasing quantity of an item in your cart, will have to be accomplished through a new punchout shopping session on their site.

Please note that Amazon orders will fail if you attempt to edit your cart in UDX or combine multiple shopping sessions in one cart.

LOWE'S HOME CENTERS INC - 2 Items - 399.00 USD				
▼ SUPPLIER DETAILS PO BOX 530954 : 1605 CURTIS BRIDGE ROAD, WILKES... ▼				
Status	Item	Catalog No.	Size/Packaging	
1	 12-in 15 Amps Dual Bevel Sliding Compound Corded Miter Saw	819980	EA	



I added items to my cart, but there is already information and/or other items in it!

Possible causes:

- You previously added items to a cart and named it, you may have deleted the items from the cart if you changed your mind, but you did not delete the empty, named cart. It is still your Active Cart.
- You previously added items to a cart and did not submit it for approval and it is still your Active Cart.
- You submitted a previous cart for approval, but it was returned to you, so it is now your Active Cart.



If you shop and add items to your cart, and then see that there are already items in your cart from a previous shopping search, you can select the **line actions menu** and either:

- Select the previous items and choose **Remove Selected Items** from the Items menu if you no longer want them.
- OR
- Select the previous items and choose **Move to Another Cart** from the Items menu.
 - Note: This option will not work for punchout catalog items (an error message will appear in the new cart).

2 Items

2

✓

⌵

Subtotal *

37,688.00

Total *

37,688.00

BAY COUNTRY LANDSCAPE CO · 1 Item · 32,000.00 USD

⌵

...

✓

SUPPLIER DETAILS

Item	Catalog No.	Size/Packaging	Unit Price
1 landscaping cleanup after commencement		EA	32,000.00

⌵

ITEM DETAILS

Move to new cart

Draft Cart

2023-04-27 702214053 01 (3762249)

Add to Favorites

Remove Selected Items

Remove All Items

Move to Another Cart

Change Supplier

Add to Draft Cart or Pending PR/PO

Change Commodity Code

TEST JAMES DOORCHECK INC · 1 Item · 5,688.00 USD

⌵

...

✓

SUPPLIER DETAILS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
2 test requisition	1	EA	5,688.00	1 EA	5,688.00

⌵

ITEM DETAILS

✓



I received an error message that says I can't add something to my cart (“contains a ‘do-not-mix form’”)

Possible causes (see also slides 5 &6):

- UDX carts can contain a mixture of catalog and non-catalog items, but *form requests*, such as subawards, Non-PO Payment requests (NPOPs), and Honorarium Payment Request forms need their own carts.
- To prevent this error, it is recommended that you *fully* complete carts by assigning the cart, placing the order, or deleting the cart.
- If this is not possible, **create a new cart** before you begin a new form or punchout session.



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TEST SITE

All

Search (Alt+Q)

37,688.00 USD

Logout

Shop > My Carts and Orders > View Carts > Draft Carts

Cart Management

Draft Carts

Assigned Carts

> Filter Draft Carts

Type	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2023-04-27 702214053 01		4/27/2023	0.00 USD	View
Normal	Active Details demo		5/4/2023	37,688.00 USD	View

From the home page, navigate to **Shopping > My Carts and Orders > View Carts**.

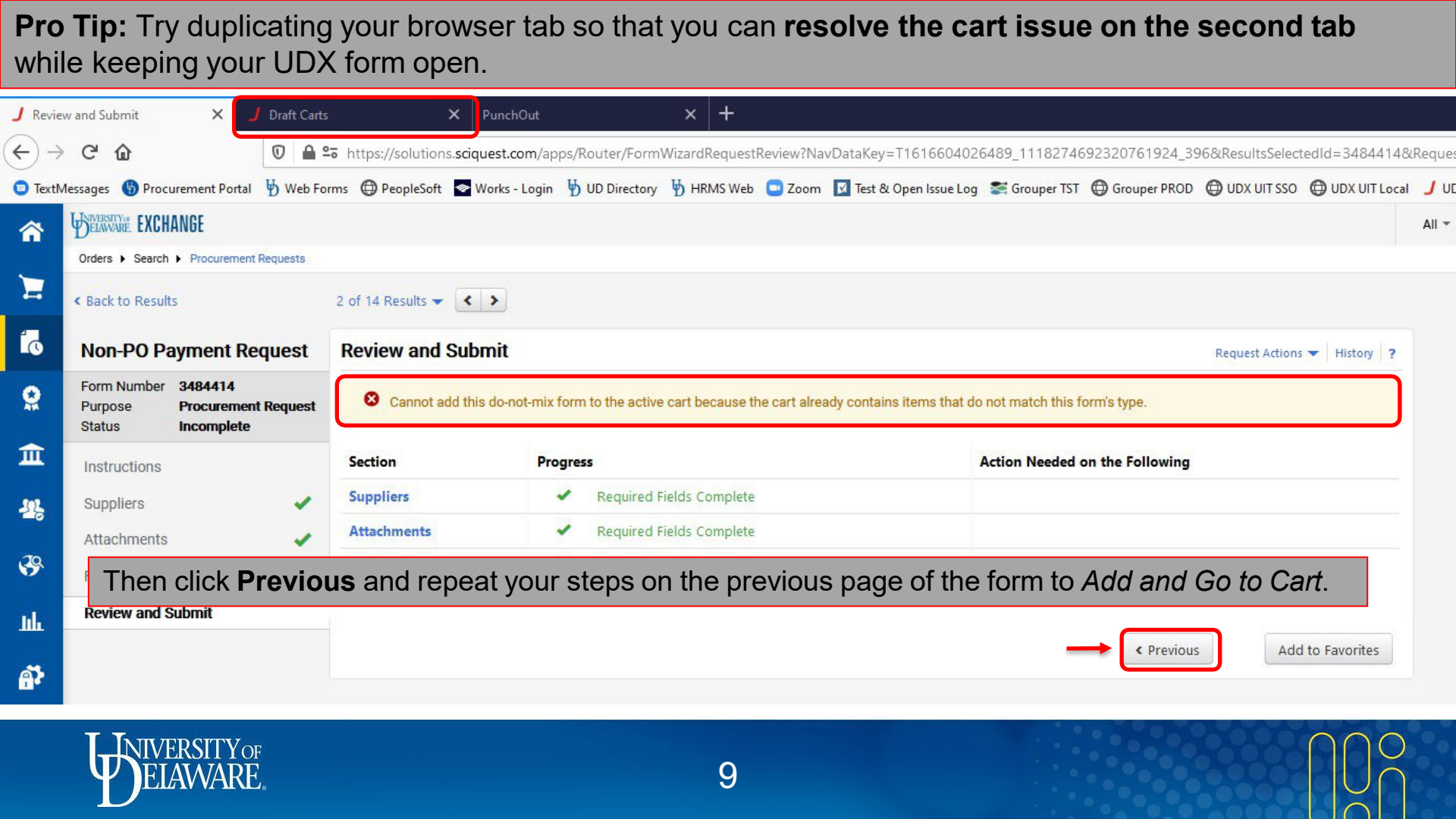
Once on the View Carts page, you will see at least one cart there, with one cart indicated as Active.

Click **Create Cart**.

Once you have clicked **Create Cart**, the new, empty cart will become your **active** cart and you can proceed.

If you were shopping with a catalog supplier, you may have already lost your punch-out session.

If you were trying to add a form to a cart, your draft form request should be saved in **Orders > Search > Procurement Requests** so you can add it to your new active cart.



Pro Tip: Try duplicating your browser tab so that you can **resolve the cart issue on the second tab** while keeping your UDX form open.

Review and Submit

Draft Carts

PunchOut

https://solutions.scquest.com/apps/Router/FormWizardRequestReview?NavDataKey=T1616604026489_1118274692320761924_396&ResultsSelectedId=3484414&Reques

TextMessages Procurement Portal Web Forms PeopleSoft Works - Login UD Directory HRMS Web Zoom Test & Open Issue Log Grouper TST Grouper PROD UDX UIT SSO UDX UIT Local

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Orders Search Procurement Requests

Back to Results 2 of 14 Results

Non-PO Payment Request

Form Number **3484414**
Purpose **Procurement Request**
Status **Incomplete**

Instructions

Suppliers

Attachments

Review and Submit

Request Actions History ?

Cannot add this do-not-mix form to the active cart because the cart already contains items that do not match this form's type.

Section	Progress	Action Needed on the Following
Suppliers	Required Fields Complete	
Attachments	Required Fields Complete	

Then click Previous and repeat your steps on the previous page of the form to Add and Go to Cart.

Review and Submit

Previous Add to Favorites

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9

I submitted my cart, but it's back in my draft carts!

Possible causes:

- There are multiple reasons that a shopping cart could be returned to your draft carts after you submit it.
- A shopping cart could be returned to your draft carts by an Approver, or as part of the automated checks performed by UD Exchange.
- Possible return reasons for the *automatic* return include:
 - Combo edit, invalid commodity code, expired project date, supplier issues, budget restrictions.
 - These are covered in detail in the [Auto Return Troubleshooting Tips guide](#).



Summary PO Preview Comments Attachments **History**

Start date

mm/dd/yyyy

End date

mm/dd/yyyy

Action

User

Filter

Clear All Filters

Export CSV

<

>

Page 1 of 2

1-20 of 29 Results

20 Per Page

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
Line 1	11/12/2021 7:09:53 PM	Richard		Requisition modified	Account Code	141254	144700	
Line 1	11/12/2021 7:09:27 PM	Richard		Requisition modified	Account Code	141254	144700	
Line 1	11/12/2021 7:09:27 PM	Richard		Requisition modified	Account Code	141254	144700	The Custom Field Value is changed/populated based on the commodity code: 800000000
Line 1	11/12/2021 7:09:27 PM	Richard		Requisition modified	Commodity Code	300000000	800000000	
	11/12/2021 3:14:57	System		Requisition returned	System		Rachel Requester	Line: 1, Split: 1 - Different Department value found for Speed Chart:

To identify **why** a shopping cart was returned to your draft carts:

- Open the requisition and click the **History** tab.
- Review the **History** tab to identify the issue that needs to be addressed.
- The history will contain a date stamped record (with a **note** containing a reason) for all approval and return steps that were performed by the system or manual approvers.

Line: 1, Split: 1 - Different Department value found for Speed Chart:
'TEST123456'. 05825 \ 05804



I can't find the Account Code I need ...

Possible causes:

- The account code has been *replaced* by a new one for use in UD Exchange
- You are used to using an *incorrect* account code for this *type* of purchase
- The item should be purchased in a *different* area of UD Exchange.

Solution:

- Revisit the [Guided Buying](#), [Commodity/Account Code Crosswalk](#), [Non-PO Payment Matrix](#) and [NPOP Account Codes](#) references linked from the UD Exchange Home Page.
- Always think about what the item ***IS***, not what it is ***FOR***



I changed the Commodity Code, but I still can't find the right Account Code

Possible causes:

- You did not *save* the new commodity code to the item before searching for a new account code.
- The commodity code is not mapped to the account code you want.
 - Remember, account code use is regulated in UD Exchange with codes restricted to where they should be used.



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TEST SITE

All Search (Alt+Q)184.80 USD

Edit Line 1: Item Details

1 48mm x 55m Silver 9 mil Talon[REG] Heavy Duty Duct Tape

Contract:

Commodity Code *30000000

Management, Business Professionals & Administrative Services

Account Code *144700

Custom Field Search

ValueDescriptionFilter

Clear All Filters

Value		Description	
141235		MANAGEMENT AND BUSINESS PROFES	+
144500		ARA CONTRACT MANAGEMENT	+
144700		COMMISSION FEES	+
146009		MANAGEMENT CONSULT AGRMNT	+

CancelSaveClose

These account codes belong to the old commodity code description (30000000), not the new one because the user did not save the new one before searching for an account code!

After searching for and selecting the correct commodity code for the item, you must click **Save** before clicking the Account Code magnifying glass to search for the correct account code.



Organization Message

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

The test
which is
status.

As you
suppliers
test site

procurement@udel.edu if you have specific questions, chances are we are working on it.

Action Items

There are no Action Items to display.

My Resources

My Resources

Product Release Library | procurement@udel.edu

Remember that the newest versions of the **Commodity Code-Account Code Crosswalk** and the **Non-PO Payment Matrix** are always available on the Shopping Home Page **Quick Links**.

Quick Links

- UD Exchange How To Guides
- How Do I Buy ____ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- NEW Waiver of Bid Form
- Request Contract

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

Honorarium Payment Request

Subaw


RFX Request (Option 2)

NSB Customer Setup

NEW Waiver of Bid Request

Office/Misc Supplies

If you review these documents and still think an account code is missing or incorrect, please email procurement@udel.edu and we will consult with VP Finance to see if it should be added.

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
 3767035	Details demo	My Drafts	5/4/2023	37,688.00 USD



I Can't Find the SpeedType I Need.....

Possible causes:

- The SpeedType you are searching for may have expired or there may not yet be a Cost Object Approver listed for it with the Controller's Office.

Solution:

- Contact the Controller's Office at coa-finance@udel.edu for assistance in adding a primary COA or confirming that the SpeedType is active.



I want to recall my Requisition

- Users can *withdraw* their requisition, **but** this is the equivalent of a “self-reject” – the requisition **cannot** be submitted back into workflow.
- Withdrawn requisitions can be copied to a new cart and resubmitted, **but** punchout orders will need to be re-done in new punchout shopping sessions.
- If you want to have the requisition ***returned to you in draft mode*** to make changes and resubmit, please see Having a Requisition or Voucher Returned starting on **slide 66**.



Withdrawing a Requisition

Requisition • 3765483

Summary PO Preview Comments Attachments History

If the Requisition has already completed approval workflow and a PO has been created, the requisition *cannot* be withdrawn.

However, if the Requisition is still in approval workflow, the submitter can withdraw it.

- Click the **Withdraw Entire Requisition** button
- OR
- Select **Withdraw Entire Requisition** from the **Actions** menu.

Department: PROCUREMENT SERVICES (04750)

Multi-Invoice/Payment: ✕

Internal Fields

UD Internal Fields

eBuilder Process Instance	no value
After-The-Fact Purchase	✕
Technology Request #	no value
Waiver of Bid	✕

Workflow

Show skipped steps

Submitted
5/3/2023 3:18 PM
Brandon Gabriel-Perez

PR Validation
Completed

COA Approver
Active - Error

Dept Purchasing Specialist
Future

Withdraw Entire Requisition
Copy to New Cart
Add Comment
Add Notes to History
View My Orders (Last 90 Days)
Continue Shopping
View Carts

Withdrawing a Requisition

Requisition • 3765483

Summary Comments 1 Attachments History

General ...

Status **← Withdrawn**
(5/5/2023 1:38 PM)

Submitted 5/3/2023 3:18 PM

Cart Name Cassidy Powerwashing

Description *no value*

Priority Normal

Prepared by Brandon Gabriel-Perez

Prepared for Brandon Gabriel-Perez

Shipping ...

Ship To

Shipping address NC01

code

UNIVERSITY OF DELAWARE
Attn: Brandon Gabriel-Perez
Room: Basement
162 THE GREEN
HULLIHEN HALL
NEWARK, DE 19716
United States

Billing ...

Bill To

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Billing Options

Purchasing Business UOD01
Unit UNIVERSITY OF DELAWARE

What's next? ...

Workflow

UD Internal Fields

eBuilder Process Instance *no value*

After-The-Fact Purchase ✗

COA Approver
Canceled (Withdrawn)

Once the requisition is withdrawn it, the status will be listed as withdrawn in the requisition summary. It can only be copied to a new cart, not resubmitted into workflow. Click the **ellipsis** to open the Actions menu and select **Copy to New Cart**

I want to Close a Purchase Order

- Purchase orders will auto-Close when they have been fully invoiced.
 - Once an order has been fully invoiced, it enters “Soft Close” status. During this 15-day period, the PO can still be reopened to issue credits.
 - When the Soft Close time period has ended, the PO is considered fully closed, enters Closed status, and updates in PeopleSoft.
- If a PO has not been fully invoiced and should be Closed to release the obligation in PeopleSoft/UDataGlance, this can be accomplished with a comment tagging Procurement Help.
- The most frequent use for Closing a PO is for a blanket purchase order. Standard POs should have lines Canceled if they are not going to be invoiced.



I want to Close a Purchase Order: **Blanket POs**

- PO Close requests are most frequently used for a blanket purchase order.
 - For example, a PO was created for a blanket dollar amount because the user did not know precisely how much a repair would cost, or how long the supplier's services would be engaged.
- Blanket purchase orders can be Closed with a PO Comment to Procurement Help once the user determines that all invoices have been paid.



- Add Comment
- Add Notes to History
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version

Closing a Blanket Order with a comment:

- Click the **ellipsis** on the **PO** and select **Add comment** from the Actions menu.
- OR
- Navigate to the **Comments** tab and click **+**

General Information

PO/Reference No. UDBT000092

Revision No. 4

Priority

Supplier Name

Address

Purchase Order

Total

Shipping Information

Ship To

UNIVERSITY OF DELAWARE

Priority

Supplier Name

Address

Purchase Order

Total

Billing/Payment

Bill To

Accounts Payable

Priority

Supplier Name

Address

Purchase Order

Total

Requisition Number 3328084 view | print

Expedite X

F.O.B.

Destination

Purchasing Business Unit UOD01 UNIVERSITY OF DELAWARE

Ship Via Best Carrier-Best Way

eBuilder Process Instance no value

Requested Delivery Date no value

Multi-Invoice/Payment ✓

After-The-Fact Purchase X

Contact Information

Owner Name Kristen Pickering

Details

Supplier Status

Items rejected

INC

USD)

and Tax charges are calculated and charged by values shown here are for estimation purposes, and workflow approvals.

Subtotal 11,380.00

11,380.00

Related Documents

Requisition: 3328084

Change Requests: 3396195

Change Requests: 3395628

Change Requests: 3395513

Change Requests: 3395355

Voucher: IT000764

Voucher: IT000798

What's next?



Records found: 1

Show comments for Purchase Order +

ADD COMMENT

1000 characters remaining expand clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) Add recipient
☐ Kristen Pickering (Prepared by, Prepared for) <ud-mart@udel.edu>

Attach file (optional)

Attachment Type File

Rachel Requester - 11/9/2021 1:30:22 PM

Negotiated cancellation of the service charge.

After navigating to the comments tab and clicking the “+”,
Type a comment requesting closure of the purchase order.

- Include a reason for the closure (e.g., services have been completed, all invoices have been paid, and no further invoices are expected).

Click on **Add Recipient**.

Completed

Details

Supplier Status

Sent To Supplier

⚠ one or more lines rejected

Supplier

TRI-STATE CARPET INC

Total (11,380.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 11,380.00
11,380.00

Related Documents

Requisition: 3328084

Change Requests: 3396195

Change Requests: 3395628

Change Requests: 3395513

Change Requests: 3395355

Voucher: IT000764

Voucher: IT000798

What's next?

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Purchase Order • TRI-STATE CARPET INC • UDBT000092 Revision 4

StatusSummaryRevisions 5ConfirmationsShipments

Records found: 1

ADD COMMENT

User Search

Last NameFirst NameUser NameEmailDepartment

help

SearchClose

37,688.00 USD

Search (Alt+Q)

1 of 1 Results

AttachmentsHistory

Completed

Details

Supplier Status

Sent To Supplier

one or more lines rejected

Supplier

TRI-STATE CARPET INC

Total (11,380.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

11,380.00

11,380.00

Type **"Help"** in the **last name** field.

Click **Search**.

Select **Procurement Help** from the search results.

User Search

New Search

Name ↑	User Name	Email	Phone	Action
Procurement Help	Procurement	udexchange@udel.edu		+

Close

Purchase Order • TRI-STATE CARPET INC • UDBT000092 Revision 4

1 of 1 Results

Status Summary Revisions 5 Confirmations Shipments Change Requests 4 Receipts Vouchers 2 Comments 1 Attachments History

Records found: 1

Show comments for Purchase Order +

ADD COMMENT

Please close this purchase order, there will be no further invoices against it.

921 characters remaining

expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)☐ Kristen Pickering (Prepared by, Prepared for) <ud-mart@udel.edu>☒ Procurement Help <udexchange@udel.edu>

Attach file (optional)

Attachment Type

☒ File☐ Link/URL

Make sure your comment requesting closure of the purchase order is typed once the Procurement Help email address is checked.

Click the **Check Mark** to **Add comment** and send the notification to Procurement Help.

Rachel Requester - 11/9/2021 1:30:22 PM

Purchase Order - UDBT000092

PO Line Cancelled

Negotiated cancellation of the service charge.

Completed

Details

Supplier Status

Sent To Supplier

⚠ one or more lines rejected

Supplier

TRI-STATE CARPET INC

Total (11,380.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

11,380.00

11,380.00

Change Requests: 3395513

Change Requests: 3395355

Voucher: IT000764

Voucher: IT000798

What's next?

Powered by JAGGAER | Privacy Policy

I want to Close a Purchase Order: **Standard POs**

- Standard purchase orders should be set up by quantity – the order would be precise as to what we are ordering, and once that line/quantity is invoiced, the line is closed.
- A standard purchase order closes once all quantities have been invoiced, regardless of price.
- Therefore, standard purchase orders should normally include a reason why we are not going to fully pay for all items ordered, such as a cancellation by the supplier.
- ***For catalog orders, you MUST attach documentation that you have already completed the cancellation with the supplier.*** For other order types, we can cancel as part of the process.



Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Vouchers 1 Comments 5 Attachments History

- Add Comment
- Create Change Request
- Add Notes to History
- Create Quantity Receipt
- Print Fax Version

General Information

PO/Reference No. UDST001048

Revision No. 0

Priority Normal

Supplier Name W W GRAINGER INC

Address 117 QUIGLEY BLVD
NEW CASTLE, Delaware 19720-4103 United States

Purchase Order Date 11/1/2021

Total 784.74

Requisition Number 3384507 view | print

Purchasing Business Unit UOD01
UNIVERSITY OF DELAWARE

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Expiration Date 3/2023

Billing Options

Accounting Date no value

Payment Terms 0% 0, Net 0

F.O.B. Destination

eBuilder Process Instance no value

Multi-Invoice/Payment ✗

After-The-Fact Purchase ✗

Contact Information

Owner Name Kristen Pickering

Owner Phone +1 302-831-2330

Shipping Information

Ship To University of Delaware

Billing/Payment

Bill To Accounts Payable

Closing a Standard Order with a comment:

- Navigate to the **Comments** tab and click “+”
- OR
- Click the **ellipsis** on the **PO** and select **Add comment** from the Actions menu.

Details

Supplier Status

Related Documents

Requisition: 3384507

What's next?

Workflow Status

Completed

Workflow

Show skipped steps

Submitted
11/1/2021 8:18 PM
Kristen Pickering



Purchase Order • W W GRAINGER INC • UDST001048 Revision 0

Status Summary Revisions **1** Confirmations Shipments

General Information

Shipping Information

After selecting *Add Comment* from the PO Actions menu:

Click the blue **Add Recipient** link in the **Add Comment** window.

Type **Help** in the **last name** field of the **User Search** window.

Click **Search**.

Select **Procurement Help** from the search results.

Total	784.74
-------	--------

Requisition Number 3384507 [view](#) | [print](#)

Purchasing Business Unit	UOD01 UNIVERSITY OF DELAWARE
--------------------------	---------------------------------

eBuilder Process	<i>no value</i>
Instance	

Multi-
Invoice/Payment

After-The-Fact Purchase ✗

Contact Information

Owner Name	Kristen Pickering
------------	-------------------

Owner Phone +1 302-831-2330

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) [Add recipient](#)

☐ Kristen Pickering (Prepared by Prepared for) <ud-mart@udel.edu>

File Name

File

Choose File

Upload your file

User Search

[New Search](#)

Name _____

↑

User Name

Email

Phone

Action

Procurement Help

Procurement

udexchange@udel.edu

+

Close



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Purchase Order • W W GRAINGER INC • UDST001048 Revision 0

Status Summary Revisions 1 Confirmations Shipments

General Information

PO/Reference No. UDST001048

Revision No. 0

Priority Normal

Supplier Name W W GRAINGER INC

Address 117 QUIGLEY BLVD
NEW CASTLE, Delaware 19720-4103 United States

Purchase Order Date 11/1/2021

Total 784.74

Requisition Number 3384507 view | print

Purchasing Business Unit UOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instance no value

Multi-Invoice/Payment X

Shipping Information

Ship To

University of Delaware
Attn: Kristen Pickering
Room: atrium
170 THE GREEN
MEMORIAL HALL
Newark, DE 19716
United States

ShipTo Address Code NC3

Delivery Options

Expedite X

Ship Via Best

Requested Delivery Date no value

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Kristen Pickering (Prepared by, Prepared for) <ud-mart@udel.edu>

Grainger canceled line 2 as no longer in stock. Please see attached email.

926 characters remaining expand | clear

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name cancellation email

File Choose File UDX TEST.png

Add Comment Close

Completed

Details

Supplier Status

Sent To Supplier

Supplier W W GRAINGER INC

Total (784.74 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 784.74

784.74

Related Documents

Requisition: 3384507

What's next?

Workflow Status Completed

Type a comment requesting closure of the purchase order once the Procurement Help email address is checked.

Attach documentation using **Choose File**.

Click **Add comment**.



I have received Multiple Invoices for a Standard PO

- Standard (UDS) purchase orders can invoice once per quantity per line.
 - All catalog purchase orders should be Standard.
- Blanket (UDB) purchase orders will change the quantity in PeopleSoft to 1 and will then allow multiple invoices against a line as an amount-only (declining) purchase order.
- If you did not set up a Multi-Invoice/payment PO but need to pay multiple invoices against a quantity of one on one line item, you will need to amend that line using the PO Type Override Box.
 - **This can only be done if the line has not been invoiced.**
 - Please refer to the [Purchase Order Type Override \(POTO\) Box Guide](#) for details.



I Can't Find My Order!

The UDX Shopping Home Page has an array of saved searches, including:

- My Requisitions and My Purchase Orders.
 - These default searches are for the documents on which you are the PO Owner (Prepared For user).

Even if a Requester processed a cart for you as a Shopper, you remain the PO Owner and you will see the order on your home page.

- The Prepared For user on a PO is the driving force behind the order and who will know whether it's been fulfilled.
- The Prepared For user on a PO *can* be changed.
- The Prepared By user is always the person who *places the order*. This is recorded by UDX and *cannot* be manually changed.

If there is a lot of collaboration in your department, it is possible you originated a requisition and assigned it, but you are neither the Prepared For or Prepared By user.



My Purchase Orders is a list of POs on which you are listed as the PO Owner (Prepared For).

If you scroll down the Shopping Home Page to **Requisitions on Which I am Participant**, you will see a list of requisitions which involve you in some way – possibly as an approver, or in another capacity.

There may be requisitions in this list where you are neither the Prepared For nor the Prepared By user.

Note that if they are owned by an employee in a department to which you do not have access, you may not be able to view the requisition you created.

My Purchase Orders (last 90 days)				
<input type="radio"/> View as Graph <input checked="" type="radio"/> View as List				
Number	Supplier	Requisition	Date	Total
✓ UDP0000087	NCURA	3100163	2/22/2021	190.00 USD
✓ UDB0000062	ATLANTIC TRACTOR LLC	3179300	2/22/2021	71,635.01 USD
✓ UDB0000060	ATLANTIC TRACTOR LLC	3181392	2/18/2021	71,635.01 USD
✓ UDB0000059	ATLANTIC TRACTOR LLC	3170528	2/9/2021	2,835.01 USD
✓ UDB0000058	OLIVER SPRINKLER CO INC	3170525	2/9/2021	5,200.00 USD
Displaying 5 of 5				
Search My Purchase Orders				

Requisitions on which I am Participant (last 90 days)				
<input type="radio"/> View as Graph <input checked="" type="radio"/> View as List				
Total Requisitions: 5				
Approx. Total Amount: 151,398.81 USD				
Requisition Number	Supplier	Requisition Status	Submitted Date	Total Amount
3262378	ANIXTER INC. 	Completed	5/3/2021 5:26:29 PM	93.78 USD
3181392	ATLANTIC TRACTOR LLC 	Completed	2/18/2021 5:46:33 PM	71,635.01 USD



Owner Changes for a Purchase Order

- Occasionally, it may be necessary to change the Owner of a PO
 - Example: the Owner has changed departments
- To change the owner of a PO, someone should post a comment in the PO tagging Procurement Help naming the new PO owner
- Department Access will also change based on the new PO owner's department.
- Changes affect vouchers created after the change is complete – if there are vouchers pending, please see the “[Approving Vouchers in UD Exchange](#)” guide for options to handle pending vouchers.



Purchase Order • TRI-STATE CARPET INC • UDBT000092 Revision 4



1 of 1 Results



Status Summary Revisions 5 Confirmations Shipments Change Requests 4 Receipts Vouchers 2 Comments

- Add Comment
- Add Notes to History
- Create Quantity Receipt
- Create Cost Receipt
- Print Fax Version

General Information

PO/Reference No. UDBT000092

Revision No. 4

Priority Normal

Supplier Name TRI-STATE CARPET INC

Address 2 SOUTH POPLAR STREET
WILMINGTON, Delaware 19801-5052 United States

Purchase Order Date 8/27/2021

Total 11,380.00

Requisition Number 3328084 [view](#) | [print](#)

Purchasing Business Unit UOD01
UNIVERSITY OF DELAWARE

eBuilder no value

Process

Instance


Shipping Information

Ship To

UNIVERSITY OF DELAWARE
Attn: Laura Gleason
Room: Suite 101
162 THE GREEN
HULLIHEN HALL
NEWARK, DE 19716
United States

ShipTo NC01
Address Code

Delivery Options

Expedite 

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Requesting a Change of PO Owner:

- Navigate to the **Comments** tab and Click '+'.
OR
- Click the **ellipsis** on the purchase order and select **Add Comment** from the Actions menu.

Billing Options


Accounting Date no value

Payment Terms 0% 0, Net 0

F.O.B. Destination

Details

Supplier Status

Sent To Supplier
 one or more lines rejected

Supplier
TRI-STATE CARPET INC

Total (11,380.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 11,380.00

11,380.00

Related Documents

Requisition: 3328084

Change Requests: 3396195



Purchase Order • TRI-STATE CARPET INC • UDB

Status	Summary	Revisions	5	Confirm
--------	---------	-----------	---	---------

General Information

PO/Reference No. **UDBT000092**

Revision No. 4

Priority	Normal
----------	--------

Shipping

Ship To

UNIVERSITY

Attn: Laura

Room: Suite

162 THE C

HULLIHEN

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) [Add recipient](#)

☐ Kristen Pickering (Prepared by, Prepared for) <ud-mart@udel.edu>

1000 characters remaining

expand | clear

Click the **Add Recipient** link in the **Add Comment** window.
Type Help in last name field of the **User Search** box.
 Select **Procurement Help** from the search results.

User Search

Last Name

Help

First Name User Name Email 

Department •

Role

Results Per Page


10

Search

Close

User Search

[New Search](#)

Name	↑	User Name	Email	Phone	Action
Procurement Help		Procurement	udexchange@udel.edu		

Close

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Purchase Order • TRI-STATE CARPET INC

Status

Summary

Revisions 5

General Information

PO/Reference No. UDBT000092

Revision No. 4

Priority Normal

Supplier Name TRI-STATE CARPET INC

Address 2 SOUTH POPLAR STREET

Total 11,380.00

Requisition Number 3328084 view | print

Purchasing Business Unit UOD01 UNIVERSITY OF DELAWARE

eBuilder Process Instance no value

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Kristen Pickering (Prepared by, Prepared for) <ud-mart@udel.edu>

☒ Procurement Help <udexchange@udel.edu>

Please change PO owner to Rachel Requester, Kristen has left the department.

924 characters remaining expand clear

Attach file (optional)

File Name

File

Choose File

Upload your file

Add Comment

Close

Type a comment requesting change of the purchase order PO Owner.
Click **Add Comment** to send a notification to Procurement Help.

37,688.00 USD

1 of 1 Results

Vouchers 2

Comments 1

Attachments

Completed

Details

Supplier Status

Sent To Supplier

one or more lines rejected

Supplier

TRI-STATE CARPET INC

Total (11,380.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 11,380.00

11,380.00

Related Documents

Requisition: 3328084

Change Requests: 3396195

UNIVERSITY OF
DELAWARE

37

I Can't Find My Supplier's Address

- In webforms, you could choose any one of a supplier's addresses from a list regardless of what kind of address or payment method was used. This resulted in a lot of manual review by Accounts Payable to adjust to the right payment method for that supplier.
- In UD Exchange, you see and select the Fulfillment Centers for the supplier – this is where the order is sent.



Non-PO Payment Request

Form Number **5243304**
 Purpose **Procurement Request**
 Status **Incomplete**

Instructions

Suppliers ✓

Attachments ✓

Form Fields ✓

Review and Submit

Suppliers

Request Actions ▾ History ?

Supplier [Maryland, State of](#)
 ACH-UNCLAIMED PROPERTY, COMPLI: Comptroller of Maryland,
 Unclaimed Property, Compliance Division, 301 W. Preston Street,
 Room 310, Baltimore, Maryland 21201 United States

▶ Modify Search

Supplier Name	Doing Business As	Fulfillment Centers	Action
Maryland, State of		1000 Hilltop Circle, RAC 252A University of Maryland - Baltimore County, 1000 Hilltop Circle, RAC 252A, Baltimore, Maryland 21250 United States Select	
		ACH-Schaefer Ctr Public Policy Schaefer Ctr for Public Policy, University of Baltimore, 1420 N Charles Street, Baltimore, Maryland 21201 United States Select	
		ACH-UNCLAIMED PROPERTY, COMPLI: (preferred) Comptroller of Maryland, Unclaimed Property, Compliance Division, 301 W. Preston Street, Room 310, Baltimore, Maryland 21201 United States ✓ Selected	
		ACH-Univ of Baltimore, Schaefer Schaefer Ctr for Public Policy, University of Baltimore, 1420 N Charles Street, Baltimore, Maryland 21201 United States Select	

In this example, you need to pay an invoice for conference registration fees.

The invoice has a PO box number listed as their remittance address and requests payment by ACH.

When you create your requisition, you will only see **Fulfillment Centers** on the Suppliers page.

None of the centers show a PO box.

◀ Previous

Next ▶



If you navigate to the **Supplier Profile, Contacts and Locations > Fulfillment Centers**, you can browse various Fulfillment centers to view the remittance addresses associated with each one.
Here, you see that the remittance address associated with the Schaefer Center for Public Policy is PO Box 2016.

State of Maryland

Supplier Number 0000038885
Registration Status Approved
Registration Type Full Supplier Registration

About

Contacts and Locations

Fulfillment Centers

Workflow and Review

Accounts Payable

eProcurement

[View History](#)

Fulfillment Centers

Fulfillment Centers

Default Settings for this Supplier

1000 Hilltop Circle, RAC 252A

11975 Homewood Road

ACH-Comptroller of Maryland

ACH-Morgan State University

ACH-Schaefer Ctr Public Policy

ACH-UNCLAIMED PROPERTY, COMPLI

ACH-Univ of Baltimore, Schaefer

ACH-Univ of MD, Ctr for Environ

CC-100 COMMUNITY PLACE

MOTOR VEHICLE ADMINISTRATION

Revenue Administration Divisio

St Mary's College of Maryland

Terps Lacrosse Club-University

University of Maryland - Balti

University of Maryland Extensi

UOM-B- PO Box 41427

UOM-B- PO Box 41427

General

Ordering

Order Distribution

Custom Data

History

Name

ACH-Univ of Baltimore, Schaefer

Address ID

00005

3rd Party Address ID

No Value

Active

✓

Primary Address (used as default in application)

✗

Current Primary Address

ACH-UNCLAIMED PROPERTY, COMPLI

Associated Addresses

Selected Addresses

Active Fulfillment Address

Univ of Baltimore, Schaefer Ctr for Public Policy
Schaefer Ctr for Public Policy
University of Baltimore
1420 N Charles Street
Baltimore
Maryland, 21201
United States

No Active Contact Provided

Active Remittance Address

Schaefer Ctr for Public Policy Remit
Schaefer Ctr for Public Policy
University of Baltimore
PO Box 2016
Baltimore
Maryland, 21203
United States

No Active Contact Provided



[Back to Results](#)

10 of 15 Results

Maryland, State of

Supplier Number 0000038885
Registration Status Approved
Registration Type Full Supplier Registration

- About
- Contacts and Locations
- Workflow and Review
- Accounts Payable
- Payment Methods**
- Payment Custom Fields

[View History](#)

Payment Methods

Manage Accounts Payable

- ACH-Univ of Baltimore Schaefer Ctr Public Policy (Direct Deposit (ACH))**
- CC - Community Place (Credit Card)
- Check - Motor Vehicle Administration (Check)
- Check - UMBC 1000 Hilltop Circle (Check)
- Check - Unclaimed Property (Check)
- Check - University of Maryland - Baltimore (Check)
- Unclaimed Property - ACH (Direct Deposit (ACH))

Edit Accounts Payable

Payment Title ACH-Univ of Baltimore Schaefer Ctr Public Policy
Country United States
ERP Number
Third Party Reference
Payment Type Direct Deposit (ACH)
Direct Deposit Format CCD
Remittance Address Schaefer Ctr for Public Policy Remit (Remittance)
Electronic Remittance Email osr@ubalt.edu
Currency USD
Contact Name
Purpose
Active ☒ Yes ☐ No

Bank Account

Country United States
Bank Name Wells Fargo Bank, N.A.
Account Holder's Name University of Baltimore, Schaefer
Account Type Checking
Account Number Type Account Number
SWIFT/BIC No Value
International Routing Code (IRC) No Value
Routing/Transit Number 121000248
Account Number *****

In **Accounts Payable > Payment Methods**, you can see that we have an ACH Payment method on record with this Fulfillment Center.

With this information you can select this Fulfillment Center with confidence on your requisition!

You will NOT be able to see account information, but Accounts Payable can, and does check this as part of the vouchering process.



Did My Invoice Pay? How Can I Tell?

- **Payment Activity is NOT recommended to track UD Exchange payments;** more information is visible in UDX than Payment Activity.
- Additionally, if there is a problem with a payment voucher, Accounts Payable will place a comment on the UDX voucher for documentation purposes.



Accounts Payable > Vouchers > Search For Vouchers

Search Vouchers

Search

Quick FiltersMy Searches

Created Date: Last 90 daysQuick search

Accounts Payable

Vouchers

Receipts

Approvals

Complete14502

Pending194

Rejected93

Show More

Voucher Type

PO Voucher14532

PO Credit Memo257

Show More

AP Home

Search For Vouchers

Search AP Requests

of 14789 Results

20 Per Page

Supplier	PO Number	Voucher Status	Created Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Voucher Source	Voucher Type	Pay Status
enrey, Nadin	UDB0004874	Complete	5/8/2023 11:33:35 AM	6/3/2023		0.00 USD	5/8/2023 11:34:47 AM	Manual	PO Voucher	Payable
		Complete	5/8/2023	6/3/2023		0.00 USD	5/8/2023	Manual	PO Voucher	Payable
		Pending	5/8/2023 11:24:52 AM	5/4/2023		0.00 USD	5/8/2023 11:26:30 AM	Manual	PO Voucher	In Process
		Complete	5/8/2023 10:59:52 AM	5/4/2023		0.00 USD	5/8/2023 11:01:41 AM	Manual	PO Voucher	Payable
		Complete	5/8/2023 10:58:09 AM	5/4/2023		0.00 USD	5/8/2023 10:59:23 AM	Manual	PO Voucher	Payable

Filter by due date, paid status, etc., and save your searches!

Navigate to Accounts Payable > Vouchers > Search for Vouchers to see all vouchers you have access to. Click on a Voucher Number to view.





Voucher • W.B. Mason Co., Inc. • I0019383

... 1 of 1 Results ▾

Summary Matching Supplier Messages Comments Attachments History

Contains substituted item(s)	Reason	Tax 1	0.00 USD	0.00 USD
	Separate Payment	Tax 2	0.00 USD	0.00 USD

In the voucher, scroll down to the **Payment Status** section.

This information is similar to what you would see in Payment Activity and updates after paycycle each day.

Withholding Code Override	no value	Tax Flag	×
---------------------------	----------	----------	---

Payment Status

Payment Method	Check
Payment Reference No.	00050620
Payment Date	11/10/2021
Payment Cancellation Date	no value
Escheatment Date	no value

Complete

W.B. Mason Co., Inc. ▾

Supplier Invoice No. 224904742

Total (129.27 USD) ▾

Subtotal	129.27
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00

129.27**Related Documents** ▾[Purchase Order: UDS0007550](#) [Requisition: 150779468](#) **What's next?** ▾

Workflow



Purchase Order: UDB0000907

Requisitions: 149481947

What's next?

Workflow



Show skipped steps



Submitted

11/12/2021 4:02 PM

Tyeshia Lockhart



PO Owner Approval

Active

Bonnie Bowman



Invoice Budget Check

Future

General

Voucher Type	Voucher
Pay Status	Payable
Voucher Number	I0020281
Supplier Invoice No.	2021/NACIV000015904
Supplier Name	FEI COMPANY
Voucher Date	11/11/2021
Discount Date	no value
Due Date	12/11/2021
Terms	0% 0, Net 30

If something is *not paid*, check:

- Is it still awaiting an approval step?
- Has the due date (according to the PO terms) passed yet?
- Is there a comment about this voucher from an Accounts Payable staff member, explaining further?

Remember – wires pay outside of Procurement systems with coordination from Treasury, and the update is done last, after any currency conversion.

Summary Matching Supplier Messages Comments 1 Attachments 3 History

Records Found: 1

Manjusha Edara - 10/27/2021 10:04:10 AM

Voucher to be paid Via JPMC wire

Email sent: Lea Narwold <lnarwold@udel.edu>



I Need to Increase a Closed PO

- When purchase orders are fully invoiced, they soft close to await any credits and for vouchers to move to paid status. After 15 days, they close fully in UD Exchange and PeopleSoft (assuming all vouchers are paid).
- Fully invoiced purchase orders cannot be updated with a change request – even if reopened from soft close status. The option is just not there.
- On occasion, it *may* be necessary to add funds to a PO *after* it is fully vouchered, such as in a subaward where funds have not yet arrived. **This scenario should be extremely rare!**
- Generally speaking, all POs should be set up for the full amount before any invoices arrive, and increased before fully vouchered, if needed. In most cases, a new PO is more appropriate.



Purchase Order • RUTGERS, THE STATE UNIVERSI... • UDRT000044 Revision 3



1 of 1 Results



Status

Summary

Revisions 4

Confirmations

Shipments

Change Requests 2

Receipts

Vouchers 2

Comments

[Add Comment](#)[Add Notes to History](#)[Create Quantity Receipt](#)[Create Cost Receipt](#)[Print Fax Version](#)

In this scenario, the subaward is fully invoiced and **Create Change Request** is not an option from the PO Actions menu.

Rec

Vouch

IT000808

12345-02

11/5/2021

12/5/2021

Voucher

Paid

74,975.00 USD

Pickering,
Kristen

IT000756

invoice1

8/30/2021

9/29/2021

Voucher

Payable

1,000.00 USD

Pickering,
Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	line 1		25,000.00 USD	1	25,000.00 USD	n/a / 25,000.00 USD	Net Invoiced
2	Placeholder		50,975.01 USD	1	50,975.01 USD	n/a / 50,975.00 USD	Net Invoiced

etails

Supplier S

New Order

Supplier

RUTGERS, THE STATE UNIVERSITY OF NJ

Total (75,975.01 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 75,975.00

75,975.00

Related Documents

[Requisition: 3328207](#)[Change Requests: 3328707](#)

UNIVERSITY OF DELAWARE
EXCHANGE
TEST SITE

Purchase Order • RUTGERS, THE STATE UNIVERSITY

StatusSummaryRevisions 4Confirm

Records found: 2, Totaling: 75,975.00 USD

Voucher No. ↓	Supplier Voucher No.	Voucher Date
IT000808	12345-02	11/5/2021
IT000756	invoice1	8/30/2021

Line Details

Line No.	Product Name
1	line 1
2	Placeholder

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Dottie DPS <ud-mart@udel.edu>

☐ Kristen Pickering (Prepared by, Prepared for) <ud-mart@udel.edu>

☒ Procurement Help <udexchange@udel.edu>

Please reopen this PO with an additional penny on the line 2 to enable a change request

37,688.00 USD

Search (Alt+Q)

1 of 1 Results

Vouchers 2

Comments 3

Attachments

Completed

Details

Supplier Status

New Order

Supplier

RUTGERS, THE STATE UNIVERSITY OF NJ

Total (75,975.01 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

75,975.00

75,975.00

Net Invoiced

Related Documents

Requisition: 3328207

Change Requests: 3328707

Voucher: IT000756

Add a comment to the PO tagging Procurement Help to request the PO be reopened with a penny on line 2 (153300) to allow a change request.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

AllSearch (Alt+Q)37,688.00 USD

Purchase Order • RUTGERS, THE STATE UNIVERSI... • UDRT000044 Revision 3

StatusSummaryRevisions 4ConfirmationsShipmentsChange Requests 2ReceiptsVouchers 2Comments

Records found: 3

Show comments forPurchase Order

Procurement Help - 11/12/2021 9:54:31 PM

Purchase Order - UDRT000044Comment Added

This has been completed.

Email sent: Dottie DPS <ud-mart@udel.edu>

Procurement Help will reply when complete and the Change Request will be available for that line.

Dottie DPS - 11/12/2021 9:35:26 PM

Purchase Order - UDRT000044Comment Added

Please reopen this PO with an additional penny on line 2 to enable a change request.

Email sent: Procurement Help <udexchange@udel.edu>

Add Comment

Create Change Request

Add Notes to History

Create Quantity Receipt

Create Cost Receipt

Print Fax Version

Details

Supplier S

New Order

Supplier

RUTGERS, THE STATE UNIVERSITY OF NJ

Total (75,975.01 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal75,975.01

75,975.01

The \$0.01 increase will NOT sync to PeopleSoft. The PO will only be open and available to increase in UD Exchange.

Proceed as normal to add the increase, which will go through all required approvals.

Unit Price	75000	USD	Quantity	1	Total	50,975.01 USD
Product Description	Increased funding for year 3					
	972 characters remaining					
Commodity Code	RO-SUB2 - Research Office Subawards >\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.					
<div>< PreviousSave on Change RequestNext ></div>						



I Forgot My Attachments!

- Attachments are required for every type of UDX request/order:
 - On NPOPs, the required attachment for each payment type is outlined on the NPOP matrix.
 - On purchase orders, you must have at least a quote; multiple competitive quotes can be required per the Guided Buying matrix in many circumstances.
 - If you are attaching invoices to a PO, you are outside compliance policy! Please ensure you are obtaining your PO **prior** to any supplier engagement!
- Approvers should not approve without reviewing the attachments. They may place the document on hold and send you a comment asking you to upload attachments. It is not necessary for them to return your document to you.





Requisition • 3396507

Summary PO Preview Comments **Attachments** History

Clicking on the Attachments tab shows no Attachments.

Attachments found: 0

This document does not have any attachments associated with it.

If you need to add an attachment, return to the Summary page and find the "Add attachment" button.

Please note that attachments cannot be added to documents once they have completed workflow.

This requisition did not include any attachments.
You can tell by the missing number to the right of the Attachments tab.

1 of 1 Results < > Approve

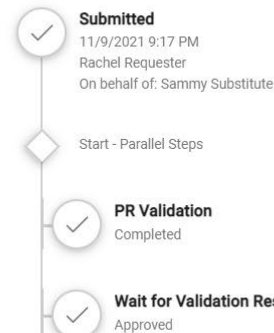
Pending

Total (24,650.00 USD)

Subtotal	24,650.00
	24,650.00

What's next?

Workflow





Requisition • 3396507

1 of 1 Results

Summary PO Preview **Comments 1** Attachments History

Records found: 1

Show comments for Requisition

Pending
Total (24,650.00 USD)

Alice Approver - 11/22/2021 6:13:13 PM

You are missing the required attachment. Please add your attachment in a reply comment.

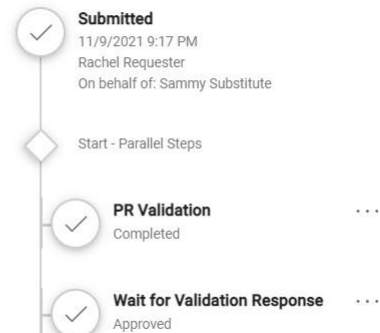
Email sent: Rachel Requester <ud-mart@udel.edu>

The approver should insert a comment to let you know that you are missing an attachment.
You will get an email letting you know there is a new comment.

Please do NOT reply to the email notification you receive from UD Exchange – replying to that email will send a reply to the person who created the comment but will not update the comments in UDX. You must attach the document in the requisition for the audit trail.

What's next?

Workflow






Records found: 1

Show comments for Requisition 

Alice Approver - 11/22/2021 6:13:13 PM


Requisition - 3396507 Comment Added 

You are missing the required attachment. Please add your attachment in a reply comment.
Email sent: Rachel Requester <ud-mart@udel.edu>

Click the **reply arrow** next to the comment.


You can also click the + symbol to create a new comment, but then you would have to manually tag the person you want to notify.



Pending


Total (24,650.00 USD) 


Subtotal 24,650.00


24,650.00


What's next? 

Workflow  

 **Submitted**
11/9/2021 9:17 PM
Rachel Requester
On behalf of: Sammy Substitute

 Start - Parallel Steps

 **PR Validation** ...
Completed

 **Wait for Validation Response** ...
Approved





Requisition • 3396507

1 of 1 Results Withdraw Entire Requisition

Summary PO Preview Comments 1 Attachments History

Records found: 1

Enter your comment.
Click Choose File.

REPLY TO Alice Approver

Sorry, here is the attachment.

970 characters remaining

expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

- ☒ Alice Approver (Approver, Approved) <udexchange@udel.edu>
- ☐ Kristen Pickering (Approved) <kpick@udel.edu>
- ☐ Rachel Requester (Prepared by, Approved) <ud-mart@udel.edu>

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name

File

Choose File

Upload your file

Pro tip – although you could tag multiple people, please only tag those who need to take an action as a result of your comment.

Alice Approver - 11/22/2021 6:13:13 PM

Requisition - 3396507

Comment Added

PR Validation
Completed

Wait for Validation Response
Approved



Requisition • 3396507

Summary PO Preview **Comments 1** Attachments History

Follow the prompts until your file is showing in the file field.
When finished, click the **check mark** at the top of the comment to save and send.

REPLY TO Alice Approver



Sorry, here is the attachment.

970 characters remaining

[expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

- ☒ Alice Approver (Approver, Approved) <udexchange@udel.edu>
- ☐ Kristen Pickering (Approved) <kpick@udel.edu>
- ☐ Rachel Requester (Prepared by, Approved) <ud-mart@udel.edu>

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name

File

Choose File

9015508392.pdf

You may name your attachment, but it is not required.

Alice Approver - 11/22/2021 6:13:13 PM

Requisition - 3396507

Comment Added



Pending

(24,650.00 USD)

Subtotal

24,650.00

24,650.00

What's next?

Workflow



Submitted

11/9/2021 9:17 PM
Rachel Requester
On behalf of: Sammy Substitute



Start - Parallel Steps



PR Validation

Completed



Wait for Validation Response

Approved





Requisition • 3396507



1 of 1 Results ▾



Withdraw Entire Requisition

Summary

PO Preview

Comments 2

Attachments 1

History

Records found: 2

Show comments for

Requisition ▾

**Rachel Requester** - 11/22/2021 6:29:54 PM

Requisition - 3396507

Comment Added



Sorry, here is the attachment.

Email sent: Alice Approver <udexchange@udel.edu>

Attachment Added: [↓ 9015508392.pdf](#)**Alice Approver** - 11/22/2021 6:13:13 PM

Requisition - 3396507

Comment Added



You are missing the required attachment. Please add your attachment in a reply comment.

Email sent: Rachel Requester <ud-mart@udel.edu>

The attachment is now part of the document for all to see, and the Approver has received a comment to let them know it has been attached and they can review.

Pending

Total (24,650.00 USD) ▾

Subtotal	24,650.00
	24,650.00

What's next? ▾

Workflow



Submitted

11/9/2021 9:17 PM

Rachel Requester

On behalf of: Sammy Substitute



Start - Parallel Steps



PR Validation

Completed



Wait for Validation Response

Approved



What was sent to the supplier?

- You can view the PO that was sent to the supplier if it was a non-catalog or waiver of bid order.
 - Nothing is sent to suppliers for NPOPs or subawards
 - Catalog orders are sent electronically directly into the suppliers' ERPs
- To view the PO, save it, resend it, etc., navigate to the Purchase Order itself and click on the Revisions tab.



Purchase Order • ION-TOF USA INC • UDBT000095 Revision 0



1 of 1 Results ▾



Status

Summary

Revisions 1

Confirmations

Shipments

Change Requests 1

Receipts

Vouchers 2

Comments 1

Attachments



Records found: 1

Revision No.	Revision Date	Revision Name	Revised By		
original	10/26/2021 10:21 PM	original	System	PO Documents	HTML Body Email PO PO Export Document

The **Revisions tab** is only on the purchase order, and will have at least the original version, as well as any revisions to that purchase order.

Completed

Details ▾

Supplier Status

Sent To Supplier

Supplier

ION-TOF USA INC

Total (995,058.28 USD) ▾

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	995,058.28
	995,058.28

Related Documents ▾

[Requisition: 3375787](#)[Voucher: IT000797](#)[Voucher: IT000828](#)

Records found: 1

Revision No.	Revision Date	Revision Name	Revised By	
original	10/26/2021 10:21 PM	original	System	PO Documents HTML Body Email PO PO Export Document

Click on **HTML Body Email PO**.

This will open a new window with the exact format and layout sent in the body of the email to the supplier.

Completed

Details ▾

Supplier Status

Sent To Supplier

Supplier

ION-TOF USA INC


Total (995,058.28 USD) ▾


Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.


Subtotal 995,058.28

995,058.28

Related Documents ▾

[Requisition: 3375787](#) 

[Voucher: IT000797](#) 

[Voucher: IT000828](#) 



TEST PO-PLEASE DO NOT FULFILL		Purchase Order	
Purchase Order Date		PO/Reference No.	Revision No.
Oct 26, 2021		UDBT000095	0

Important Billing Information

Please send all invoices via email attachment to accountspayable@udel.edu, referencing the PO number on the invoice and in the subject line. Invoices sent via postal mail or to any other email address will delay payment. Invoices without a PO number will be discarded.

Supplier Information		Delivery Information	
Supplier Name	ION-TOF USA INC	Delivery Address	
Address	100 RED SCHOOLHOUSE ROAD BUILDING A CHESTNUT RIDGE, New York 10977-7049 United States	University of Delaware University of Delaware	
F.O.B.	Destination	Attn:	Kristen Pickering
Additional Notes to print on PO	<i>no note</i>	Room:	atrium
		170 THE GREEN MEMORIAL HALL Newark, DE 19716 United States	
		ShipTo Address Code	NC32
		Delivery Information	
		Requested Delivery Date	No Best Carrier-Best Way

You can create a PDF from this if you need to send it to someone else at the supplier.

Buyer Name	Buyer Email	Buyer Phone
<i>no value</i>	<i>no value</i>	<i>no value</i>

Line No.	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
1 of 2	Waiver of Bid Request - TOF-SIMS 5 time-of-flight secondary ion mass spectrometer. The price for equipment & accessories net of the discount of \$391,375.72 is \$933,058.28. The total cost of the equipment without the discount and including the service contract is \$1,386,434.44.			933,058.28 USD	1	933,058.28 USD
	ADDITIONAL INFO	Commodity Code		41000000		
		Unit Price		933,058.28 USD		



Revision No.	Revision Date	Revision Name	Revised By		
2	10/31/2022 9:01 AM	PO Revision	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	proposal.pdf (Header)
1	7/29/2022 5:23 PM	PO Revision	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	proposal.pdf (Header)
original	1/3/2022 1:19 PM	original	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	proposal.pdf (Header)

Voucher: IT000962

Create Date ↓

12/17/2021 9:45 AM

Subtotal	50,000.00
----------	-----------

combination of catalog and non-catalog items.



Purchase Order • PHILIP ROSENAU COMPANY INC • UDST001016 Revision 1

1 of 1 Results ▾ < >

Status Summary Revisions 2 Confirmations Shipments Change Requests 2 Receipts Vouchers Comments 2 Attachments 1 >

Owner Email ud-mart@udel.edu

Distribution Information ...

Distribution Methods

The system will distribute purchase orders using the method(s) indicated below:

Email (HTML Body) sholland@imperialdade.com

Distribution Options

Supplier Terms and Conditions no value

Important Billing Information Please send all invoices via email attachment to accounts payable@udel.edu, referencing the PO num...
[Show more](#)

The Summary screen of the Purchase Order will show **where** the purchase order was sent under **Distribution Information**.

Pricing Code no value

Quote number no value

Note to Supplier combination of catalog and non-catalog items.

PO Clauses 1 [View details](#)

Attachments for supplier

Date

[DadeTestNonCatalog.pdf](#)

7/23/2021

Buyer Information ... ▾

ⓘ User does not have the necessary permissions to view the custom fields associated with this section.

Completed

Details ▾

Supplier Status

Sent To Supplier

Supplier

PHILIP ROSENAU COMPANY INC

Total (2,252.17 USD) ▾

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 2,252.17

2,252.17

Related Documents ▾

[Requisition: 3307835](#) 🖨[Change Requests: 3375851](#) 🖨

Having a Requisition or Voucher Returned

- A requisition or voucher can only be returned if it has not completed workflow.
- If return of a requisition is required in order to make a substantive change (e.g., increase the amount), please tag the current approver in a comment request to return it to you in draft.
- If a minor change is needed (e.g., check the multi-invoice box), please tag the Procurement Approver to make the change at their approval step.
- Documents *cannot be returned to the previous approver*, only back to the beginning/draft form.
- POs do not go through workflow, so this applies only to requisitions and vouchers.



Requisition • 3457935

Summary Comments Attachments 1 History

General

Status

✓ Completed
(2/7/2022 4:28 PM)

Submitted

2/7/2022 4:27 PM

Cart Name

copy prod UDB0000858

Description

no value

Priority

Normal

Prepared by

Kristen Pickering

Prepared for

Kristen Pickering

Purchasing Business Unit

UOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instance

no value

Multi-Invoice/Payment

✓

After-The-Fact

✗

Shipping

Ship To

University of Delaware
Attn: Kristen Pickering
Room: atrium
170 THE GREEN
MEMORIAL HALL
Newark, DE 19716
United States

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Billing Options

Accounting Date

no value

Delivery Options

Expedite

✗

Ship Via

Best Carrier-Best Way

Requested Delivery Date

no value

Status shows as Completed, so this requisition **cannot** be returned and the PO would have to be amended to make changes.

Completed

Total (23,890.00 USD) >

Related Documents ▾

[Purchase Order: UDBT000106](#)

[Voucher: IT000941](#)

[Voucher: IT000955](#)

What's next? >

Requisition • 3458191

- Summary
- PO Preview
- Comments
- Attachments
- History

General

...

Status

Pending
Commodity Approval

Submitted

2/8/2022 11:33 AM

Cart Name

Second Test for Trade-In Radio Button

Description

no value

Priority

Normal

Prepared by

Margot Martin

Prepared for

Margot Martin

Purchasing Business Unit

UOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instance

no value

Multi-Invoice/Payment

Shipping

...

Ship To

University of Delaware
Attn: Margot Martin
Room: n/a
535 S. COLLEGE AVE
UD CREAMERY
Newark, DE 19716
United States

Bill To

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Delivery Options

...

Expedite

Ship Via

Best Carrier-Best Way

Requested Delivery Date

no value

Billing Options

...

Accounting Date

no value

Requisition status is Pending, so it can be returned.

Pending

Total (1,500.00 USD) >

What's next? ▾

Workflow

☐ Show skipped steps

Submitted
2/8/2022 11:33 AM
Margot Martin

Start - Parallel Steps

PR Validation
Completed

Wait for Validation Response

Wait for Validation Response
Approved

End - Parallel Steps

COA Approver
Approved
 Kristen Pickering

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

Requisition • 3458191

Summary

PO Preview

Comments

Attachments

History

Records found: 0

Show comments for Requisition

ADD COMMENT

Can you please return this to me? This quote is incorrect and needs to be replaced and the amount increased. Thank You.

881 characters remaining

expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Kristen Pickering (Approved) <ud-mart@udel.edu>

☐ Margot Martin (Prepared by, Approved) <ud-mart@udel.edu>

Attach file (optional)

File Name

File

Choose File

Upload your file

Approved

Kristen Pickering

Dept Purchasing Specialist

Approved

Kristen Pickering

Commodity Approval

Active

Capital Equipment

Bhaveshree K Varsani

ud-mart@udel.edu

Michael Rothfuss

ud-mart@udel.edu

Susan Bledsoe

ud-mart@udel.edu

Automobiles

Alice Approver

ud-mart@udel.edu

+1 302-831-2163

Buyer Routing

Future

Start - Parallel Steps

Clicking on the **Active Approval step** shows the name of the pending approver; this person should be tagged in a **comment requesting return**.

UNIVERSITY OF DELAWARE

69

Requisition • 3458191

☰ 🖨️ ? ⋮ 1 of 1 Results ▾ < >

Summary

PQ Preview

Comments

Attachments

History

Records found: 0

Show comments for

Requisition ▾

 +

ADD COMMENT

Can you please check the multi-invoice box before final approval?

935 characters remaining

[expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

☐ Kristen Pickering (Approved) <ud-mart@udel.edu>

☐ Margot Martin (Prepared by, Approved) <ud-mart@udel.edu>

Attach file (optional)

Approvers cannot make changes, they can only return, reject or approve. Buyers can make changes, so for minor changes that don't affect approval, tag the Buyer to make a change for you at their review and approval step.

File

Choose File

 Upload your file

✓

Dept Purchasing Specialist ⋮

Approved

✓ Kristen Pickering

📍

Commodity Approval ⋮

Active

Capital Equipment

Bhaveshree K Varsani
ud-mart@udel.edu

Michael Rothfuss
ud-mart@udel.edu

Susan Bledsoe
ud-mart@udel.edu

Automobiles

Alice Approver
ud-mart@udel.edu
+1 302-831-2163

○

Buyer Routing ⋮

Future

◇

Start - Parallel Steps

○

PR Validation 2 ⋮

Future



UNIVERSITY OF DELAWARE
EXCHANGE
TEST SITE

Requisition • 3458191

SummaryPO PreviewCommentsAttach

Records found: 0

ADD COMMENT

Can you please check the multi-invoice box before final approval?

935 characters remaining

expand | clear

User Search

Last Name

First Name

User Name

Email

Department

Role

Results Per Page

Buyer

Buyer Manager

Catalog Administrator

Contract Administrator

Contract Approver

Contract Manager

Contract Requester

Contracts System Administrator

Contracts Template Administrator

End User

Dept Purchasing Specialist

Approved

Kristen Pickering

Commodity Approval

Active

Capital Equipment

Bhaveshree K Varsani

ud-mart@udel.edu

Michael Rothfuss

ud-mart@udel.edu

Susan Bledsoe

ud-mart@udel.edu

Automobiles

Alice Approver

ud-mart@udel.edu

+1 302-831-2163

Buyer Routing

Future

Start - Parallel Steps

PR Validation 2

Future

PRO TIP: To quickly find the buyer's name, search on Role: Buyer.

Voucher • TRI-STATE SECURITY & CONTROLS • IT000890



1 of 1 Results ▾



Summary

Matching

Supplier Messages

Comments

Attachments 1

History

General

Voucher Type	Voucher
Pay Status	In Process
Voucher Number	IT000890
Supplier Invoice No.	TEST600
Supplier Name	TRI-STATE SECURITY & CONTROLS
Voucher Date	1/5/2022
Discount Date	no value
Due Date	1/5/2022
Terms	0% 0, Net 0
Terms Discount	0.00 USD
Voucher Name	2022-01-05 702650667 01
Purchasing	UDB01

Addresses

Remit To

2860 OGLETOWN ROAD BUILDING 5 UNIT 2
NEWARK, Delaware 19713-0000United States
Address Id 1

Bill To

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Payment Information

Requested Payment Override

Accounting Date
1/5/2022Payment Message
no valuePayment Hold
no valueInternal Note/Business Justification
UPDATE SECURITY SYSTEM

External Attachments

Internal Attachments	Date
TEST 600.pdf	1/5/2022

Discount, Tax, Shipping & Handling

Discount, tax, shipping & handling

Allocation
Sum of All

Header-level

Sum of lines

Similarly, vouchers showing as pending approval can be returned by an approver.

Pending

TRI-STATE SECURITY & CONTROLS ▾

Supplier Invoice No. TEST600
Voucher Image
[TEST 600.pdf](#)

Total (35,000.00 USD) ▾

Subtotal	35,000.00
Discount	0.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	35,000.00

Related Documents ▾

[Purchase Order: UDBT000097](#)
[Requisition: 3429097](#)

What's next? ▾

Summary Matching Supplier Messages Comments 1 Attachments History

General

Voucher Type

Voucher

Pay Status

Payable

Voucher Number

IT000922

Supplier Invoice No.

IT000922

Supplier Name

MOTOR VEHICLES DIVISION OF

Voucher Date

1/14/2022

Discount Date

no value

Due Date

1/14/2022

Terms

0% 0, Net 0

Terms Discount

0.00 USD

Voucher Name

2022-01-14 702648951 05

Purchasing Business Unit

UOD01
UNIVERSITY OF DELAWARE

Multi-Invoice/Payment

✗

After-The-Fact Purchase

✗

Invoiced By

Phyllis-Pearl Kessie

Match Status

Matched

Addresses

Remit To

PO BOX 698
DOVER, Delaware 19903-0698

Note/Attachments

External Note

no value

Internal Note/Business Justification

no value

Complete

MOTOR VEHICLES DIVISION OF

Supplier Invoice No.

IT000922

Total (50.00 USD)

50.00

0.00

0.00

0.00

0.00

50.00

Related Documents

Purchase Order: UDPT000160

Requisition: 3440598

Payment Information

Requested Payment Override

Accounting Date

1/14/2022

Payment Message

UD Specialty License Plate: (LINDA PURY)

Payment Hold Reason

no value

Separate Payment

✓

Payment Handling Code

AT
Attachments to go with Check

Withholding Override

no value

Withholding Code Override

no value

Discount, Tax, Shipping & Handling

Discount, tax, shipping & handling

Allocation

Sum of All

	Header-level	Sum of lines
Terms Discount	0.00 USD	
Discount	0.00 USD	0.00 USD
Tax 1	0.00 USD	0.00 USD
Tax 2	0.00 USD	0.00 USD
Shipping	0.00 USD	0.00 USD
Handling	0.00 USD	0.00 USD

Vouchers in **Payable** status have not yet paid and *may* be able to be stopped if workflow is complete, but Pay Status is Payable.

Send a **Comment** to the **Invoiced By** user and **Procurement Help** if there is an urgent need to stop payment on a completed, payable voucher.

Note: Many catalog orders pay via credit card and will show as Payable until the transaction is reconciled.

Voucher • DELMARVA POWER • IT000903



1 of 1 Results ▾



Summary

Matching

Supplier Messages

Comments

Attachments

History

General

Addresses

Note/Attachments

Voucher Type Voucher

Pay Status Paid

Voucher Number
IT000903Supplier Invoice No.
400000007256-122021Supplier Name
DELMARVA POWERVoucher Date
12/16/2021Discount Date
no valueDue Date
1/15/2022Terms
0% 0, Net 30Terms Discount
0.00 USDVoucher Name
2022-01-11 702648951 01Purchasing Business Unit
UOD01 UNIVERSITY OF DELAWARE

Remit To

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Payment Information

Requested Payment Override

Accounting Date
1/11/2022Payment Message
400000007256Payment Hold
no value

External Note ***** Seq: 1 | Payment Ref:

Attachments

Internal Attachments

Discount, Tax, Shipping & Handling

Discount, tax, shipping & handling

Allocation
Sum of All

Header-level

Sum of lines

Terms

Complete

DELMARVA POWER

Supplier Invoice No. 400000007256-122021

859.11 USD)

25,859.11

0.00

0.00

Tax1

0.00

Tax2

0.00

Shipping

0.00

Handling

0.00

25,859.11

Related Documents

Purchase Order: UDPT000149

Requisition: 3439900

What's next?

Voucher • DELMARVA POWER • IT000903



1 of 1 Results ▾



Summary

Matching

Supplier Messages

Comments

Attachments

History

Invoiced by

Phyllis Farnsworth

Override

Match Status

Matched

Withholding

no value

Code Override

Handling

0.00 USD

0.00 USD

Voucher

Automated

Source

Total

25,859.11 USD

Contains
substituted
item(s)

Payment Status

Payment
Method

ACH

Payment
Reference No.

00154351

Payment Date

1/19/2022

Payment
Cancellation
Date

no value

Escheatment
Date

no value

Paid vouchers include information about the payment if the supplier needs details.

Complete

DELMARVA POWER



7256-122021



Subtotal

25,859.11

Discount

0.00

Tax1

0.00

Tax2

0.00

Shipping

0.00

Handling

0.00

25,859.11

Codes



LINE

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	UTIL112115	UTIL112115	OPBAS	05867	OPMNT	no value	no value	no value	no value

Related Documents

[Purchase Order: UDPT000149](#)[Requisition: 3439900](#)

What's next?



Who is the Pending Approver?

- Expanding the What's Next sidebar on a document will show you a preview of workflow steps.
- It is easy to identify the Active workflow step, which will also have the name of an approver associated with it.
- Depending on the type of workflow step, the current approver may or may not be automatically shown.
- When more than one approver is required, the workflow step will not show all approvers until you click to expand the workflow step unless multiple approvers have assigned the requisition to themselves at the same time.
- Details can also be found in the document history.



Summary PO Preview Comments Attachments 2 History

General

Status

Pending

Dept Purchasing Specialist

Submitted

7/15/2024 11:20 AM

Cart Name

2024-07-15 test5000requester 04

Description

Jasco 11500 PM

Priority

Normal

Prepared by

Robert

Prepared for

Robert

Department

CTR REQUEST PARTNER SERVICES (00115)

Multi-Invoice/
Payment

✓

Shipping

Ship To

Shipping address code NC15

UNIVERSITY OF DELAWARE

Attn: Robert Requester

Robert.lobby

Billing

Bill To

Accounts Payable

accountspayable@udel.edu

222 South Chapel Street

Newark, DE 19716

United States

Internal Fields

UD Internal Fields

eBuilder Process Instance

no value

Technology Request #

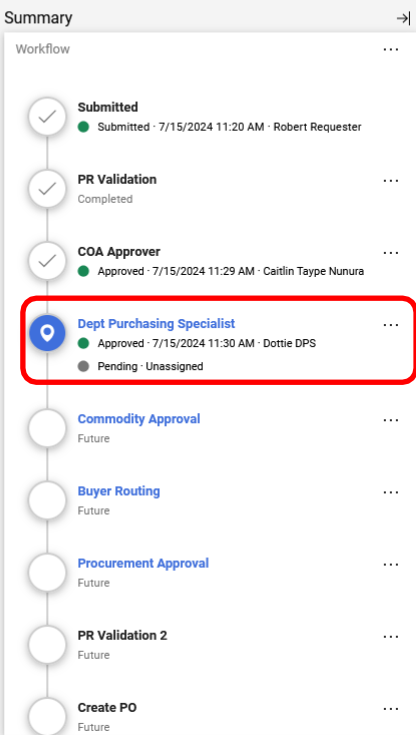
no value

Waiver of Bid

✗

Buyer Information

The active workflow step on this requisition is the DPS approval. Currently, it shows that Dottie DPS has approved, and the requisition appears to have no assigned approvers.



Requisition • 4068513

Withdraw Entire Requisition 1 of 1 Results

Summary PO Preview Comments Attachments 2 History

General Shipping Billing

However, clicking on the Workflow step to expand shows that Dottie DPS is in the *Completed* Approval Group and that the actual **pending approver** is Alice Approver. Alice just did not assign the requisition to herself yet.

Description Jasco J-1500 PM Room: lobby
150 ACADEMY STREET
COLBURN LAB
NEWARK, DE 19716
United States

Priority Normal

Billing Options

Purchasing Business UOD01
Unit UNIVERSITY OF DELAWARE

Prepared by Robert Requester

Prepared for Robert Requester

Department CTR RES SOFT MATTER & POLYMERS (03119)

Multi-Invoice/
Payment ✓

Internal Fields

UD Internal Fields

eBuilder Process Instance	no value
Technology Request #	no value
Waiver of Bid	✗

Buyer Information

Summary Workflow

Submitted
Submitted · 7/15/2024 11:20 AM · Robert Requester

CR Validation
Completed

COA Approver
Approved · 7/15/2024 11:29 AM · Caitlin Taype Nunura

Dept Purchasing Specialist
Approved · 7/15/2024 11:30 AM · Dottie DPS
Pending · Unassigned

COE - DPS - CRSP
Alice Approver
ud-mart@udel.edu
+1 302-831-2163

Completed Approval Group
Dottie DPS
ud-mart@udel.edu

Commodity Approval
Future

Buyer Routing
Future

Procurement Approval

Summary PO Preview Comments Attachments 2 History

General Shipping Billing

If the requisition is assigned to an approver but not approved yet, you will see who it is currently assigned to listed as “Pending”. If you click the Workflow step to expand, you will see “Assigned” next to the pending Approver’s name, as well as the other approvers in that step that could have assigned it to themselves.

Priority Normal COLBURN LAB
Prepared by Robert Requester NEWARK, DE 19716
Prepared for Robert Requester United States
Department CTR RES SOFT MATTER & POLYMERS (03119)
Multi-Invoice/ Payment ✓

Internal Fields

UD Internal Fields

eBuilder Process Instance no value
Technology Request # no value
Waiver of Bid ✗

Buyer Information

Dept Purchasing Specialist

Approved - 7/15/2024 11:30 AM - Dottie DPS
Pending - Alice Approver

COE - DPS - CRSP

Alice Approver
ud-mart@udel.edu
+1 302-831-2163 **Assigned**

Deirdre Martin
ud-mart@udel.edu
+1 302-831-0332

Megan Argoe
ud-mart@udel.edu

Completed Approval Group

Dottie DPS
ud-mart@udel.edu

Summary

Workflow

Submitted
Submitted - 7/15/2024 11:20 AM - Robert Requester

PR Validation
Completed

COA Approver
Approved - 7/15/2024 11:29 AM - Caitlin Taype Nunura

Dept Purchasing Specialist

Approved - 7/15/2024 11:30 AM - Dottie DPS
Pending - Alice Approver

Commodity Approval
Future

Buyer Routing
Future

Procurement Approval
Future

PR Validation 2
Future

Create PO
Future



Requisition • 4068513

Summary PO Preview Comments Attachments 2 History

Start date
mm/dd/yyyy

End date
mm/dd/yyyy

Action

User

Filter

Clear All Filters

1-13 of 13 Results

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	7/15/2024 11:32:36 AM	Alice Approver	Dept Purchasing Specialist	Requisition assigned				
	7/15/2024 11:30:08 AM	Dottie DPS	Dept Purchasing Specialist	Requisition approved				
	7/15/2024 11:30:05 AM	Dottie DPS	Dept Purchasing Specialist	Requisition assigned				
	7/15/2024 11:29:42 AM	Caitlin Taype Nunura	COA Approver	Requisition approved				
	7/15/2024 11:29:39 AM	Caitlin Taype Nunura	COA Approver	Requisition assigned				
	7/15/2024 11:29:05 AM	System	PR Validation	Requisition budget check passed				Requisition 4068513
	7/15/2024 11:20:41 AM	System	PR Validation	Message transmission to external system was successful.				
	7/15/2024 11:20:40 AM	Robert Requester		Requisition submitted				
Line 3	7/15/2024 11:20:32 AM	Robert Requester		Requisition Line item copied		Requisition 4068505	empty	
Line 2	7/15/2024 11:20:32 AM	Robert Requester		Requisition Line item copied	Labor	Requisition 4068505	empty	
Line 1	7/15/2024	Robert Requester		Requisition Line item copied	7069-J011A	Requisition 4068505	empty	

Export CSV

20 Per Page

Remember! The History tab will always show you who approved the requisition, when, and how (if by email).

Summary →

Pending

Total (14,640.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal14,640.0014,640.00

What's next?

Workflow

Submitted

Submitted · 7/15/2024 11:20 AM · Robert Requester

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Dept Purchasing Specialist

Approved · 7/15/2024 11:30 AM · Dottie DPS

Pending · Alice Approver

Commodity Approval

Future



Did this process in time for fiscal year end?

- At the conclusion of a fiscal year, Controller's Office posts closing procedures and deadlines on their website. These involve Procurement deadlines for invoices to be processed against the current fiscal year's funds.
- A voucher does not have to **pay** in the current fiscal year to **post** in that fiscal year.
- The determination as to whether the voucher will post in the current fiscal year is the GL (General Ledger) Accounting Date.
- The GL Accounting date is generated when the Production PeopleSoft (FIPRD) record posts to the Reporting PeopleSoft (FIRPT) instance every evening.




Did this process in time for fiscal year end?

- Generally speaking, the GL Accounting Date will be the same as the PeopleSoft (FIPRD) Accounting Date. However, if the voucher does not export from UDX to PeopleSoft until after the posting process runs at 7 PM, the FIRPT/GL Accounting Date will be a day behind.
- **As of June, 2024, the FIPRD Accounting Date is brought from PeopleSoft into UDX at the time that payment is processed.** The existing Accounting Date field has been renamed “UDX Accounting Date” to avoid confusion.




Summary Matching Supplier Messages Comments Attachments 1 History

General		Addresses	Note/Attachments
Voucher Type	Voucher	Remit  Unavailable	External Note ***** Seq: 1 Payment Ref: 001041 Payment Date: 2024-06-10
Pay Status	Paid		Internal Note/ no value Business Justification
Voucher Number	IT001336	Remit To EDUCATION SALES SUPPORT	

Summary	
Complete	
APPLE COMPUTER INC	
Supplier Invoice No.	test1235
Voucher Image	
BlankDoc.pdf	

The FIPRD Accounting date is automatically assigned by PeopleSoft. Therefore, it must be sent from PS back into UDX, and this communication only occurs during the Invoice Status Update process after payment. When that runs, the process will populate the FIPRD Accounting Date field on the voucher with the official value. If the voucher exported to PeopleSoft before 7 PM, this date will be the GL Accounting Date. The payment will post in this fiscal period regardless of whether it was made in the next fiscal period.

Terms 0% 0, Net 0
Terms Discount 0.00 USD
Voucher Name 2024-06-07 700456604 02
Purchasing UOD01
Business Unit UNIVERSITY OF DELAWARE
Multi-Invoice/
Payment 

Payment Information

Requested Payment Override

UDX Accounting 6/5/2024
Date

FIPRD 6/07/2024
Accounting Date

Discount, Tax, Shipping & Handling

Discount, tax, shipping & handling

Allocation Sum of All

Header-level Sum of lines

Terms 0.00 USD

Related Documents

Purchase Order: UDST001204

Requisition: 3880655

What's next?

Workflow

Submitted
Submitted · 6/7/2024 3:19 PM

Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Auto Return Troubleshooting Tips guide](#)

