Finding Users and User Information
for Department Purchasing Specialists ONLY
What’s different in UD Exchange?

Users have different roles. Access and other settings also vary.

- Any user could create a webform and sharing the form made it visible; all users could see the same content in webforms.

- In UD Exchange, users have different roles and access depending on their level of training; the DPS can view information about users and request changes to a user’s role.
Viewing User Profiles in UD Exchange

• The Department Purchasing Specialist is responsible for requesting changes to users’ roles and access via the UDX Access Request form.
• The DPS can also request changes to workflow and add emergency substitute approvers using this form.
• To that end, the DPS can see all profiles of UD employees in order to be able to make an informed request via the form.
• This guide will show how to find basic profile information to support the functionality of your department and users.
Department Purchasing Specialists have a “locked gear” icon in their sidebar menu to be able to Search for Users.
Clicking Search for Users brings up the basic User Search Page. Use the Quick Search to enter values for an individual.
You can also enter a user’s name or UDID in the top search bar on the homepage to return that user record or their documents.
You will be able to see anything in a user’s profile that you can see in your own profile, in order to be able to request changes via the Access Form or assist users.
Roles and Access

• The most common changes to users involve roles – what they can DO in the system, and access – what they can SEE in the system.
• For more about roles, please refer to the guide “Employee Roles in UD Exchange”.
• For more about access, please refer to the guide, “Understanding Access in UD Exchange”.
• Changes to roles and access take place through the HR integration twice daily, at 6 AM and 6 PM.
Rachel has a Requester 1000 role. Therefore, the DPS knows that Rachel can place an order for herself or another user, and it won’t need DPS approval unless it is over $1,000. However, Rachel is not an Approver and could not be named as a substitute approver if an approver is out of the office.
Rachel’s Access is limited to Procurement Services. Therefore, the DPS knows that Rachel will not be able to see POs owned by people in other departments – Rachel has Access to only one department and has no Approver role so she wouldn’t be included in workflow.
Roles and Access

- Based on information in Rachel’s profile, the DPS knows that they will need to complete the UDX Access Request form to update her role if they need to give Rachel the ability to approve on behalf of an approver who is not available.
- The DPS would also have to complete the UDX Access Request form to update her access if Rachel has the need to view documents outside of Procurement Services (e.g., if she supports departments such as VP Finance or Treasury in any way, node access to the parent node would give Rachel visibility to those users’ orders).
- For more about the UDX Access Request Form, please refer to the guide “Completing the Access Request Form”.

Approvals and Workflow: Determining Approval Responsibility

• While Department Purchasing Specialists cannot see all workflow at once, they can see the steps of workflow for which a specific approver is responsible.
• The DPS can also see whether there are substitutes named on those approval folders.
Alice is responsible for approving at several workflow steps: Automobiles, DPS for Procurement, and one purpose code. She is also the substitute approver for George Walueff on another purpose code.
Approvals and Workflow: Visibility of Pending Approvals

- If Alice were suddenly out sick or unavailable, the DPS would know that unless the workflow step has multiple approvers, requisitions needing approval at those specific workflow steps would stall until a substitute approver is named.
- The DPS would not be able to see the requisitions pending Alice’s approval unless they are within the DPS’s access AND Alice had already assigned herself the requisition.
Searching requisitions with the filter “Pending Approver” filtered to Alice shows no pending requisitions.
However, searching pending requisitions with the **Current Workflow Step** being Commodity Approval and the **commodity** being automobiles shows one pending requisition.
Closer inspection shows that Alice had not yet assigned it to herself, so a substitute approver would be able to be named to claim it.
Other User Search Features

- If you have users who are not receiving notifications or wonder why they cannot do or see something another user can, your visibility to their profile can assist with the explanation.
- You can also see if users have set defaults in their profile or set a different home page to use.
- Additionally, you can search and export user data to organize Requesters for Shoppers, or ensure you have the right ratio of Requesters for Shoppers.
Alice has told her DPS that she is getting too many emails from the system, so the DPS looks to see Alice’s notification preferences.
In the User History section, the DPS can see that Alice herself turned on many of these emails on November 28, 2021, and can guide her back to that area to modify them again.
Any defaults set by the user would be under Default User Settings. The DPS can see that Sam Shopper has two cart assignees so that if one is unavailable, Sam has another Requester who can place the order for him.
Returning to the user search home area, the DPS can filter by department, status, role, and other filters.

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

See also, “Completing the Access Request Form,” “Understanding Access in UD Exchange” “Employee Roles in UD Exchange” and “UDX Profile Settings”

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