Employee Roles in UD Exchange
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- All UD Employees are automatically profiled in UD Exchange via an import of a UD HR list of active employees. Employee information is updated each business day at 6 AM and 6 PM.
- UD Exchange is accessible through UD Single Sign On, so there is no need for employees to create separate log-in credentials.
- Employees are assigned roles in UD Exchange based on various factors including their position at UD, their departmental responsibilities, and training completion.
Shopper

- All employees have the ability to search for goods and services on UD Exchange, fill a Shopping Cart, and create purchase requests.
- Employees that are assigned the Shopper role will then assign their Shopping Cart or purchase request to a UD Exchange Requester to review and submit their order.
- Employees can identify who their Requester should be by contacting their department business administrator.
- *Shopper is the default role for all UD employees.*
Requester

- In UD Exchange, the Requester role is responsible for submitting requisitions into workflow. This may include reviewing Shopping Carts and purchase requests assigned to them by Shoppers.
- This review includes verifying correct shipping information, ensuring that the purchase is for a bona fide business purpose, and ensuring that the accounting information is complete and correct prior to submitting the order.
- Once the review is complete, the Requester then submits the Shopping Cart or purchase request for approval.
Approver

There are multiple types of Approvers in UD Exchange.

- **Cost Object Approver**
  - This employee is listed as the owner of the SpeedType (Purpose Code) that the purchase is being allocated to. These are set up with General Accounting (coa-finance@udel.edu) and may have Primary AND Secondary Approvals.

- **Department Purchasing Specialist**
  - This employee is responsible for reviewing orders that exceed $5,000.00, or orders that exceed a Requester’s authority.

- **Commodity and Grants Approvers**
  - If an order contains a commodity that requires special review (refrigerators, software, etc.) it will be routed to a commodity Approver for review. Similarly, if the purpose code indicates grant review is required, it will route accordingly.

- **Table of Signature Authority**
  - Orders that exceed certain dollar amounts will be routed to UD leadership for additional approval in accordance with the table of signature authority. An exception is contract orders that have already received their approval.

- **Ad Hoc Approver**
  - There may be situations where an employee is not in the standard approval flow for an order, but should review it prior to its approval, for example, a faculty member may want to see all orders that are being requested on their start-up funds by their lab assistants. In this case, the Requester can add the faculty member to the workflow as an Ad Hoc Approver. The individual must have the Approver role in UD Exchange.
Commodity Approval

- Commodity approval is triggered by either Commodity Code or Account Code.
- All commodity codes for goods and services begin with numbers and are based on the UNSPSC code, segment level.
- Commodity codes with special routing have more detailed numbers and must be selected to trigger commodity approval. For example, 23000000 is Industrial Manufacturing & Processing Machinery, but 23261507 is the code for a 3D printing machine, which needs approval by Environmental Health & Safety.
- Some commodity approval is routed by account code, if the account code applies to more than one commodity (such as Capital Equipment).
Commodity Approval
Below are the codes which currently trigger commodity approval:

<table>
<thead>
<tr>
<th>Description</th>
<th>Approver</th>
<th>Code to Trigger</th>
<th>Approval/Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>3D Printers</td>
<td>EHS</td>
<td>CC = 23261507</td>
<td>Approval</td>
</tr>
<tr>
<td>Biocabinet/Hood</td>
<td>Krista Murray</td>
<td>CC = 41103517</td>
<td>Approval</td>
</tr>
<tr>
<td>Capital Equipment</td>
<td>Susan Bledsoe</td>
<td>Account = 153100, 153101, 167900</td>
<td>Approval</td>
</tr>
<tr>
<td>Copiers</td>
<td>Michael Czerepak</td>
<td>CC = 44101500</td>
<td>Approval</td>
</tr>
<tr>
<td>Elec. Generator</td>
<td>William Harris</td>
<td>CC = 26111600</td>
<td>Approval</td>
</tr>
<tr>
<td>Fume Hoods</td>
<td>Brian Miani</td>
<td>CC = 41103502</td>
<td>Approval</td>
</tr>
<tr>
<td>Intrusion Alarms</td>
<td>Mark Carrow/Ron Beaver</td>
<td>CC = 46171604</td>
<td>Approval</td>
</tr>
<tr>
<td>Kitchen / Other Use Refrigerators</td>
<td>Brian Miani</td>
<td>CC = 52141501</td>
<td>Approval</td>
</tr>
<tr>
<td>Lab Use Refrigerators</td>
<td>Brian Miani</td>
<td>CC = 241315XX, 41103000, 422618XX</td>
<td>Approval</td>
</tr>
<tr>
<td>Laser Equipment</td>
<td>William Fendt</td>
<td>CC = 4111XXXX, 42XXXXXX</td>
<td>Approval</td>
</tr>
<tr>
<td>Non-Capital Equipment</td>
<td>Susan Bledsoe</td>
<td>Account = 141244</td>
<td>Notification</td>
</tr>
<tr>
<td>Printing</td>
<td>Michael Czerepak</td>
<td>CC = 73151900 (account = 144300)</td>
<td>Approval</td>
</tr>
<tr>
<td>Radioactive</td>
<td>William Fendt</td>
<td>CC = 26142400, 41106005, 42204XXX</td>
<td>Approval</td>
</tr>
<tr>
<td>Software/Hardware/IT Services</td>
<td>IT PMO Office</td>
<td>All IT commodity codes</td>
<td>Approval</td>
</tr>
<tr>
<td>X-ray Equipment</td>
<td>William Fendt</td>
<td>CC = 422954XX</td>
<td>Approval</td>
</tr>
</tbody>
</table>
Procurement Approval

- Once an order has received all prior approvals, it is routed to Procurement Services where it will be assigned to a Buyer who will perform a final review and dispatch it to the supplier.
- Buyers do not review catalog orders in any amount.
- Buyers approve after the Department Purchasing Specialist but before any approvals for amounts exceeding $100,000 (VP/Dean, EVP/Provost, President).
- Depending on the amount of the requisition, Procurement may have to approve it at multiple levels.
Visual Workflow for Requisitions

- Cost Object Approver
- Department Purchasing Specialist
- Grant (Research Office) Approval
- Commodity Approval

- Procurement
- VP/Dean
- EVP Provost
- President

Ad hoc approvers can be inserted at any step by any approver.
Changing Roles

• Department Purchasing Specialists have access to a form requesting that Procurement change the role of another employee (e.g., Shopper to Requester, or adding the Approver role)

• Training is required for Requesters and DPSes to be added

• Once Procurement approves the form, the role change is complete
Also remember!

• Any user can use any speedtype or work order available in UD Exchange. There is no restriction by role or access, which is why approvals are important.
• Shoppers can do all things Requesters can do except Place Order. If you have shoppers who complete all financials flawlessly and require little review by the Requester, consider elevating them to a Requester role.
• When Shoppers assign carts and search for an assignee, the system will return all users, not just Requesters. For this reason, it is best practice for the department to inform Shoppers of their recommended Requesters. Shoppers can also set their preferred Requester in their profile.
Resources

Procurement Services
procurement@udel.edu

See also, “Completing the Access Request Form”
and “Adding Requesters (Assignees) to your Profile”