Understanding Access in UD Exchange

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What is Access?

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

1. Click on the Profile icon in the top right corner.
2. Click on View My Profile.
3. In the right, click to expand User Roles and Access.
4. Click Access.
Who Else Sees My Documents?

• Your Department ID is established by Human Resources and is visible on your profile.
• Every other employee of that department ID sees documents where you are the “Prepared For” user or PO Owner.
• Additionally, anyone else with Access to that department ID will see documents where you are the “Prepared For” user or PO Owner.
Rachel is an employee of Procurement Services, dept ID 04750.
Rachel's access is limited to 04750.

<table>
<thead>
<tr>
<th>Department Assignments:</th>
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<tr>
<td>PROCUREMENT SERVICES (04750)</td>
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If Rachel clicks on Orders>Search, she will only see documents where the Prepared For user is someone else employed by dept ID 04750.
Dottie has access to multiple departments in her role in VP Finance, including Procurement.
If Dottie clicks on Orders>Search, she will see documents where the Prepared For user is anyone employed by the departments listed in her Access.
Users who have Approved your requisitions or were a participant (such as a Prepared By user) will also continue to have Access to your document by searching, in their Approval history, or the Requisitions on Which I am a Participant Search on the home page, regardless of their HR dept ID.
Why is Access Important?

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

- Access is set up by departments at rollout by the business administrator.
- If someone needs access to other departments, this is best assigned through HR tree nodes.
- Department Purchasing Specialists can request Access changes through the UDX Access Request Form.
- Procurement submits the Access Request with IT, which then applies the node to that user. All departments within that node are imported into the user’s Access settings with the next 6 AM/6 PM data feed.
When departments are set up in PeopleSoft, they are nested within other departments. Often, people with the need to view one additional department have the need to view multiple additional departments in the same area of the University. This is where nodes come into play. Here, 02609 CAS Events is part of 02501 Arts and Sciences.
If Access to node 02501 is requested and granted, the user will have Access to all the documents in the departments nested under 02501.

Some departments exist ONLY as Nodes, these will show in Access as “Node Only”
Department Changes

• The department of the “Prepared For” user is static on the document at the time it was created. If you placed orders while you were employed with Development through March 31, and then left for a position with Athletics beginning April 1, your colleagues in Development will see your orders up until March 31 only.

• For this reason, it is important not to begin working in UD Exchange for your new department before the JED completion sends the new information into UD Exchange – check your profile after the 6 AM/6 PM update to confirm.

• If you do work for your new department before the update is complete, make someone else the PO owner for visibility purposes.
This user’s move from Procurement to Student Financial Services was completed on March 1, and the system updated that evening. The User History shows what changes were made and when. Requisitions this user creates after 5:56 PM on 3/1/22 will be visible to those in SFS, not Procurement.
Other Considerations

• Since the “Prepared For” user/PO Owner dictates access, use this carefully. Also remember, this user is the one who will need to approve any vouchers over $5,000 (or lower, if your department has a lower approval limit).

• The PO Owner can be changed by Procurement, both for approval of vouchers, and visibility of the document if necessary. The owner on requisitions and vouchers cannot be changed after they are complete.

• If your requisition shows only a “Prepared By” user, the “Prepared For” user is the same. The “Prepared For” user can be changed manually on the requisition. The “Prepared By” user cannot be changed – it will be whoever clicks “Place Order” on the requisition.
Other Considerations

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

Procurement Services
procurement@udel.edu

See also, “Completing the UDX Access Request Form”