Troubleshooting Tips

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Modifying Catalog Orders

Some catalog suppliers allow you to return to the cart you assembled on their website and make changes by adding, removing items or quantities, and the links take you to that shortcut.
Modifying Catalog Orders

However, other catalog suppliers do not let you access your cart once it has been brought back into UD Exchange. To remove an item, it can be done in the cart, but any other changes, including increasing quantity of an item in your cart, will have to be modified through a new punchout session.
I added items to my cart, but there is already information or other items in it

Possible causes:

• 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 and it is now your Active Cart.
• 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.
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 either:

- Select the previous items and choose **Remove Selected Items** from the dropdown menu if you no longer want them. Click **Go**.

OR

- Select the previous items and choose **Move to Another Cart** from the dropdown menu. Click **Go**. Note this does not work for punchout catalog items.
The error message says I can’t add something to my cart (“contains a ‘do-not-mix form’”)

Possible causes (see also previous slide):

• Carts can contain a mixture of catalog and non-catalog items, but form requests, such as subawards, non-PO payment requests and waiver of bid requests need their own carts.

• To resolve, get into the habit of fully completing 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.
Go to Shop>My Carts and Orders>View Carts. You have at least one cart there, with one cart indicated as Active and you cannot add a different type of requisition to it.

Click Create Cart. This will become your active cart and you can proceed. However, you may have already lost your punch-out session. Your draft form request should be saved in Orders>Search>Procurement Requests to continue adding to an empty cart.
Another trick that may help is duplicating your browser tab so that you can resolve the cart issue there while keeping your form open.

Then navigate to previous and repeat your steps to Add and Go to Cart.
Alternatively, if you see there’s already something in your cart then instead of “Add and Go to Cart” choose “Add to new Cart” instead. You will have to access this form from within your draft carts.
I submitted my shopping 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 include:
  – Combo edit, invalid commodity code, expired project date, supplier issues, budget restrictions.
To identify why a shopping cart was returned to your draft carts, open the requisition and click **History**.

Review the **History Window** to identify the issue that needs to be addressed. The **History Window** will contain a date stamped record of all approval and return steps that were performed by the system or manual approvers.
I submitted my shopping cart, but it’s back in my draft carts (continued)

Helpful tips and tricks:

• If the History includes verbiage that says “Line: 1, Split: 1” it is a PR validation error from PeopleSoft. The language after that will provide guidance as to the nature of the error, such as different project value found or supplier not active, or work order or speedtype not active. PR Validation occurs at the start and end of every requisition to confirm that everything relating to the funding source and supplier is valid before placing the order.
I submitted my shopping cart, but it’s back in my draft carts (continued)

Helpful tips and tricks, continued:

• If the History tells you to check the project dates associated with the speedtype used, the project may not allow this type of purchase at this time. If this is in error, tag Procurement Help in a comment and we will investigate.

• You may also get an auto-return if you attempt to use the wrong commodity code on your requisition. NP codes can only be used on Non-PO Payment Requests, and numerical codes on purchase orders.

• Subawards must have the multi-invoice/payment box checked or it will autoreturn.
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 is purchased in a different area of UD Exchange.

**Solution:**
- Revisit the Non-PO Payment Matrix and Guided Buying references (see next page)
- Think about what the item *IS*, not what it is *FOR*
I changed the commodity code, but I 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 does not match the account code you want. Remember, account code use is regulated in UD Exchange with new codes created by VP Finance and other codes restricted to where they should be used.
After searching for and selecting the correct commodity code for the item, click **Save** before clicking the blue **Select from all values** link to search for the correct account code.
Also remember that the Commodity Code-Account Code Crosswalk is available for download from the Shopping Home Page. For NP-codes, download the Non-PO Payment Matrix.

If you still think an account code is missing or incorrect, email procurement@udel.edu and we will consult with VP Finance to see if it should be added.
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 coa-finance@udel.edu in the Controller’s Office for assistance in adding a primary COA or confirming that it 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-added in new punchout sessions.
- If you want to withdraw to add new information, consider just adding a comment with that new information.
- If you want to withdraw to change information, such as a funding source, shipto address, etc., best practice is to tag the current approver in a comment requesting they return it to you.
- Procurement Help can also return if tagged in a comment, but this must be part of the requisition for audit purposes.
Withdrawing a Requisition

As long as the Requisition is still in workflow, the submitter can withdraw it from Document Actions. However, once Requisition has completed workflow and a PO has been created, the requisition cannot be withdrawn.
Requesting Return of a Requisition

If the Requisition is in workflow and the submitter wants to make a substantial change, it is most effective to request the Requisition be returned. Choose Add Comment, tag the relevant approver or Procurement Help, and request the return.

You will have to look at PR Approvals to determine the current approver and enter them manually.
I want to close a purchase order

• Purchase orders will auto-close when they have been fully invoiced. Orders “soft close” for a period of time during which they can be reopened to issue credits, after which they move to fully closed.

• 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. As always, all modifications to a requisition, purchase order or invoice must be requested from within UDX for audit purposes – we cannot change any document as a result of a help ticket sent to procurement@udel.edu.

• This is most frequently used for a blanket purchase order. Standard POs should have lines canceled if they are not going to be invoiced.
Choose Add Comment from the dropdown menu in that purchase order and click Go.
1. Choose Add Email Recipient
2. Search on last name Help
3. Select Procurement Help from the available options.
1. Type a comment requesting closure of the purchase order once the Procurement Help email address is checked.
2. Click Add Comment.
I have multiple invoices on 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 then allow multiple invoices against that line as an amount-only (declining) purchase order.
• If you do not set up a multi-invoice/payment PO but need to pay multiple invoices against a quantity of one on one line, **there is no easy fix for this**. We recommend a change request to break out each invoice amount onto its own line. Once the line is invoiced at any dollar amount, it cannot be modified further.
I can’t find my order!

• Your home screen has quite an array of saved searches, including “My Requisitions” and “My Purchase Orders.”
• These are the documents on which you are the owner, or “Prepared For” user. If you are a Requester processing a cart for a Shopper, they remain the PO owner and they will see the order on THEIR home screen.
• The “Prepared By” is always the one who places the order and cannot be manually changed. The “Prepared For” can be changed and is really the one who is the driving force behind the order and who will know whether it’s been fulfilled.
• 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.
Scroll down the Shopping Home Page to “Requisitions on Which I am Participant.” Here you will see requisitions which involve you in some way—as approver, or in another capacity.

This requisition was initiated by this user but has a different “Prepared For” and “Prepared By” user.

Note that if they are in a department to which you do not have access, you may not be able to view the requisition you created.
My screen doesn’t look like yours!!

- All our training guides are currently created in the Classic User Interface (“UI”). However, in July, UD Exchange will be updated to a New User Interface, which affects eProcurement (req and PO) and AP (voucher) screens.
- Beginning in May, 2021, we have begun to update all our materials and videos for the new interface.
- Suppliers, profile and contracts screens will look the same.
- Users can turn on this new interface at any time and may have done it accidentally.
- Also, the color scheme and logo is different in the Test site (which will have the new UI on June 25) than in Production. For continuity, all new materials will be done in the Test site.
To switch back and forth between the Classic and New UI, click the toggle on the bottom right of your screen.
Using the dialog box, choose the “New Experience” or “Classic Experience” as you desire.
Resources

Do you have suggestions for additions to this guide? Please email us at procurement@udel.edu

Procurement Services