

Onboarding and Offboarding Employee Tasks (Procurement Services)

When onboarding or offboarding a new employee, there are certain tasks that happen automatically in Procurement Services, and others that the department will need to take. This serves as a checklist:

Onboarding

Once the JED is fully approved in HR, and the employee's start date has arrived, they will be imported into UD Exchange and Concur as users that evening. Note that both must apply; if the employee's start date has passed but their JED is still outstanding, they will not yet have access to either system. The exceptions are for salary admin plans 300 and 219; these types of employees are not paid by UD and are not automatically fed into either system. *NOTE: It is best practice to review these items for employees new to your department as well.*

- The employee will automatically load to UD Exchange as a Shopper, and, if they supervise employees, will also have an Approver role. **Determine whether the employee will need to submit requests as a Requester or act as a Department Purchasing Specialist.** If so, guide them to the [ConnectingU training materials](#) to complete the appropriate training. Once training is complete, have a DPS submit the UDX Access Request form to update the role. If employee needs to be made part of workflow, an additional form will be needed to update workflow.
- Determine whether the employee will need a p-card (credit card or declining balance card).** If the employee will only be traveling they have the option of having a p-card or submitting out of pocket expenses for reimbursement. If the employee will not be traveling but will be purchasing goods or making other non-travel related purchases (such as at local restaurants or stores), they will be unable to submit for reimbursement and will need a card. If the employee will only be ordering office supplies or lab supplies, a p-card is generally not needed as those purchases should be made in UD Exchange. If a card is needed, the employee should submit a Card Services request in Concur. Remember that undergraduate employees may not have p-cards.
- If the employee requires delegates** for travel arrangements, requests, or expense, have them set it up in their Concur profile.
- If the employee requires a reporting delegate**, send that request to procurement@udel.edu with that employee copied. Remember, only two reporting delegates can be set up per person.
- If the employee will have approval authority for a purpose code**, send that information to coa-finance@udel.edu. Primary approvers will need to know how to approve in both Concur and UDX.

Offboarding

Once the JED for termination is fully approved in HR, they will be imported into UD Exchange and Concur as inactive users that evening. If the employee has an extended termination date long after they will stop working, please contact HR about the EMPL_ID LCK ability which will inactivate them in UD systems prior to their final working day at UD.

If the employee has a p-card, email creditcard@udel.edu or procurement@udel.edu about disabling it. The employee may destroy the card or take it to you for destruction; Procurement does not need it back. Ensure that the employee has allocated all card charges in Concur. Alternatively, if the card was used close to the departure date, collect the receipts from the employee and ensure they have an Expense Delegate set up in their Concur profile. If the employee departed without setting up an Expense Delegate, email procurement@udel.edu to name an Expense Delegate to allocate their final expenses.

If the employee is the PO Owner on any UDX purchase orders that are not in closed or soft-closed status, consider naming a new PO Owner. This would be necessary if there are or will be any vouchers requiring approval (usually \$5,000 or more, although your department may have lower limits). To do so, place a comment on the PO tagging Procurement Help and ask the PO owner be changed to whomever you wish to name. You may also wish to check to see whether there are any pending vouchers with that employee as Voucher Owner. Note that you will need to either be in the same department as the employee or have that employee's department in your list of Access in UD Exchange to see these documents.

If the employee is a primary or secondary COA on any purpose codes, contact coa-finance@udel.edu to name a new COA on those codes. *A substitute approver for that employee will only be effective until the employee's status in the system changes to inactive.*

If the employee is in approval workflow in UD Exchange other than as a COA, have your Department Purchasing Specialist submit the [UDX Access Request form](#) to Update Workflow. They will need to identify what workflow they want to change and whether they are replacing that approver with someone else. An easy way to determine this is for the DPS to view the employee's user profile in UDX, and under "Ordering and Approval Settings" click on "View Assigned Approval Folders." If the employee has any approval folders in any type of workflow other than "My [PR, Voucher, etc.] Approvals" then a change will be needed. Contact procurement@udel.edu if you need help determining whether other approvers on that step exist. *A substitute approver for that employee will only be effective until the employee's status in the system changes to inactive.*

Changing Departments

Once the JED for a department change is fully approved in HR, they will be imported into UD Exchange and Concur with updated information that evening. The feed will include their updated department, unit, and supervisor. The new department should also review the items under "Onboarding Employees" to evaluate whether changes are needed to roles or other existing settings as part of their new responsibilities.

If the employee has a p-card, they do not need for the card to be closed and a new card reissued. Please simply email creditcard@udel.edu or procurement@udel.edu to let the card team know that the employee is working in a different department so that any reports generated from Works (e.g., list of active cardholders with purchase limits) are accurate. If the spend profile or default purpose code need to be updated, please have the cardholder submit the UD Credit Card Services Request in Concur with "Update Existing Card" as the request purpose and provide the new details.

If the employee is the PO owner on any UDX purchase orders that are not in closed or soft-closed status, please determine whether the PO should follow the employee or stay with the department. If no change is made, the employee will still need to approve vouchers over the department threshold (usually \$5,000) and the PO will still be visible to other employees of the department where the employee worked when the PO was set up. If the employee should not be the person approving the vouchers, please place a comment on the PO tagging Procurement Help to name a new PO owner for approval of new vouchers. If the employee should take the PO with them, for instance the employee began working for the new department before the JED was complete, then an administrator will have to update the department by changing the PO owner to the existing PO owner, updating the department and its access. This situation is unusual and should generally be unnecessary.

If the employee is in approval workflow in UD Exchange they will probably need to be replaced by someone else in the department. An easy way to determine this is for the DPS to view the employee's user profile in UDX, and under "Ordering and Approval Settings" click on "View Assigned Approval Folders." If the employee has any approval folders in any type of workflow other than "My [PR, Voucher, etc.] Approvals" then a change will be needed. Name a new primary or secondary COA for any purpose codes by contacting coa-finance@udel.edu. If there is other workflow, the DPS will need to submit the UDX Access Request form to change workflow and indicate the workflow step and whether they want this approver removed, or replaced with someone else. Contact procurement@udel.edu if you need help determining whether other approvers on that step exist.