

UNIVERSITY OF DELAWARE[®] EXCHANGE

25.1 Release Changes

3/10/25

These changes will be live/visible in UDX on 3/16/25

Table of Contents

Slide Content	#
25.1 Release Changes	<u>2</u>
PDF Attachments	<u>3</u>
Approval Changes	<u>5</u>
Enabled for Contracts	<u>10</u>
Funding Source Search	<u>13</u>



25.1 Release Changes

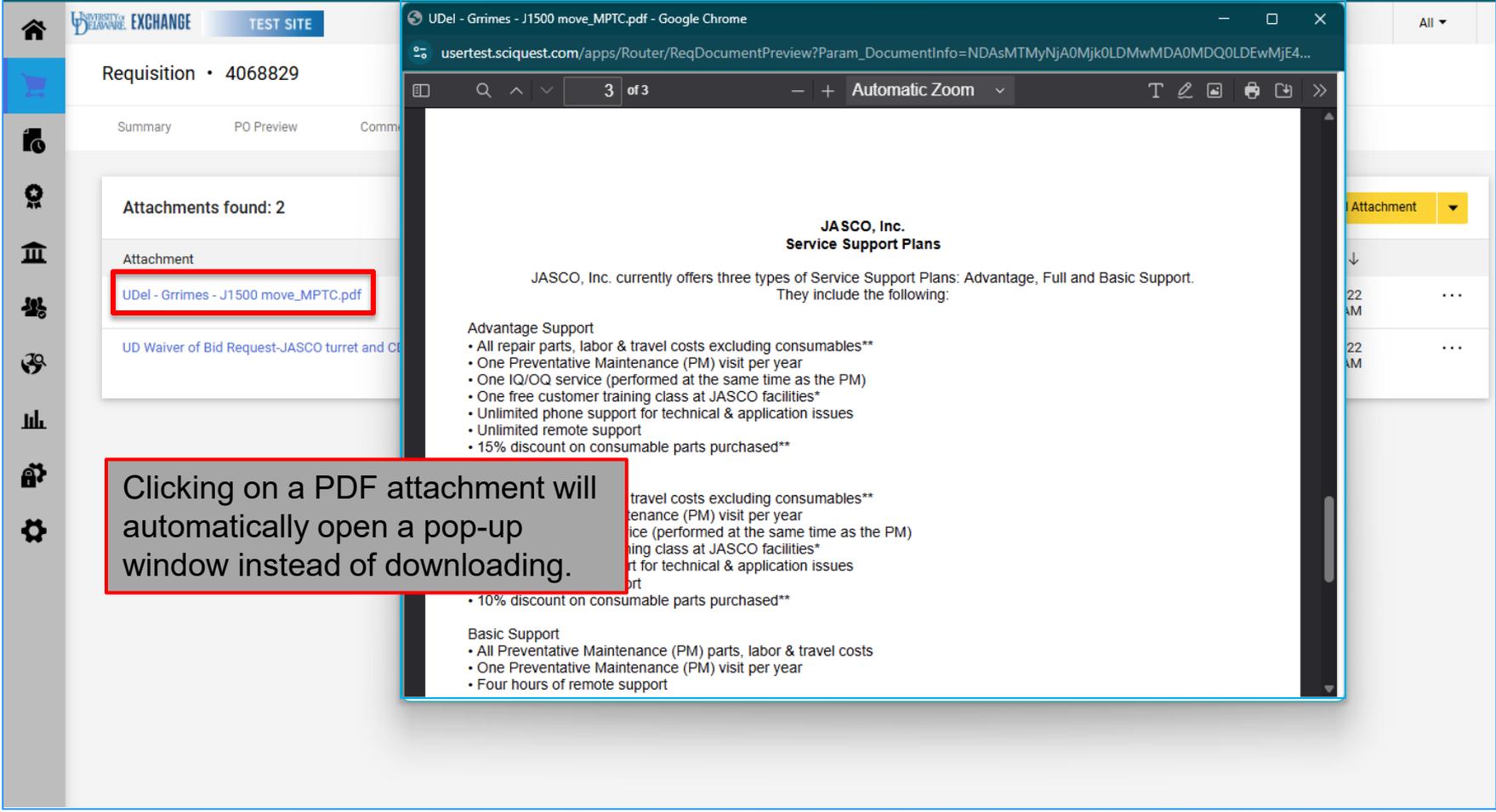
- Jaggaer, the host of UD Exchange, releases three annual updates to their system
- Update releases happen first in UIT, the UDX Test site for review and validation, and then take place in the UDX Live Production site a few weeks later.
- The following slides describe the updates for the 25.1 release.
- Updates released to UIT on Sunday, February 16th and will release to the UDX Production site on Sunday, March 16th.
- **Please note that UD Exchange will be unavailable beginning at 8PM on Friday, March 14th while the update is being deployed.**



PDF Attachments

- Previously, PDF Attachments would either download or open as an additional tab, depending on your web browser's settings.
- With this release, PDF Attachments will automatically open in a PDF Viewer, which will be in a pop-up form.
- This is for Requisitions, POs, Form Requests, Vouchers, etc.





Approval Changes

- Users can now add multiple Approvers to a single Ad-hoc step.
 - Only 1 of the approvers at a step will need to approve.
- Users can also add multiple Ad-hoc Approval steps to the workflow.
 - Please leave naming of the approval steps to “Ad-Hoc #”
 - **Be aware that multiple Ad-hoc steps can cause delays in PO creation. Please only add multiple steps when necessary.**
 - **This feature is only being added to the Requisition workflow with 25.1.**





Requisition • 196170509

Summary PO Preview

General

Cart Name: 2025-01-09 702745

Description: *no value*

Priority: Normal

Prepared by: Caitlin Taype Nunura

Prepared for: Caitlin Taype Nunura

Department: PROCUREMENT SERVICES (04750)

Purchasing: UOD01

Business Unit: UNIVERSITY OF DELAWARE

Shipping address: STC15 code
UNIVERSITY OF DELAWARE
Attn: Caitlin Taype Nunura
Room: 123
550 SOUTH COLLEGE AVE
550 SOUTH COLLEGE AVE
NEWARK, DE 19713
United States

UD Internal Fields

Ad-Hoc Approver: **Dottie DPS** [Change](#)

Multi-Invoice/Payment:

After-The-Fact Purchase:

Technology Request #: *no value*

Waiver of Bid:

Buyer Information

Currently, you can only add 1 Ad-hoc Approver to 1 Ad-hoc Approver step

Ad-Hoc Approver

After: Buyer Routing

Step Name: Ad-hoc 1

Ad-Hoc Approver: DPS, Dottie

Comments:

1000 characters remaining

Required

Summary

Draft

Total (1.00 USD)

Shipping, Handling, and Tax charges are calculated and merged by each supplier. The values shown here are for information purposes, budget checking, and workflow approvals.

total	1.00
total	1.00

What's next for my order?

Next Step: COA Approver

Approver: Drag, Amy

Workflow: ...

Show skipped steps

Draft
Active
Caitlin Taype Nunura

PR Validation
Future

Ad-Hoc Approver

After Step: COA Approver

Step Name: Ad-hoc 1

Ad-Hoc Approvers: Approver, Alex X, Approver, Alice X

Comments: Alice or Alex please approve. (970 characters remaining)

Save Close

General

Cart Name: 2025-03-05 ctntest 01

Description: no value

Priority: Normal

Prepared by: Caitlin Taype Nunura

Prepared for: Caitie Taype Nunura Tester

Department: RESEARCH OFFICE (01551)

Ad-Hoc Approver: 1 Add | Edit | Delete

Multi- X

With this new update, you can add multiple approvers to 1 Ad-Hoc step. No matter how many approvers you add to an ad-hoc step, it will only require 1 to approve.

Once the first ad-hoc step is saved, you can either **Edit** the existing Ad-hoc you added or **Add** additional Ad-hoc steps.



Ad-Hoc Approver

After Step

Step Name

Ad-Hoc Approvers

Comments

1000 characters remaining

★ Required Save Close

Ad-Hoc Approver

After Step

Step Name

Ad-Hoc Approvers

Comments

976 characters remaining

★ Required Save Close

If you click **Add**, you will see the previous Ad-hoc step listed as an After Step selection.



Delete Ad-Hoc Step

Ad-Hoc Step

Ad-hoc 2 ▼
Ad-hoc 1
Ad-hoc 2

Save Close

Edit Ad-Hoc Step

Ad-Hoc Step

Ad-hoc 2 ▼
Ad-hoc 1
Ad-hoc 2

Step Name *

Ad-Hoc Approvers *

Requester, Robert X

Comments

Bob, please also approve

976 characters remaining

* Required

Save Close

If you have multiple ad-hoc steps and click either **Edit** or **Delete**, you will need to select which step your changes are for.



Enabled for Contracts

- With this release, there is a new field on supplier profiles, called “Enabled for Contracts”.
- This is a visible system feature that is automatically added to supplier profiles, but is not currently being utilized by UD.
- Please disregard when visibly searching suppliers, it will not affect Contracts or Requisitions at this time.



CASSIDY PAINTING

Supplier 360

Supplier

Contracts

Supplier Details



 In Network

 Active

 Enabled for Contracts

 Non-Catalog 

CASSIDY PAINTING

Legal Name CASSIDY PAINTING

DBA CASSIDY PAINTING

Aliases

Supplier No. 0000019062

Withholding Status 0000019062/WH=N

Date of Last Order 2/28/2025

Registration Status Approved

Business Description



Select Primary Second Party ✕

Search for Contract Party *(Step 1 of 3)*

Contract Party/Supplier [Hide Options](#)

Contract Party Type

Type ▾

Enabled for Contracts ▾

Shopping/AP Status ▾

Class ▾

[Clear](#)

In C+, this will now be a searchable field for adding a Second Party and will automatically be set to "All".



Funding Source Search

- Previously, the funding source could only be found by clicking the magnifying glass, a pop-up would appear, and the user would be able to search for their Funding Source.
- With this release, the user can type into the field either the Funding Source's value or description without clicking into the magnifying glass.
- If you click the magnifying glass to search, the search bar has been updated to 1 search bar for both values and descriptions.



Edit Accounting Codes

Accounting Codes Standard Entry

Work Order Number	SpeedType ★	Purpose	Fun
N/A	athl	No Value	N

- ATHL112191 - ATHLETIC TRAINING
- ATHL412196 - ATHLETIC FUNDRAISING
- ATHL112157 - STUDENT-ATHLETE DEVELOPMENT

★ Required fields

Search 109 More

Edit Accounting Codes

Accounting Codes Standard Entry

Work Order Number	SpeedType ★	Purpose	Fun
N/A	act	No Value	N

- PROV112123 - CULTURAL ACTIVITIES
- STGP912642 - RIOT ACT
- ALUM112114 - HOMECOMING ACTIVITIES

★ Required fields

Search 18 More

With these changes, you can type directly on the line without clicking the magnifying glass to search. You can type either the Funding Source's number or the description.



Custom Field Search ✕

🔍 Clear All Filters

Page 1 of 4 1-10 of 33 Results 10 Per Page ▾

Value	Description	
MUSC110000	MUSIC	+
MUSC112311	GTA MUSIC	+
STGP913515	MUSICA LATINA	+
STGP913532	MUSIC MAKERS	+
MUSC175138	MUSIC EQUIP REPLACEMENT	+
MUSC412111	DISCRT FND MUSIC	+
MUSC412119	DELOACHE MUSIC AWARD	+
MUSC412139	MUSIC STUDENT TRAVEL	+
MUSC412147	DF-MUSIC EDUCATION	+
STGP913149	THE MUSIC COLLECTIVE	+

Page 1 of 4 1-10 of 33 Results 10 Per Page ▾

Cancel

If you click the magnifying glass to search your funding source, you can either type the Value or Description into the single search field.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)

