Completing the Access Request Form
FOR DEPARTMENT PURCHASING SPECIALISTS
Revised 06/02/2023
About the UDX Access Request form

- Only Department Purchasing Specialists have access to the UDX Access Request form on the UDX home page.

- A DPS can use the UDX Access Request Form to request the following updates for themselves or other employees:
  - Role Updates
  - Access (visibility) Updates
  - Workflow Updates
  - Emergency Substitute Approvers
Terms & Definitions

**USER ROLE** is the term used to indicate what a user can **DO** in UDX.
- The default role assigned to all employees in UDX is the Shopper role.
- If a user is assigned a Requester role, they can **submit** requisitions in the system.
- Once the Requester role is activated, the Shopper role is removed from their profile, but they can still do all the things that a Shopper can do!
- Approver and Department Purchasing Specialist roles can augment either a Shopper or Requester role.

**USER ACCESS** is the term relating to the **VISIBILITY** of requisitions and POs in UDX.
- Default document access is based on the **Prepared For** user’s Dept ID.
- Employees automatically have access to requisitions and POs owned by other employees who share their HR Dept ID.
Important to Know

If you are requesting to add the Requester or DPS role to an employee’s profile:

• The employee must complete required training in ConnectingU.
• The required training for the Requester role will ensure employees have the essential knowledge needed to submit requisitions.
• The DPS role acts as the “named others,” approving any requisitions over $5,000. Department Chairs have the option to, but are not required to, act as financial approvers. A DPS can stand in for them in UDX as a “named other” as described in the Table of Authority.

Employees have default access to view all requisitions and POs related to their HR department.

• Employees changing departments will automatically be removed from accessing their previous department’s documents and will automatically have access to documents for their new department.
• There is no need to request default access for an employee for their new HR department.
• Additional department access can be granted based on Dept ID for employees who support multiple departments.
Completing the Access Request Form

All requests using this form begin the same way.
On your **Shopping Home Page**, find and select the **UDX Access Request** tile in the **Procurement Forms** section of the **Catalog & Forms Showcase**.

This tile will not be visible to anyone who does not have the DPS Role!
Help links and basic guidance are provided on the Instructions page. Click Next.
Enter your own name in **Submitter Info**. Click **Next**.
What type of update are you requesting?

The UDX Access Request Form can be used for four different scenarios:

• Making changes to the Role(s) of another user (proceed to slide 9)
• Making changes to the Access of another user (proceed to slide 17)
• Making changes to Workflow (proceed to slide 21)
• Naming an Emergency Substitute Approver in a situation when an Approver does not have the capacity to do so for themselves (proceed to slide 30)
Requesting a Role Update

• All employees are granted the default Shopper role, but the need to expand what they can DO in UDX may change over time.
• Employees with the DPS role in UDX can request additional roles for other users.
• To complete the UDX Access Request form for a Role Update, you will need the employee’s first and last name, department name, email address, and UD employee ID number.
• The user must have completed required training in ConnectingU if you are requesting the Requester or DPS roles for them.
Choose **Update User Role** from the **Type of Change** menu.
In the **Role Requested** section, select the new role you want to assign to the employee.

NOTE: All employees are automatically assigned a default **Shopper** Role. Individuals who are primary COA on at least one purpose code or supervise at least one employee also automatically have an **Approver** role.

Whenever you see the ? icon, help text is available.
If you choose **Requester**, you will need to select a dollar level and the date the employee completed Requester training in ConnectingU.

The Requester role will **replace** the Shopper role in the employee’s profile.

Requesters can submit orders for any dollar amount. This is their dollar limit for their orders require only COA Approval. Orders submitted over this dollar amount will also require DPS Approval.

This field will only show if you are adding the DPS or Requester role.
If you choose **Approver**, you only need to enter comments as to why you are requesting the role.

The Approver role will **augment** the Shopper or Requester role in the employee’s profile. Note: A DPS is a type of approver so the user does not need an additional Approver role if they already have a DPS role.

Giving the Approver role only adds the abilities of the role. It does not assign them to any approval workflow steps. If approval workflow should change, please submit an additional UDX Access Request form to update workflow. Please do not enter workflow requests in the Comments of a Role Update request.
If you choose **Department Purchasing Specialist**, you will need to enter the date the employee completed DPS training in ConnectingU and enter comments as to why you are requesting the role.

The DPS role will **augment** any other role.

This field will only show if you are adding the DPS or Requester role.

Giving the DPS role only adds the abilities of the role. It does not assign them to any approval workflow steps. If approval workflow should change, please submit an additional UDX Access Request form to update workflow. Please do not enter workflow requests in the Comments of a Role Update request.
If you choose **Other**, we will require more information about the other role requested.

**Some examples:**
- Remove a Requester role and change the user to a Shopper with no ability to submit an order.
- For subaward processing offices, add the AP Processor role in order to enter invoices against subawards.
- Request the Auditor role for positions at UD that require it (e.g., Internal Audit, Research Office, etc.).
- Create a profile for non-employee shoppers.

For mass import of users, such as a class of undergraduate shoppers who need to be able to assign carts to UD staff, use the template provided.
For all types of role updates, you will need to complete the information about the user to whom the change applies. All starred fields are required and the DPS submitting the form can obtain this information from the employee’s UDX profile.

When complete, click Next and proceed to slide 39.
Requesting Access Updates

- By default, each user has access (visibility) to the requisitions and POs where the Prepared For user (or PO Owner) is also in their HR Dept ID.
- Approvers can also view requisitions that they approved in workflow.
- If a user needs access to purchasing activity in other Dept IDs, such as administrative staff in centralized departments, an update to access is required.
- Every Dept ID at UD is part of a tree node. If the tree node is known – for instance, node 02500 for the College of Arts and Sciences, which includes every Dept ID in the college – this will simplify the request.
Choose Update Access (Visibility) from the Type of Change menu.
In the **Access Requested** box, you can list specific Dept ID numbers needed.

If the user needs access to multiple Dept IDs, such as all departments in a college, please complete the **Access Node** field.

Please add a **Comment** explaining why the user needs expanded access.
For access updates, you will need to complete the information about the user to whom the change applies. All starred fields are required and the DPS submitting the form can obtain this information from the employee’s UDX profile.

When complete, click Next and proceed to slide 39.
Requesting Changes to Workflow

• Approval Workflow determines which Approvers documents route to in UDX.
• Workflow includes the following:
  – Misc. Department Approval – an optional step for department-specific workflow
  – Department Purchasing Specialist – approvals based on the dept ID associated with the speedtype(s) used for payment
  – Commodity Approval (involving specific commodities)
  – Grant Approval (involving the Research Office)
• Please note that COA Approvers imported via a file maintained by the Controller’s Office. Any changes that need to be made to COA purpose code owners for approval routing should be sent to coa-finance@udel.edu, not on a UDX Access Request form.
Choose Update Workflow from the Type of Change menu.
From the **Workflow Change Step** menu, select the step you need to update. It should only be a step your department is responsible for approving. E.g., a college should not be trying to edit the Grant Approval step).
If you choose a workflow step that is department-dependent, you will be asked to indicate the Workflow dept ID(s) it applies to. Please provide the number rather than the name of the department(s).
For workflow changes other than on the DPS step, you will be asked if a change is necessary to the approver(s). If so, additional fields will show at the bottom of the form (see slide 28).
In the **Workflow Detail** field, please be as specific as possible about the workflow changes needed, *especially* if you are requesting that new workflow be created.

When requesting new workflow, consider: dollar threshold, approval based on user or funding source, and triggers (such as commodity codes).

On multi-line boxes, you can expand the field by dragging in the bottom right corner.
Multi-line text boxes are limited to 2000 characters.

Please use the **Comments** box for any other details we may need to know if the information did not fully fit into the other box.
1. For all workflow requests, you will have to complete the name of the department and dept ID this affects.

2. If you checked Additional or Replacement Approver, you will have to name the new approver.

These fields will not show on DPS changes because those approvers MUST have a DPS role.
Depending on the selections on the form, required fields to complete may change.

Remember, any fields marked with a star are required in order to proceed with the form.

When complete, click **Next** and proceed to slide 39.
Naming Emergency Substitute Approvers

- Ideally, workflow moves quickly because Approvers take prompt action.
- When Approvers are scheduled to be out of the office, they can select a substitute approver in their UDX profile in advance so that workflow will not stall.
- Occasionally, Approvers are unexpectedly unavailable, such as in medical emergencies. In those cases, this form can be used by a DPS to assign a substitute approver while retaining an audit trail.
Choose Name Emergency Substitute Approver from the Type of Change menu.
Enter the **Substitute approver circumstance** precipitating the need, explaining why the Approver cannot set their own substitute.
In the **Substitute approver types** section, select whether you want the substitute to approve requisitions, vouchers, or both.
Indicate whether there should be an **End date for substitution**.
Did the approver go on vacation for the week and forget to set the substitute?
Or is there a medical emergency and you don’t know when the approver will be back?

If you select “yes” to an **end date**, enter the date. The change will take effect at 12am on the day you select, so if the substitution should run through Friday, enter the Saturday afterward.
In the **Change Requester For** section, you will be asked for information related to the employee who needs the substitute.
In the **Substitute Approver** section, you will be asked for information related to the employee who will serve as the substitute.
If the substitute needs to approve requisitions, they will need a role that allows them to do so (Approver or DPS). Please check their user profile in UDX to confirm they have this before completing the form.

Any user can approve vouchers, so this question will not show if only vouchers are checked.

Confirm the substitute’s role, click **Next** and **proceed to slide 39**.
Finalizing the UDX Access Request Form
Do not add any comments to the **Purchasing Use Only** Section, simply click **Next** again.

Procurement Staff may make comments in this field as your request is reviewed.
In the **Review and Submit** section, click **Submit**.
Click Yes to confirm that you want to submit the form.
Click on Form Approvals to view the approval status of the form.

Once the form has been marked approved, the changes will have been made, but please note that roles and access changes update in the system twice daily at 6 AM and 6 PM on business days only.
If there are questions about the request or clarification is needed, a discussion can be started by either Procurement or the submitting DPS. You will receive an email notification if a new comment is added to the thread.
To see your previous requests, including drafts, navigate to **Orders>Search>Procurement Requests** then click on the linked form name.
If you wish to delete a *draft*, choose **Discard Request** from the **Request Actions** menu.

There is not currently an option to delete *returned* requests, only *draft* requests.
Please remember!

- User information for both UD Exchange is imported from HR daily. Procurement does not manually add users. Changes run through these feeds at 6 AM and 6 PM. Approved role and access changes will be reflected in UDX at those times.
- COA Approvers are imported from PeopleSoft and updated every two hours during business hours; COA changes can only be made with General Accounting (coa-finance@udel.edu)
- Approver roles are automatically assigned to employees based on their supervisor and/or COA status, but a user with an Approver role also needs something specifically to route to them (therefore, we generally do not remove Approver roles from profiles)
- If a user moves from one department of the University to another, their access will change appropriately, but roles will stay the same, so review the profiles of new hires closely.

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Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Employee Roles in UD Exchange
• Finding Users and User Information in UD Exchange
• Understanding Access in UD Exchange