Completing the Access Request Form

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What’s different in UD Exchange?

For use only by trained users

In Webforms, anyone could submit a requisition, whether they knew how to do so or not, taking time of approvers to review and reject if done incorrectly.

In UD Exchange, training before assigning the Requester role will ensure users have the essential knowledge needed to submit requisitions.

Table of Authority Approvals

Previously, approvals over $5,000 routed to “Department Chairs and named others,” maintained in the Table of Authority by Office of General Counsel.

In UD Exchange, the (Department) Purchasing Specialist 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.
What’s different in UD Exchange?

Access to requisitions based on Dept ID

- In Webforms, any user on the chain would have access to the webform if added by someone with visibility to the webform. Users changing departments have to be manually added or removed from webforms.

- In UD Exchange, all users have access to view requisitions related to their department. Additional access can be granted based on Dept ID. Users changing departments will automatically be removed from accessing their previous department’s requisitions and will automatically have access to requisitions in their new department.
Definitions

• **User roles** – the terms indicating what a user can do in UD Exchange. All users are Shoppers (can add items to a requisition) as default. If made a Requester (and can *submit* a requisition), the Shopper role is removed. Approver and Department Purchasing Specialist roles can augment either a Shopper or Requester role.

• **User Access** – the term relating to visibility of requisitions based on the Prepared For user’s dept ID. Each user automatically has access to requisitions owned by others who share their HR dept ID. NOTE: Changing the “Prepared For” user changes the Access, since that user’s department identity is what drives visibility.
Completing the Form

All requests using this form begin the same way.
From your **Shopping Home Page**, find and click the **UD Access Request** tile in the **Procurement Forms** section.

This tile will not be visible to anyone who does not have the Purchasing Specialist Role!
Links and basic directions are shown at the beginning of the form.
Enter your own name in **Submitter Information**. Click **Next**.
UDX Access Request Form

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

– Making changes to the Role(s) of another user (see slide 9)
– Making changes to the Access of another user (see slide 17)
– Making changes to Workflow (see slide 21)
– Naming a substitute approver in an emergency situation, meaning, when the approver does not have the capacity to do so for themselves (see slide 30)
Changes to Roles

- User roles are initially established when each department begins using UD Exchange, but may change over time.
- Users with the Department Purchasing Specialist role in UD Exchange can request roles and levels of access for other users.
- To complete the form, you will need the user’s first and last name, department name, email address, and UD employee ID number.
- The user will have to have completed formal training if you are requesting Requester or Department Purchasing Specialist roles for them.
In the **Type of Change** question, choose **Update User Role.**
Here you will select the new role you want for the user in question.

NOTE: All users are loaded to UDX with a **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 have to enter the dollar level for that Requester, and the date on which the user completed Requester training in ConnectingU.

The Requester role will **replace** the Shopper role.

Requesters can submit for any dollar amount. This is the limit that requires only a COA approval. Submissions over this dollar amount must also be approved by the DPS.

This field will only show if you are adding DPS or Requester access.
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.
If you choose **Department Purchasing Specialist**, you will have to enter the date on which the user completed Requester training in ConnectingU.

The DPS role will augment any other role. The DPS is another kind of approver so the user does not need an approver role in addition to a DPS role.

Giving the DPS role only adds the abilities of the role. It does not change approvers in workflow. If workflow should change, please submit a new form to update workflow.
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.)
- Add 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 information can be obtained from their UDX profile.

When complete, click Next and proceed to slide 38.
Changes to Access

- By default, each user has Access (visibility) to the POs where the Prepared For user (or PO Owner) is also in their HR dept ID.
- Approvers also can 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 – a change 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.
In the **Type of Change** question, choose **Update Access (Visibility)**.
If you choose **Add User Access**, supply detail in the **Access Requested** box. If applicable, list specific dept ID numbers.

Ideally, provide the access node if known.
For user Role and Access updates, you will also be required to enter the information about the employee affected by the change. Please complete all fields to ensure that we are updating the right user as many users have similar names to others.

As a DPS, you have the ability to look up any user to find their HR dept ID and Employee ID in UD Exchange.

When complete, click Next and proceed to slide 38.
Changes to Workflow

- Workflow was established by departments at the time they began using UD Exchange.
- 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)
In the **Type of Change** question, choose **Update Workflow**.
Next, choose the Workflow Step you wish to change. 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 which dept ID(s) it applies to. If possible, provide the number rather than the name of the department(s).
For workflow steps other than 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 (see slide 28).
Please be as specific as possible about the workflow, especially if it does not already exist. Consider: dollar threshold, approval based on user or funding source, and trigger (such as commodity code).

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 detail we may need to know or if the information did not fully fit into the other box. The Comments box is available on all four change types.
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, fields to complete may change. Again, any fields marked with a star are required in order to proceed with the form.

When complete, click Next and proceed to slide 38.
Emergency Substitute Approvers

- Ideally, workflow moves quickly because approvers take prompt action.
- When approvers are unavailable, they name a substitute approver in advance so that workflow will not stall.
- Occasionally, approvers are unexpectedly unavailable, such as medical emergencies. In those cases, this form can be used for the department to assign a substitute approver while retaining an audit trail.
In the Type of Change question, choose **Name Emergency Substitute Approver**.
Enter the circumstance precipitating the need, explaining why the approver cannot set their own substitute.
Check whether you want the substitute to approve requisitions, vouchers or both.
Indicate whether there should be an end date for the 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 indicate yes to an end date, enter the date. The change will take effect at midnight on that day, so if it goes through Friday, enter the Saturday afterward.
For Substitute Approver changes, you will be asked for both the user who needs the substitute …
... and the user who will be named 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.

When complete, click Next and proceed to slide 38.
Do not add any comments to the **Purchasing Use Only** Section, simply click **Next** again.

This field will be populated by Procurement 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.

When the form is approved, the changes will have been made. Note that roles and access update 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 created by either party. You will receive an email notification of a new comment on this thread.
To see your previous requests, including drafts, navigate to Orders>Search>Procurement Requests and click on the linked form name.
If you wish to delete a draft, choose **Discard Request** from the Request Actions menu.

Unfortunately there is not currently an option to delete a returned request, only draft requests.
Also remember!

- Users are fed from HR daily to both UD Exchange and Concur; we do not manually add users in Procurement. Changes run through these feeds at 6 AM and 6 PM. Role and access changes will take place at those times.
- COAs are fed from PeopleSoft and updated every two hours during business hours; changes can only be made with General Accounting (coa-finance@udel.edu)
- Approvers are automatically designated by supervisor and COA status, but a user with an Approver role also needs something specifically to route to them (therefore, we generally do not remove Approver access)
- 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 new hires closely.
Resources

Procurement Services
procurement@udel.edu
See also “Employee Roles in UD Exchange” and “Understanding Access in UD Exchange”