Completing the Access Request Form
What’s different in UD Exchange?

Access only for 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.
UDX Access Request Form

• User roles are initially established when each department prepares to roll out, but can be changed over time.
• Users with the Department Purchasing Specialist role in UD Exchange can request 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 access for them.
From your **Shopping Home Page**, find and click the **UD Access Request** tile in the **Other Forms** section.

This tile will not be visible to anyone who does not have the Purchasing Specialist Role!
Note that when requesting Requester or Department Purchasing Specialist access for another user, they will have to have completed formal training for those roles.

The required form sections are listed on the left side of the page. Click on each section to complete it until the section is marked complete with a green check mark.
In the Questions section, click on **Department Information**.
Complete the **Access Requested For** section, then scroll down to the **Access Requested** Section.
Complete the **Access Requested** section, including the date that the user completed their formal training (if you are requesting Requester or Department Purchasing Specialist access for them).

Click **Next**.

This field will show even if you are changing a Requester to a Shopper – just enter the current date.
Do *not* add any comments to the *Purchasing Use Only* Section, simply click *Next* again.

This field will be populated by Procurement if there are any questions, comments, or issues.
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.
To see your previous requests, navigate to **Orders>Search>Procurement Requests** and click on the linked form name.
Resources

Procurement Services
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