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

**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.
Definitions

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

- **User Access** – the term relating to visibility of requisitions based on speedtype’s dept ID used. Each user automatically has access to requisitions using a speedtype matching their HR’s dept ID (e.g., PURC110000 is 04750, employees of 04750 can see all purchases using that speedtype).
UDX Access Request Form

• User roles are initially established when each department prepares to roll out, 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.
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!
Note that when requesting Requester or Department Purchasing Specialist roles for another user, they will have to have completed formal training for those roles; the link to training is here.

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 Change Requested For section, then scroll down to the Change Requested Section.
Complete the **Change Requested** section.

If you choose **Add** or **Update User Roles**, include the date that the user completed their formal training (if you are requesting Requester or Department Purchasing Specialist access for them).

Click **Next *OR***

This field will only show if you are adding DPS or Requester access, not Shopper or Approver.

This field will show only for DPS changes and places the user in approval workflow for the dept ID(s) named.
If you choose **Add User Access**, supply detail in the **Access Requested** box. If applicable, list specific dept ID numbers.

Click **Next** *OR*
If you choose Other, supply detail in the Other Request Detail box.

Attachments may also be uploaded.

Click Next.

A template is available for mass changes to roles or access.
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.

When the form is approved, the changes will have been made. Note that roles and access updates twice daily at 6 AM and 6 PM on business days only.
To see your previous requests, navigate to Orders>Search>Procurement Requests and click on the linked form name.
When to Use the Form

• To change roles that have already been set up prior to rollout
• To request visibility to department orders other than those belonging to a user’s HR department (e.g., a VPFN employee needs visibility to Procurement purchases)
• To grant approver access to someone who is not fed that role as a COA or supervisor (in order to make an ad hoc approver)
• To request Procurement to set up a substitute approver in the event of an unforeseen absence (indicate existing approver, substitute, time period)
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.
• 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”