



UD Credit Card Services - Access to Works

Procurement Services

UD Credit Card Services

Use this form for all requests related to the UD Credit Card. This form can be initiated for yourself or for another UD employee. Updates to existing cards for multiple employees can be done using one form. The types of requests that can be made using this form are:

1. Access to Works (the employee is NOT required to have a UD credit card to get access to Works)
2. Request a New Card
3. Replenish a declining balance card
4. Update existing card
5. Cancel Card



If you have questions, contact Procurement at (302) 831-2159 or by email, creditcard@udel.edu.

Symbol key: * Required information, ! Error

Form originator

Originated by: Narayan, Abirami Meyyappan (701814301)

Department: Procurement Services (4750)

Department address: 104 General Services Building

Department phone: * (use format nnn-xxx-xxxx)

Request type

Requested for: *

Myself

Another employee

Multiple employees (only for requesting updates to existing cards)

Type of request: *

Choose one ▼

Choose one

Access to Works™

New card

Replenish declining balance card

Update existing card(s)

Cancel card

Next step ▶



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Steps for requesting Access to Works:

Step 1: UD Web forms log in → Blanks → UD Credit Card Services

HELP BLANKS IN BASKET OUT BASKET ARCHIVE FOLDERS DRAFTS LOG OUT

Scroll down the list to find

- UD Credit Card Services
- Wellness Activity Log: Individual
- Wellness Activity Log: Team Captain
- Winter Session Housing Registration

Step 2: The top section on the first page comes with the Originator's information already filled in.

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Step 3: Select Requested for - Myself or Another Employee. Multiple Employees choice is available only for Updating Existing Card(s). For Another Employee choice – type in the last name of the employee in the text box and pick from the available list.

Step 4: For Type of Request Select – Access to Works. Click Next Step.



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Procurement Services

Step 5: For Type of access requested select User – view transactions / reimbursements. The requested for employee information comes in auto filled.

Works™ access requested for

Type of access requested: * Auditor - query management and reporting
 Approver - card administrator
 User - view transactions/reimbursements

Requested for: Kuhn, Mary E. (700506967)

Department name: *

Department address: *

Department phone: * (use format nnn-xxx-xxxx)

Step 6: Select the card administrator. The card administrator is the person who will approve the reimbursement request, transaction sign off.

Start typing the last name of the card administrator or use the magnifying glass to open a pop-up window for an employee look up by last name, first name or UD ID.

Card administrator information

Please note that if the ~~card administrator does not~~ have access to Works™, then they will need to complete a form to request access

Card administrator name: *

Funding

- Roeder, Kathy L (51248), Procurement Services
- Schroeder, Kimberly A. (60671), Arts & Sciences
- Schroeder, Owen James (701385179), Academic Enrichment Center



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Procurement Services

Step 7: Type in the default Speed Type and Account. Click on Next Step

Funding

SpeedType: *

Account: *

Step 8: Choose a Purpose Code Administrator from the drop down to approve the request. Additional Approvers are optional, not required. Click Finish and Submit.

Routing

Role	Email address	Date
Form Originator	Narayan,Abirami Meyyappan	
Approver ▾	<input type="text"/>	
Approver ▾	<input type="text"/>	<input type="button" value="Search"/>
Approver ▾	<input type="text"/>	<input type="button" value="Search"/>
Cardholder	Kuhn,Mary E.	
Purpose Code Administrator *	Choose one ▾	
Final Approver	Credit Card	
Copy	Narayan,Abirami Meyyappan	
Copy	Kuhn,Mary E.	
Copy	Roeder,Kathy L	

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Step 9: After the approval of the Purpose Code Administrator, the form is routed to the Credit Card web form basket for final approval.

Step 10: The Card Holder and the Card Administrator are automatically copied upon Final Approval of the form.