University of Delaware EXCHANGE

Completing the Access Request Form

FOR DEPARTMENT PURCHASING SPECIALISTS ONLY

Revised 2/19/2024

University of Delaware

In This Guide

About the UDX Access Request Form

Only DEPARTMENT PURCHASING SPECIALISTS have access to the UDX Access Request Form on the UD Exchange home page.
The UDX Access Request Form can be used for five different scenarios:
Updating the **Role**(s) of another user
Updating the **Access** (visibility) of another user
Updating **Workflow**
Naming an **Emergency Substitute Approver** ▪ When an Approver does not have the ability to do so for themselves
Updating **Contracts+ Workgroups**

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Terms & Definitions – User Role

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.

When a Requester role is added to a user's profile, the Shopper role is removed, but they can still do all the things that a Shopper can do.

The Approver and Department Purchasing Specialist (DPS) roles can augment either a Shopper or Requester role.

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

- The employee must complete required training in ConnectingU because:
  - The Requester role requires system-specific knowledge to submit requisitions.
  - The DPS role acts as a "named other," as described in the Authority to Sign Financial Documents policy.
    - A DPS is responsible for approving any requisitions over $5,000.
    - Department Chairs have the option, but are not required to, act as financial Approvers. A DPS can stand in for them in UDX as a "named other"

Contracts roles supplement purchasing roles and can also be requested on this form.

Terms & Definitions – User Access

USER ACCESS is the term relating to the VISIBILITY of requisitions and purchase orders in UDX.
Default document access is based on the requisition/PO **Prepared For** user's Dept ID.
Employees automatically have access to requisitions and POs owned by any other employees who share their HR Dept ID.
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 Dept ID access for an employee for their new department.
Additional department access can be granted based on Dept ID for employees who support multiple departments.
You can list specific Dept IDs or list a node that includes many Dept IDs, such as a node for an entire college.
A node is a grouping of Dept IDs within larger tree nodes in PeopleSoft.

Terms & Definitions - Workflow

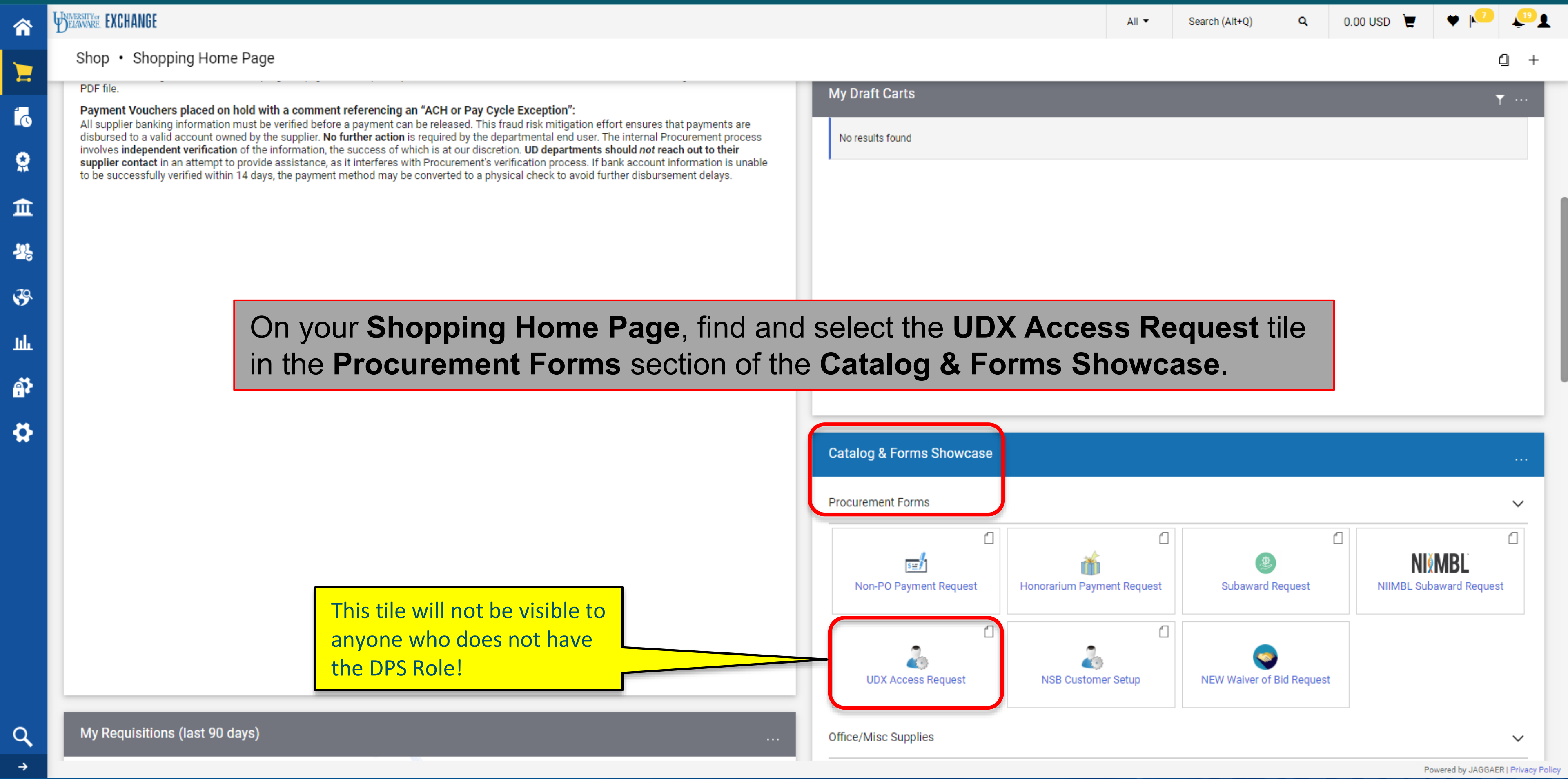
WORKFLOW is the term referring to how documents move through UDX
If you need to change the Approver at a specific approval step, submit a workflow change.
Workflow changes can be made for Requisitions and Vouchers.
Depending on the type of change requested, you may have to clarify whether the new Approver is being *added to* the approval group or *replacing* the existing Approver in workflow.
Utilize your access (visibility) as a DPS to look at users' current approval folders when requesting workflow changes. ▪ Copy and paste the exact name of the workflow steps into the form. ▪ This will allow for faster processing of the form ▪ If you enter a name or a description for a workflow step that does not match the name of the step in UDX the system administrator may think that you are requesting the creation of new workflow, and may need to ask you clarifying question or return the form for corrections.

Terms & Definitions - Workgroups

WORKGROUPS is the term relating to the VISIBILITY of CONTRACTS in UDX.
System users **do not** automatically have access (visibility) to contracts for their department in the Contracts+ module of UD Exchange.
To use C+, users must have a Contracts role added to their profile and they must be added to a C+ Workgroup.

Completing the Access Request Form

All UDX Access Requests begin with completing the Submitter Information section.



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!

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‹ Back to Shopping Home

UDX Access Request

Form Number **5260710**
Purpose **Generic Request**
Status **Incomplete**

Instructions

Questions
Submitter Information
Department Information
Purchasing Use Only
Review and Submit

Discussion
Form Approvals

Instructions

Request Actions | History | ?

This form may be completed for any of the following uses:

- Role updates
- Access (visibility) updates
- Workflow updates
- Emergency substitute approvers
- Contracts+ Workgroup changes

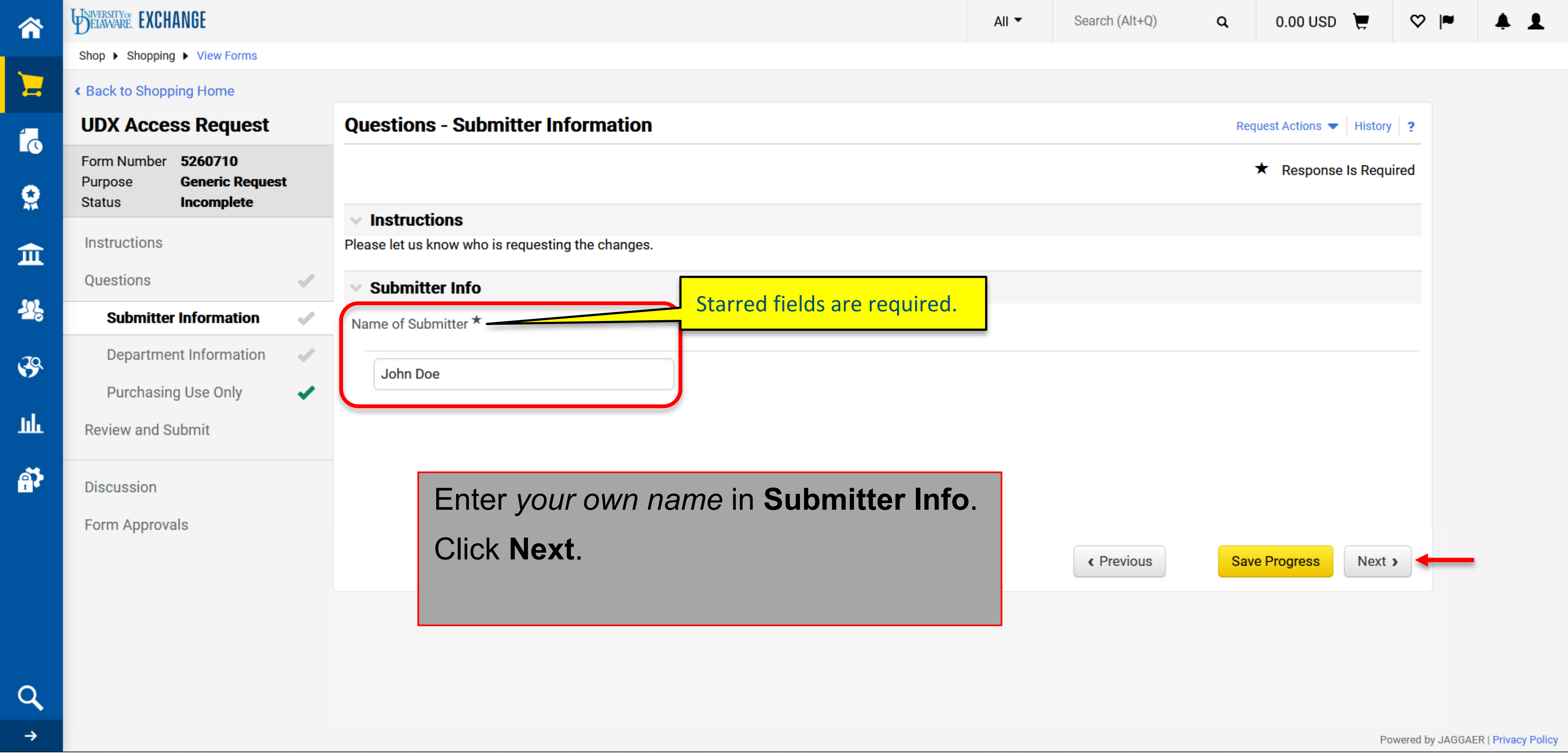
Please remember, formal training is required for users with the roles of Requester and Department Purchasing Specialist (DPS). For assistance, please refer to:

- Procurement Services UD Exchange Resources Website
- A PDF guide to use of this form
- ConnectingU UDX Certificate Programs (requires SSO login)
- Finding Users and User Information in UD Exchange

Please note that the Approver and Shopper roles have certificate courses but these are only *recommended*, not *required*, for assignment of those Roles.

Next ›

The Instructions page lists the uses of this form, as well as provides links to any associated job aids.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UDX Access Request
Form Number 5260710
Purpose Generic Request
Status Incomplete
Instructions
Questions
Submitter Information
Department Information
Purchasing Use Only
Review and Submit
Discussion
Form Approvals
Questions - Submitter Information
Request Actions
History
?
★ Response Is Required
Instructions
Please let us know who is requesting the changes.
Submitter Info
Starred fields are required.
Name of Submitter ★
John Doe
Enter your own name in Submitter Info.
Click Next.
‹ Previous
Save Progress
Next ›
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What Type of Change Are You Requesting?

The next section to complete is the Change Requested section.

- You will need to select the Type of Change you are requesting from a menu.

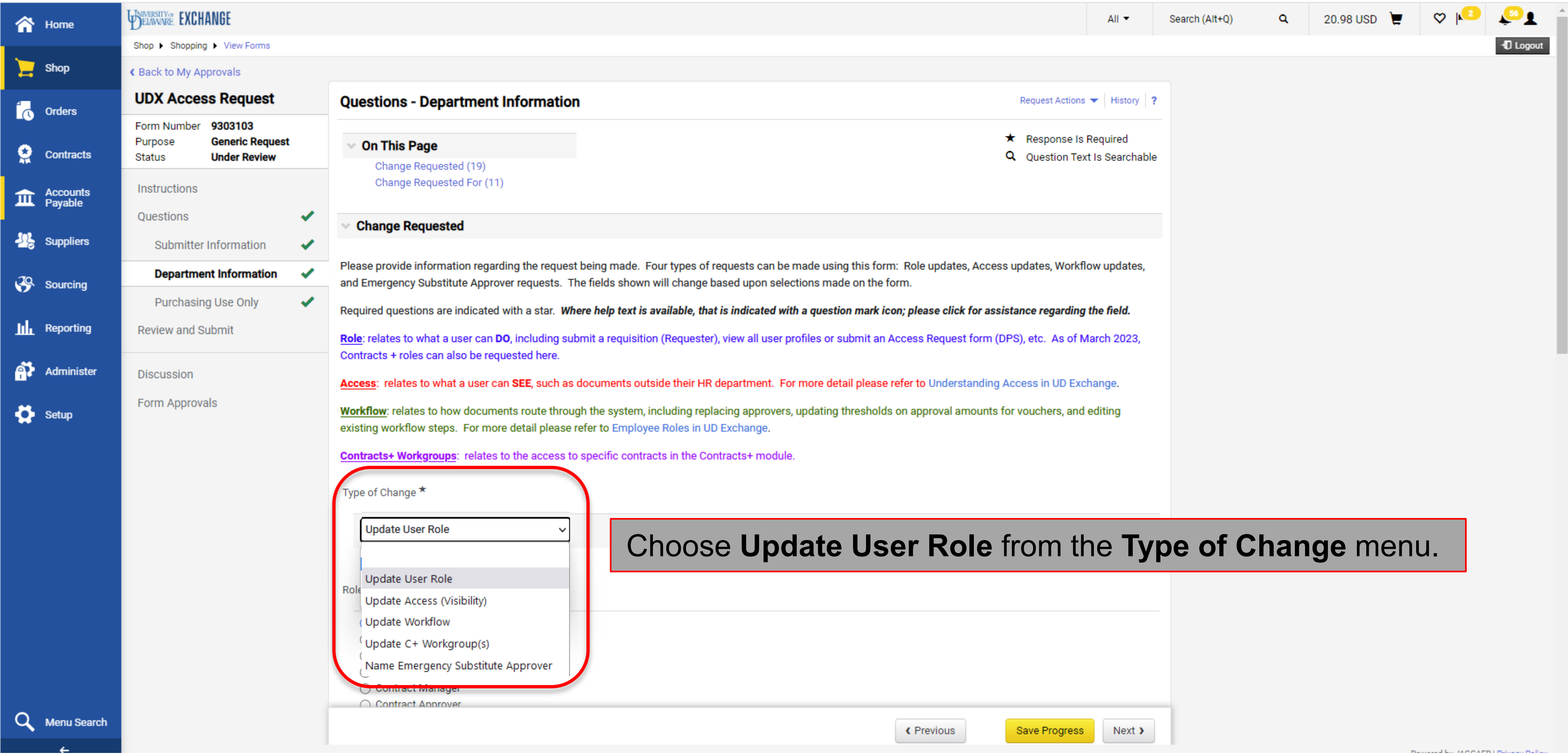
It is important that you choose the correct option for the Type of Change

The questions on the form dynamically change depending on the Type of Change you select.
For example, if you select Access change on the form, but you're requesting a Workflow change, the questions on the form will not provide the information needed to make a Workflow change. **The form will be returned to you so it can be resubmitted correctly.**
If you are requesting multiple changes for the same person, but each change is a different type (e.g., Add the DPS Role, add node Access, and add them to a DPS Workflow step), each change type requires its own separate request form (Update Role, Update Access, Update Workflow).
A further example would be assigning the Contracts Manager role to a system user that needs to be be placed in a Contracts + Workgroup. This would require two separate requests, each with a separate type of change (Update Role and Update C+ Workgroup).
Procurement is limited to performing only what is requested in the Access Request form. The Discussion section of the form can be used for clarification (see Slide **53**), but the form may need to be returned to the DPS if there are changes that need to be made .

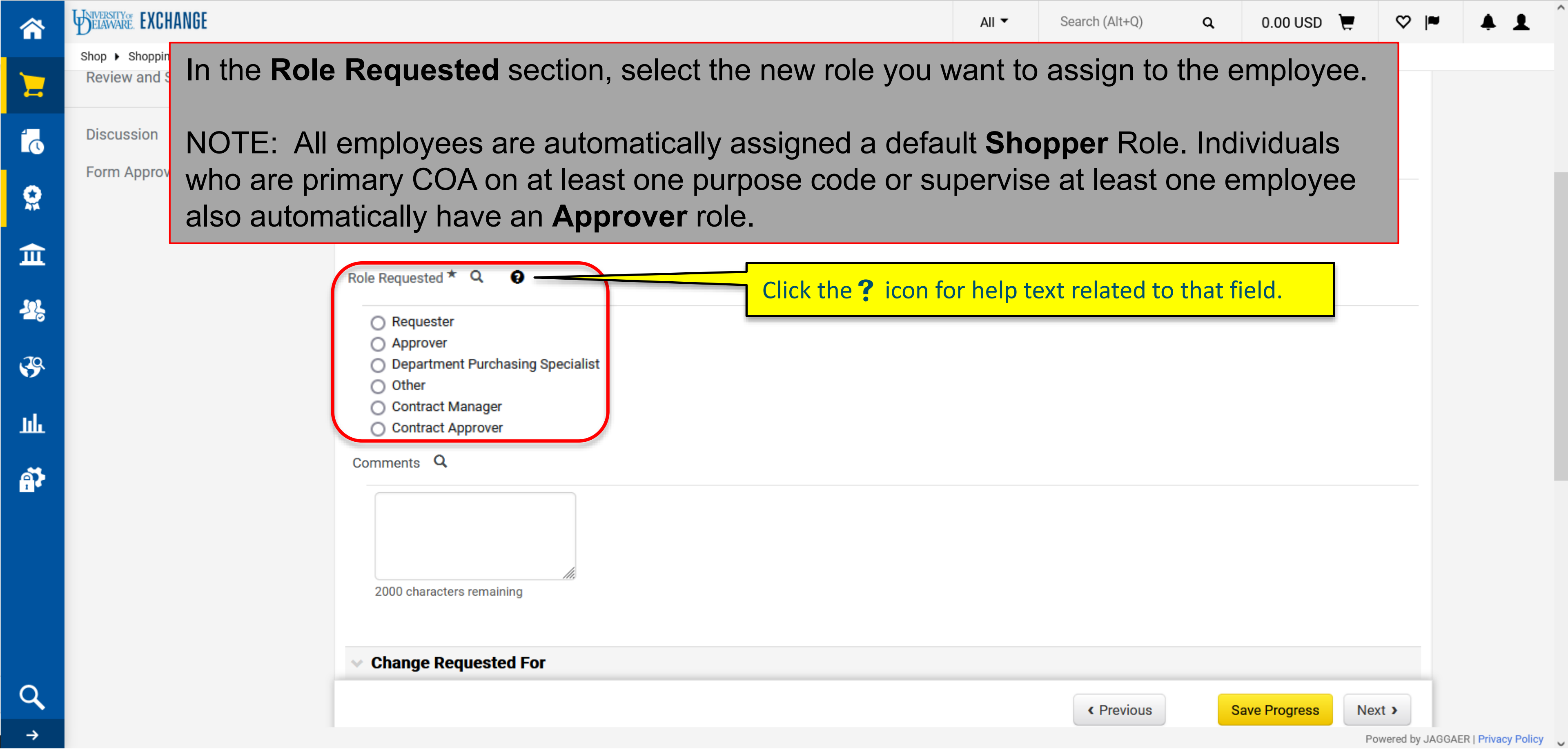
The UDX Access Request Form can be used for five different scenarios:	
Updating the **Role**(s) of another user	Skip to Slide 14
Updating the **Access** of another user	Skip to Slide 22
Updating **Workflow**	Skip to Slide 26
Naming an **Emergency Substitute Approver** ▪ When an Approver cannot do so for themselves	Skip to Slide 35
Updating **Contracts+ Workgroups**	Skip to Slide 43

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.
- You will need the employee's:
  - First and last name
  - Department name
  - Email address
  - UD employee ID number
- For Requester and DPS Roles, the user must have completed required training in ConnectingU.
  - You will be asked to enter the date they completed training.



Choose **Update User Role** from the **Type of Change** menu.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Discussion
Form Approv
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.
Role Requested *
Click the ? icon for help text related to that field.
Requester
Approver
Department Purchasing Specialist
Other
Contract Manager
Contract Approver
Comments
2000 characters remaining
Change Requested For
‹ Previous
Save Progress
Next ›
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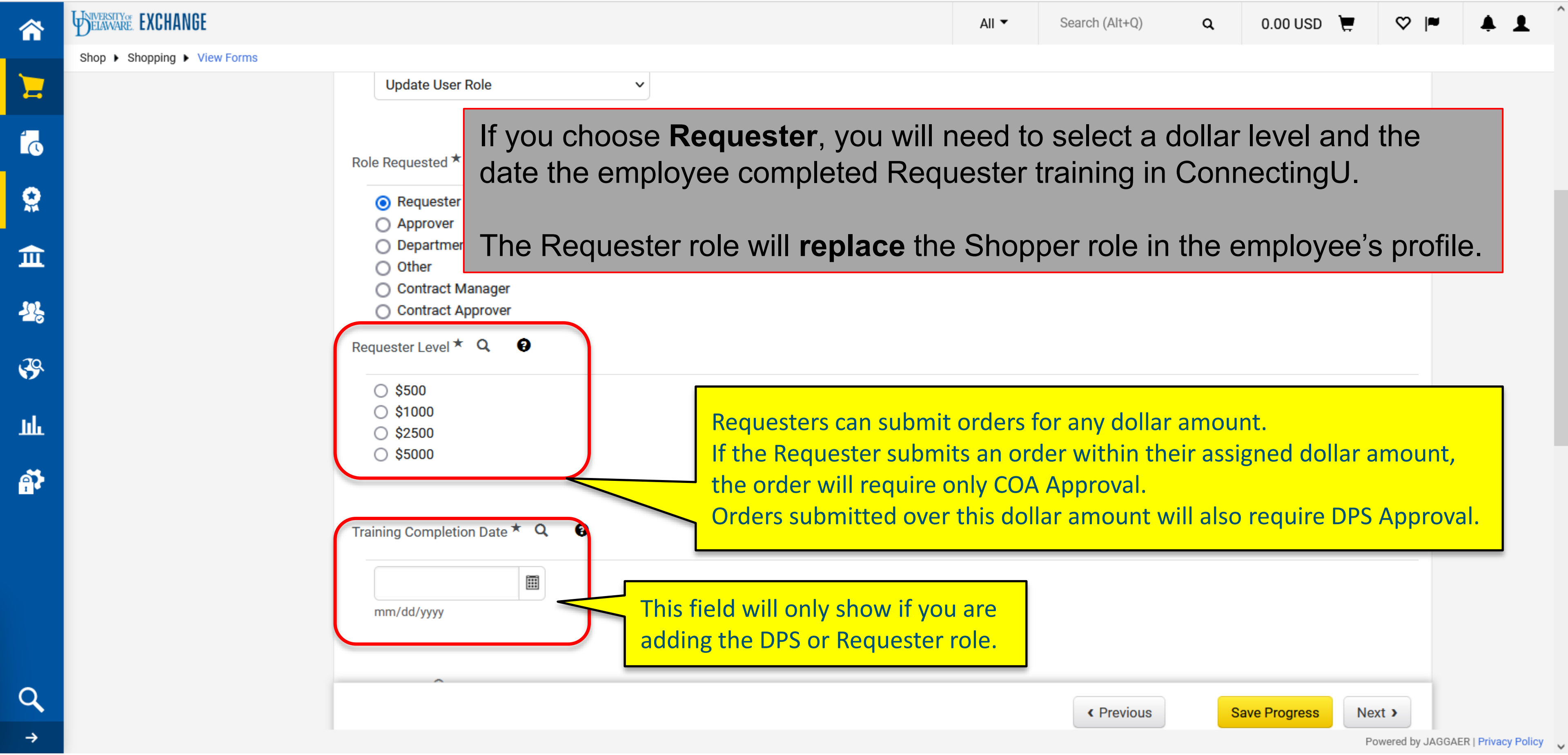

If you choose **Requester**, you will need to select a dollar level and the date the employee completed Requester training in ConnectingU.

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

Requesters can submit orders for any dollar amount.
If the Requester submits an order within their assigned dollar amount, the order will 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.

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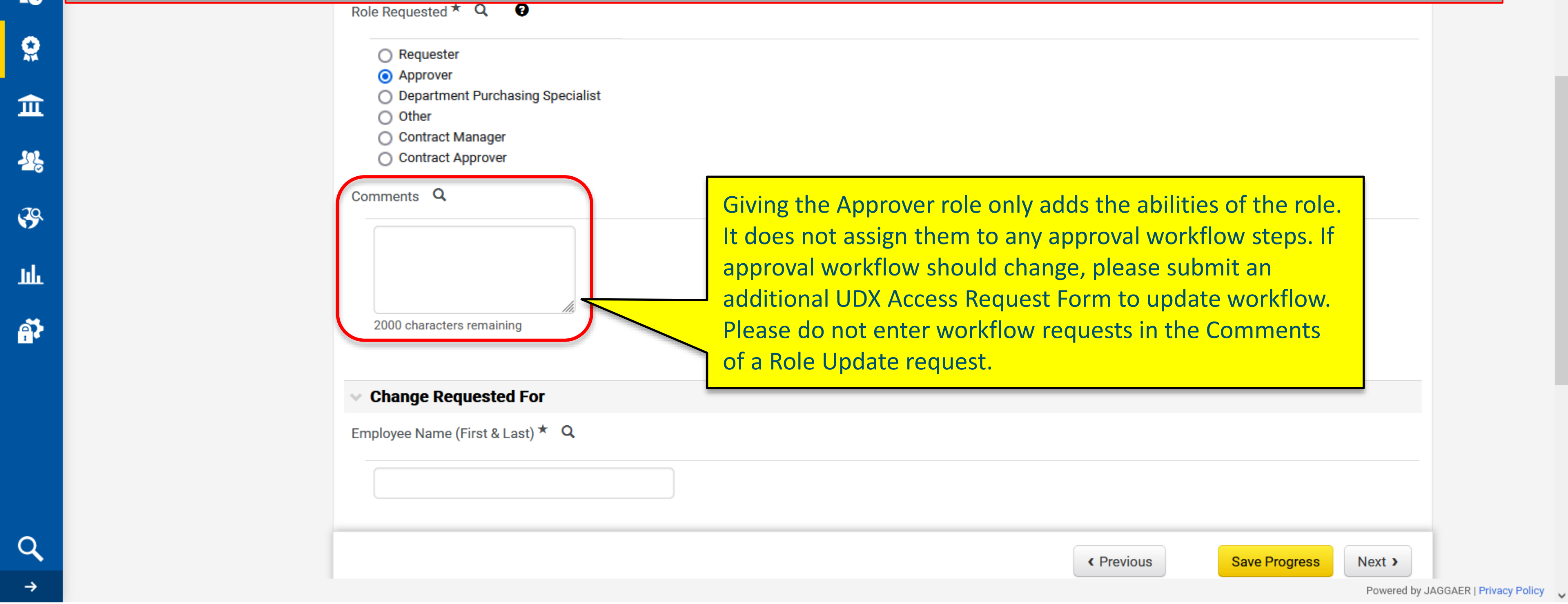
If you choose **Approver**, you only need to enter comments as to why you are requesting the role.

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.



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.

Role Requested *

- ○ Requester
- ○ Approver
- ◉ Department Purchasing Specialist
- ○ Other
- ○ Contract Manager
- ○ Contract Approver

Training Completion Date *

mm/dd/yyyy

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

Comments

2000 characters remaining

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.

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If you choose **Other**, we will require more information about the other role requested.

Role Requested *

- ○ Requester
- ○ Approver
- ○ Department Purchasing Specialist
- ◉ Other
- ○ Contract Manager
- ○ Contract Approver

Name other role requested and reason *

2000 characters remaining

Some examples:

- Remove a Requester role and change the user to a Shopper with no ability to submit an order
- For subaward processing or Facilities Accounting offices, add the AP Processor role in order to enter invoices
- Request the Auditor role for positions at UD that require it (e.g., Internal Auditor, Research Office accountant, etc.)
- Create a Shopper profile for non-employee students.

Other Request Attachments

UDX Access Request Template

No File Attached Upload

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.

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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.

Comments

Alice Approver needs to act as a substitute approver on occasion.

1935 characters remaining

Change Requested For

Employee Name (First & Last) *

Alice Approver

Department Name *

Procurement Services

Dept ID *

04750

Employee ID (UDID) *

700123123

As a DPS you have access to find all required information in UDX user profiles.

Please check the user profile prior to submitting. Requests will be returned if there is a discrepancy between the form and the user's UDX profile.

When complete, click **Next** and **proceed to Slide 48**.

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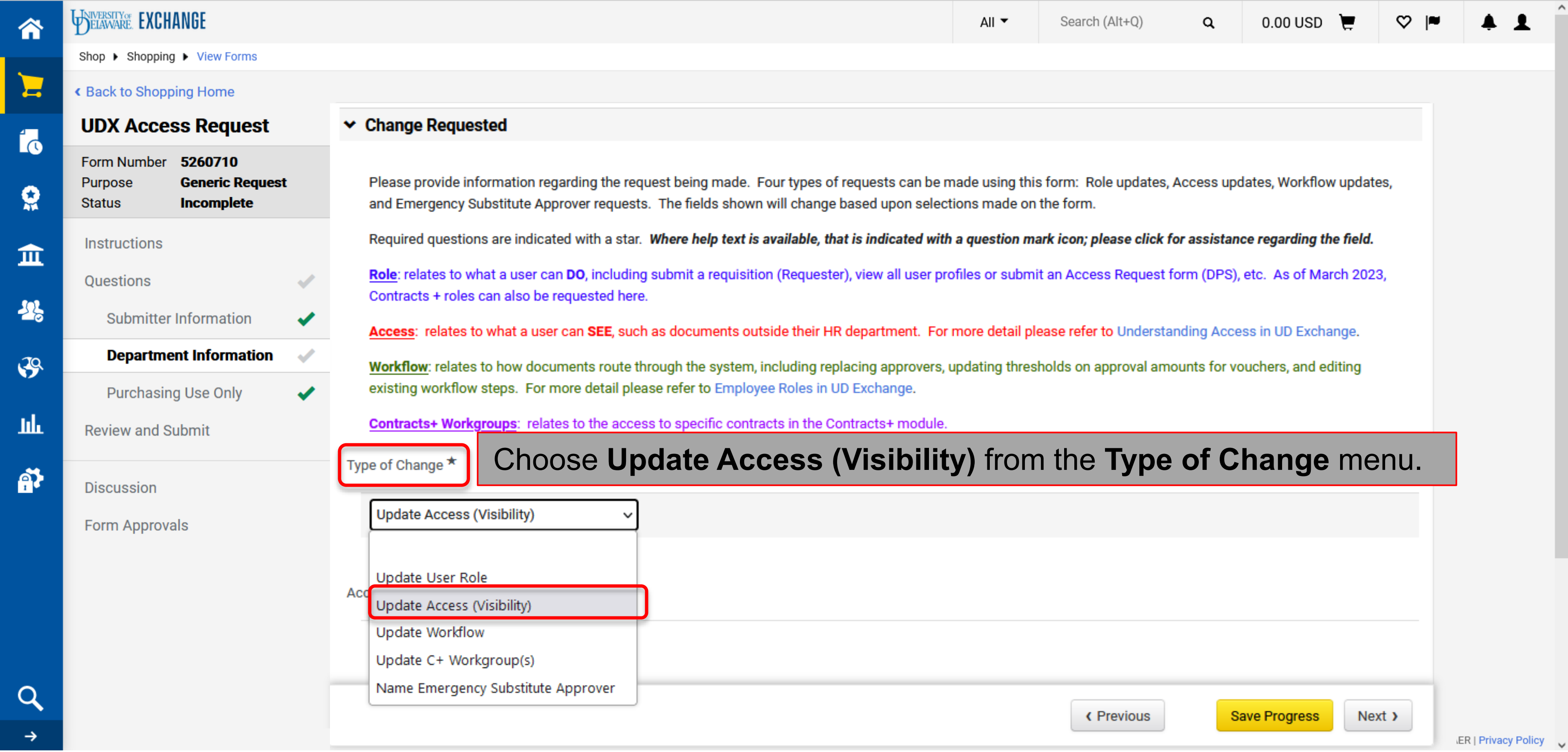
Requesting Access Updates

- 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.
- Users with the Approver Role can also view requisitions that they approved in workflow.
- If a user needs expanded access to purchasing activity in other Dept IDs, an update to access is required. An example would be a request on behalf of administrative staff in centralized departments.
- Every Dept ID at UD is part of a tree node (for example, the node for the College of Arts and Sciences, which includes every Dept ID in the college, is 02500). If a user needs access to all departments in a college, requesting the node will simplify the request.



Choose **Update Access (Visibility)** from the **Type of Change** menu.

Discussion

Form Approvals

Type of Change *

Update Access (Visibility)

Access Requested *

2000 characters remaining

Access node/mirror

Comments

2000 characters remaining

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. Alternately, enter the name/UDID to mirror another user's access.

Please add a **Comment** explaining why the user needs expanded access.

‹ Previous | Save Progress | Next ›

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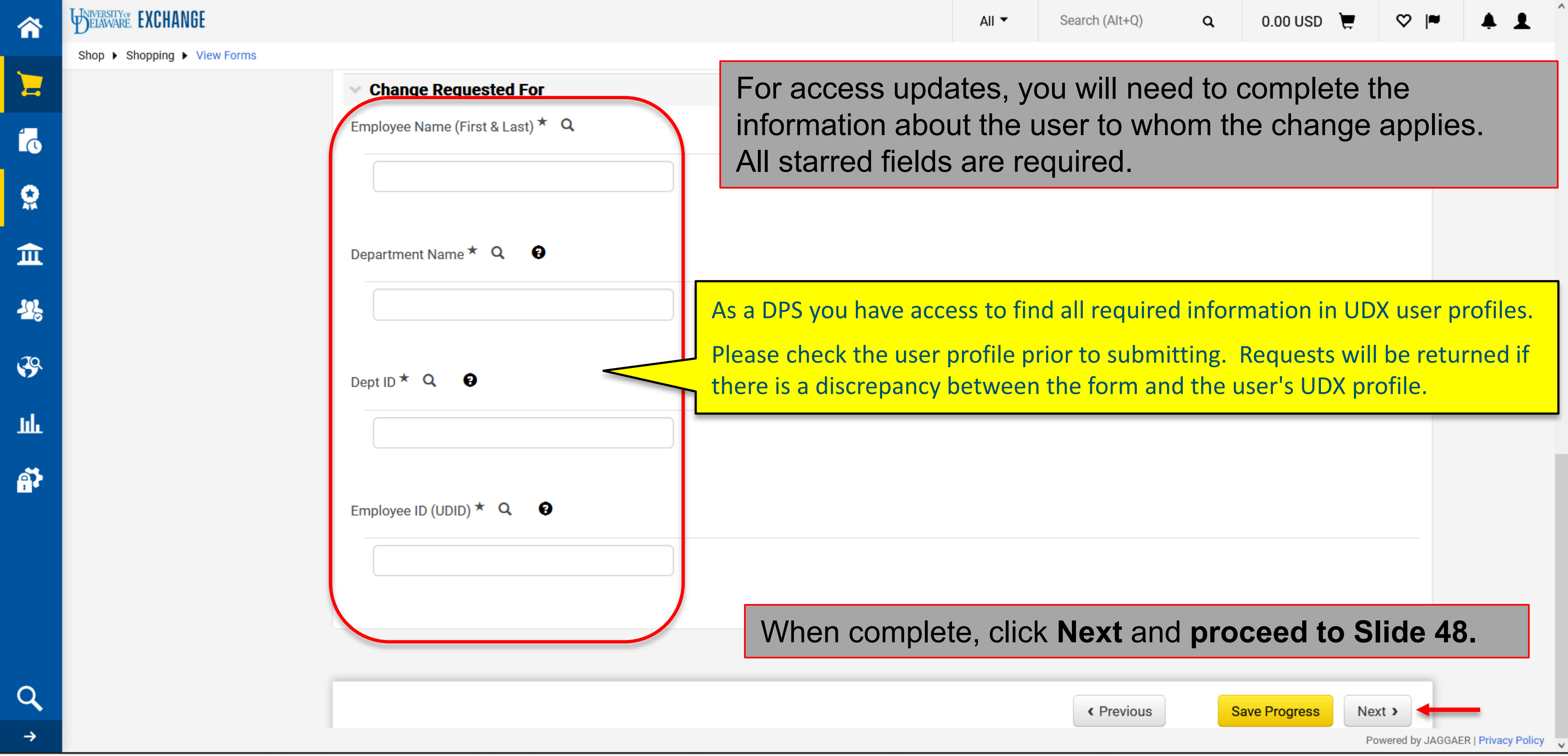

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Change Requested For
Employee Name (First & Last) *
Department Name *
Dept ID *
Employee ID (UDID) *
For access updates, you will need to complete the information about the user to whom the change applies. All starred fields are required.
As a DPS you have access to find all required information in UDX user profiles.
Please check the user profile prior to submitting. Requests will be returned if there is a discrepancy between the form and the user's UDX profile.
When complete, click Next and proceed to Slide 48.
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Save Progress
Next ›
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Requesting Changes to Workflow

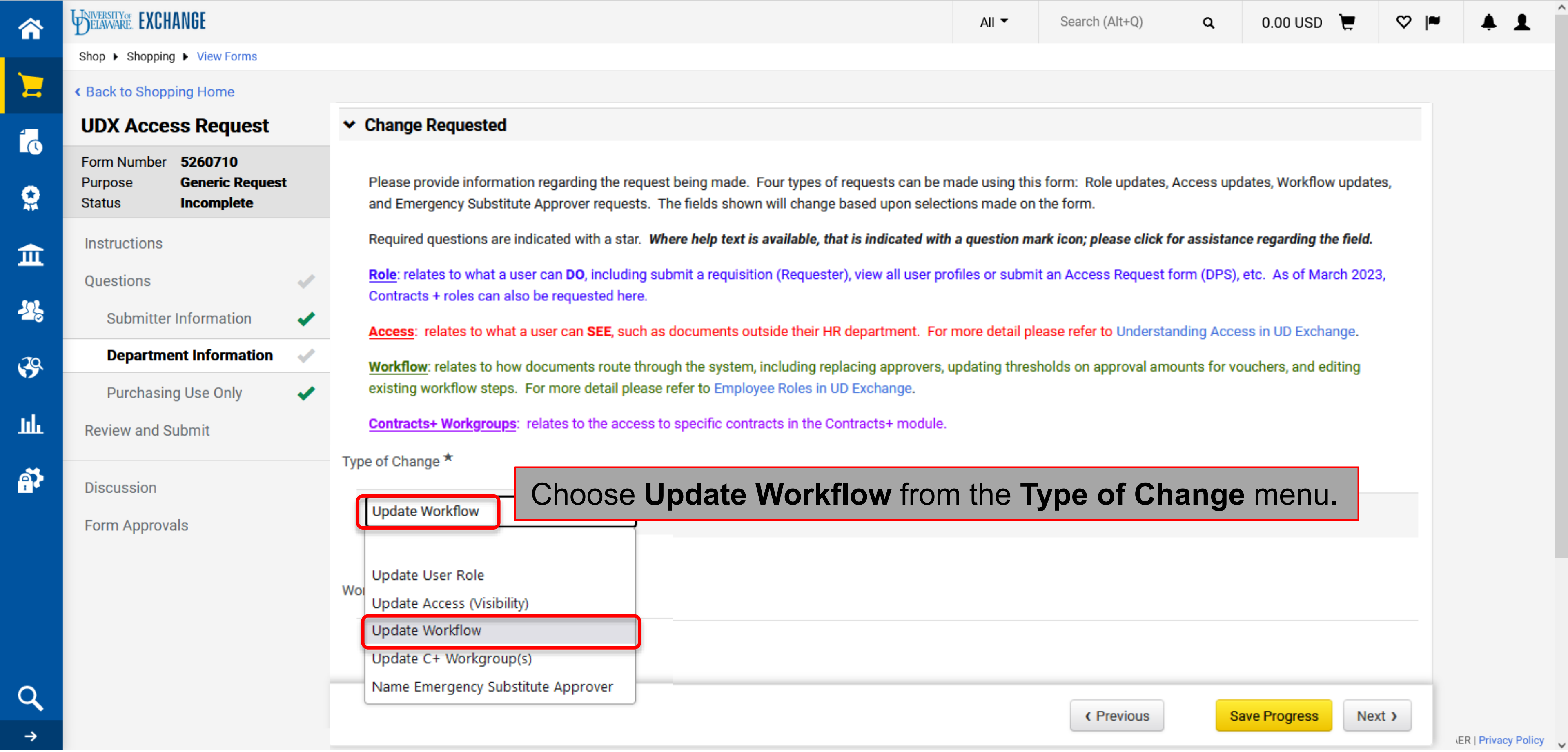
Approval Workflow directs documents to specific Approvers in UDX.

Workflow options include the following:

- Misc. Department Approval - An optional step for departments that have created additional workflow
- Department Purchasing Specialist - Routes approvals based on the Dept ID associated with the SpeedType(s) used for payment.
- Commodity Approval – Routes purchases involving specific commodities (e.g., vehicles, capital equipment)
- Grant Approval – Routes purchases requiring Research Office approval.
- Other - Updates to executive level approvals if not proactively adjusted by Procurement staff.
- Voucher Workflow – Routes vouchers to the PO Owner for approval prior to payment when required.

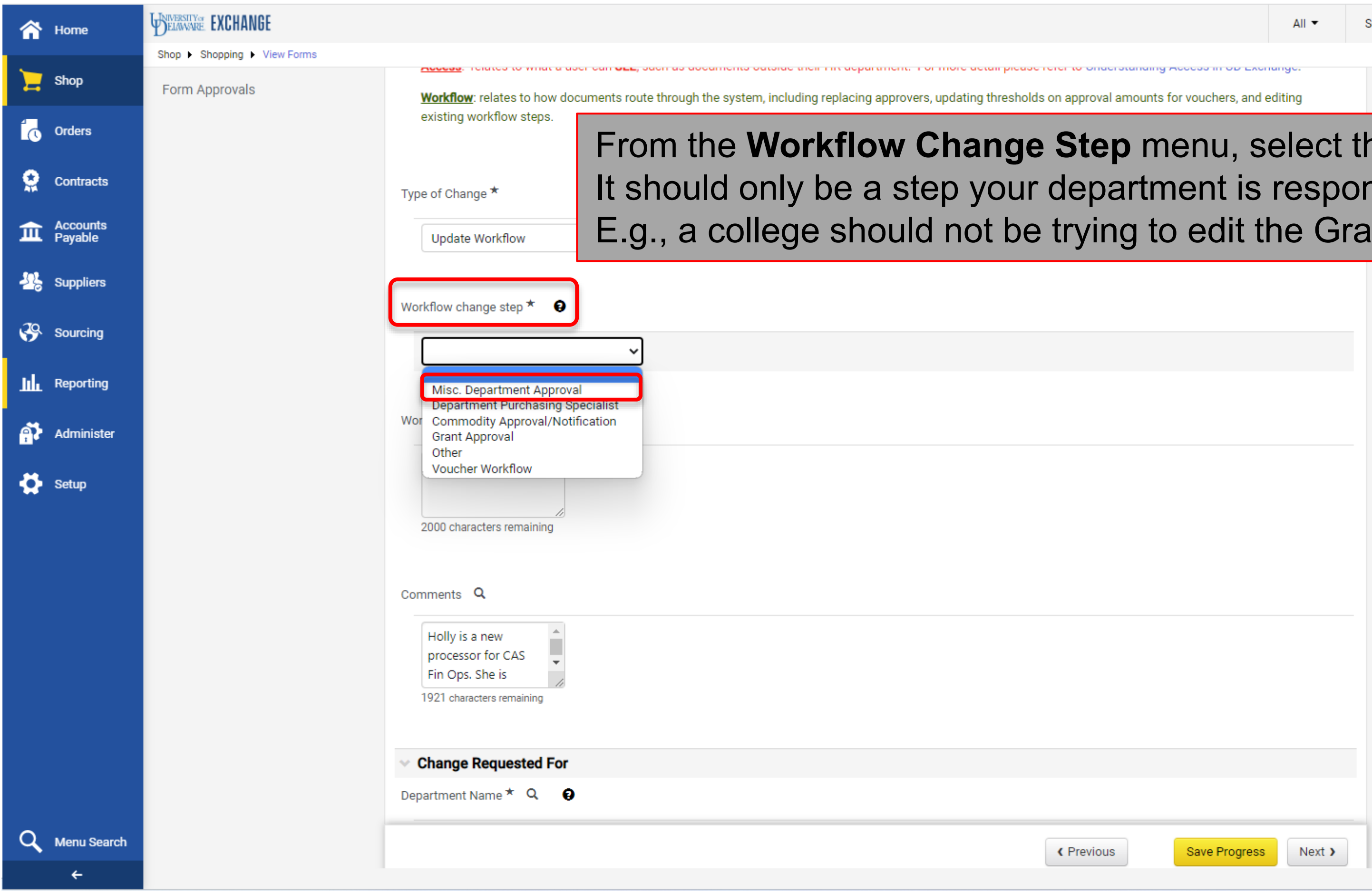
Please note that Cost Object Approvers (COA) are imported into UDX via a file maintained by the Controller's Office and cannot be updated with the UDX Access Request orm.

  - Any changes that need to be made to COA purpose code owners for approval routing should be sent to coa-finance@udel.edu.



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).



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Logout

Type of Change *

Update Workflow

Workflow change step *

Misc. Department Approval

Workflow step name and/or dept IDs

04750

1995 characters remaining

If you choose a workflow step that is department-dependent, you will be asked to indicate the **Workflow step and/or dept ID(s)** it applies to.

Please provide the name of the workflow step as it appears in the user's approval folder. If you do not know the name of the workflow step, you can provide the dept ID(s) that the change applies to.

If dept ID(s) are provided, Procurement may need further confirmation before setup if the DPS rule has more/less dept ID(s) than were provided.

Does workflow change involve an additional or replacement approver? *

- Additional
- Replacement
- Neither

Workflow Change Detail *

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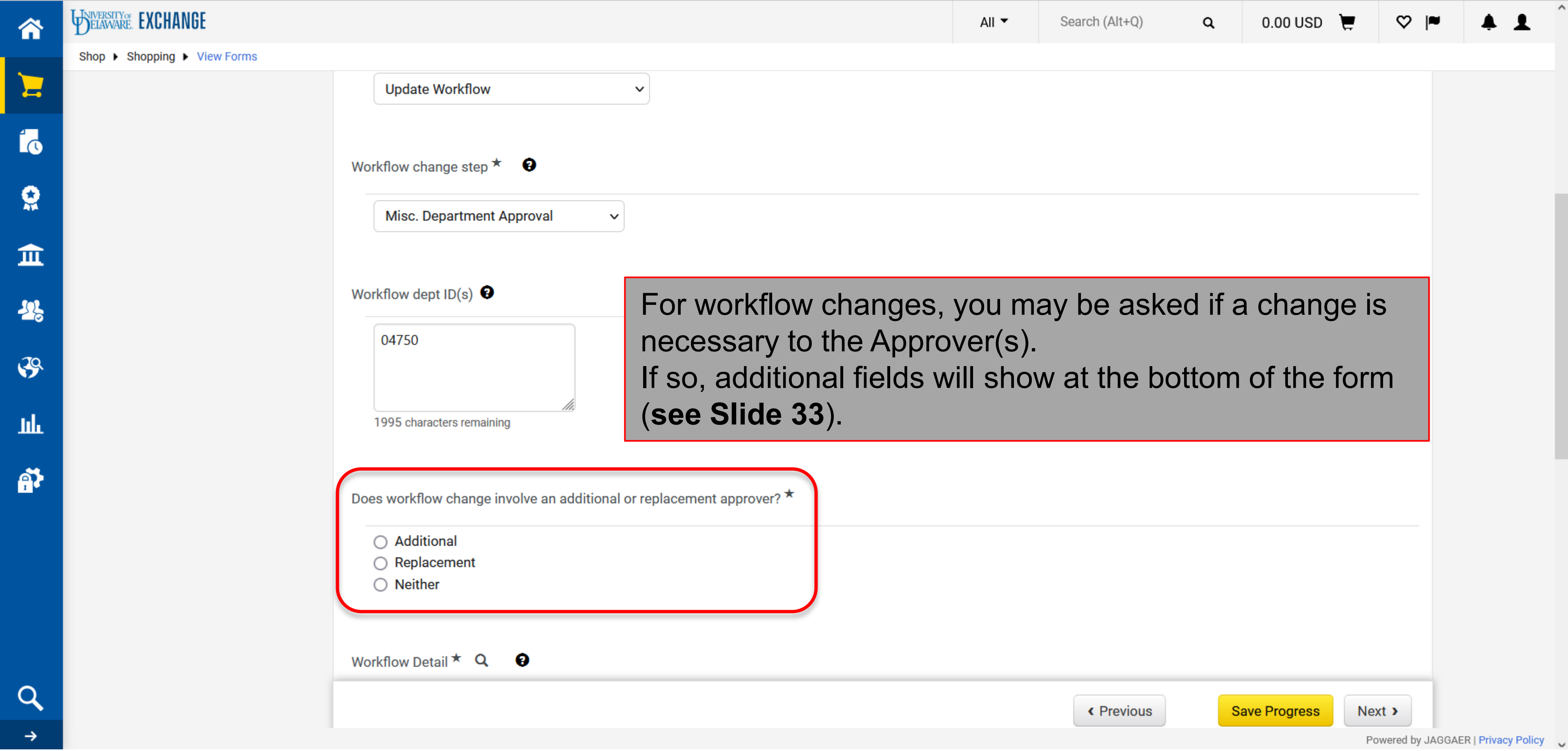
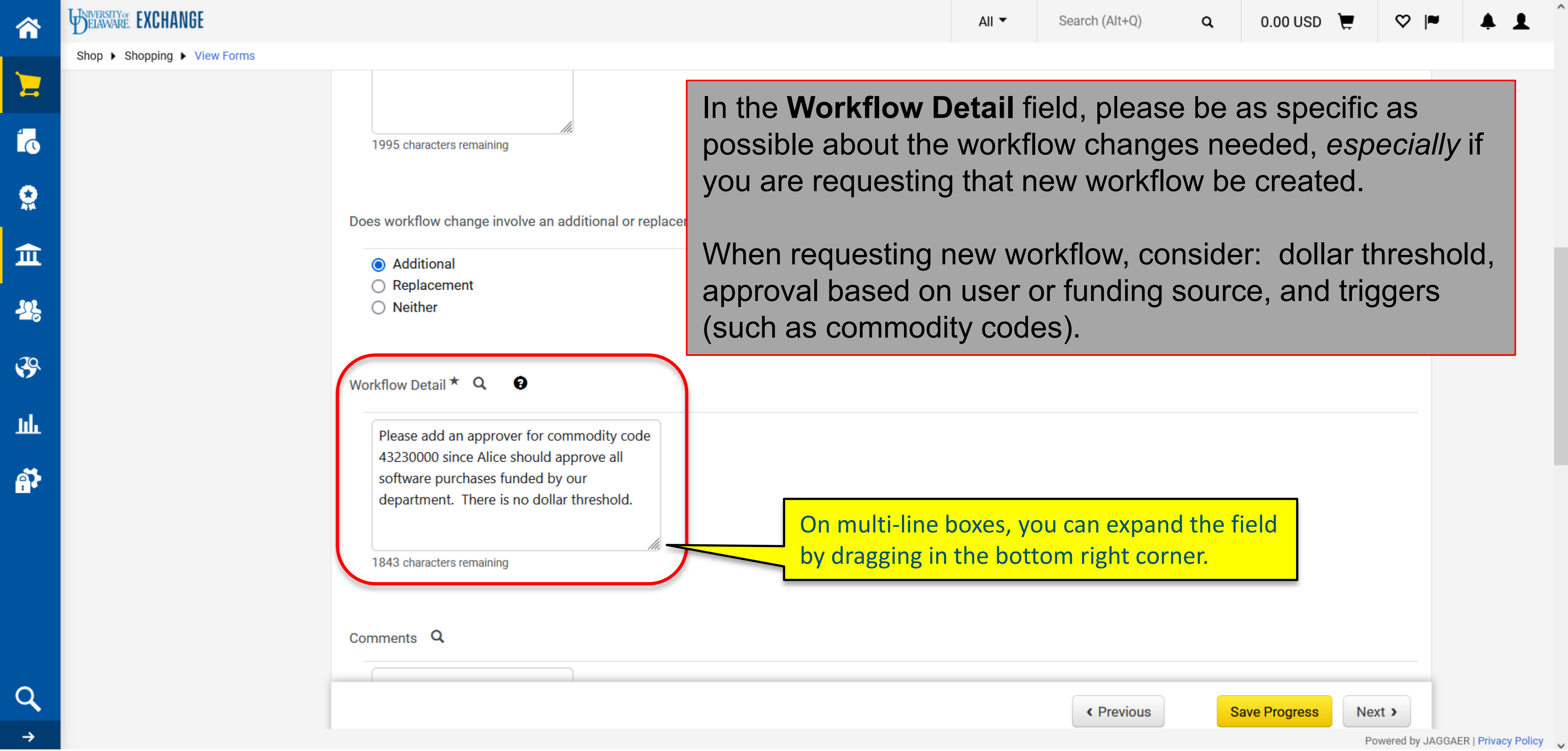


For workflow changes, you may be asked if a change is necessary to the Approver(s).
If so, additional fields will show at the bottom of the form (**see Slide 33**).

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.

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Please add an approver for commodity code 43230000 since Alice should approve all software purchases funded by our department. There is no dollar threshold.

1843 characters remaining

Comments

This workflow step does not currently exist.

1956 characters remaining

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.

Change Requested For

Department Name *

Dept ID *

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1956 characters remaining

Change Requested For

Department Name *

Procurement Services

Dept ID *

04750

Name of Approver being added to Workflow (first and last) *

Alice Approver

Employee ID (UDID) of Approver being added to Workflow *

703123123

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.

‹ Previous | Save Progress | Next ›

Employee ID (UDID) of Approver being added to Workflow *

Does Approver being added to workflow already have an Approver role? *

Yes No

If adding a new approver at DPS step, does Approver being added to workflow already have DPS role?

Yes No

Please confirm that we should add the Approver role as part of this request. *

I confirm

Name of Approver being replaced in workflow (First and Last) *

‹ Previous Save Progress Next ›

Depending on the selections on the form, required fields to complete may change.

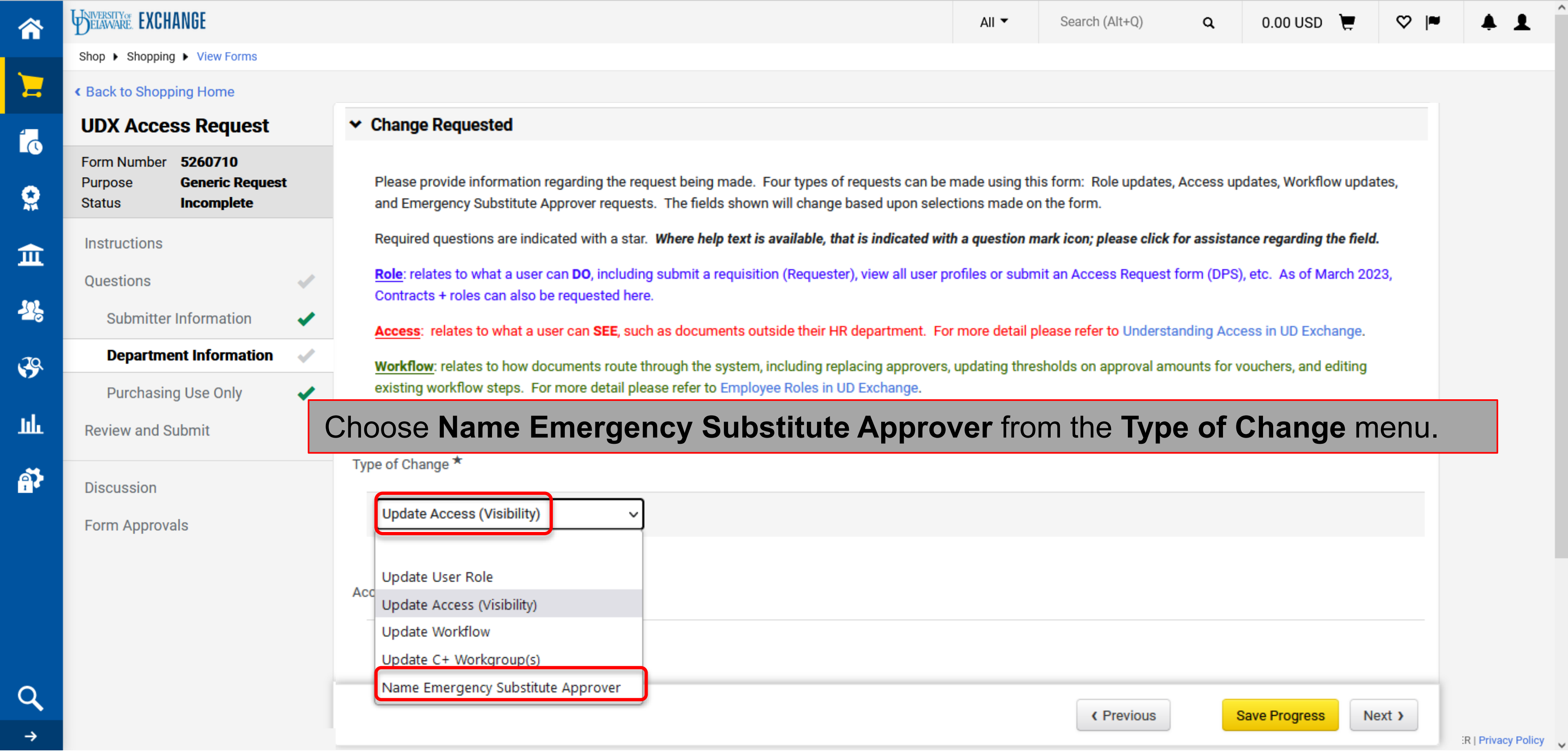
Remember, any fields marked with a star are required in order to proceed with the form.

If DPS is the selected Workflow change step, you will be asked if the new Approver has the DPS role

When complete, click **Next** and **proceed to Slide 48.**

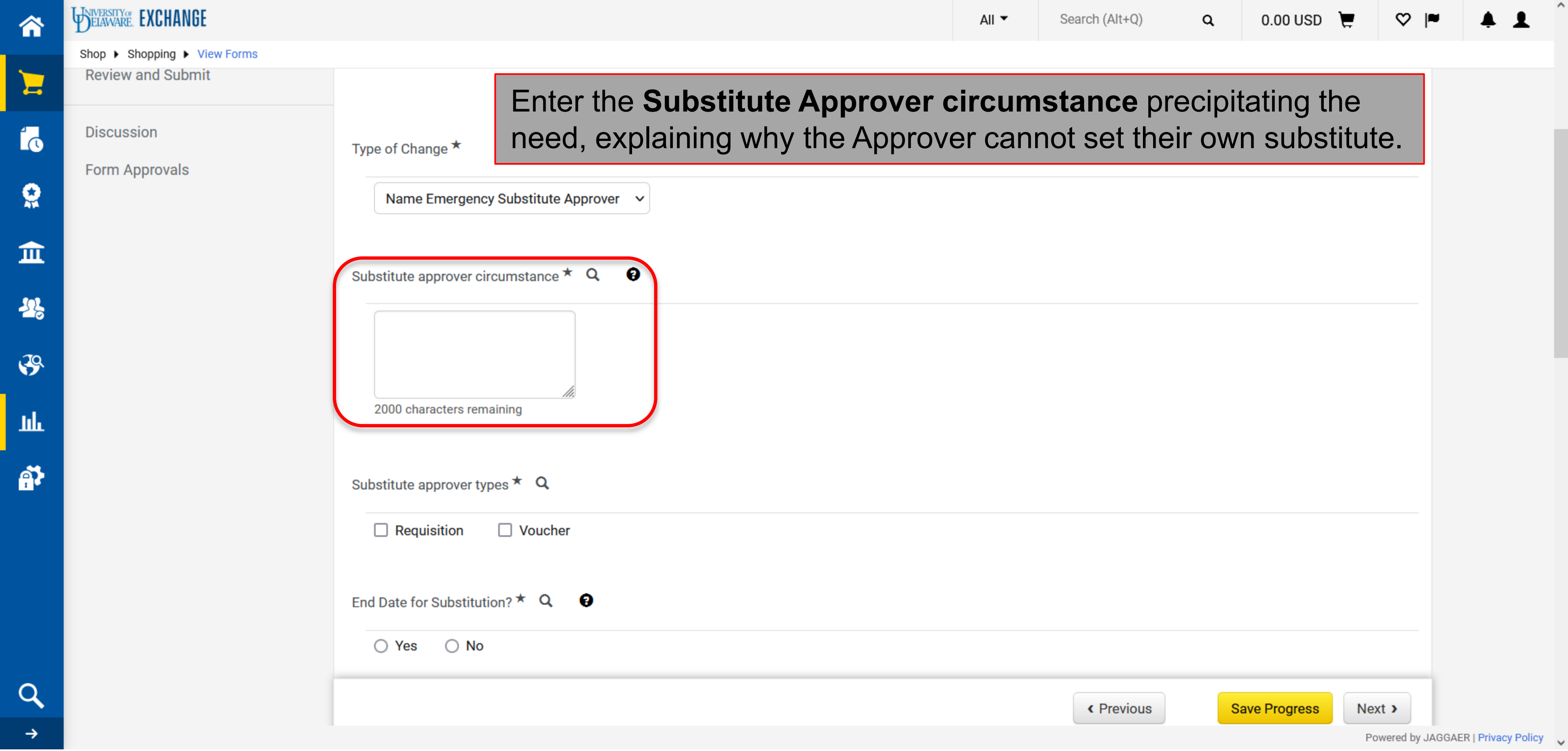
Naming Emergency Substitute Approvers

- Occasionally, Approvers are unexpectedly unavailable, such as in medical emergencies.
- The Access Request Form can be used by a DPS to assign an Emergency Substitute Approver while retaining an audit trail.
- Do not submit this form to select a Substitute Approver for yourself.
- When Approvers are scheduled to be out of the office, they can select their own substitute Approver in their UDX profile in advance using the Assigning and Removing Substitute Approvers guide.



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.



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Review and Submit

Discussion

Form Approvals

Type of Change *

Name Emergency Substitute Approver

Substitute approver circumstance *

2000 characters remaining

Substitute approver types *

☐ Requisition ☐ Voucher

In the **Substitute Approver types** section, select whether you want the substitute to approve requisitions, vouchers, or both.

End Date for Substitution? *

○ Yes ○ No

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End Date for Substitution? *

Yes No

Indicate whether there should be an **End date for substitution**. **For example:** Select YES for an employee on vacation with a known return date; select NO if there was a medical emergency and the return date is unknown.

What is the end date for substitution (at midnight)? *

mm/dd/yyyy

If you select "yes" to an **end date**, enter the date. The change will take effect at 11:59 pm on the day you select.

Comments

2000 characters remaining

Change Requested For

Employee Name (First & Last) *

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Change Requested For

In the **Change Requester For** section, you will be asked for information related to the employee who needs the substitute.

Employee Name (First & Last) *

Department Name *

Dept ID *

Employee ID (UDID) *

As a DPS you have access to find all required information in UDX user profiles.

Please check the user profile prior to submitting. Requests will be returned if there is a discrepancy between the form and the user's UDX profile.

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Dept ID *

In the **Substitute Approver** section, you will be asked for information related to the employee who will serve as the substitute.

Substitute Approver

Information about the substitute approver

Substitute Name (First & Last) *

Employee ID (UDID) *

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Employee ID (UDID) *

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.

Employee ID (UDID) *

Confirm that Substitute Approver has an Approver or DPS role in UDX. *

☐ I confirm

Confirm the substitute's role, click **Next** and **proceed to Slide 48**.

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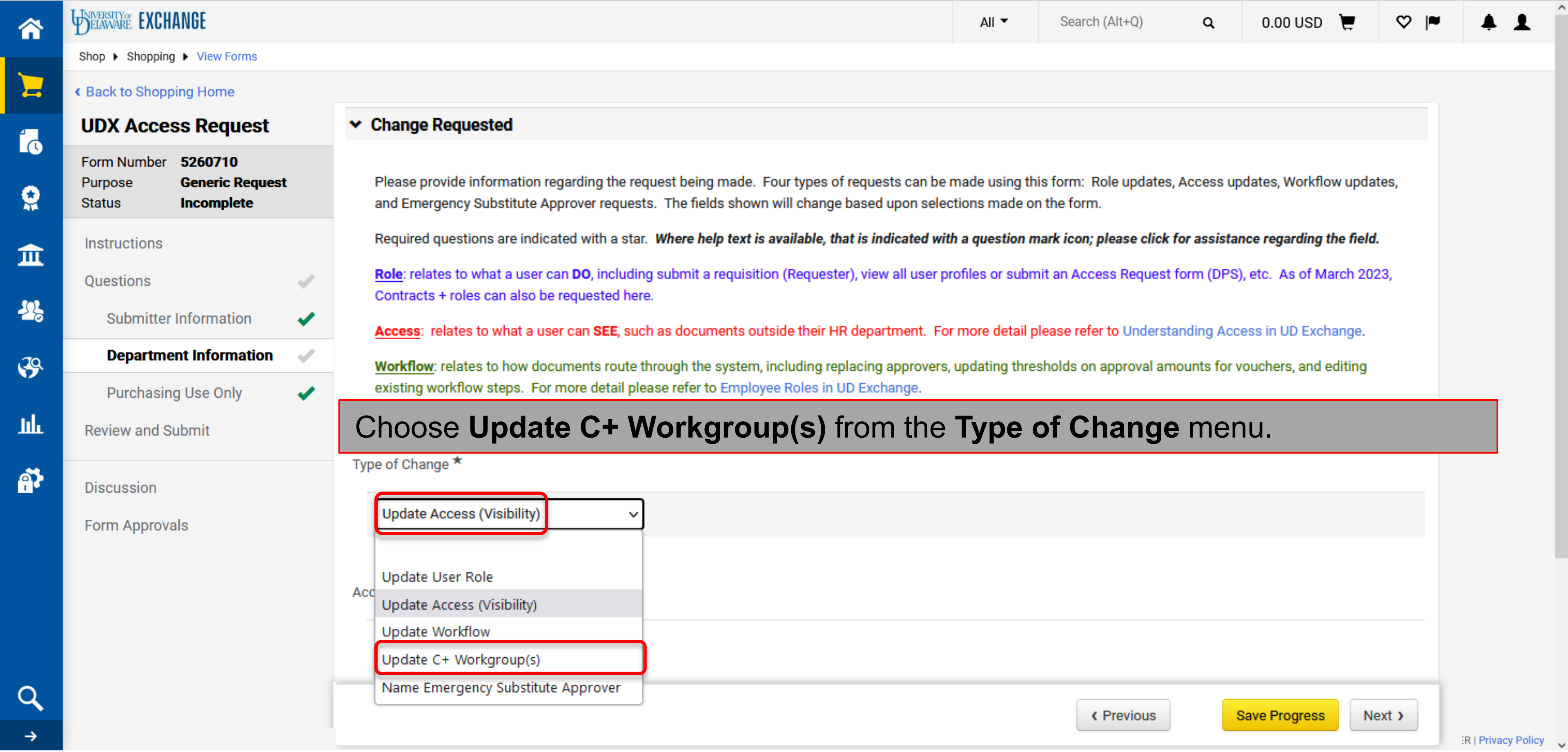
Updating Contracts+ (C+) Workgroups

- The Workgroups in Contracts+ (C+) dictate who can create and view contracts in UDX for their designated department
- Before being added to a C+ Workgroup, the user will need a C+ role (e.g., Contract Manager or Contract Approver) added to their UDX profile.
  - The C+ role update will need to be submitted on a separate UDX Access Request Form.
  - If the user does not have a C+ role in UDX, it will limit the scope of the tasks they can perform, even if listed in a Contracts+ Workgroup
- This request should comply with the Authority to Sign Financial Documents Policy



Choose **Update C+ Workgroup(s)** from the **Type of Change** menu.

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Type of Change *

Update C+ Workgroup(s)

Do workgroups need to be added, removed, or both? *

- Added
- Removed
- Both

Select whether this request is an Addition, Removal, or Both.

Based on the selected option, you will be asked for further information regarding your request to an existing C+ Workgroup.

Contracts + Workgroup Detail to be Added

2000 characters remaining

Contracts + Workgroup Detail to be Removed

2000 characters remaining

‹ Previous Save Progress Next ›

Other Request Attachments

UDX Access Request Template

No File Attached Upload

Change Requested For

Does this request apply to one user or more than one user?

- One User
- More than One User

Employee Name (First and Last)

Employee ID (UDID)

Department Name *

Dept ID *

In the **Change Requested For** section, you will be asked for information related to you will need to complete the information about the user to whom the change applies.

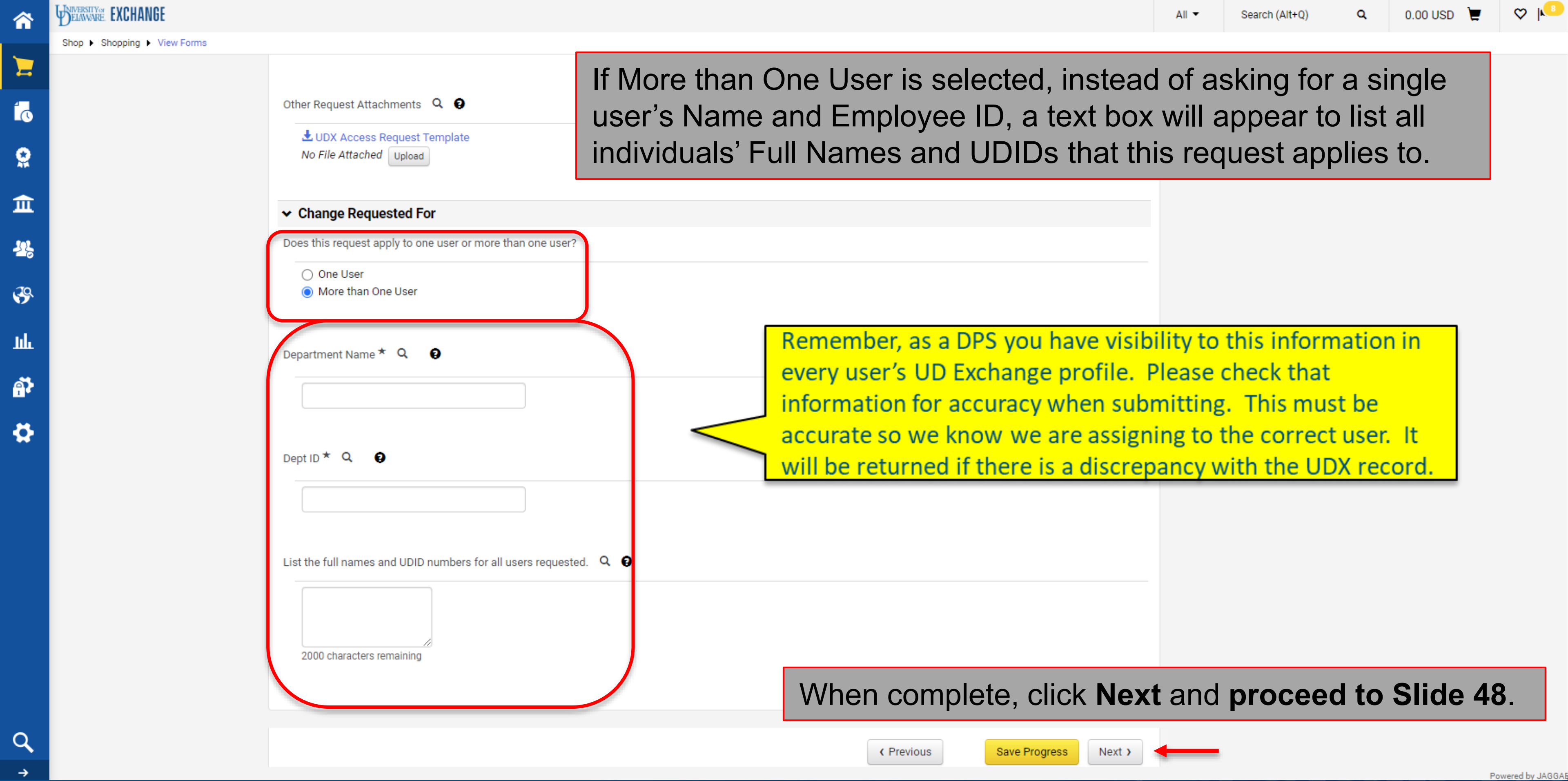
All starred fields are required.

See **Slide 44** to see the differences if *More than One User* is selected

As a DPS you have access to find all required information in UDX user profiles.

Please check the user profile prior to submitting. Requests will be returned if there is a discrepancy between the form and the user's UDX profile.

Previous Save Progress Next



If More than One User is selected, instead of asking for a single user's Name and Employee ID, a text box will appear to list all individuals' Full Names and UDIDs that this request applies to.

Remember, as a DPS you have visibility to this information in every user's UD Exchange profile. Please check that information for accuracy when submitting. This must be accurate so we know we are assigning to the correct user. It will be returned if there is a discrepancy with the UDX record.

When complete, click **Next** and **proceed to Slide 48**.

Finalizing the UDX Access Request Form

University of Delaware EXCHANGE

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UDX Access Request

Form Number	**5268123**
Purpose	**Generic Request**
Status	**Incomplete**

- Instructions
- Questions ✔
  - Submitter Information ✔
  - Department Information ✔
  - **Purchasing Use Only** ✔
- Review and Submit
- Discussion
- Form Approvals

Questions - Purchasing Use Only

Request Actions | History | ?

Question Text Is Searchable

Internal Use Only

This area is to be used by Procurement staff when reviewing and taking action on the request. You may also refer to the History and Discussion for any updates.

Comments

2000 characters remaining

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.

‹ Previous | Save Progress | Next ›

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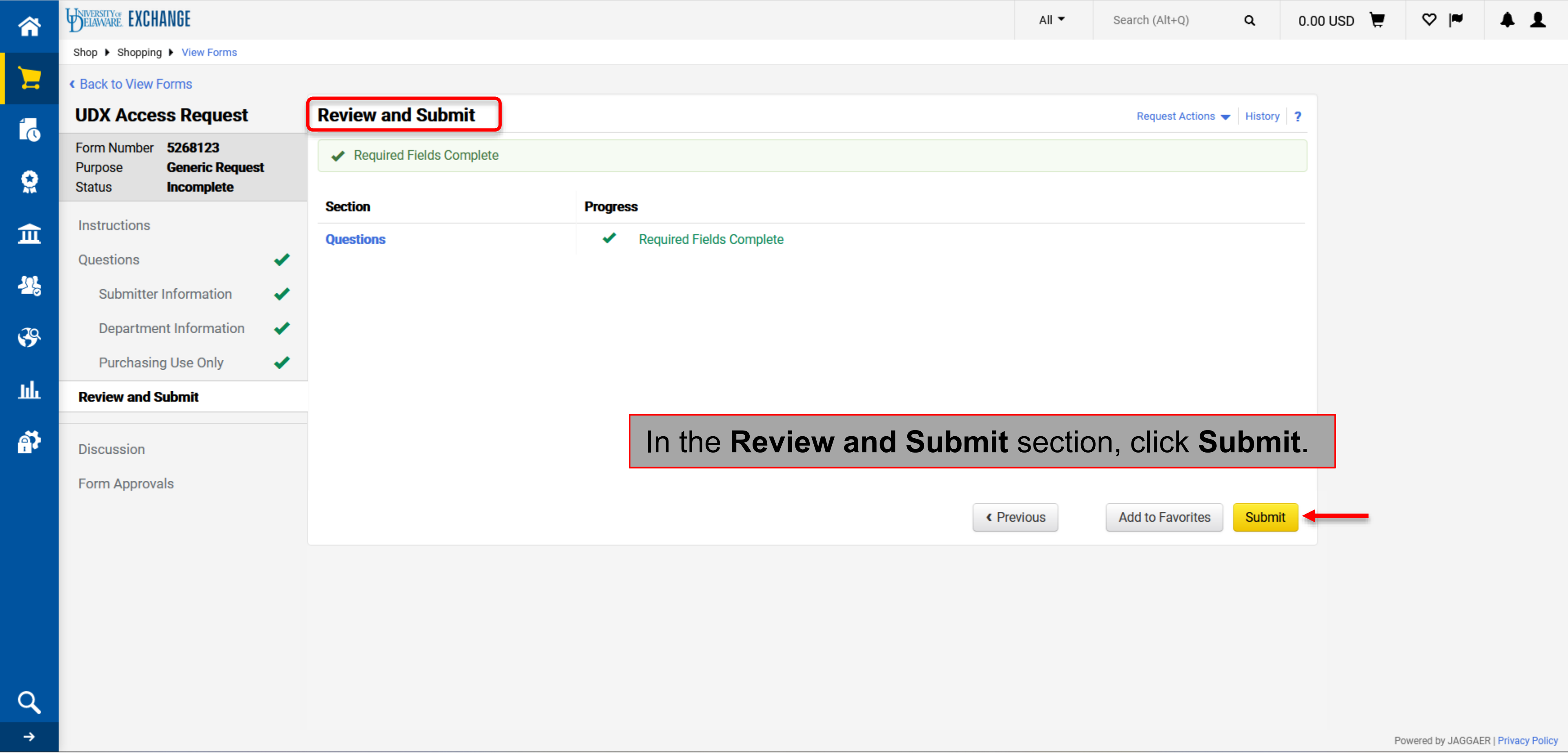
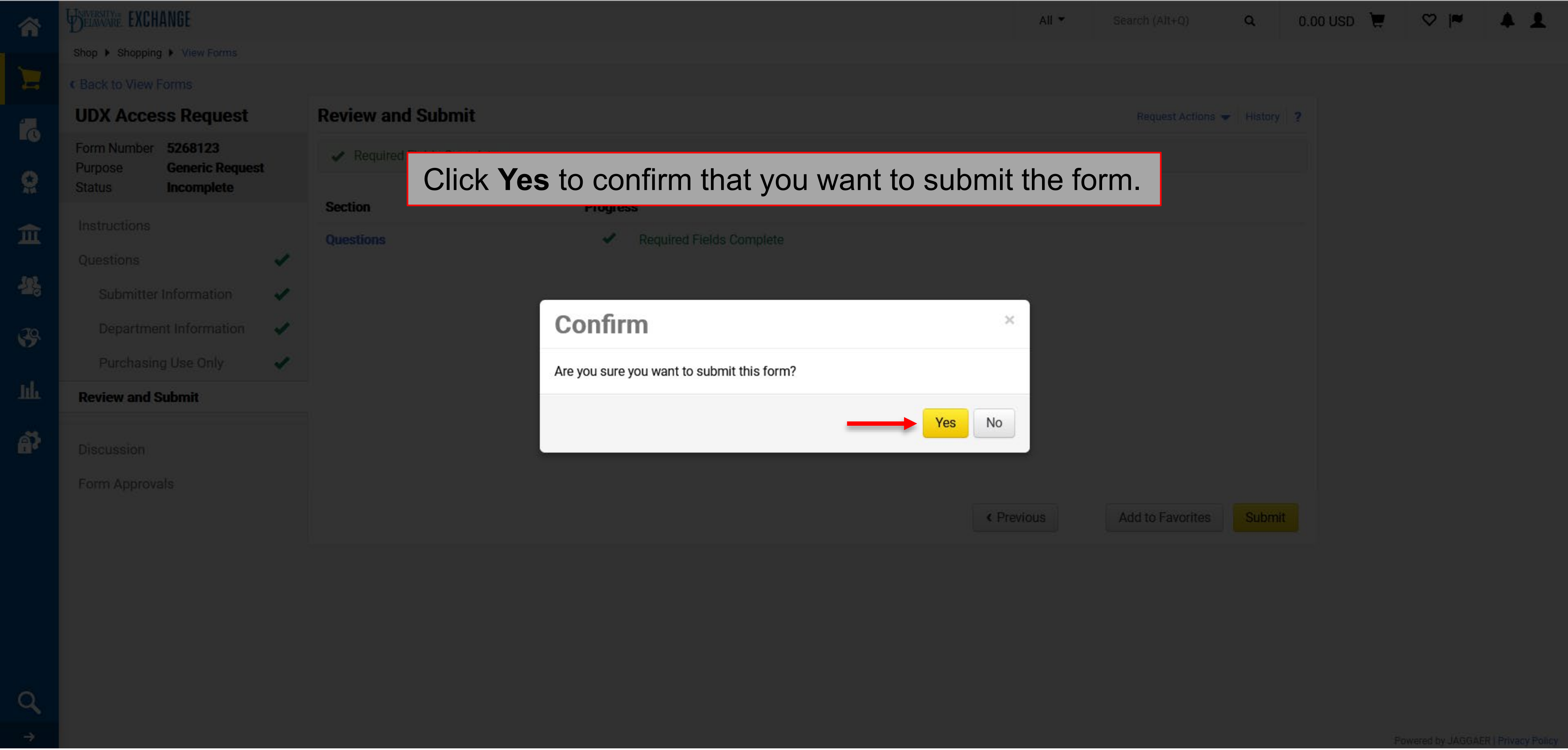
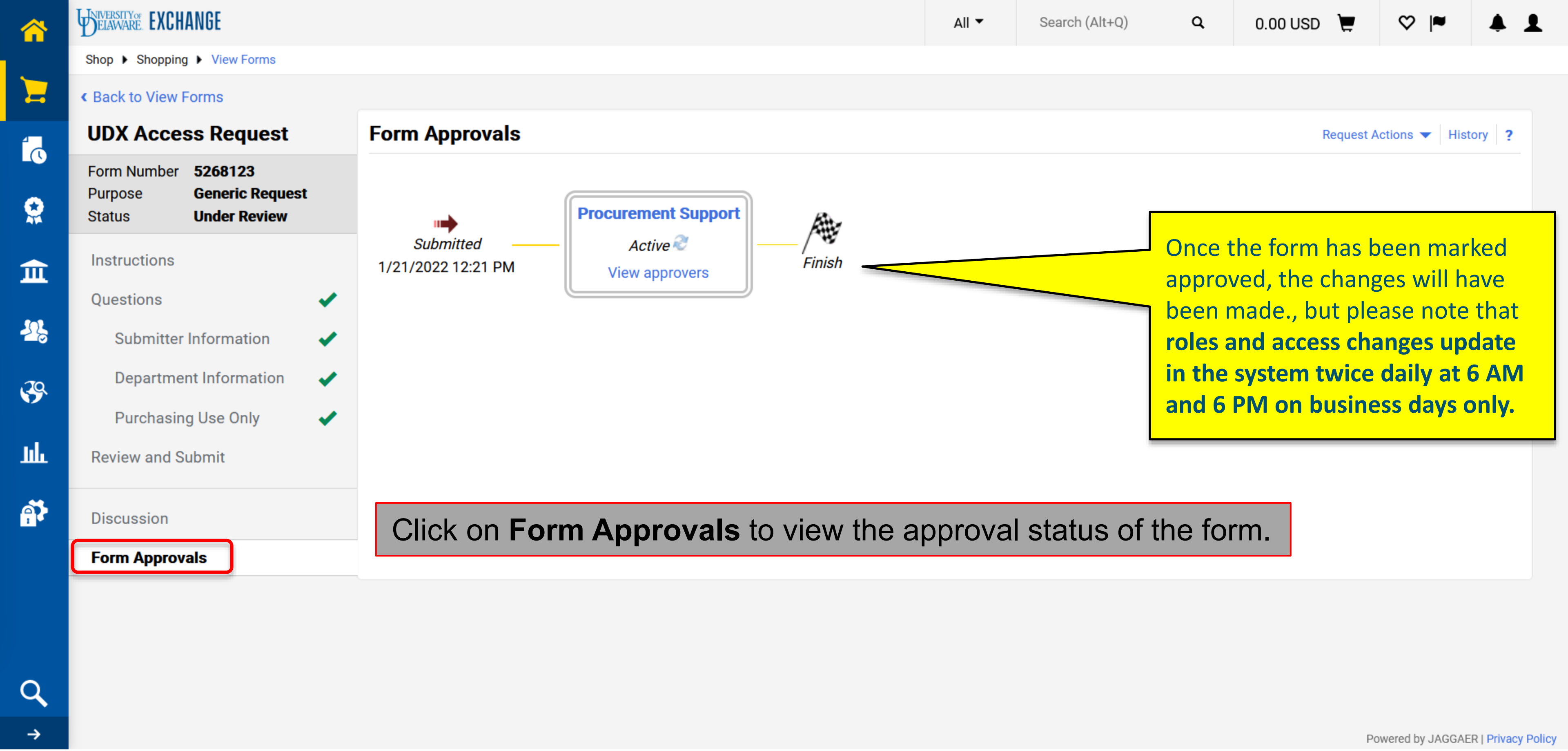


In the **Review and Submit** section, click **Submit**.

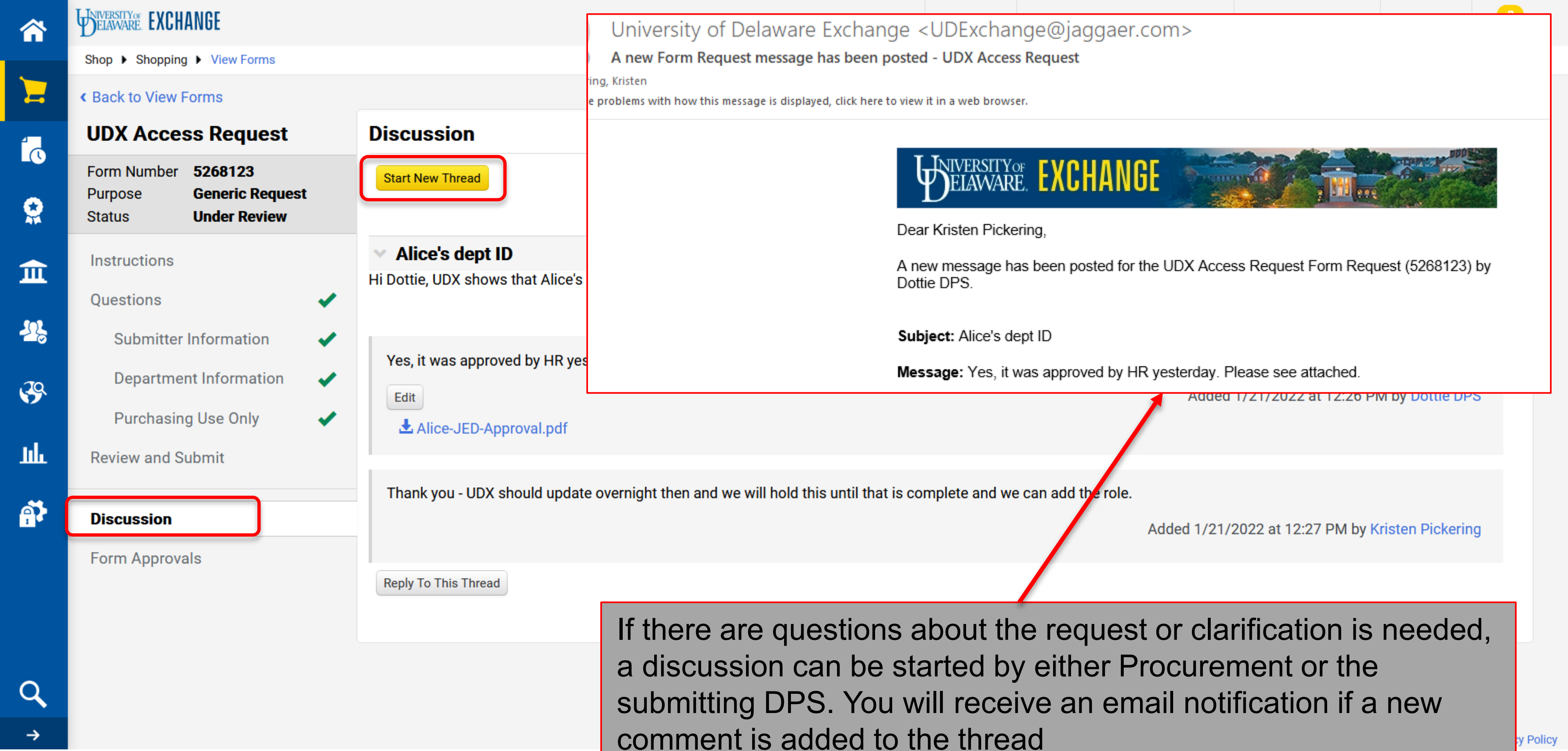
Click **Yes** to confirm that you want to submit the form.



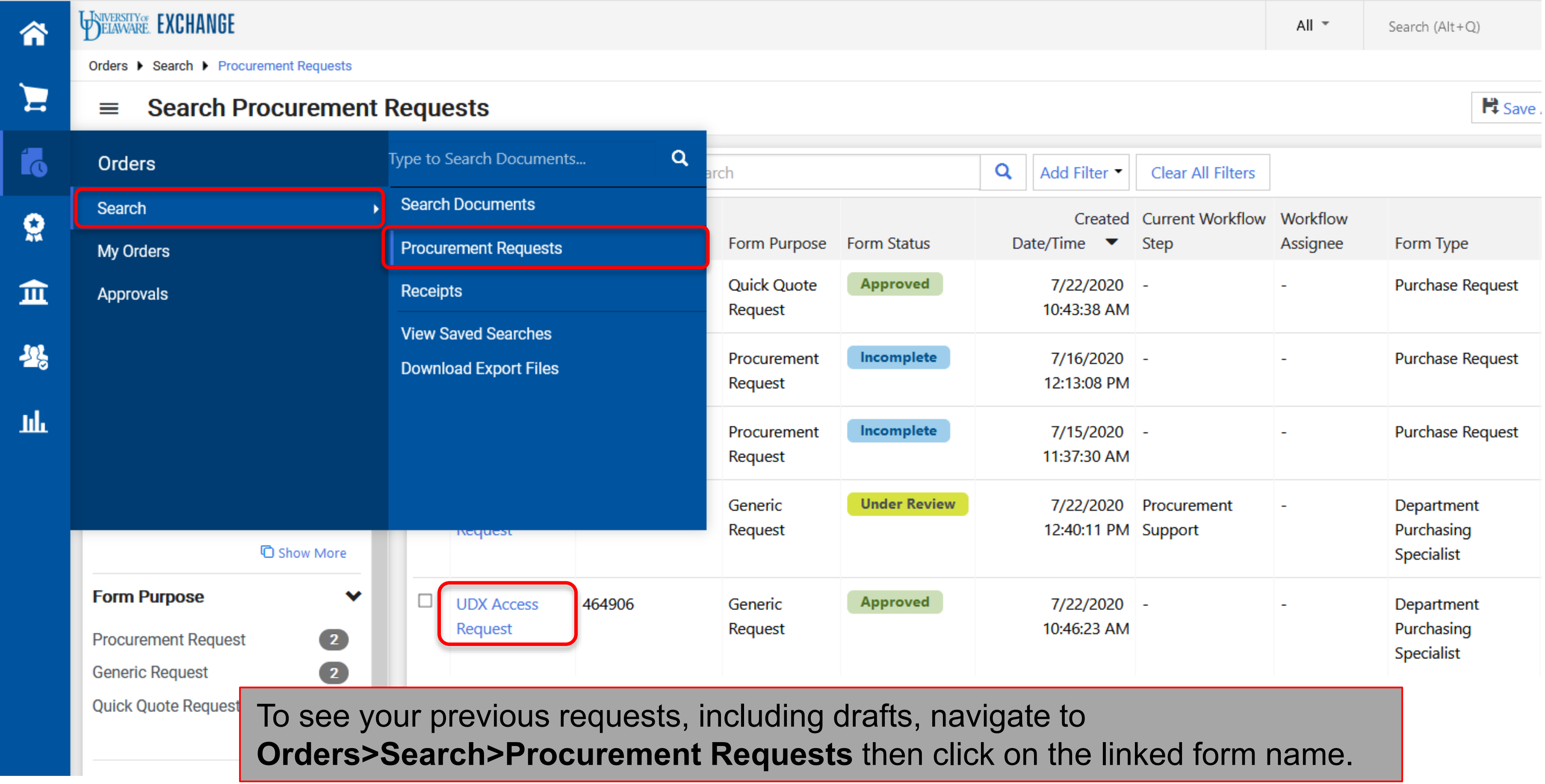


Once the form has been marked approved, the changes will have been made., but please note that **roles and access changes update in the system twice daily at 6 AM and 6 PM on business days only.**

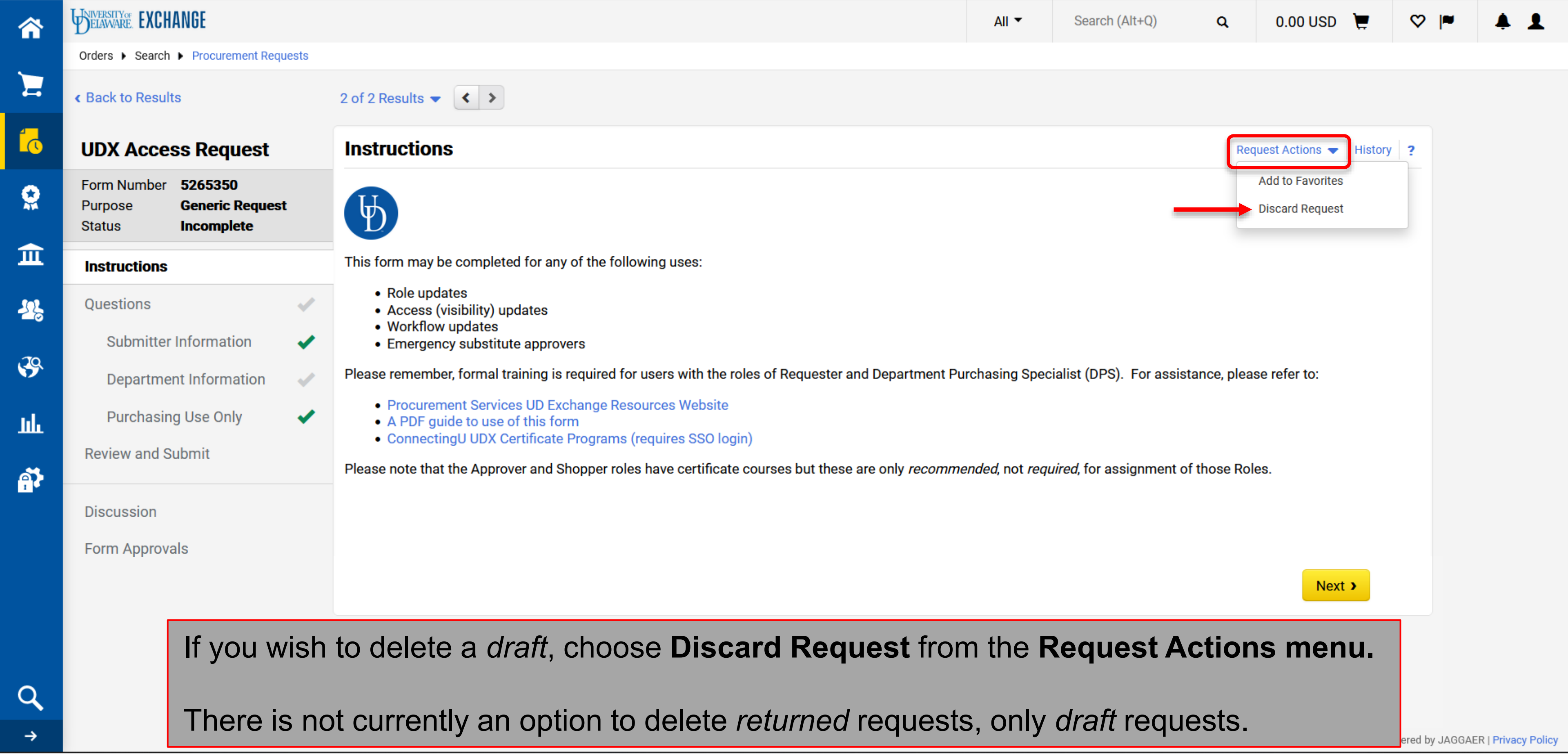
Click on **Form Approvals** to view the approval status of the form.



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.

Remember…

- Procurement *does not* manually add users to UD Exchange.
  - User information for UD Exchange is imported from HR daily.
  - Approved role and access changes run through these feeds at 6 AM and 6 PM.
- COA changes can only be made with General Accounting (coa-finance@udel.edu)
  - COA Approvers are imported from PeopleSoft and updated every two hours during business hours
- Approver roles are automatically assigned to employees based on their supervisory status and/or COA assignment
  - We generally do not remove Approver roles from profiles, because a user will not receive anything for approval unless it is intentionally routed to them
- If a user moves from one department of the University to another, their access will change automatically, but the Roles in their profile will stay the same. Review the profiles of new department users to determine whether they still need all of their previous Roles.

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