



Assigning and Unassigning Shopping Carts to and from Requesters

Revised 6/1/2023



# Assigning and Unassigning Shopping Carts to and from Requesters

- Shoppers in UD Exchange must **assign** their shopping carts to a Requester for processing.
- Shoppers can **unassign** a shopping cart from a Requester to:
  - Update the shopping cart
  - Assign a different Requester to the shopping cart for processing



# As a Shopper in UD Exchange:

- You can **prepare** your own orders.
- Employees with the Shopper role can **prepare** their own orders but will have to **assign** their orders to a Requester to review and submit them on their behalf.
- A Shopper can assign their order to a Requester while it is still a Shopping Cart *or* after they have clicked Proceed to Checkout to create their draft requisition.
- Business processes may vary by department/business unit. Some departments might expect Shoppers to complete all required information on a draft requisition before assigning it to a Requester while others might instruct their Shoppers to only complete basic cart information and add necessary attachments prior to assigning the order to a Requester who will complete the financial details.
- This guide will illustrate how to assign your carts/requisitions to a Requester, and how to unassign them if needed!



Organization Message

Welcome to the University of Delaware Exchange Test Site!

Here you'll find the goods and services you need. The greatly expanded **University of Delaware Exchange** provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.

Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email [procurement@udel.edu](mailto:procurement@udel.edu) if you have specific questions, chances are we are working on it!

Quick Links

- [UD Exchange How To Guides](#)
- [How Do I Buy ???](#)
- [Commodity Code-Account Crosswalk](#)
- [Non-PO Payment Matrix](#)
- [Non-Catalog Item](#)
- [Request Contract](#)

My Cart (Punchout Catalog)




-  **Ultra Clear Cups, Squat, 16-18 oz...**  
Quantity: 1  
Price: 133.33 USD
-  **30% Recycled Copy Paper, 8 x 11 ...**  
Quantity: 1  
Price: 219.90 USD
-  **747 Classic Full Strip Stapler, 20-...**  
Quantity: 1  
Price: 22.95 USD

[View My Cart](#)  
[Checkout](#)

376.18 USD

Catalog & Forms Showcase (Under Development)

Procurement Forms





-   
Non-PO Payment Request
-   
Subaward
-   
Waiver of Bid Request

Office/Misc Supplies

- 

1. Access your active cart by clicking the shopping cart link located in the upper right corner of your screen.

2. Click **View My Cart**.

			Date ▾	Total ▾
			10/10/2021	106.43 USD
	3186235	Punchout Catalog	My Drafts	2/25/2021 376.18 USD
	3186232	Fisher Testing 3	My Drafts Assigned to Others	2/25/2021 641.09 USD
	3186204	2021-02-25 testshopper 01	My Drafts Assigned to Others	2/25/2021 605.91 USD
	3089868	NCURA 2020 Membership Dues	My Returned Requisitions	10/23/2020 0.00 USD



Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Administer

Setup

Menu Search

UNIVERSITY OF DELAWARE EXCHANGE

AllSearch (Alt+Q)

253

Shopping Cart • Shopping Cart

Assign CartProceed To Checkout

SimpleAdvanced

Search for products, suppliers, forms, part number, etc.

Cart Name

When your order is ready, click the **Assign Cart** button.

Description

Multi-Invoice/Payment

After-The-Fact Purchase

Waiver of Bid

1 Item

Amazon.com Services LLC • 1 Item • 20.98 USD

Details

For

Margot McCabe

Total (20.98 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal★20.98

Total★20.98

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The screenshot shows the 'Assign Cart: User Search' pop-up window. The window has a blue header with the title and a close button. The main content area includes a label 'Assign Cart To:' followed by a dropdown menu currently showing 'no value' and the options 'SELECT' and 'or SEARCH'. Below this is a text area labeled 'Note To Assignee:'. At the bottom right of the window are two buttons: 'Assign' (yellow) and 'Close' (grey). The background shows the 'Shopping Cart' page with a sidebar menu on the left containing 'Home', 'Shop', 'Orders', 'Contracts', 'Accounts Payable', 'Suppliers', 'Sourcing', 'Reporting', 'Administer', and 'Setup'. The main content area of the cart shows a search bar, tabs for 'Simple' and 'Advanced', and a list of items including 'Snacks for Outreach Program'. On the right side of the cart, there are buttons for 'Assign Cart' and 'Proceed To Checkout', and a 'Details' section showing the total amount of 20.98 USD.

The **Assign Cart** pop-up window will appear.

You can select a Requester (also referred to as an assignee) using one of three possible options.

The options available to you will depend on how you have set up your UD Exchange profile.



UD UNIVERSITY OF DELAWARE EXCHANGE

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name Snacks for Outreach Program

Description

Multi-Invoice/Payment ☐

After-The-Fact Purchase ☐

Waiver of Bid ☐

1 Item

Amazon.com Services LLC • 1 Item • 20.98 USD

Assign Cart: User Search

Assign Cart To: **Kristen Pickering**

SELECT or SEARCH

Note To Assignee:

Assign Close

Details

For Margot McCabe

Total (20.98 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal\* 20.98

Total\* 20.98

Menu Search

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**Preferred assignee:** If you have identified a preferred Requester in your UD Exchange profile, that person's name will automatically appear.



**Assign Cart: User Search**

Assign Cart To: Kristen Pickering  
**SELECT** or SEARCH

Note To Assignee:

Profile Values

- Brandon Gabriel-Perez
- Kristen Pickering

Assign Close

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name Snacks for Outreach Program

Description

Multi-Invoice/Payment ☐

After-The-Fact ☐

Amazon.com Services LLC • 1 Item • 20.98 USD

Details

For Margot McCabe

**Total (20.98 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal ★ 20.98

Total ★ 20.98

Menu Search

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**Select from Profile Values:** If you have identified multiple Requesters in your UD Exchange profile, and you want to assign your shopping cart to one of them:

Click the **Select** menu.

Choose the appropriate Requester from the list that appears.



UNIVERSITY OF DELAWARE EXCHANGE

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name Snacks for Outreach Program

Description

Multi-Invoice/Payment ☐

After The Fact ☐

Assign Cart: User Search

Assign Cart To: no value  
SEARCH

Note To Assignee:

Assign Close

Details

For Margot McCabe

Total (20.98 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal \* 20.98

Total \* 20.98

1 Item

Amazon.com Services LLC • 1 Item • 20.98 USD

Menu Search

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**Search for an assignee:** If you have not identified Requesters in your UD Exchange profile, or if you want to assign your shopping cart to a Requester not identified in your profile: Select the **Search** link.



The screenshot shows the University of Delaware Exchange Shopping Cart interface. A 'User Search' pop-up window is open in the center, allowing users to search for requesters by last name, first name, user name, email, department, or role. The 'Last Name' field is populated with 'gabriel'. A red arrow points to the 'Search' button at the bottom of the pop-up. A yellow callout box on the right states: 'NOTE: User search will show **all** users, not only Requesters!'. The background shows the shopping cart with one item, 'Snacks for Outreach Program', and a subtotal of 20.98 USD. The top navigation bar includes links for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup.

Home Shop Orders Contracts Accounts Payable Suppliers Sourcing Reporting Administer Setup

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name Snacks for Outreach Program

Description

Multi-Invoice/Payment ☐

After-The-Fact Purchase ☐

Waiver of Bid ☐

1 Item

Amazon.co

Menu Search

User Search

Last Name

First Name

User Name

Email

Department

Role

Results Per Page 10

Search Close

NOTE: User search will show **all** users, not only Requesters!

Subtotal \* 20.98

Total \* 20.98

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The **User Search** pop-up window will appear.

Search for the Requester by last name (or other information if desired).  
Click **Search**.



Home

UNIVERSITY OF DELAWARE EXCHANGE

All

Search (Alt+Q)

20.98 USD

User Search

×

New Search

Name ↑	User Name	Email	Phone	Action
Gabriel-Perez, Brandon	702214053	bgabriel@udel.edu		<div>+</div>

Close

Reporting

Multi-Invoice/Payment

After-The-Fact Purchase

Administer

workflow approvals.

Subtotal \*

Total \*

20.98

20.98

1 Item

Amazon.com Services LLC - 1 Item - 20.98 USD

Menu Search

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From the list of results, select the appropriate Requester by clicking ‘+’ on the line of the person’s name.



Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Administer

Setup

Shopping Cart • Shopping Cart

SimpleAdvanced

Search for products, suppliers, forms, part number, etc.

Cart Name

Snacks for Outreach Program

Description

Multi-Invoice/Payment

☐

After-The-Fact Purchase

☐

Assign Cart: User Search

Assign Cart To:Gabriel-Perez, Brandon  
or [SEARCH](#)

Add to Profile☐

Note To Assignee:

AssignClose

Details

For

Margot McCabe

Total (20.98 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal \*20.98

Total \*20.98

1 Item

Amazon.com Services LLC • 1 Item • 20.98 USD

Menu Search

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Check the **Add to Profile** checkbox if you plan to assign shopping carts to this Requester again.



**Assign Cart: User Search**

Assign Cart To: Gabriel-Perez, Brandon  
or [SEARCH](#)

Add to Profile ☐

Note To Assignee:

[Assign](#) [Close](#)

1. Once you have selected a Requester, you can enter comments to your Requester in the **Note To Assignee** box. The comments will be part of the email notification sent to the Requester.

2. Click **Assign**.



Home

Shop

Orders

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Suppliers

Sourcing

Reporting

Administer

UNIVERSITY OF DELAWARE EXCHANGE

AllSearch (Alt+Q)0.00 USD

253

SimpleAdvanced

Search for products, suppliers, forms, part number, etc.

Q

Cart Assigned

Requisition Summary

Requisition number167250888

Cart nameSnacks for Outreach Program

Requisition total20.98 USD

Number of line items1

Options

Create new draft cart

Recent orders

Return to your home page

A confirmation message appears, along with a summary of your request.

An email notification of the assignment is sent by UD Exchange to the Requester.

You will receive an email notification from UD Exchange when the Requester submits your shopping cart.

Menu Search

←

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# How to unassign a shopping cart from a Requester

Note: You should notify your Requester when you unassign a shopping cart – your Requester will not receive an email notification



UD EXCHANGE TEST SITE

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

Shopping Settings

Open My Active Shopping Cart

View Carts

View My Orders (Last 90 Days)

Action Items

MY ASSIGNED APPROVALS

Requisitions To Approve 9

Vouchers 10

My Resources

My Resources

Product Release Library

procurement@udel.edu

Site Map

Quick Links

UD Exchange How To Guides

How Do I Buy ???

Commodity Code-Account Crosswalk

Non-PO Payment Matrix

Non-Catalog Item

NEW Waiver of Bid Form

Request Contract

Catalog & Forms Showcase (Under Development)

Procurement Forms

MBL

Use your side navigation bar to go to **Shop > My Carts and Orders > View Carts.**

https://usertest.sciquest.com/apps/Router/ViewDraftCarts?tmstmp=1685652732618

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## Cart Management

Create Cart ?

Draft Carts

Assigned Carts

[Assign Substitute](#)

▸ [Filter Assigned Carts](#)

Type ▴	Shopping Cart Name ▴	Cart Description	Date Created ▴	Total ▴	Created By ▴	Assigned To ▴	Action
Normal	<a href="#">M&amp;O Test</a>		12/15/2020	1.00 USD	Margot Martin	Ronald Brozek	<a href="#">View</a> ▾
Normal	<a href="#">Keen June 2023</a>		2/7/2023	211.20 USD	Margot Martin	Brandon Gabriel-Perez	<a href="#">View</a> ▾

View

Unassign ←

On the **Assigned Carts** tab, locate the shopping cart you want to unassign.  
Click the **Action** drop-down menu.  
Click **Unassign**.



Shopping Cart • Shopping Cart

⋮ ⏏ ⌂ ⋮

Assign Cart

Proceed To Checkout

Simple Advanced



Search for products, suppliers, forms, part number, etc.

Cart Name

Keen June 2023

Description

Multi-Invoice/Payment

☐

After-The-Fact Purchase

☐

Waiver of Bid

☐

Your shopping cart will open.

If needed, update the shopping cart.

When ready, **Assign** your shopping cart to the appropriate Requester.

Details

For

Margot Martin

Total (211.20 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here purposes, budget checking, and s.

211.20

211.20

3 Items

KEEN COMPRESSED GAS COMPANY • 3 Items • 211.20 USD

^ SUPPLIER DETAILS



### Questions:

- [procurement@udel.edu](mailto:procurement@udel.edu)

### Resources:

- [Procurement Services Website](#)
- [Adding Requesters to Profile](#)

