

UNIVERSITY OF DELAWARE[®] EXCHANGE

Adding Requesters (Assignees) to Your Profile

Revised 4/4/2023

How Can a Shopper Submit an Order?

- A Shopper can *create* but **cannot submit** an order for approval in UD Exchange.
- A Shopper will need to assign their order to a Requester who will prepare and/or review the draft requisition for allocation, business justification, and required attachments.
- Once the draft requisition has been reviewed, the Requester will submit it for approval on the Shopper's behalf.
- A Shopper should contact their department business administrator to determine who they should select as their Requester.
- UD Exchange offers system users the option to add specific Requesters (also referred to as "Assignees") to their user profile for convenience when assigning their shopping carts.
- This guide will illustrate how to add a Requester to your profile.



Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

The test site does not create live purchase orders or payments sent to suppliers. The integrations are set up to use the FITST PeopleSoft instance, which is not dynamically updated for production values of custom fields such as projects, work orders and speedtypes, or supplier active/inactive status. **The last refresh of FITST was completed on March 29, 2022.** Custom fields, with the exception of work order and user ref, were updated to reflect those values on April 22.

As you use this site for training and testing, you may see small differences from guides and the production site. The integration with catalog suppliers depends on their having a test site for integration; some suppliers (such as Amazon) do not have a test site and are not in this catalog. The test site is where the administrators test new solutions before moving to production and while building new guides. Please email procurement@udel.edu if you have specific questions; chances are we are working on it!

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request	Honorary Payment Request	Subaward Request	NIIMBL Subaward Request
RFQ Request (Option 2)	NSB Customer Setup	NEW Waiver of Bid Request	

Office/Misc Supplies

Action Items

MY ASSIGNED APPROVALS

[Requisitions To Approve](#) 9

[Vouchers](#) 10

ORDERS

[My Returned Requisitions](#) 2

CONTRACT

Margot Martin

[View My Profile](#)

[Dashboards](#)

[Manage Searches](#)

[Manage Search Exports](#)

[Set My Home Page](#)

[My Pending Requisitions](#) 5

[My Recently Completed Requisitions](#) 1

[My Pending Purchase Orders](#) 1

[My Recently Completed Purchase Orders](#) 1

Logout

[UD Exchange How To Guides](#)

[How Do I Buy ____ ???](#)

[Commodity Code-Account Crosswalk](#)

Click the **Profile** icon on the top of your screen.
Select **View My Profile**.

My Draft Carts

Showing Results 1 - 17 of 17

20 Per Page

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
3703294	My Cart's Name	My Drafts	2/7/2023	211.20 USD
	2022-04-15 700586502 01	Mv Drafts	4/15/2022	1 00USD



My Profile > User's Name, Phone Number, Email, etc.

Margot Martin

User Name 700586502

User Profile and Preferences <

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

App Activation Codes

Early Access Participation

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

Payment Options

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

User's Name, Phone Number, Email, etc. ?

First Name

Last Name

Phone Number
International phone numbers must begin with +

Mobile Phone Number
International phone numbers must begin with +

E-mail Address *

Department

Position

Reports To

Authentication Method

User Name * 700586502

* Required

Use the menu on the left to click **Default User Settings**.

Select **Cart Assignees**.



Margot Martin

User Name 700586502

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees**
- Financial Approvers
- Payment Options
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Cart Assignees

[Add Assignee...](#)

My Cart Assignees

Name	Action
------	--------

Click Add Assignee



Margot Martin

User Name 700586502

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees**
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- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Cart Assignees

Add Assignee...

Name

User Search

Last Name ←

First Name

User Name

Email

Department

Role

Results Per Page 10

Search

Enter your Requester's **Last Name** – entering additional information will help narrow down your list of results, but you are not required to complete all fields.

Click **Search**.



My Profile > Cart Assignees

Margot Martin

User Name 700586502

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees**
- Financial Approvers
- Payment Options
- User Roles and Access >
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- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Cart Assignees

Add Assignee...

My Cart Assignees

Name

New Search

Name	User Name	Email	Phone	Action
Pickering, Kristen	700456604	ud-mart@udel.edu	+1 302-831-2330	[select]
Pickering, Kristen L	kpickering	kpick@udel.edu		[select]

Select a Requester from the list by clicking the blue **[select]** link.

UDX will allow you to select any active employee, regardless of whether they have the Requester role.

Be sure that the person you select has the Requester role or they will also have to assign your cart to a Requester!



Margot Martin

User Name 700586502

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses
- Cart Assignees**
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- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Cart Assignees

Add Assignee...

My Cart Assignees

Name	Action
Kristen Pickering	Set as Preferred Remove

The Requester(s) listed in your Cart Assignees section will be now be available to you in a dropdown list on your future shopping carts.

To designate a Requester as *preferred* and have that Requester default to your shopping cart click **Set as Preferred**.

To *remove* a Requester from your Profile click **Remove** for that Requester.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Assigning and Unassigning Shopping Carts to and from Requesters](#)

