



Adding Default SpeedTypes to your Profile

Last revised 3/8/2023



Profile Settings and Options

This guide will illustrate how to add “favorite” and default SpeedTypes to your UDX Profile.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

106.43 USD

1

Shop • Shopping Home Page

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 if you have specific questions; chances are we are working on it!

Click on the **Profile** icon at the top of the Shopping Home Page

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

Waiver of Bid Request

Office/Misc Supplies

My Draft Carts

Draft Cart Type

All Drafts

Number	Cart	Cart Type	Date	Total
3357030	2021-10-10 testshopper 01	My Drafts	10/10/2021	106.43 USD
3186235	2021-02-25 testshopper 01	My Drafts	2/25/2021	22.95 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

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Quick Links

UD Exchange How To Guides

How Do I Buy _____ ???

Commodity Code-Account Crosswalk

Non-PO Payment Matrix

Non-Catalog Item

Request Contract

Sam Shopper

View My Profile

Dashboards

Manage Searches

Manage Search Exports

Set My Home Page

My Pending Requisitions15

My Pending Purchase Orders3

Logout

Help

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

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NIIMBL Subaward Request

RFX Request (Option 2)

Waiver of Bid Request

Office/Misc Supplies

WILSON

My Draft Carts

Draft Cart Type

All Drafts

Number

Cart

3357030

2021-10-10 testshopper

3186235

2021-02-25 testshopper

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

Select View My Profile

My Requisitions (test orders)



Sam Shopper

User Name testshopper

User Profile and Preferences ▸

Update Security Settings ▸

Default User Settings ▸

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

User Roles and Access ▸

Ordering and Approval Settings ▸

Permission Settings ▸

Notification Preferences ▸

User History ▸

Administrative Tasks ▸

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** Internal Information Cart

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

▼ Code Favorites for Check Requests & Vouchers

no value	no value	no value	no value	no value	no value	no value	no value	no value	no value
----------	----------	----------	----------	----------	----------	----------	----------	----------	----------

Go to **Default User Settings > Custom Field and Accounting Code Defaults**

Select the **Code Favorites** tab.

Sam Shopper

User Name testshopper

User Profile and Preferences >

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Financial Approvers

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

Custom Field and Accounting Code Defaults ?

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Add

Click the Add button.

Accounting Codes ?

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

Code Favorites for Check Requests & Vouchers

Add

Accounting Codes ?

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

My Profile ▸ Custom Field and Accounting Code Defaults

Sam Shopper

User Name testshopper

Custom Field and Accounting Code Defaults

Header (int.) Codes **Code Favorites** Internal Information Cart

Under the **SpeedType** column, click the blue **Select from all values** link.

User Profile and Settings

Update Security Settings ▸

Default User Settings <

Custom Field and Accounting Code Defaults

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User Roles and Access ▸

Ordering and Approval Settings ▸

Permission Settings ▸

Notification Preferences ▸

User History ▸

Administrative Tasks ▸

used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Accounting Codes

Nickname

☐ Default

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project	add split
N/A	no value	no value	no value	no value	no value	no value	no value	no value	no value	
Select from profile values...	Select from all values...							Select from all values...	Select from all values...	
Select from all values...								Clear selected value...	Clear selected value...	

Save

Cancel

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
-------------------	-----------	---------	------	------	---------	--------	------------	----------	--------------------

no value no value no value no value no value no value no value no value no value



Sam Shopper

User Name testshopper

User Profile and Preferences >

Update Security Settings >

Default User Settings <

Custom Field and Accounting Code Defaults

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Financial Approvers

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) Codes Code

Use Code Favorites for quick access at checkout. You may create a new used combination of accounting checkout by editing the codes profile.

Accounting Codes

Nickname

Work Order Number	SpeedType	Purpose
-------------------	-----------	---------

N/A	no value	no value
Select from profile values...	Select from all values...	no value

Accounting Codes

Work Order Number	SpeedType	Purpose
-------------------	-----------	---------

no value	no value	no value	no value	no value	no value	no value	no value	no value	no value
----------	----------	----------	----------	----------	----------	----------	----------	----------	----------

Mozilla Firefox (Private Browsing)

https://usertest.sciquest.com/apps/Router/CFValueSearchPopup?Cfid=1075324&Callback=

Close

Custom Field Search

Value

Description

Search

A pop-up search box will appear.

You can enter search criteria into the **Value** field (if you know the SpeedType you are looking for), or the **Description** field to narrow your search.

Click the **Search** button.



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My Profile ▸ Custom Field and Accounting Code Defaults

Sam Shopper

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Update Security Settings ▸

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Permission Settings ▸

Notification Preferences ▸

User History ▸

Administrative Tasks ▸

Custom Field and Accounting Code Defaults ?

Header (int.) Codes Code

Use Code Favorites for quick access to frequently used codes. You may create a new code combination by editing the codes in your profile.

Accounting Codes

Nickname

Work Order Number

SpeedType

Purpose

N/A

Select from profile

Select from all values...

Accounting Codes

Work Order Number

SpeedType

Purpose

no value

no value

no value

no value

no value

no value

no value

no value

no value

no value

Mozilla Firefox (Private Browsing)

https://usertest.sciquest.com/apps/Router/CFValueSearchPopup

Close

Click to filter search results ?

Results Per Page 20 ▾Values Found 1Page 1 of 1 ?

Value

Description

VPFN175JAGVPFN IT JAGGAER IMPLEMENT

select

Find the SpeedType you are looking for from the list of results.

Click **Select**.



Sam Shopper

User Name testshopper

User Profile and Preferences ▸

Update Security Settings ▸

Default User Settings <

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Custom Field and Accounting Code Defaults

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Accounting Codes

Nickname Implementation

☐ Default

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project	add split
N/A Select from profile values... Select from all values...	VPFN175JAG Select from all values...	VPFN175121 Select from all values...	OPBAL Select from all values...	14005 Select from all values...	ADALL Select from all values...	no value	VPFN17512120001 Select from all values...	no value Select from all values... Clear selected value...	no value Select from all values... Clear selected value...	

Save

Cancel

Create a **Nickname** for the SpeedType you selected.

If you would like to make this your default SpeedType, check the **Default** box.

Click **Save**.

My Profile ▸ Custom Field and Accounting Code Defaults

Sam Shopper

User Name testshopper

User Profile and Preferences

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Custom Field and Accounting Code Defaults ?

Header (int.) Codes **Code Favorites** Internal Information Cart

You can continue to add multiple favorite SpeedTypes as needed.

To remove a SpeedType from your favorites, click the **Delete** button.

Accounting Codes ?

Implementation

Edit

Delete

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	VPFN175JAG	VPFN175121	OPBAL	14005	ADALL	no value	VPFN17512120001	no value	no value
N/A	VPFN IT JAGGAER IMPLEMENT	R/E VPFN IT INITIATIVES	OPERATING BALANCE	GU UNIVERSITY FINANCE	ADMINISTRATIVE ALLOWABLE		VPFN IT JAGGAER IMPLEMENT		

Code Favorites for Check Requests & Vouchers

Add

Accounting Codes ?

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value

Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Adding Financial Information to Requisitions](#)

