



Identifying Requesters of Purchase Orders

Revised 05/31/2023



Identifying Owners & Requesters of Purchase Orders

When a Purchase Order (PO) is created, it is important to be able to identify the PO Owner and the Requester. A UD employee or a supplier may need to know who the owner of the PO is for order confirmation, shipping updates, resolution of issues, questions from suppliers and more.

There are usually two main parties involved in most POs:

- The Shopper who created the original shopping cart
- The Requester who submitted the order for approval

Sometimes the Shopper and Requester are the same person, since Requesters can also shop!



Identification on a Requisition:

On the **Summary** tab, the Requester's name is in the **Prepared by** field. The Shopper/PO Owner's name is in the **Prepared for** field.

Comments 3

General

Status ✓ Completed
(7/20/2020 10:03)

Submitted 7/14/2020 9:50 AM

Cart Name	Articulate - Day 2 Homework
Cart 1	1. What is the purpose of the articulation process?
Cart 2	2. How does the articulation process differ from the articulation process?
Cart 3	3. What are the key components of the articulation process?
Cart 4	4. How does the articulation process differ from the articulation process?
Cart 5	5. What are the key components of the articulation process?
Cart 6	6. How does the articulation process differ from the articulation process?
Cart 7	7. What are the key components of the articulation process?
Cart 8	8. How does the articulation process differ from the articulation process?
Cart 9	9. What are the key components of the articulation process?
Cart 10	10. How does the articulation process differ from the articulation process?

Description	Ultrasound Equipment
1. General Ultrasound Machine	1. General Ultrasound Machine
2. Doppler Ultrasound Machine	2. Doppler Ultrasound Machine
3. Portable Ultrasound Machine	3. Portable Ultrasound Machine
4. High-Resolution Ultrasound Machine	4. High-Resolution Ultrasound Machine
5. 3D/4D Ultrasound Machine	5. 3D/4D Ultrasound Machine
6. Color Doppler Ultrasound Machine	6. Color Doppler Ultrasound Machine
7. Small Parts Ultrasound Machine	7. Small Parts Ultrasound Machine
8. Vascular Ultrasound Machine	8. Vascular Ultrasound Machine
9. Obstetric Ultrasound Machine	9. Obstetric Ultrasound Machine
10. Cardiac Ultrasound Machine	10. Cardiac Ultrasound Machine
11. Musculoskeletal Ultrasound Machine	11. Musculoskeletal Ultrasound Machine
12. Pediatric Ultrasound Machine	12. Pediatric Ultrasound Machine
13. Endovascular Ultrasound Machine	13. Endovascular Ultrasound Machine
14. Intracranial Ultrasound Machine	14. Intracranial Ultrasound Machine
15. Transcranial Doppler Ultrasound Machine	15. Transcranial Doppler Ultrasound Machine
16. Carotid Ultrasound Machine	16. Carotid Ultrasound Machine
17. Renal Ultrasound Machine	17. Renal Ultrasound Machine
18. Gallbladder Ultrasound Machine	18. Gallbladder Ultrasound Machine
19. Liver Ultrasound Machine	19. Liver Ultrasound Machine
20. Pancreas Ultrasound Machine	20. Pancreas Ultrasound Machine
21. Spleen Ultrasound Machine	21. Spleen Ultrasound Machine
22. Kidney Ultrasound Machine	22. Kidney Ultrasound Machine
23. Bladder Ultrasound Machine	23. Bladder Ultrasound Machine
24. Prostate Ultrasound Machine	24. Prostate Ultrasound Machine
25. Testis Ultrasound Machine	25. Testis Ultrasound Machine
26. Uterus Ultrasound Machine	26. Uterus Ultrasound Machine
27. Ovary Ultrasound Machine	27. Ovary Ultrasound Machine
28. Cervix Ultrasound Machine	28. Cervix Ultrasound Machine
29. Vagina Ultrasound Machine	29. Vagina Ultrasound Machine
30. Breast Ultrasound Machine	30. Breast Ultrasound Machine
31. Thyroid Ultrasound Machine	31. Thyroid Ultrasound Machine
32. Parathyroid Ultrasound Machine	32. Parathyroid Ultrasound Machine
33. Adrenal Ultrasound Machine	33. Adrenal Ultrasound Machine
34. Pituitary Ultrasound Machine	34. Pituitary Ultrasound Machine
35. Hypothalamus Ultrasound Machine	35. Hypothalamus Ultrasound Machine
36. Pineal Ultrasound Machine	36. Pineal Ultrasound Machine
37. Brain Ultrasound Machine	37. Brain Ultrasound Machine
38. Spine Ultrasound Machine	38. Spine Ultrasound Machine
39. Joint Ultrasound Machine	39. Joint Ultrasound Machine
40. Muscle Ultrasound Machine	40. Muscle Ultrasound Machine
41. Tendon Ultrasound Machine	41. Tendon Ultrasound Machine
42. Ligament Ultrasound Machine	42. Ligament Ultrasound Machine
43. Cartilage Ultrasound Machine	43. Cartilage Ultrasound Machine
44. Bone Ultrasound Machine	44. Bone Ultrasound Machine
45. Skin Ultrasound Machine	45. Skin Ultrasound Machine
46. Hair Ultrasound Machine	46. Hair Ultrasound Machine
47. Nerve Ultrasound Machine	47. Nerve Ultrasound Machine
48. Blood Vessel Ultrasound Machine	48. Blood Vessel Ultrasound Machine
49. Heart Ultrasound Machine	49. Heart Ultrasound Machine
50. Lung Ultrasound Machine	50. Lung Ultrasound Machine
51. Stomach Ultrasound Machine	51. Stomach Ultrasound Machine
52. Intestine Ultrasound Machine	52. Intestine Ultrasound Machine
53. Pancreas Ultrasound Machine	53. Pancreas Ultrasound Machine
54. Spleen Ultrasound Machine	54. Spleen Ultrasound Machine
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115. Heart Ultrasound Machine	115. Heart Ultrasound Machine</

Priority Normal

Prepared by George Walueff

Prepared for Sean Malone

Purchasing Business UOD01
Unit UNIVERSITY OF DELAWARE

eBuilder Process *no value*
Instance

Multi- Invoice/Payment ✖

University of Delaware
Attn: Linguistics& Cognitive Science
Room: Room 0110
125 E Main St
125 E Main St
Newark, DE 19711
United States

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Billing Options

Accounting Date *no value*

Delivery Options

Expedite ✖

Best Carrier-Best Way

Requested Delivery Date

Buyer Information

 User does not have the necessary permissions to view the custom fields associated with this section

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dent	Program	Source	Project ID
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Completed

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

Subtotal	12,885.00
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12.885.00

Related Documents

Purchase Order: UDS0000597

What's next?

This information automatically populates when the Shopper (Sean) assigns their cart to a Requester (George). However, the Requester can manually change the name of the Prepared For user if someone else should have the responsibility of being the PO Owner.



Identification on a Purchase Order

- Internal users and suppliers can also find the Owner on the PO
 - The Shopper / Owner is clearly identified in the header of the PO
 - Suppliers may use this information for questions regarding the order. The Buyer's name is also included on non-catalog purchase orders for reference.



- Status
- Summary
- Revisions 2
- Confirmations
- Shipments
- Change Requests
- Receipts
- Vouchers
- Comments
- Attachments 1
- History

General Information

PO/Reference No.

Revision No.

Supplier Name

Purchase Order Date7/20/2020

Total12,885.00

Owner NameSean Malone

Owner Phone+1 302-831-2125

Owner Emailspmalone@udel.edu

Requisition Number2999742 view | print

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view

Email (HTML Body)ud-mart@udel.edu

Distribution options have been overridden for this PO

Distribution Date/Time8/6/2020 8:59 AM

SupplierSent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 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.

Subtotal12,885.00

12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow StatusCompleted

Workflow

Show skipped steps

Submitted7/20/2020 10:03 PMSean Malone

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	✓ EchoB 128 CEXT-1Z Compact External Ultrasound System Modified for Speech Research	CEXT-1Z	EA	4,765.85	1 EA	4,765.85

DETAILS

Supplier	Receiving	Invoicing	Matching
Sent To Supplier	none	none	No Matches

Records found: 2

Revision No.	Revision Date	Revision Name	Revised By		
1	8/6/2020 8:59 AM	PO Export	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	PO-Terms-And-Conditions-Oct2019.pdf (System)
original	8/6/2020 8:58 AM	original	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	PO-Terms-And-Conditions-Oct2019.pdf (System)

Completed

Details

Supplier Status

Sent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 USD)

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Subtotal

12,885.00

12,885.00

Completed

Submitted

7/20/2020 10:03 PM

Sean Malone

To see where a *supplier* will see the information, select the **Revisions** tab of the PO. This tab houses all historic versions of the PO available. In almost all cases, the most recent version will be the one to select:

Revisions are listed newest to oldest by **Revision Date**.
Select the **HTML Body Email PO** link to open a copy of the PO as the supplier received it.

	External Note								
6 of 8	UltraFit Probe Stabilisation Headset				EA	1,122.15 USD	1 EA	1,122.15 USD	
	Taxable	No							
	Capital Expense	No							
	Commodity Code								
	External Note								
7 of 8	Audio Bundle						1 EA	264.04 USD	
	Taxable								
	Capital Expense								
	Commodity Code	41000000							
		Laboratory, Measuring, Observing & Testing Equipment							
	External Note								
8 of 8	Carriage (Incoterm CPT, Newark Courier)				EA	112.26 USD	1 EA	112.26 USD	
	Taxable	No							
	Capital Expense	No							
	Commodity Code	78000000							
		Transportation, Storage & Mail Services							
	External Note								

Scroll down to the **Shipping Instructions** section of the PO.

The PO Owner is identified as the **Contact** in the **Requestor Information** section.

Shipping, Handling and Tax charges are calculated and charged by each supplier.

Total

12,885.00 USD

Shipping Instructions

Note to Supplier

Supplier Terms and Conditions

PO-Terms-And-Conditions-Oct2019.pdf (65k)

Requestor Information

Contact

Sean Malone

Email

somalone@udel.edu

Phone

+1 302-831-2125

Approval Signature



Billing Information

Contract

no value

Quote number

766

Billing Address

University of Delaware
Accounts Payable
accounts payable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States



Owner Changes for a Purchase Order

Occasionally, it may be necessary to change the Owner of a PO

- Example: The PO Owner has changed departments and their original department needs to retain visibility of the PO since document access is dictated by the PO Owner's HR department.

To change the owner of a PO, add a Comment to the PO with Procurement Help as the recipient, naming the new PO owner.



Status Summary Revisions 2 Confirmations Shipments Change Requests Receipts Vouchers **Comments** Attachments 1 History

Records found: 0

Show comments for

Purchase Order



No comments have been added

To send a comment request to Procurement Help:

Select the **Comments** tab.
Click the **'+'** to **Add New Comment**.

Completed

Details

Supplier Status

Sent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 USD)

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Subtotal 12,885.00
12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow Status

Completed

Workflow

Show skipped steps



Submitted

7/20/2020 10:03 PM
Sean Malone



Records found: 0

Show comments for

Purchase Order

 +

ADD COMMENT

Click the blue **Add Recipient** link.



1000 characters remaining

[expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

[Email notification\(s\)](#) | [Add recipient](#)

- ☐ George Walueff (Prepared by) <ud-mart@udel.edu>
- ☐ Kristen L Pickering (Approved) <kpick@udel.edu>
- ☐ Sean Malone (Prepared for) <ud-mart@udel.edu>

Attach file (optional)

Attachment Type

☒ File ☐ Link/URL

File Name

File

Choose File

Upload your file

No comments have been added

Completed

Details

Supplier Status
Sent To Supplier

Supplier
ARTICULATE INSTRUMENTS LTD

Total (12,885.00 USD)

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Subtotal	12,885.00
	12,885.00

Related Documents

[Requisition: 2999742](#)

What's next?

Workflow Status

Completed

Workflow

☐ Show skipped steps

✓

Submitted
7/20/2020 10:03 PM
Sean Malone



UNIVERSITY OF DELAWARE
EXCHANGE
TEST SITE

Purchase Order • ARTICULATE INSTRUMENTS LTD • UDS0000597 Revision

StatusSummaryRevisions2ConfirmationsShipments

Records found: 0

ADD COMMENT

1000 characters remaining

No comments have been added

This was added

Email

Attachments

Link/URL

User Search

Last NameFirst NameUser NameEmailDepartmentRoleResults Per Page

help

10

SearchClose

0.00 USD

Search (Alt+Q)

1 of 1 Results

Attachments1History

Completed

Details

Supplier Status

Sent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 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

12,885.00

12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow Status

Completed

Workflow

Show skipped steps

Submitted

7/20/2020 10:03 PM

Sean Malone

Powered by JAGSAER | Privacy Policy

Type the keyword **"help"** in the **Last Name** field.

Click **Search**.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

User Search

New Search

Name ↑	User Name	Email	Phone	Action
Procurement Help	Procurement	udexchange@udel.edu		+

Close

1000 characters remaining

expand / clear

Email notification(s) | Add recipient

☐ George Walueff (Prepared by) <ud-mart@udel.edu>

☐ Kristen L Pickering (Approved) <kpick@udel.edu>

☐ Sean Malone (Prepared for) <ud-mart@udel.edu>

Link/URL

File Name

File

Choose File

Upload your file

No comments have been added

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 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

12,885.00

12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow Status

Completed

Workflow

Show skipped steps

Submitted

7/20/2020 10:03 PM

Sean Malone

Powered by JAGGAER | Privacy Policy



Records found: 0

Show comments for Purchase Order ▾ +

ADD COMMENT

Please change PO owner to George Walueff since Sean has changed departments.

924 characters remaining expand clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

- ☐ George Walueff (Prepared by) <ud-mart@udel.edu>
- ☐ Kristen L Pickering (Approved) <kpick@udel.edu>
- ☐ Sean Malone (Prepared for) <ud-mart@udel.edu>

✓ Procurement Help <udexchange@udel.edu>

Attach file (optional)

Type a comment requesting the change of PO owner.

Select the **Check Mark** to **Add and send the Comment**.

File

Choose File

Upload your file

No comments have been added

Completed

Details ▾

Supplier Status

Sent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 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 12,885.00
12,885.00

Related Documents ▾

Requisition: 2999742

What's next? ▾

Workflow Status

Completed

Workflow

Show skipped steps

Submitted
7/20/2020 10:03 PM
Sean Malone



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Understanding Access in UD Exchange](#)

