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.
Click the **Profile** icon on the top of your screen. Select **View My Profile**.
Use the menu on the left to click **Default User Settings.**

Select **Cart Assignees.**
Click Add Assignee
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**.
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!
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