Adding Requesters (Assignees) to Your Profile
What’s different in UD Exchange?

Purchase and Approval Process

Previously, UD employees would make purchases with their p-cards and submit them to department approvers after the fact. If an employee had no p-card, they had to find someone who did.

In UD Exchange, employees shop for goods and services, then assign their purchase requests (“carts”) to a department Requester who reviews, allocates, and approves the purchase prior to it being made, eliminating the need for verification after the fact. All employees are able to shop, only those with purchasing authority can submit.
How Shoppers Submit Requests

• If you have the **Shopper** role in UD Exchange, you’ll need to add **Requesters** (also referred to as “Assignees”) to your Profile.

• A Shopper cannot submit a purchase request, so you’ll need to assign your shopping cart to a Requester for submission.

• To determine who you should select as your Requester, contact your department business administrator.

• This guide will illustrate how to add a Requester to your Profile.
1. Click the name icon on the top of your screen.
2. Select View My Profile.
1. Use the menu on the left to click **Default User Settings**.
2. Select **Cart Assignees**.
Click Add Assignee…
1. Enter your Requester’s Last Name – entering additional information will help narrow down your list of results.
2. Click Search.
Select a Requester from the list by clicking into the person’s row.

The system does not know who has which roles and simply returns the name matching your search. Be sure that your Requester has access to Request, or they will also have to assign your cart to a Requester!
The Requester will be available to you in a dropdown list on your shopping carts.

1. To designate a Requester as preferred and have that Requester default to your shopping cart click **Set as Preferred**.
2. To remove a Requester from your Profile click **Remove** for that Requester.
Resources

Procurement Services
procurement@udel.edu