



University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2010-P3

HOW TO ASSIGN AN ACTIVE SHOPPING CART

OVERVIEW:

An Assignee represents a Requisitioner or Approver who can place the order. A Shopper can assign a cart without all of the required information populated. Shoppers are typically allowed to shop, but cannot place an order, and instead are allowed to assign a cart to an Assignee. Assignees have the ability to receive an email notification when they are assigned a cart. If your current role is a Requisitioner or Approver and you have decided to place your order rather than assigning it to an Assignee, proceed to *Procedure #2010-P8 How To Submit Your Purchase Requisition* for further instructions.

PROCEDURE:

STEP 1: CREATING A LIST OF ASSIGNEES IN YOUR PROFILE

In order to assign a cart to an Assignee you must add the Assignee to your profile. You will have the option to indicate a preferred Assignee which will automatically appear when you are ready to assign your cart. If you previously created a list of Assignees in your profile, proceed to *Step 2: Searching For An Assignee* to continue.

- Select the **profile** navigation tab.
- Select the **Purchasing** and **Cart Assignees** sub-tabs.
- Click on **Add Assignee** and a pop-up box will appear.

NOTE: If you do not see an add assignees option, please contact the HuskBuy Help Desk to have the search for assignee permission added to your profile.

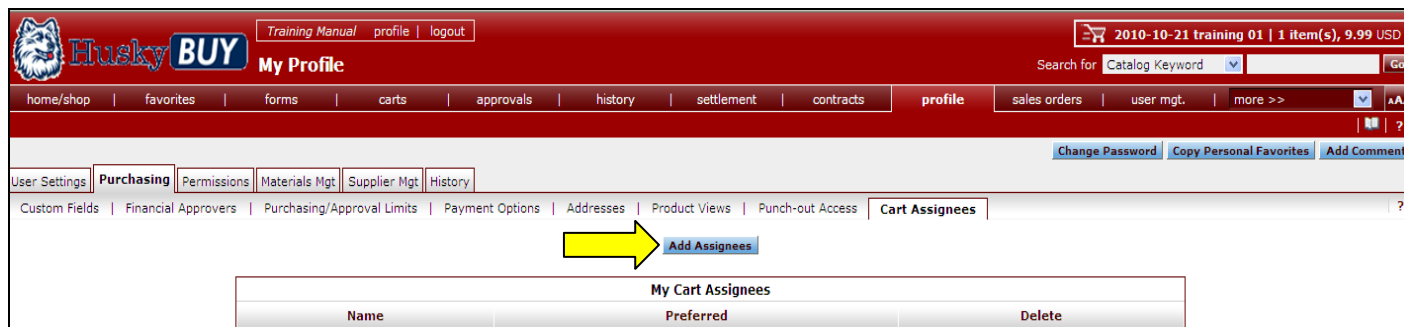


Figure 1

- Enter searchable information for any of the following fields: **First Name, Last Name, User Name, Email, or Department.**
- Click on **Search.**

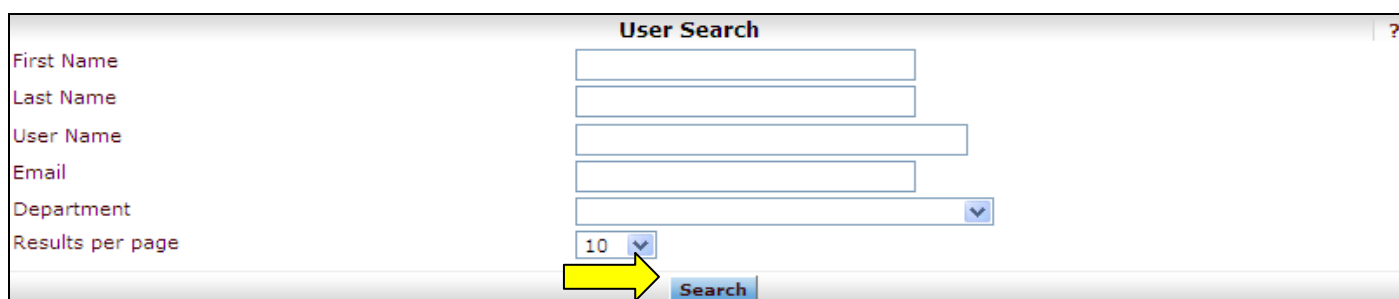


Figure 2

- Click on the circle next to the appropriate Assignee located under **Select.**
- Click on **Choose Selected User.**

NOTE: If you need to restart your search click on New Search to search again.

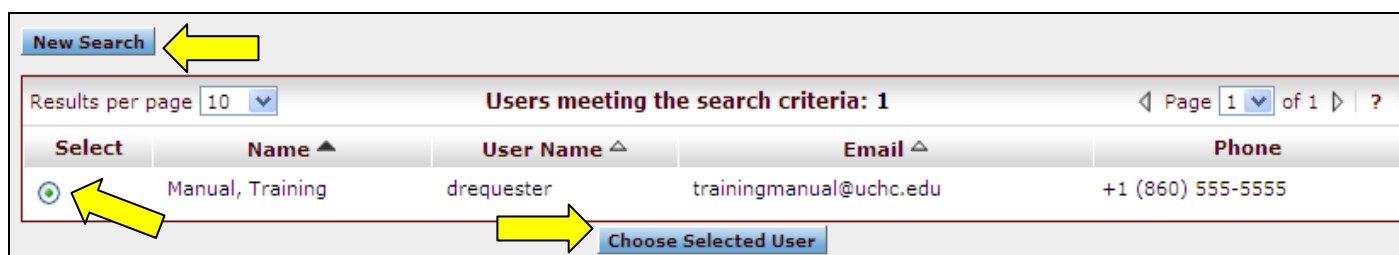


Figure 3

- The Assignee is now added to your profile. In order to add additional Assignees click on **Add Assignee** and repeat the above steps.
- Click on the circle next to the appropriate Assignee located under **Preferred** to select an Assignee that will automatically appear in the Assign Cart To field when you are ready to assign your cart.

NOTE: If you need to delete an Assignee profile click on Delete.

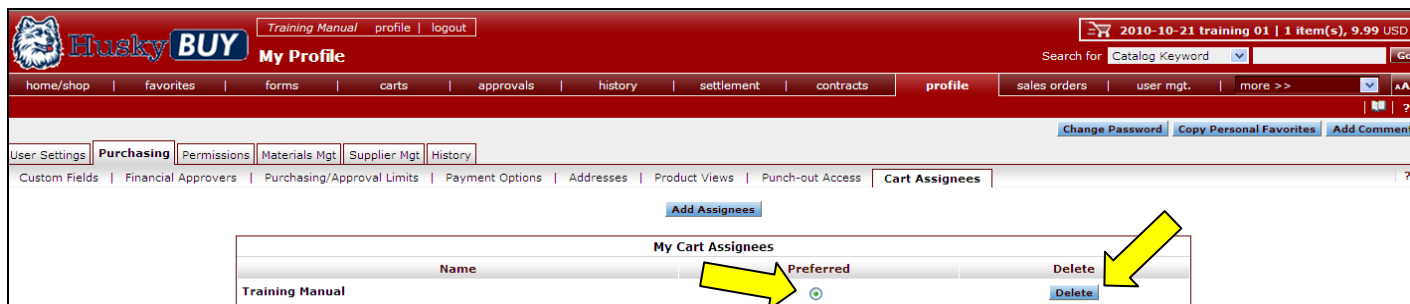


Figure 4

STEP 2: SEARCHING FOR AN ASSIGNEE

Once you have completed your shopping cart you can proceed to search for an Assignee.

- Select the **carts** navigation tab.
- Select the **active cart** sub-tab.
- Click on **Assign Cart** and a pop-up box will appear.

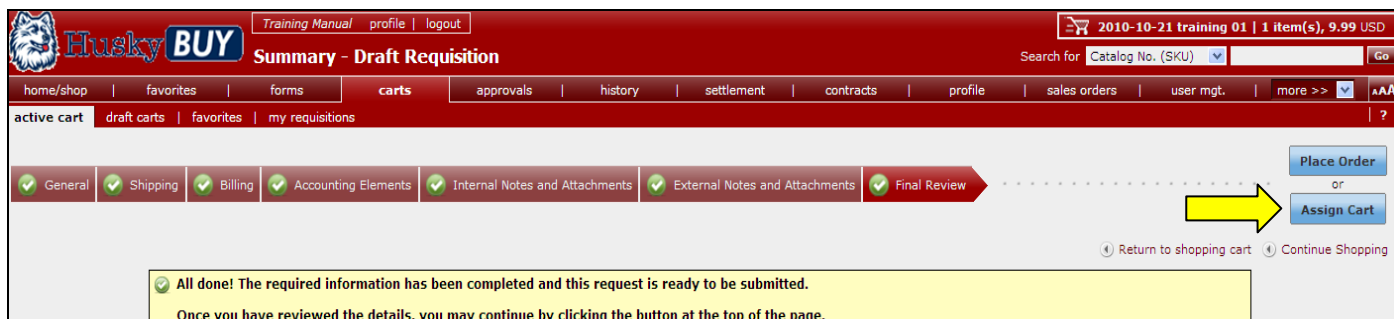


Figure 5

NOTE: Please contact the HuskBuy Help Desk if you receive the following message: "You have no assignees in your profile, and you do not have permission to search for assignees. Please ask your site administrator to update your user profile".

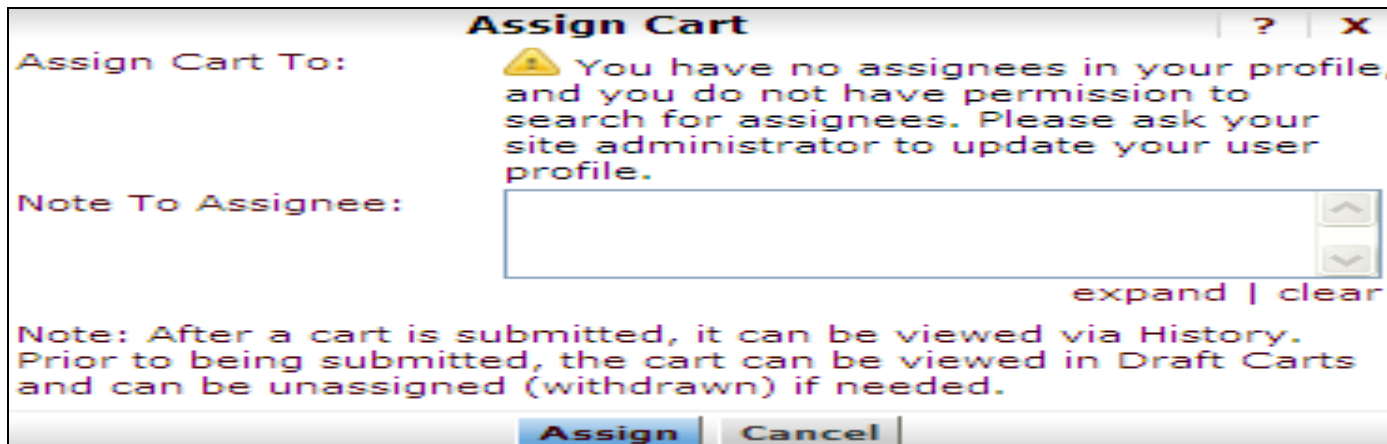
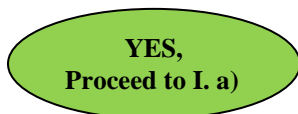


Figure 6

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I. Have you previously selected a preferred Assignee in your profile?



- a) The preferred Assignee will automatically appear in the **Assign Cart To** field.
 - If you would like to select this Assignee, proceed to *Step 3: Assigning Your Cart* to continue.
 - To select a different Assignee from your profile, proceed to *Step 2 Section I. b).*

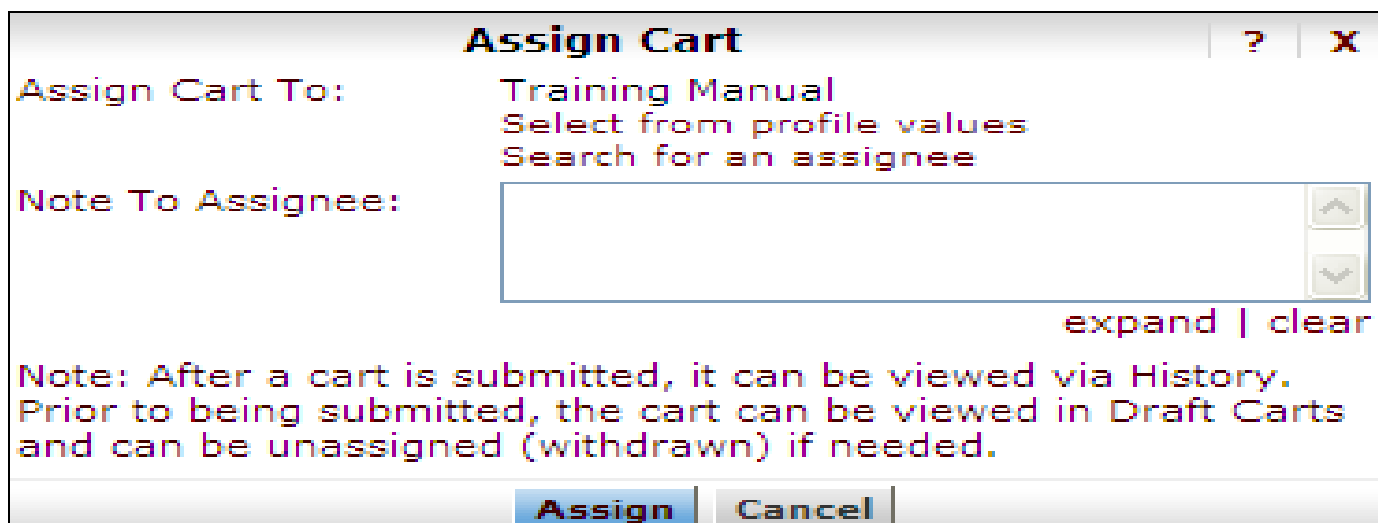


Figure 7

- b) Within the **Assign Cart To** field, click on **Select from profile values** and a drop-down menu will appear.

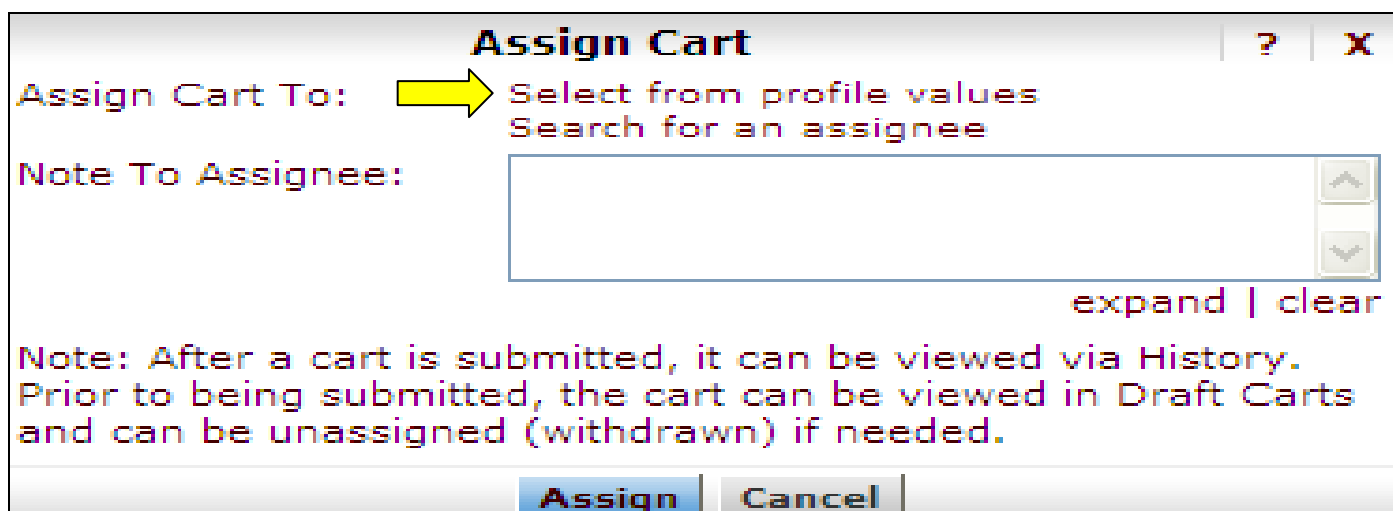




Figure 8

- Click on the drop-down arrow to select an Assignee from your profile.
- If the Assignee does not appear in the drop-down menu, proceed to *Step 2 Section II*.

Assign Cart ? X

Assign Cart To: Hide profile values  

Note To Assignee:

Search for an assignee

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Figure 9


II. Does the Assignee appear in the **Select from profile values** drop-down menu?

YES,
Proceed to II. a)

NO,
Proceed to II. b)

- Select an Assignee from your profile and proceed to *Step 3: Assigning Your Cart* to continue.
- Within the **Assign Cart To** field, click on **Search for an assignee** and a pop-up box will appear.

Assign Cart ? X

Assign Cart To:  Select from profile values
Search for an assignee

Note To Assignee:

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Figure 10

- Enter searchable information for any of the following fields: **First Name**, **Last Name**, **User Name**, **Email**, or **Department**.
- Click on **Search**.

User Search

First Name

Last Name

User Name

Email

Department

Results per page

Figure 11

- Click on the circle next to the appropriate Assignee located under **Select**.
- Click on **Choose Selected User**.

NOTE: If you need to restart your search click on New Search to search again.

Results per page Users meeting the search criteria: 1 Page 1 of 1

Select	Name	User Name	Email	Phone
<input checked="" type="checkbox"/>	Manual, Training	drequester	trainingmanual@uchc.edu	+1 (860) 555-5555

Figure 12

- **Add to Profile** – click on the check box if you want to add the Assignee to your assignee profile list.

Assign Cart

Assign Cart To: Training Manual

Search for an assignee

Add to Profile

Note To Assignee:

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Figure 13

STEP 3: ASSIGNING YOUR CART

Once you have selected your Assignee you can proceed to assign your cart.

- **Note to Assignee** – enter any notes for the Assignee to view
- Click on **Assign**.

Assign Cart

Assign Cart To: Training Manual
Select from profile values
Search for an assignee

Note To Assignee: Training 123
expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Figure 14

- Once you have assigned the cart you will receive the following message: "Congratulations! Your cart was successfully assigned for further review". An email notification will be sent to the Assignee for review.

Shopping Cart Information

Congratulations! Your cart was successfully assigned for further review.

At this point, you can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via requisition history search.
You included the following note for the assignee:

Training 123

Here is a brief summary of the requisition you have assigned:

Requisition number	539403
Cart name	2010-10-21 training 01
Requisition total	9.99 USD
Number of line items	1

What would you like to do next? Here are links to some common actions.

- Search for another item
- Check the status of an order
- Return to your home page
- Create new draft cart

Figure 15

NOTE: To place your order, proceed to *Procedure #2010-P8 How To Submit Your Purchase Requisition* for further instructions.