



University of Connecticut Health Center HuskyBuy Training Manual

PROCEDURE NUMBER: 2010-P4

HOW TO MANAGE FOLDERS

OVERVIEW:

Users have the ability to create personal folders for their favorite items. Folders and subfolders can be created to manage your personal and shared favorites. Personal favorites are items that you have identified for future purchasing. Shared favorites allow favorite items to be shared with the entire organization, or a select group within the organization. You will have full control over items in your personal folders; however shared folders are created by the HuskyBuy Administrator.

Favorites give you quick access to items and forms you've saved personally or that are shared by others in the organization. Favorite items are organized into folders, which can be browsed using the navigation tree. All of the items and forms in a folder will be listed when a folder is selected, and the last folder you select will be remembered on your next visit to the favorites tab. View audio visual *Lesson #5 Managing Favorites* for additional information.

PROCEDURE:

STEP 1: CREATING PERSONAL FOLDERS AND SUBFOLDERS

- Select the **carts** navigation tab.
- Select the **favorites** sub-tab.

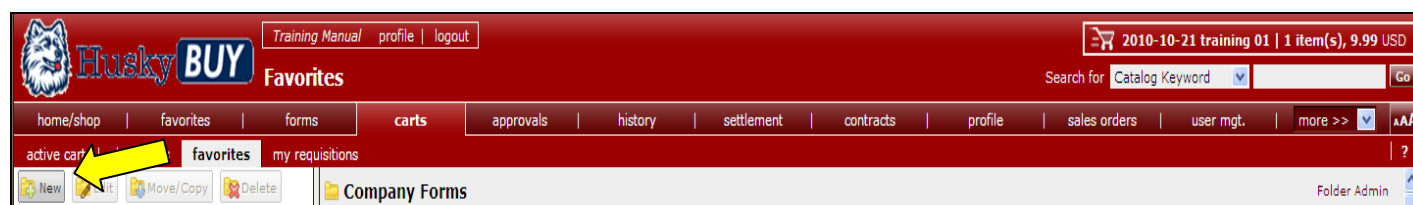


Figure 1

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CREATE PERSONAL FOLDER:

- Click on **New** and drop-down menu will appear.
- Click on **Top level personal folder** and a pop-box will appear.

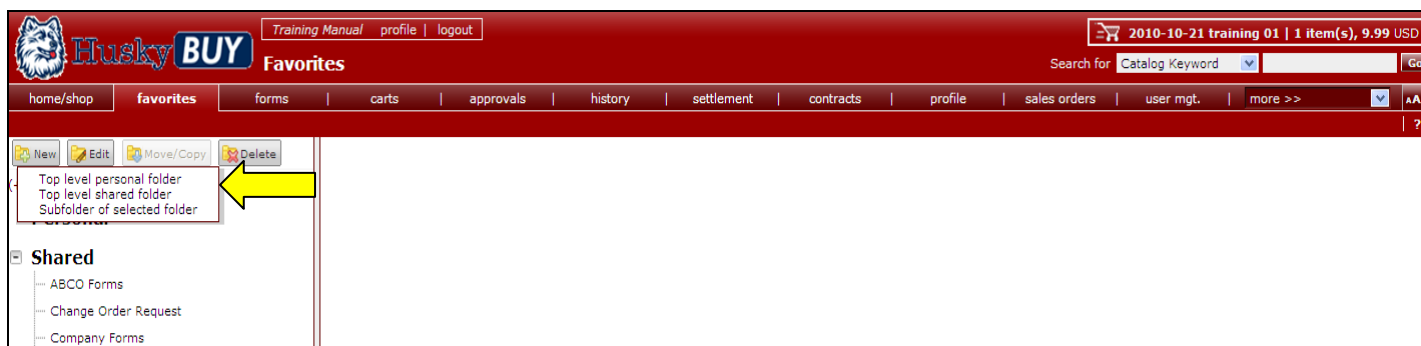


Figure 2

- **Name** – enter a folder name.
- **Description** – enter a description to briefly explain the contents of your folder.
- Click on **Save**.

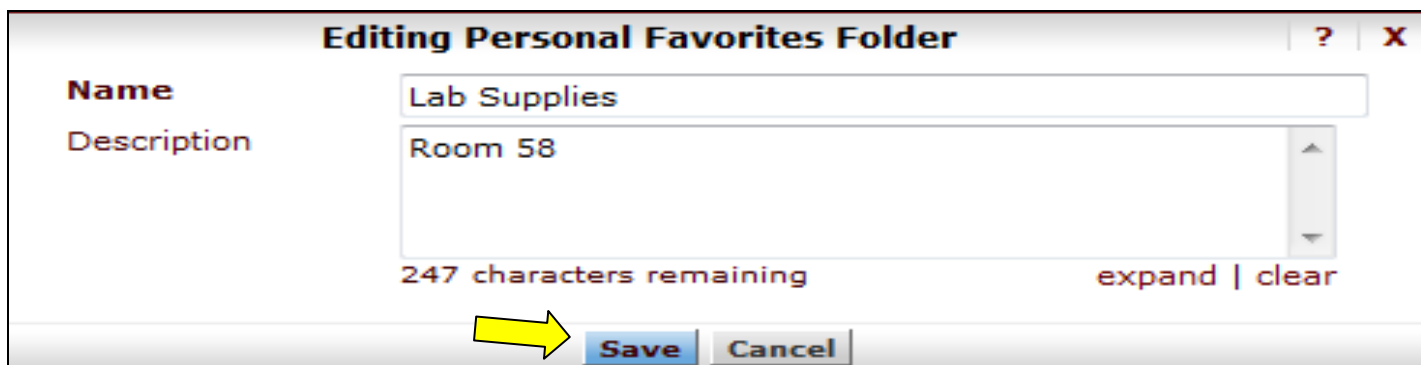


Figure 3

CREATE PERSONAL SUBFOLDER:

- Click to highlight the folder name in which you want to create a subfolder.
- Click on **New** and drop-down menu will appear.
- Click on **Subfolder of selected folder** and a pop-up box will appear.

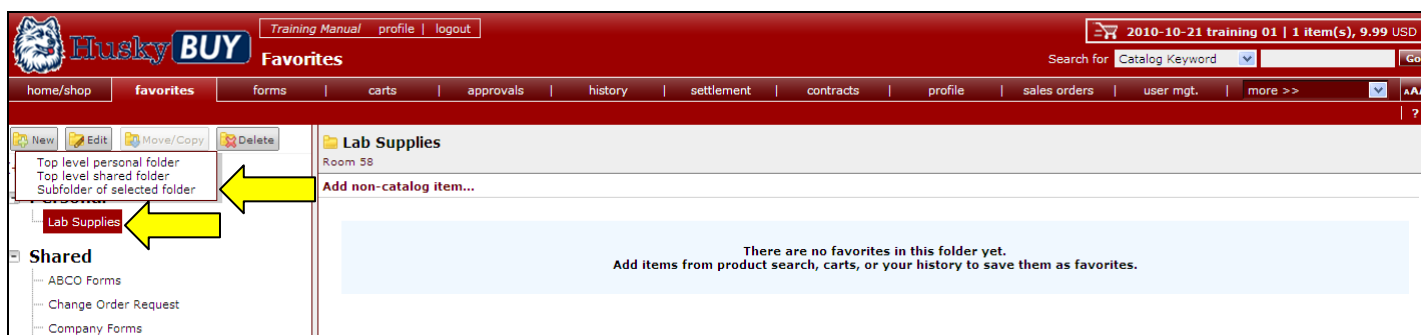


Figure 4

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- **Name** – enter a subfolder name for the selected folder.
- **Description** – enter a description to briefly explain the contents of your subfolder.
- Click on **Save**.

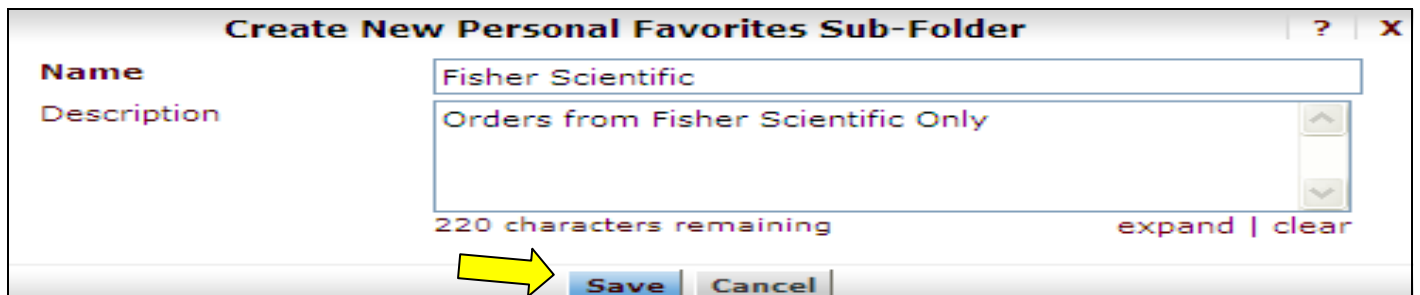


Figure 5

STEP 2: EDITING FOLDERS AND SUBFOLDERS

You have the option to edit, move, copy or delete folders and subfolders.

- Select the **carts** navigation tab.
- Select the **favorites** sub-tab.

EDIT:

- Click to highlight the folder or subfolder name in which you want to edit.
- Click on **Edit** and drop-down menu will appear.

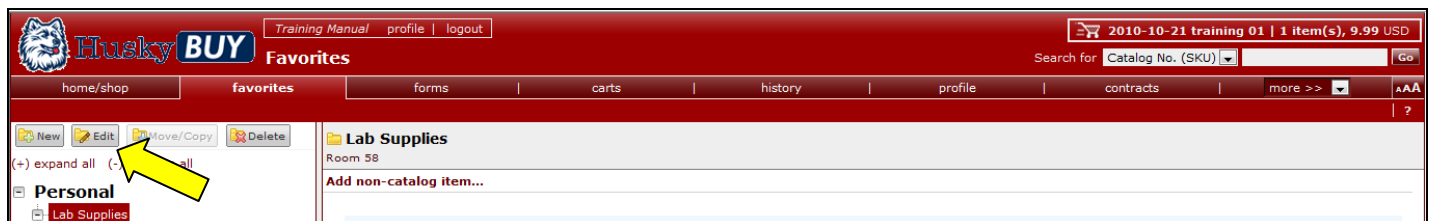


Figure 6

- **Name** – highlight the current name entered to edit.
- **Description** – highlight the current description entered to edit.

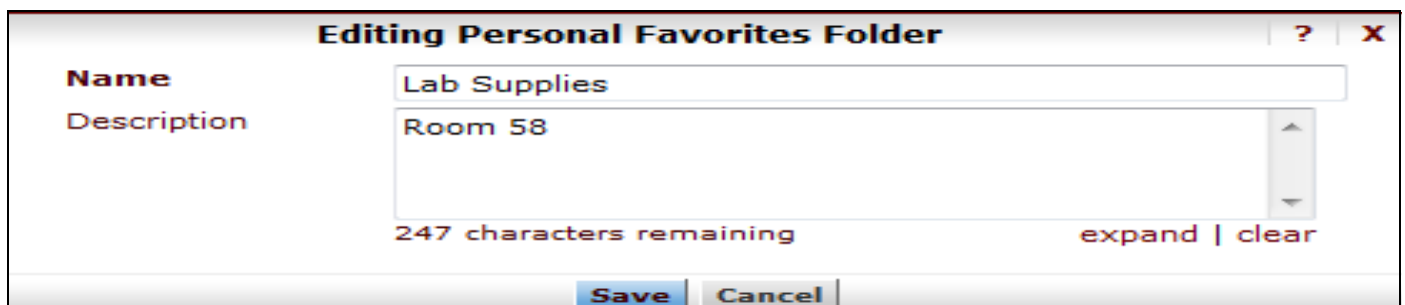


Figure 7

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- Click on **Save**.

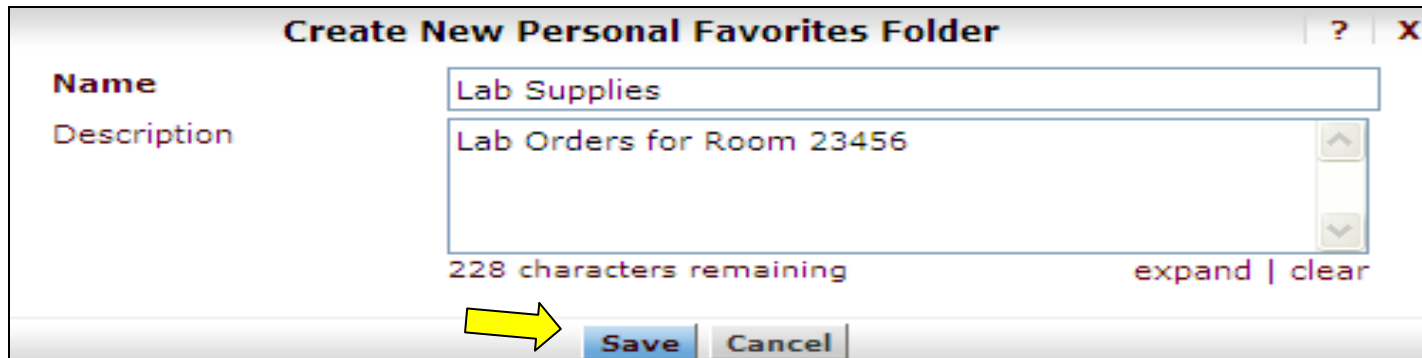


Figure 8

MOVE/COPY:

- Click to highlight the folder or subfolder name in which you want to move or copy.
- Click on **Move/Copy** and a pop-box will appear.



Figure 9

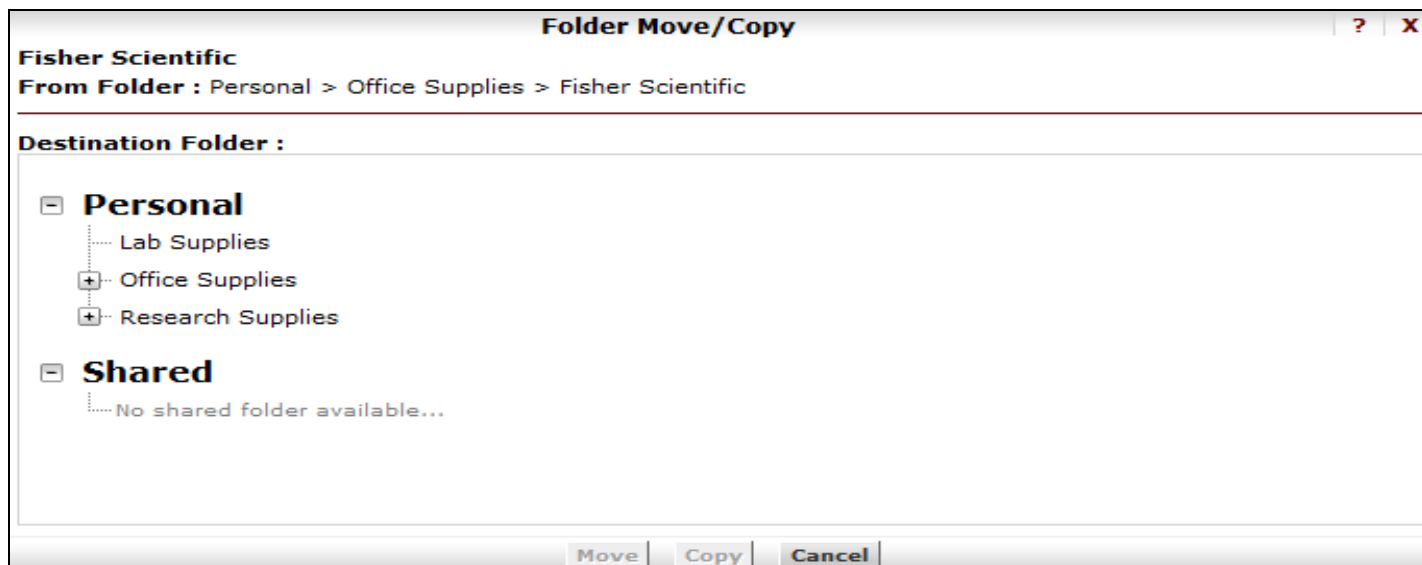


Figure 10

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- Click to highlight the folder or subfolder name in which you want to move or copy your folder or subfolder to.
- Click on **Move** to move or **Copy** to copy the folder or subfolder.

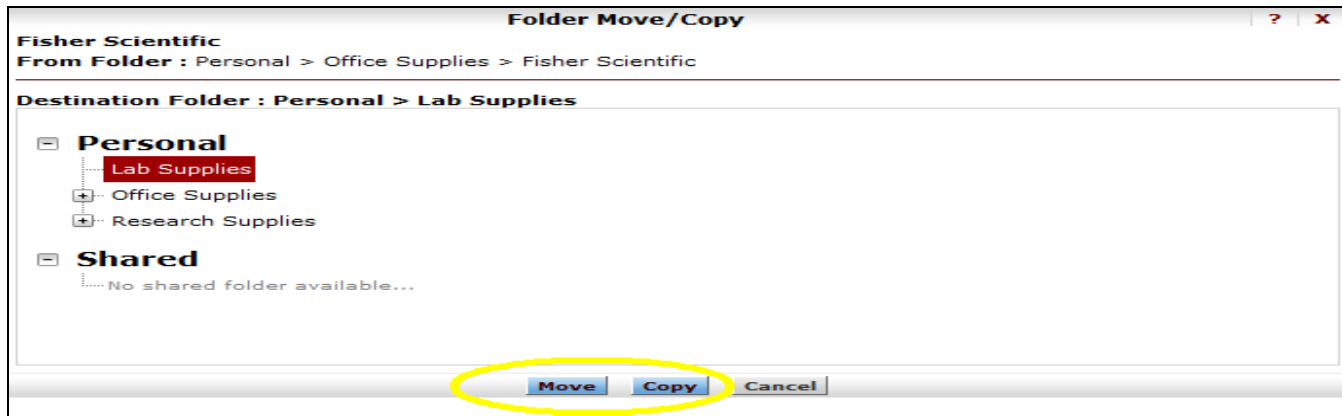


Figure 11

- If you moved your folder or subfolder, you will receive the following message: "_____ has been moved successfully".
- If you copied your folder or subfolder, you will receive the following message: "_____ has been copied successfully".
- Click on **Close**.

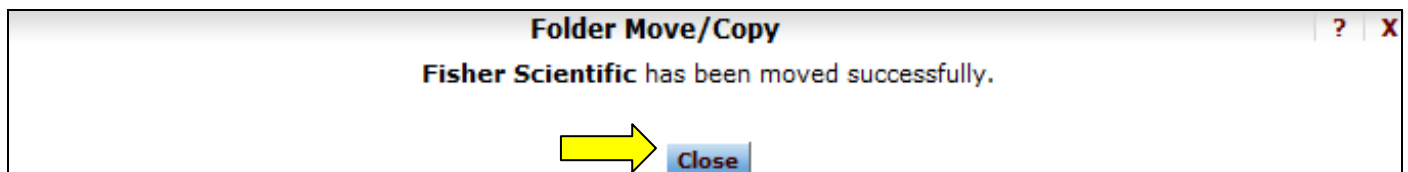


Figure 12

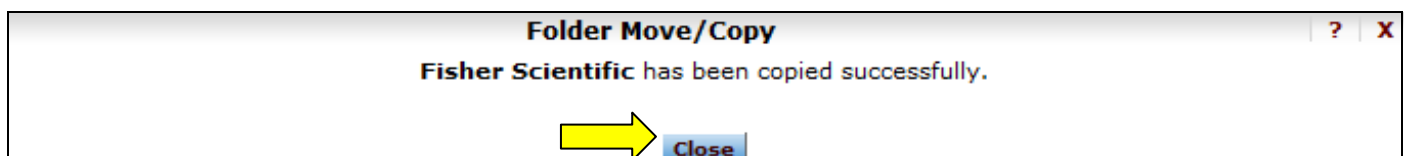


Figure 13

DELETE:

- Click to highlight the folder or subfolder name in which you want to delete.
- Click on **Delete** and a pop-box will appear.

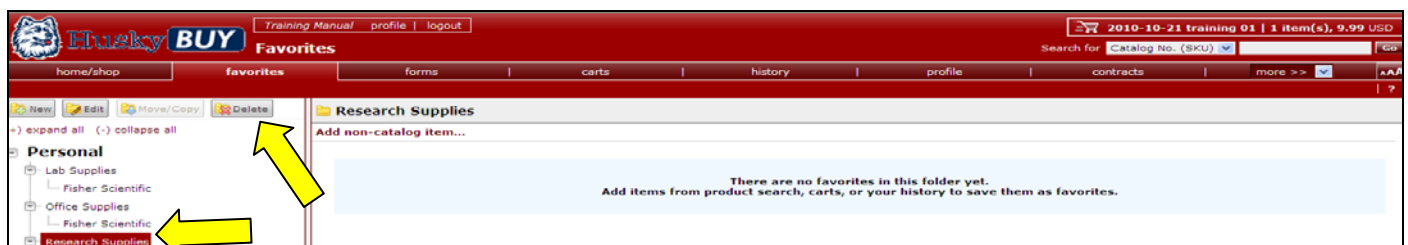


Figure 14

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- You will receive following message: "Are you sure to delete this folder?"
- Click on **OK** to confirm deletion.

NOTE: Click on Cancel if you decided not to delete the folder or subfolder.

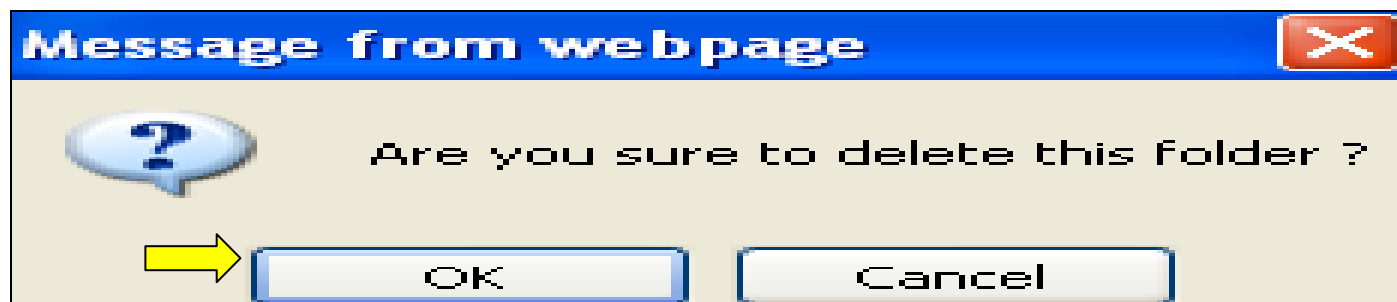


Figure 15

STEP 3: EDITING FOLDER AND SUBFOLDER CONTENTS

You have the option to edit, move, copy or delete the favorite item(s) within a folder and subfolder.

- Select the **carts** navigation tab.
- Select the **favorites** sub-tab.

EDIT:

- Click to highlight the folder or subfolder name that contains the favorite item you want to edit.
- Search for the favorite item you want to edit.
- Click on **Edit** and a pop-box will appear.

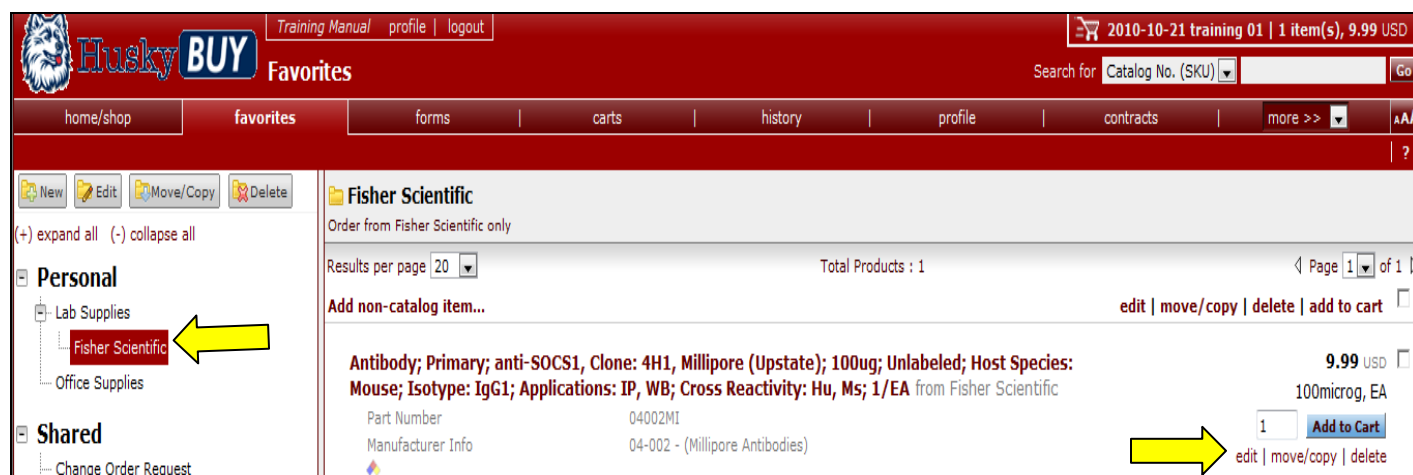


Figure 16

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- **Item Nickname** – highlight the current name entered to edit.
- **Quantity** – highlight the current quantity amount entered to edit.

NOTE: If you want to add a description to your favorite item, click on Add Description.

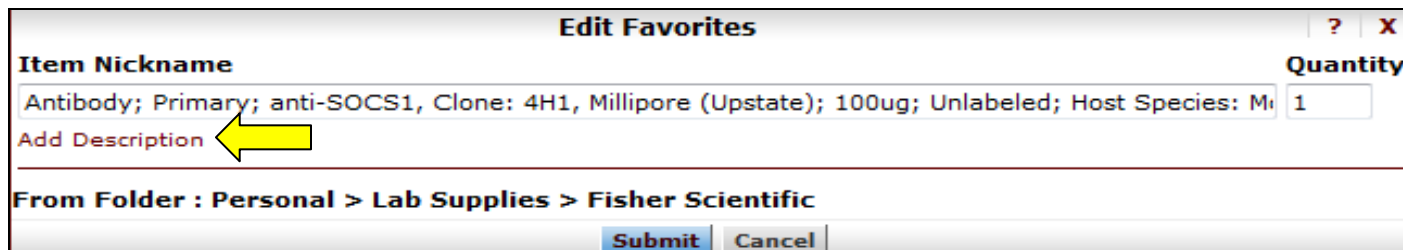


Figure 17

- Click on **Submit**.



Figure 18

- You will receive the following message: " Product(s) successfully, edited".
- Click on **Close**.

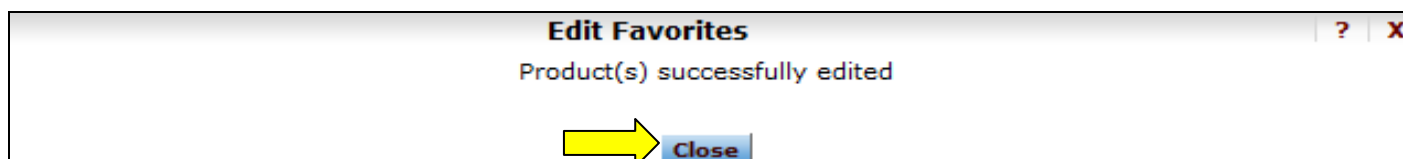


Figure 19

NOTE: Your description will appear below the product details.

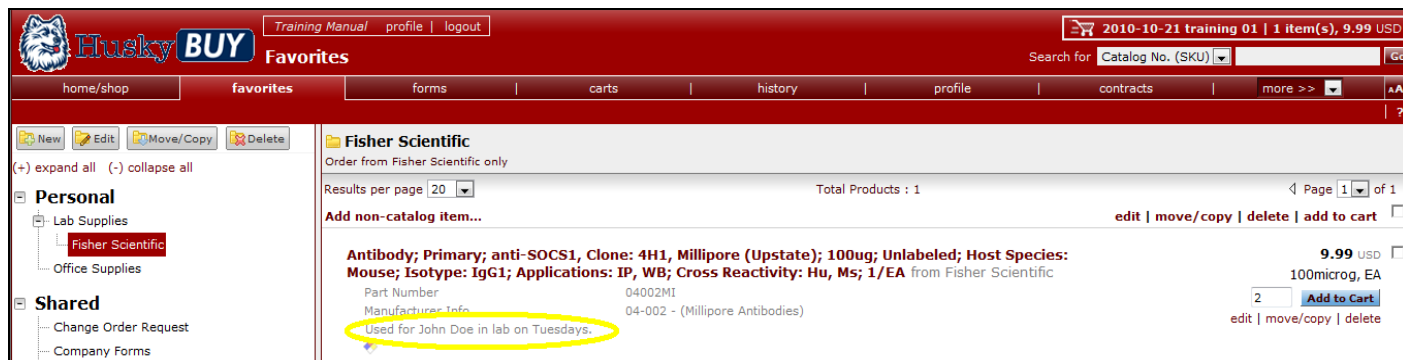


Figure 20

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MOVE/COPY:

- Click to highlight the folder or subfolder name that contains the favorite item you want to move or copy.
- Search for the favorite item you want to move or copy.
- Click on **Move/Copy** and a pop-box will appear.

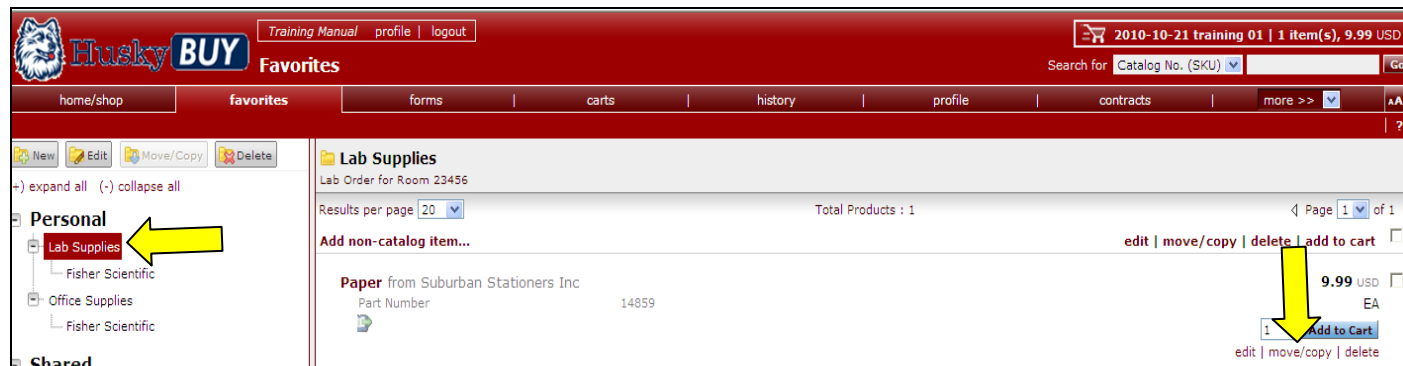


Figure 21

- Click to highlight the folder or subfolder name in which you want to move or copy your favorite item to.
- Click on **Move** to move or **Copy** to copy the favorite item.

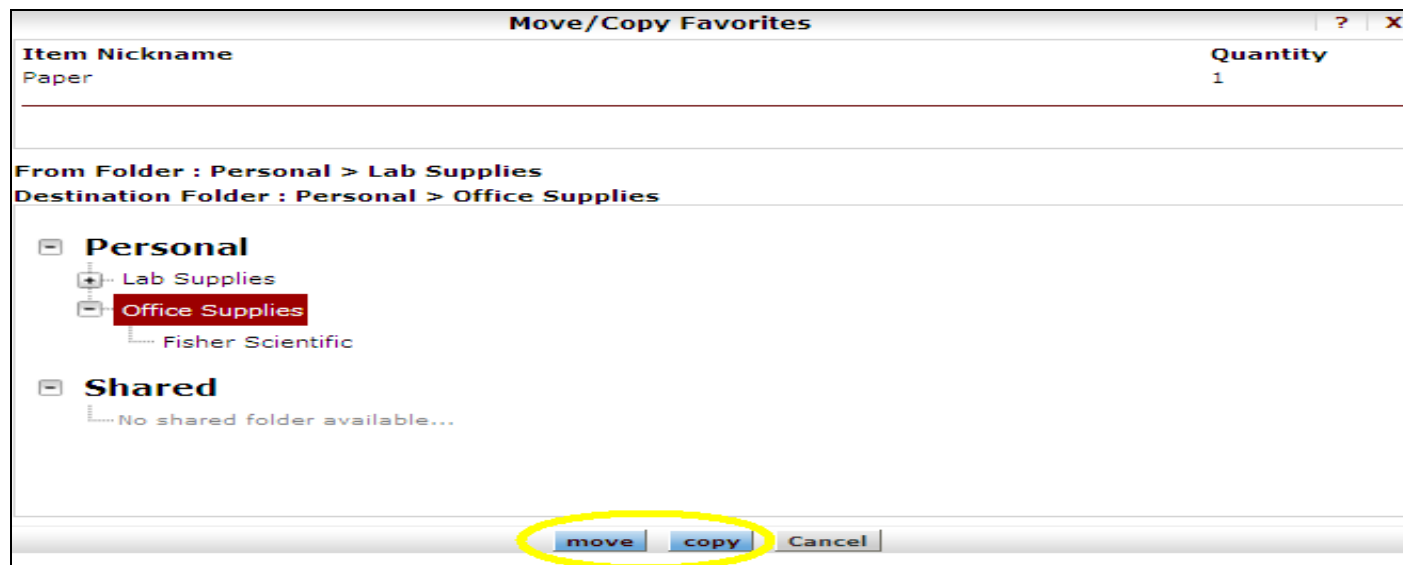


Figure 22

- If you moved your folder or subfolder, you will receive the following message: "Favorite product(s) has been successfully moved".
- If you copied your folder or subfolder, you will receive the following message: "Favorite product(s) has been successfully copied".
- Click on **Close**.

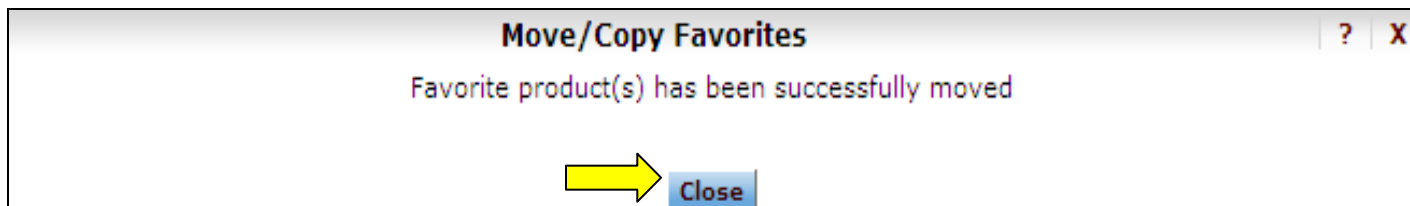


Figure 23

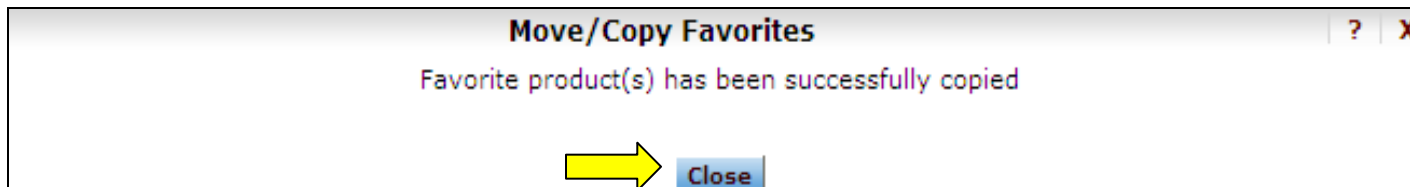


Figure 24

DELETE:

- Click to highlight the folder or subfolder name that contains the favorite item you want to delete.
- Search for the favorite item you want to delete.
- Click on **Delete** and a pop-box will appear.

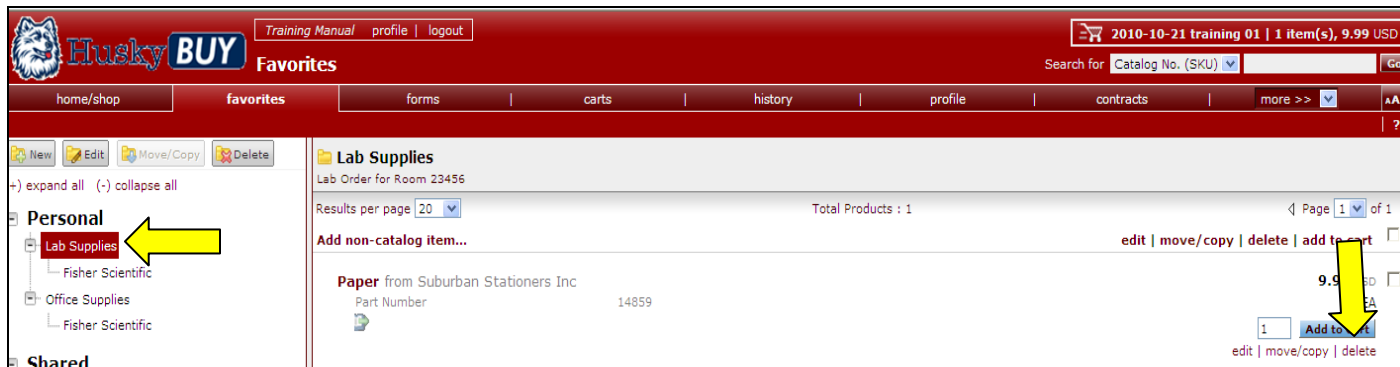


Figure 25

- You will receive following message: "Click OK to delete the Favorite Item(s)".
- Click on **OK** to confirm deletion.

NOTE: Click on Cancel if you decided not to delete the favorite item.

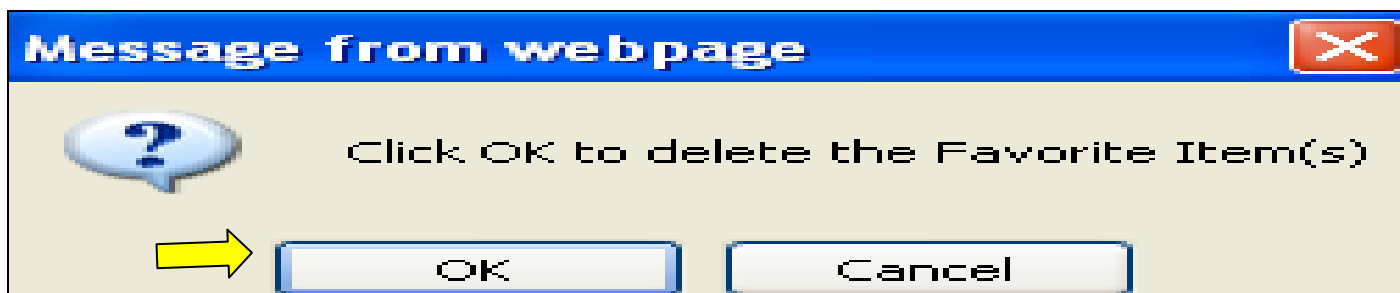


Figure 26