

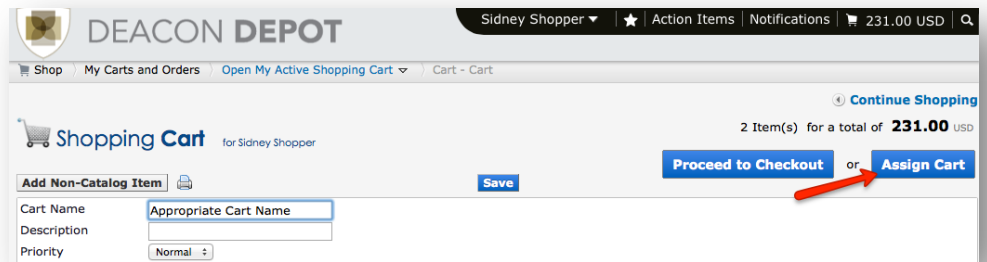


## Toolbox: Assigning a Cart Quick Guide



Shoppers *must* assign carts to a Requisitioner who can submit the cart on their behalf. Requisitioners and Approvers have the option of assigning a cart if necessary. Carts can only be assigned to Requisitioners. Assigning a cart is completed by clicking 'Assign Cart' in the Shopping Cart and selecting an assignee.

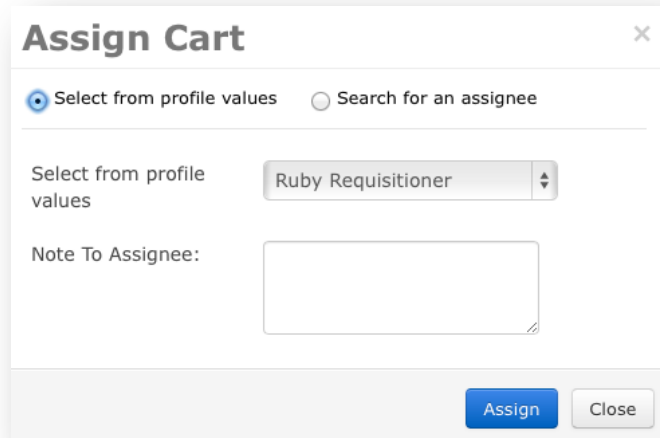
After naming the cart and adding any necessary business purpose statements on the Shopping Cart screen, click 'Assign Cart' to select an assignee.



If assignees have been added to the user profile:

If an assignee has been indicated as "preferred" in the user profile, that assignee displays by default in the Assign Cart drop-down. If no changes are necessary, click the blue Assign button.

To select a different assignee from profile values, click the drop-down and choose the appropriate assignee.



To select an assignee from the university-wide list:

Check the radio button at the top of the pop-up box to search for an assignee. The profile values drop-down will be replaced with a link to 'Search for an assignee'.

Click the "Search for an Assignee" link to choose from the university-wide list.

**Assign Cart**

Select from profile values  Search for an assignee

Selected Assignee:

Assign Cart To: [Search for an assignee](#)

Note To Assignee:

A User Search pop-up box will display. Type the desired assignee's name into the appropriate field and click 'Search'.

**User Search**

Last Name:

First Name:

User Name:

Email:

Department:

Results Per Page:

A list of users meeting the search criteria will display. Select the desired user by clicking the 'select' link to the right of their name.

Results Per Page:  **Users meeting the search criteria: 3** Page 1 of 1

Name	User Name	Email	Phone	Action
Smith, Baylee	smithb	smithb@wfu.edu		<a href="#">[select]</a>
Smith, Michele	kmsmith	kmsmith@wakehealth.edu		<a href="#">[select]</a>
Smith, Sarah	smithsr	smithsr@wfu.edu		<a href="#">[select]</a>

The selected assignee's name will display in the assign cart pop-up box. Add a note if necessary and then click the "Assign" button to complete the assign cart process.

**Assign Cart**

Select from profile values  Search for an assignee

Selected Assignee: **Baylee Smith**

Assign Cart To: [Search for an assignee](#)

Add to Profile

Note To Assignee: