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.

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

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.

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.