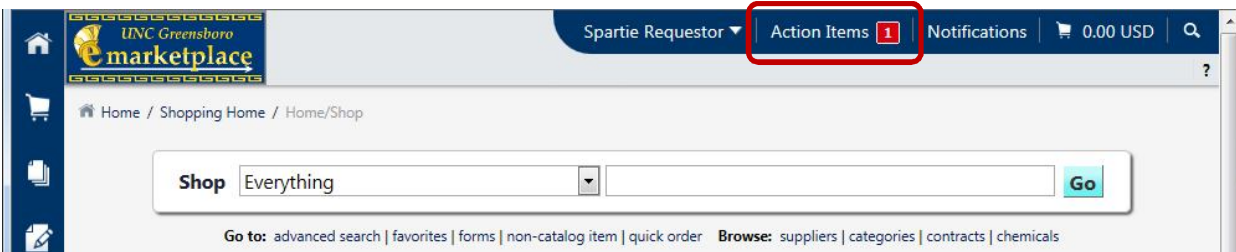


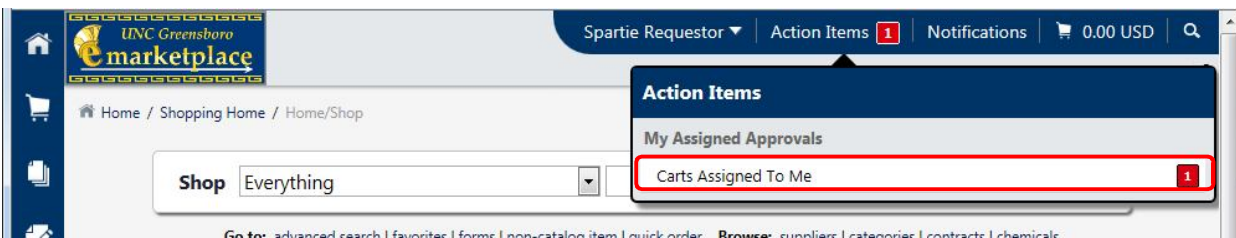
Requisitioner Assignee Role

You will receive an email (See **Turning off email notifications** instructions) when a cart has been assigned to you by someone else. If you do not receive an email notification, you can also search for any carts that may be assigned to you (See **Assigned Carts** instructions).

1. Any carts assigned to you will be listed under Action Items. Click Action Items.



2. Select Carts Assigned to Me.



- Note the 1 in the red box. This number will show how many carts have been assigned to you.

3. You are taken to the carts page where any draft carts you have are listed as well as any draft carts that have been assigned to you.

My Drafts							legend ?
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete	
	956725	2013-04-16 GENTRN1 01	4/16/2013		900.00 USD	Delete	
	956460	2013-04-16 GENTRN1 02	4/16/2013		64.95 USD	Delete	
	956969	2013-04-17 GENTRN1 01	4/17/2013		172.68 USD	Delete	
	957114	2013-04-17 GENTRN1 02	4/17/2013		250.00 USD	Delete	
	957222	2013-04-17 GENTRN1 03	4/17/2013		29.97 USD	Delete	
	957240	2013-04-17 GENTRN1 04	4/17/2013		1,069.97 USD	Delete	
	959384	2013-04-22 GENTRN1 01	4/22/2013		353.43 USD	Delete	
	959914	2013-04-23 GENTRN1 01	4/23/2013		0.00 USD	Delete	
	956395	Windows	4/16/2013		800.00 USD	Delete	

Drafts Assigned To Me							legend ?
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete	
	962933	2013-04-30 gamcdona 01	4/30/2013		1.00 USD	Delete	

4. Click on the shopping cart name of the draft cart you want to review.

Drafts Assigned To Me						legend ?
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	962933	2013-04-30 gamcdona 01	4/30/2013		1.00 USD	Delete

5. Since you are the one with access to the funds, the **Prepared for** must be changed to your name or the requisition will fail. Click the edit button in the General section. (If the person who created the cart also has maintenance access to the fund being used for the order, the requisition will pass Banner Budget Authorization.)

Click the edit button to change the Prepared for from the shopper's name to your name

Requisition Summary

General | Shipping | Billing | Accounting

Hide header

General ?

Cart Name: 2013-04-30 gamcdona 01

Description: no value

Priority: Normal

Prepared by: Spartie Requestor

Prepared for: Gay McDonald

Confirming Order:

PO Clauses: edit clauses...
IMPORTANT BILLING INFORMATION
view all clauses - (1)
View/edit by line item...

Shipping ?

Ship To

Contact Name: Gay McDonald
Phone: +1 (336) 334-4673
Email: gamcdona@uncg.edu
Business Services: 525 Tate St
Greensboro, NC 27412
United States

Delivery Options

Expedite:
Ship Via: Best Carrier-Best Way
Req Delivery: no value

Billing ?

Bill To

Accounts Payable
UNC Greensboro
PO Box 26170
Greensboro, NC 27402
United States

Billing Options

Accounting Date: no value
View/edit by line item...

6. Click the [Select a different user....](#) link. Since you are the one with access to the funds, the **Prepared for** must be changed to your name or the requisition will fail.

General ? X

Cart Name: 2013-04-30 gamcdona 01

Description:

Priority: Normal

Prepared by: Spartie Requestor

Prepared for: Gay McDonald
[Select a different user....](#)

Confirming Order:

Click here to select your name as the Prepared for name.

5. Enter your last name in the **Last Name** text box and click **Search**.

User Search

Last Name: Requestor
First Name:
User Name:
Email:
Department:
Results per page: 10

Search

Enter your last name in the **Last Name** text box and click **Search**

6. Click the **Select** link in line with your name.

New Search Close

Results per page: 10 Users meeting the search criteria: 3 Page 1 of 1

Name	User Name	Email	Phone	Action
Requestor, Ricky	rrequestor	nobody@sciquest.com	+1 (919) 659-2205	[select]
Requestor, Spartie	srogerson	slroger2@uncg.edu	+336 (334) 3858	[select]
Requestor, Spartie	GENTRN1	gamcdona@uncg.edu	+1 (336) 334-4673	[select]

7. Click **Save** to save your changes.

General

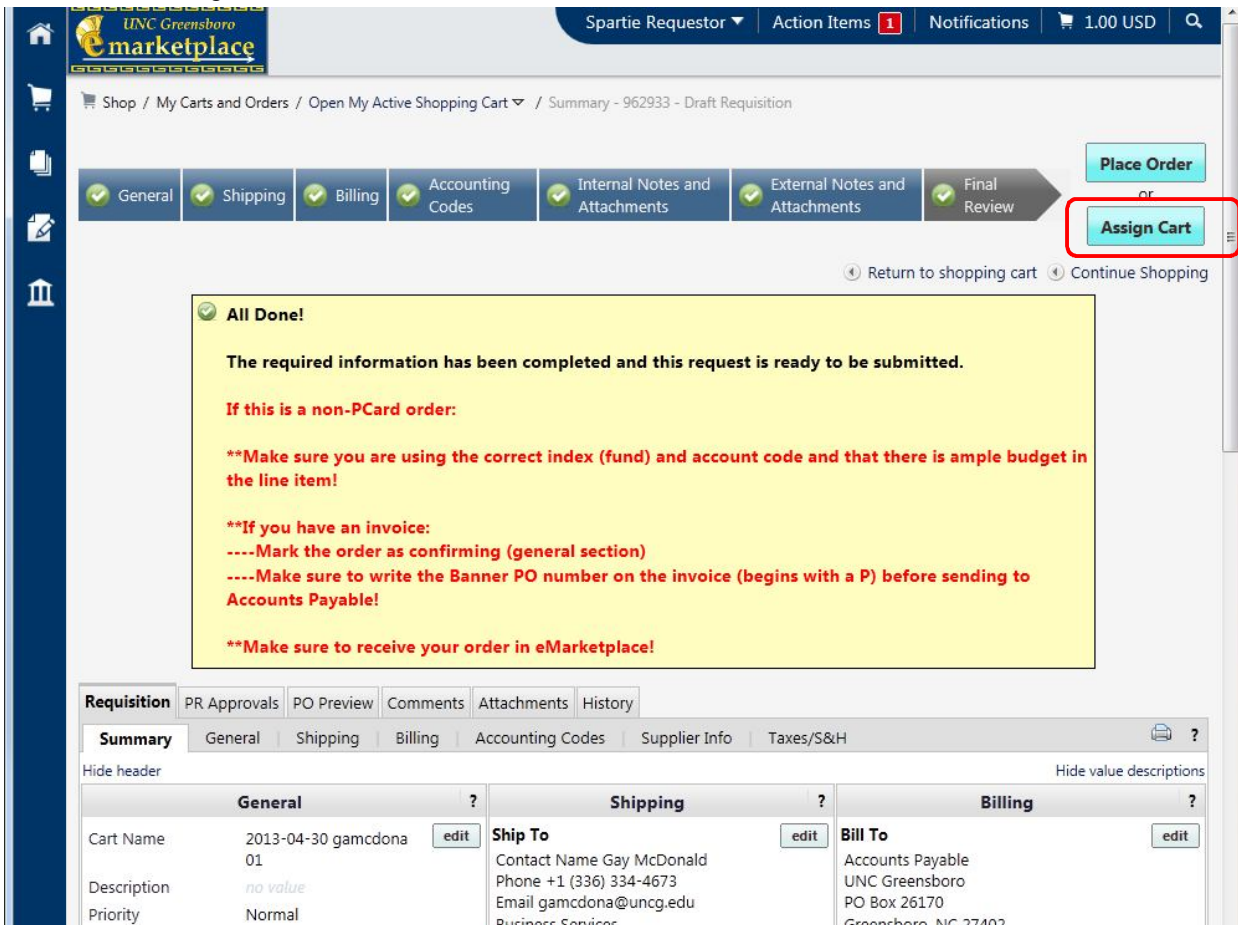
Cart Name: 2013-04-30 gamcdona 01
Description:
Priority: Normal
Prepared by: Spartie Requestor
Prepared for: Spartie Requestor
Confirming Order:

Save Cancel

Make any necessary changes to the draft requisition just as you would any other order and then click **Place Order** (See **Ordering** instructions).

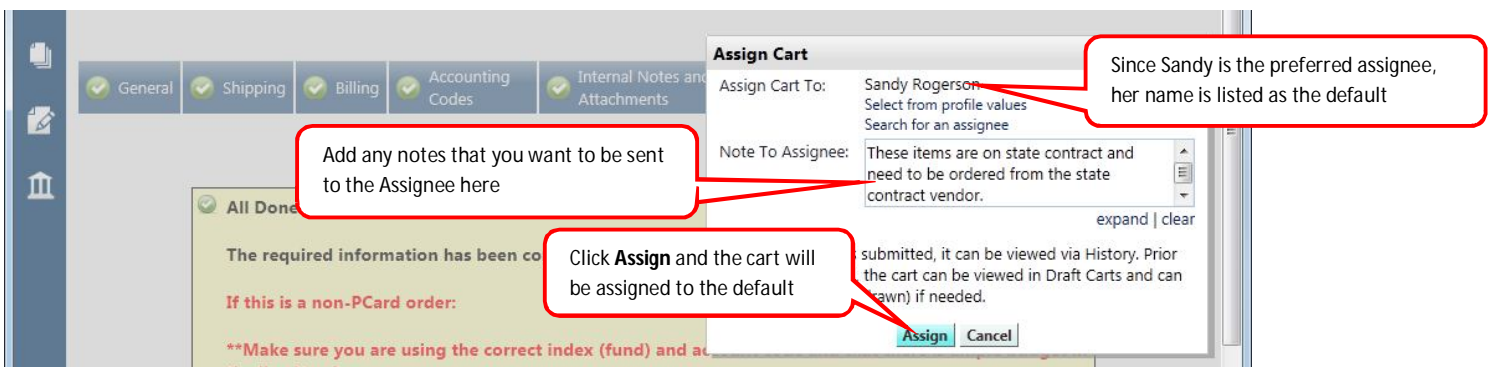
If you need to return the cart to the shopper for any reason (ex.: items should be ordered from state contract vendor, not enough funds available for the purchase, etc.) or if you need to assign the cart to someone else, you can do so by using the **Assign Cart** feature.

1. Click **Assign Cart**.



2. You have 3 options:

- (1)Click **Assign** to assign the cart to the defaulted preferred assignee (See **Profile/Creating Assignees**)



- (2) Click **Select from profile values** and select another assignee that has already been created (**Profile/Creating Assignees**) from the dropdown.

The screenshot shows the 'Assign Cart' dialog box. The 'Assign Cart To:' dropdown is set to 'Sandy Rogerson'. The 'Note To Assignee:' text area contains the text: 'state contract and from the state'. Annotations include:

- A red box pointing to the dropdown menu with the text: 'Select the person's name who you want to assign the cart to'.
- A red box pointing to the 'Assign' button with the text: 'Click Assign and the cart will be assigned to the selected assignee'.
- A red box pointing to the 'Note To Assignee:' text area with the text: 'Add any notes that you want to be sent to the Assignee here'.

- (3) Click **Search for an assignee**.

The screenshot shows the 'Assign Cart' dialog box. The 'Assign Cart To:' dropdown is set to 'Search for an assignee'. The 'Note To Assignee:' text area contains the text: 'These items are on state contract and need to be ordered from the state contract vendor.'. An annotation points to the 'Search for an assignee' option with the text: 'Click here to search for an assignee'.

- A User Search box is displayed. Click in the **Last Name** text box and enter the user's last name then click **Search**.

The screenshot shows the 'User Search' form. The 'Last Name' field contains the text 'Clegg'. The 'Search' button is highlighted. Annotations include:

- A red box pointing to the 'Last Name' field with the text: 'Enter the Last Name of the person who you want to assign the cart to here'.
- A red box pointing to the 'Search' button with the text: 'Click Search'.

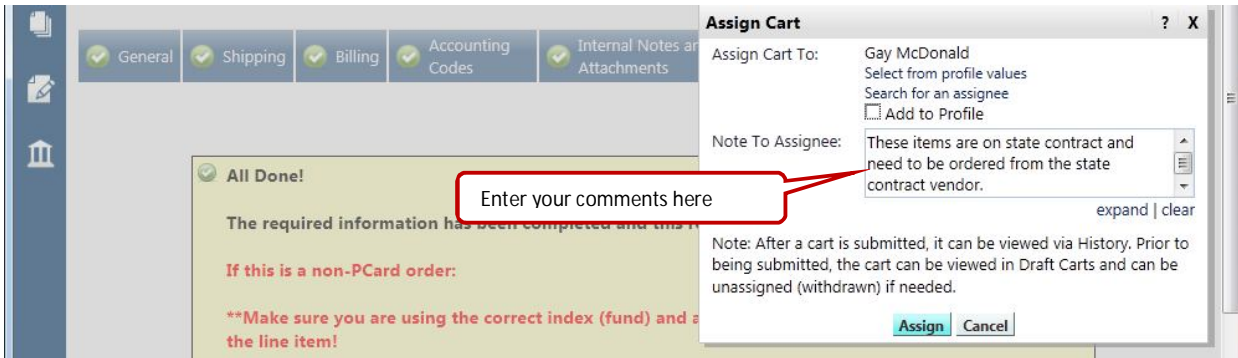
- Select the name of the person you want to assign the cart to by clicking the **Select** link in line with that person's name.

The screenshot shows the search results table. The table has the following data:

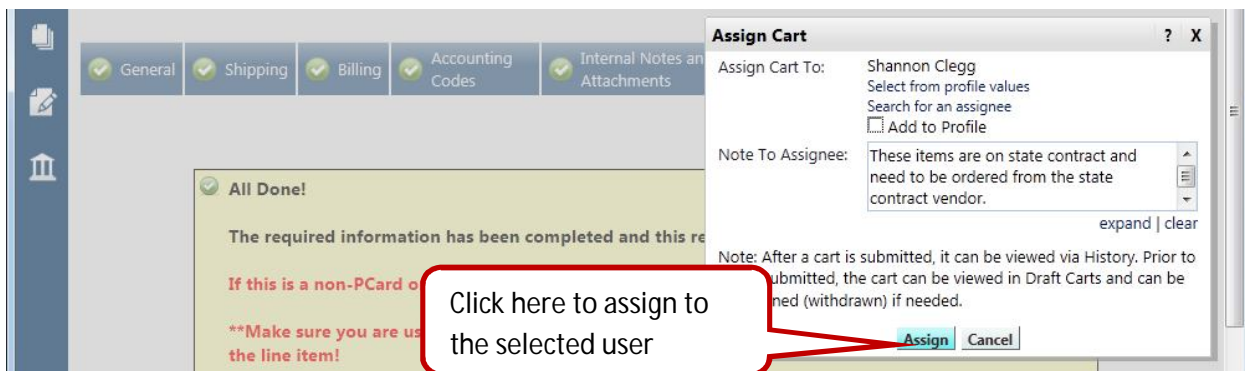
Name	User Name	Email	Phone	Action
McDonald, Brian	b_mcdon3	b_mcdon3@uncg.edu	+1 (336) 256-1439	[select]
McDonald, Gay	gamcdona	gamcdona@uncg.edu	+1 (336) 334-4673	[select]
McDonald, Lisa	lgmcdona	lgmcdona@uncg.edu	+1 (336) 334-5184	[select]

An annotation points to the '[select]' link in the 'Action' column for the second row (Gay McDonald) with the text: 'Click here to search for an assignee'.

- You can enter notes for the shopper/assignee. The shopper/assignee will receive an email notification with your notes and the notes will also be saved in the Comments section of the requisition.



- Click **Assign** and the cart will be assigned to the selected user.



The cart has now been assigned to the selected user with your comments.

