

How to Take Over a Team Shopping Cart



Sourcing & Procurement

Take Over Team Shopping Carts



Team members can only take over and edit a team member shopping cart if the cart is in 'Saved' status and has been selected as a Team Cart by the shopping cart creator. ‡

The screenshot shows the Boston University procurement system interface. The top navigation bar includes 'Home', 'Employee Self-Service', 'Manager Self-Service', and 'Payroll'. The 'Procurement' tab is highlighted. Below the navigation bar, there are several tabs: 'Overview', 'Personalization', 'Terrier Temps', and 'Internal Service Request'. The 'Active Queries' section shows 'Shopping Carts' with 'All (0)', 'Saved (0)', and 'Awaiting Approval (0)' options. The 'Show Quick Criteria Maintenance' button is highlighted. Below this, there is a table with columns: 'Shopping Cart Number', 'Shopping Cart Name', 'Created On', 'PO Number', 'Supplier', 'Item Status', 'Item Name', 'Quantity', 'Net Value', and 'Total'.

- ❖ Click 'Procurement Tab'
- ❖ Select 'All'
- ❖ Click 'Show Quick Criteria Maintenance' to display the search bars

‡ Teams must be set up in Personalization first in order to have the team shopping cart option on the shopping cart level. The creator of the shopping cart must create the cart as a Team Shopping Cart.

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Shopping Cart Queries display individual or team shopping cart numbers, status, and PO numbers.

The screenshot shows the 'Shopping Carts - All' search interface. It includes a 'Hide Quick Criteria Maintenance' dropdown, a search criteria form, and an 'Apply' button. Annotations highlight the following steps:

- Step 4. Enter the Search Criteria:** A yellow box with arrows pointing to the search criteria fields: Shopping Cart Number, Shopping Cart Name, Item Description, Timeframe (set to 'Today'), Creation Date, Status, Role, PO Number, Product Category, and Partner Product.
- Step 5-6. Check off boxes:** A yellow box with arrows pointing to the checkboxes: 'Bought on Behalf' (checked), 'Including Completed Shopping Carts' (checked), and 'Show my Team Carts' (checked).
- Step 7. Click Apply:** A yellow box with an arrow pointing to the 'Apply' button.

❖ Search using popular search criteria:

- ❖ Shopping Cart Number
- ❖ Timeframe
- ❖ PO Number

❖ Check the following boxes:

- ❖ 'Including Completed Shopping Cart' ❖
- ❖ 'Buy on Behalf of' box *
- ❖ 'Show My Team Carts' box ‡

❖ Click 'Apply'

❖ Click 'Including Complete Shopping Carts' to search for shopping carts that have been submitted for approval.

‡ Teams must be set up in Personalization first in order to have the team shopping cart option on the shopping cart level. The creator of the shopping cart must create the cart as a Team Shopping Cart. See 'Team Shopping Carts' for more information (bu.edu/sourcing/how-to-place-orders/).



* Click the 'Buy on Behalf of' box to include shopping carts created using the Buy on Behalf of function in the search.

Take Over Team Shopping Carts



Shopping Cart Queries display information including your individual or team‡ shopping cart numbers, status, and PO numbers.

- ❖ Review search results
- ❖ Click shopping cart link to open cart in a new window‡

Shopping Carts - All

▼ Hide Quick Criteria Maintenance

Shopping Cart Number: To

Shopping Cart Name:

Item Description:

Timeframe:

Creation Date: To

Status:

Role:

PO Number:

Product Category:

Partner Product:

Including Product Category Hierarchy:

Bought on Behalf:

Including Completed Shopping Carts:

Show my Team Carts:

Smart Number:

Step 9. Click shopping cart link

Step 8. Review search results

View: [Standard view] | Create Shopping Cart | Copy | Display | Edit | Delete | Order | Create Confirmation | Print Preview | Refresh | Export

Shopping Cart Number	Shopping Cart Name	Created On	PO Number	Supplier	Item Status
1000752034	BUWTN503	11/21/2017 16:13	11/21/2017 16:14:20	8500411028 Carolina Biological Supply Company	Follow-on Document Cr

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Display Shopping Cart

Print Preview | Close **Take Over** Refresh

Number 1000336317 Document Name Team Cart Test 2 Status Saved Create

Buy on Behalf of: 52936

Name of shopping cart: Team Cart Test 2

Header Data: [Values](#)

Team Shopping Cart: Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Records Management: [Display](#)

Document Changes: [Display](#)

Item Overview

- ❖ Click 'Take Over' to open the shopping cart for editing

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Sourcing & Procurement Additional Resources

Ordering Information
Sourcing & Procurement:

Website: www.bu.edu/sourcing
Email: sourcing@bu.edu

Invoice Payment Information
Accounts Payable:

Website: www.bu.edu/ap/resources
Email: invoices@bu.edu