Requesters can shop, submit their own carts, submit carts assigned to them by Shoppers, and edit or return carts. They can approve their own carts if they have the Approver role and authorization on the chart field string on the cart.

See:

- MacBuy User Profile Guide for customizing user profile processes.

Log into Mosaic.

Select the MacBuy tile. This may be on the Home screen or the My Work screen.
On the Home screen in MacBuy, click on the notification flag in the Notification toolbar, upper right hand portion of screen.

This will show a list of Action Items. The example here is Assigned Carts. A Shopper has assigned a cart to the Requester to submit. Shoppers cannot submit their own carts; they can only assign carts.

Click on Carts Assigned to Me hyper link.
OR Shop>My Carts and Orders>View Carts

Both processes take the user to the Cart Management Screen.

There are 3 tabs: Draft Carts, Assigned Carts and Shared Carts. Select Assigned Carts.

Use the Action column, far right, to find actions available to process cart.

Actions available are below.

- View
- Activate
- Return
- Delete

When the Requester views a cart, the cart is Activated. At this point the Requester can enter chart field strings, VAT, etc. and submit the cart to workflow.
View – takes Requester into the Activated Cart for editing, naming cart, adding items, entering chart field string, taxes, commodity code (if not completed by supplier), delivery location, etc. and proceeding to checkout.

Delete – Requester deletes cart without going into the cart to review contents

Return – if Requester wants the Shopper to make changes.

Note, below, that the Shopper is notified of the returned cart under the bell icon.
The **returned** cart shows up in the Shopper's Cart Management Draft Cart tab.

Icon reflects that the cart has been returned.
The green circular arrow indicates a returned cart when mouse hovers over icon.

The Shopper can now choose what to do with the cart, including resubmitting or deleting.

Activating the cart takes the Shopper back into the cart to continue shopping.

**TIP:** Make the comments clear when returning a cart so the Shopper knows what to do next. If it should be deleted, have the Shopper do this rather than the Requester.
The Requester activates the cart then selects the cart name hyperlink to go into the cart. Or simply click the hyperlink on the report title.

The Requester can use the **Return Cart** button to return a cart after reviewing it, while in the cart.
A window appears. Enter a comment on the reason for returning the cart.

If the Requester wishes to continue with the order without changes, click on **Proceed to Checkout** button.
If the Requester wishes to make a change to the order, check the box to right of line item(s) to activate actions available, below.

For selected line items:

- Add to Favorites
- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Change Commodity Code

TIP: To use the Add to Favourites option, a Folder must be created.

Click on Proceed to Checkout to submit the cart. Use the ribbon to guide the process.
**Ribbon** showing missing fields in Shipping, Accounting Codes and Final Review screens.

Click on each to reach screen to enter required information.

**Ribbon** showing requisition with all required information completed, ready to Submit Order.

Once the **Proceed to Checkout** button has been clicked, the system goes to the above screen.

The ribbon, top above, guides the process. In this example, the chart field string has not been entered. The ribbon explains the missing items in easily understood terms and highlights the fields missing required information. Click on the **Edit** button.

If chart field strings have been set up in the user’s profile, they can be accessed using a drop down menu, as shown below, once the first field in the chart field string is selected.
Nicknaming chart field strings makes selecting the correct one very simple. MacBuy requires saved chart field strings to be nicknamed for this reason. There is no limit to the number of chart field strings that can be saved to a profile.

**TIP:** For information on saving chart field strings on a profile, see the MacBuy User Profile Guide.

**TIP:** Delete chart field strings from profile as they close (projects) for better management of spending on research accounts.

**TIP:** Requisitions can be split between chart field strings at the header or line.

Once chart field string is complete, click on the **Save** button.
When all sections of the ribbon have green check marks, the cart is ready to submit (click on **Place Order** button).

Shoppers cannot access the **Place Order** button. Although it will be on their screen, it becomes greyed out when they click on it.

Once the **Place Order** button has been clicked, the system moves to a Summary screen.
As soon as the cart has been submitted, it becomes a requisition. MacBuy lists the requisition number and other relevant information.

Work flow can be seen by clicking on the View Approval Status hyper link.
To view the name of an approver (or who is in a pool of approvers) click View approvers hyperlink.

Approver name and contact information is displayed.

**TIP:** If there is a pool of approvers, only ONE of them needs to approve, not all.

**TIP:** If there is more than one chart field string, approvers from all of them will be shown, divided by the department or program or project they approve for.

For further assistance please contact MacBuyhelp@mcmaster.ca