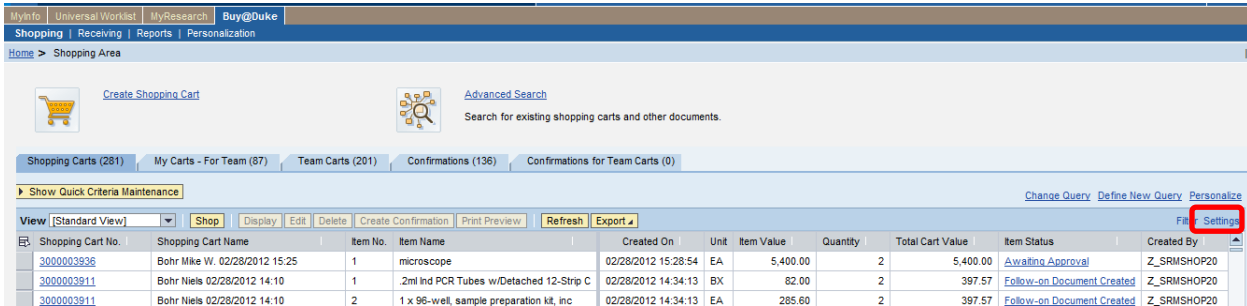


The Buy@Duke initial shopping cart view can be customized and changed to meet the needs of the user. This document details the process of establishing a hierarchy (a series of groupings) in the initial shopping cart view. A custom hierarchy can be set on any screen with the *Setting* link.

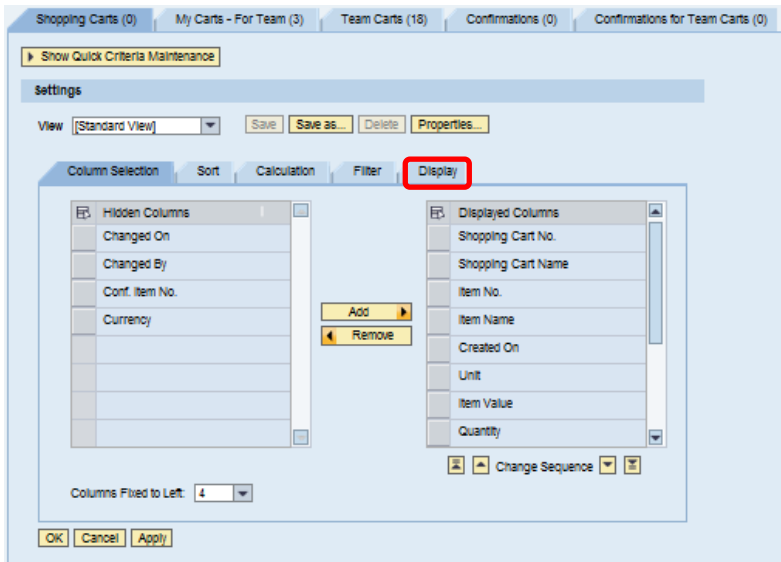
1. Select *Setting* on the far right of the screen.



The screenshot shows the Buy@Duke Shopping Cart interface. The top navigation bar includes links for MyInfo, Universal Worklist, MyResearch, Buy@Duke, Shopping, Receiving, Reports, and Personalization. Below this, there are tabs for Shopping Carts (281), My Carts - For Team (87), Team Carts (201), Confirmations (136), and Confirmations for Team Carts (0). A 'Show Quick Criteria Maintenance' button is visible. The main table displays shopping cart items with columns for Shopping Cart No., Shopping Cart Name, Item No., Item Name, Created On, Unit, Item Value, Quantity, Total Cart Value, Item Status, and Created By. The 'Settings' link in the top right corner is highlighted with a red box.

Shopping Cart No.	Shopping Cart Name	Item No.	Item Name	Created On	Unit	Item Value	Quantity	Total Cart Value	Item Status	Created By
3000003836	Bohr Mike W. 02/28/2012 15:25	1	microscope	02/28/2012 15:28:54	EA	5,400.00	2	5,400.00	Awaiting Approval	Z_SRMSHOP20
3000003811	Bohr Niels 02/28/2012 14:10	1	.2ml Ind PCR Tubes w/Detached 12-Strip C	02/28/2012 14:34:13	BX	82.00	2	397.57	Follow-on Document Created	Z_SRMSHOP20
3000003811	Bohr Niels 02/28/2012 14:10	2	1 x 96-well, sample preparation kit, inc	02/28/2012 14:34:13	EA	285.60	2	397.57	Follow-on Document Created	Z_SRMSHOP20

2. The screen below appears. Select the *Display* tab



The screenshot shows the 'Settings' dialog box in the Buy@Duke Shopping Cart interface. The 'Display' tab is selected, showing a list of columns to be displayed in the shopping cart view. The 'Hidden Columns' list includes Changed On, Changed By, Conf. Item No., and Currency. The 'Displayed Columns' list includes Shopping Cart No., Shopping Cart Name, Item No., Item Name, Created On, Unit, Item Value, and Quantity. The 'Columns Filled to Left' is set to 4. The 'Display' tab is highlighted with a red box.

3. Check the *Hierarchy* box and click the *Define* button

Shopping Carts (0) My Carts - For Team (3) Team Carts (18) Confirmations (0) Confirmations for Team Carts (0)

Show Quick Criteria Maintenance

Settings

View: [Standard View] Save Save as... Delete Properties...

Column Selection Sort Calculation Filter Display

Table

Displayed Rows: 10

Displayed Columns: All 8

Table Design: Standard

Grid Lines: All

☒ Hierarchy Define

OK Cancel Apply

The screen below appears.

4. Move rows from the *Selection of Hierarchy Columns* on the left to the *Hierarchy Columns* on the right to build a hierarchy to display cart information to meet your needs and click *OK*. The order of the items listed on the right will determine the order of the data items in the hierarchy.

Select Columns for Hierarchy Display

Selection of Hierarchy Columns

- Changed By
- Created By
- Shopping Cart Name
- Currency
- Item Name
- Item Status
- Shopping Cart No.
- Owning Organization

Add Remove

Hierarchy Columns

Change Sequence

OK Cancel

5. To save your hierarchy settings, select *Save As*.

The screenshot shows the 'Settings' dialog box with the 'Display' tab selected. At the top, there are buttons for 'Save', 'Save as...', 'Delete', and 'Properties...'. The 'Save as...' button is highlighted with a red rectangle. Below these buttons are tabs for 'Column Selection', 'Sort', 'Calculation', 'Filter', and 'Display'. The 'Display' tab contains settings for 'Table', including 'Displayed Rows' (set to 10), 'Displayed Columns' (set to All), 'Table Design' (set to Standard), and 'Grid Lines' (set to All). There is a checked checkbox for 'Hierarchy' and a 'Define...' button next to it. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

6. Enter a name for the customized view in the *Description* field and click *OK*.
7. If you would like to have this customized view as the first view you seen when you log into Buy@Duke, check the *Initial View* Box and click *OK*.

The screenshot shows the 'Save View as' dialog box. It has a title bar with a maximize button and a close button. The 'Description: *' field is highlighted with a red rectangle. Below it is the 'Assignment:' dropdown menu, which is set to 'User'. The 'Initial View' checkbox is also highlighted with a red rectangle. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

8. Click *Apply* to display the changes.

View: Cart Status Save Save as... Delete Properties...

Column Selection | Sort | Calculation | Filter | Display

Table

Displayed Rows: 10

Displayed Columns: All 8

Table Design: Standard

Grid Lines: All

☒ Hierarchy Define...

OK Cancel Apply

9. Multiple custom views can be saved by using the *Save As* function and creating a unique name for the view.
10. After creation of more than one custom view, you can easily change the view by clicking on the drop down box next to *View*.

View: Cart Creator Shop Display Edit Delete Create Confirmation Print Preview Refresh Export

Created By/Changed By/Item Status/Shopping Cart Name/Item Name	Shopping Cart No.
▶ CFREEL	
▶ DCLEMENT	
▶ Z_SRMSHOP10	
▶ Z_SRMSHOP20	

11. Select the view you would like to see and the system will automatically refresh to display the view chosen.

Examples:

Example 1 - Shopping cart view with a hierarchy set by cart approval status

This view is helpful to monitor cart status on a daily basis to ensure carts created are approved timely. Expanding the *Follow-on Documents Created* section provides a view of the carts with POs created. The section *In Purchaser's Worklist* indicates the cart is in Procurement.

Hierarchy settings:

Select Columns for Hierarchy Display

Selection of Hierarchy Columns

- Changed By
- Created By
- Currency
- Shopping Cart No.

Add Remove

Hierarchy Columns

- Item Status
- Shopping Cart Name
- Item Name

Change Sequence

Initial display

View: Cart Status				
Shop Display Edit Delete Create Confirmation Print Preview Refresh Export				
Item Status/Shopping Cart Name/Item Name	Shopping Cart No.	Item No.	Created By	
▶ Awaiting Approval				
▶ Deleted				
▶ Follow-on Document Created				
▶ In Purchaser's Worklist				
▶ Saved				

First level of the hierarchy expanded displays the names of carts awaiting approval.

View: Cart Status				
Shop Display Edit Delete Create Confirmation Print Preview Refresh Export				
Item Status/Shopping Cart Name/Item Name	Shopping Cart No.	Item No.	Created By	
▼ Awaiting Approval				
▶ Approval Test 10 11/14/2011 13:43				
▶ Approval Test 3 11/14/2011 13:33				
▶ Biochem Training 2 01/31/2012 12:15				
▶ Biochem Training 3 01/31/2012 13:49				
▶ Bohr 01/31/2012 15:41				
▶ BOHR 12/14/2011 10:49				
▶ BOHR BROCK 12/08/2011 08:46				
▶ Bohr KCB 02/08/2012 12:48				
▶ Bohr KCB 02/08/2012 13:19				

Second level of the hierarchy expanded displays the items ordered and has a link to the shopping cart to view the details.

View	Cart Status	Shop	Display	Edit	Delete	Create Confirmation	Print Preview	Refresh	Export	Filter Settings
Item Status/Shopping Cart Name/Item Name	Shopping Cart No.	Item No.	Created By	Created On	Unit	Item Value	Quantity	Total Cart Value		
▼ Awaiting Approval										
▼ Approval Test 10 11/14/2011 13:43										
• microscope	3000002702	1	Z_SRMSHOP20	11/14/2011 13:46:05	EA	6,800.00	2	6,800.00		
► Approval Test 3 11/14/2011 13:33										
► Biochem Training 2 01/31/2012 12:15										
► Biochem Training 3 01/31/2012 13:49										
► Bohr 01/31/2012 15:41										
► BOHR 12/14/2011 10:49										
► BOHR BROCK 12/08/2011 08:48										
► Bohr KCB 02/08/2012 12:48										

Example 2 - Shopping cart view with a hierarchy set by cart creator

This view is helpful to monitor the carts created by person.

Hierarchy settings:

Select Columns for Hierarchy Display

Selection of Hierarchy Co...

Currency

Shopping Cart No.

Add

Remove

Hierarchy Columns

Created By

Changed By

Item Status

Shopping Cart Name

Item Name

Change Sequence

OK

Cancel

Initial Display

View	Cart Creator	Shop	Display	Edit	Delete	Create Confirmation	Print Preview	Refresh	Export
Created By/Changed By/Item Status/Shopping Cart Name/Item Name								Shopping Cart No.	
►	CFREEL								
►	DCLEMENT								
►	Z_SRMSHOP10								
►	Z_SRMSHOP20								

First level of the hierarchy expanded displays the cart creator and the Buy@Duke user that changed the cart.

View Cart Creator Shop Display Edit Delete Create Confirmation Print Preview Refresh Export		
Created By/Changed By/Item Status/Shopping Cart Name/Item Name	Shopping Cart No.	Item No.
▼ CFREEL		
▶ Z_SRMSHOP20		
▼ DCLEMENT		
▶ Z_SRMSHOP10		
▶ Z_SRMSHOP20		
▼ Z_SRMSHOP10		
▶ BROCK005		
▶ DCLEMENT		
▶ JWB23		
▶ MWOODARD		

Second level of the hierarchy expanded displays the status of the cart.

View Cart Creator Shop Display Edit Delete Create Confirmation Print Preview Refresh Export		
Created By/Changed By/Item Status/Shopping Cart Name/Item Name	Shopping Cart No.	
▼ CFREEL		
▼ Z_SRMSHOP20		
▶ Follow-on Document Created		
▼ DCLEMENT		
▼ Z_SRMSHOP10		
▶ Follow-on Document Created		
▼ Z_SRMSHOP20		
▶ Saved		
▼ Z_SRMSHOP10		
▼ BROCK005		

Third and fourth level of the hierarchy expanded displays the cart name and item details with a link to the shopping cart.

View <div>Cart Creator</div> <div>Shop</div> <div>Display</div> <div>Edit</div> <div>Delete</div> <div>Create Confirmation</div> <div>Print Preview</div> <div>Refresh</div> <div>Export</div> <div>Filter Setting</div>							
Created By/Changed By/Item Status/Shopping Cart Name/Item Name	Shopping Cart No.	Item No.	Created On	Unit	Item Value	Quantity	Total Cart Value
▼ CFREEL							
▼ Z_SRMSHOP20							
▼ Follow-on Document Created							
▼ CFREEL 01/25/2012 21:24							
▪ UPrep? Universal Spin Filters	3000003377	1	01/25/2012 21:25:20	EA	88.29	3	88.29

Example 3 – Shopping cart view with hierarchy set by cart

This view is helpful to see cart level information with the item detail available.

Hierarchy settings:

Initial display

View: Cart View			
Shop Display Edit Delete Create Confirmation Print Preview Refresh Export			
Shopping Cart Name/Item Name	Shopping Cart No.	Item No.	Created By
▶ Approval Test 10 11/14/2011 13:43			
▶ Approval Test 3 11/14/2011 13:33			
▶ Biochem Training 01/31/2012 12:06			
▶ Biochem Training 2 01/31/2012 12:15			
▶ Biochem Training 3 01/31/2012 13:49			
▶ Bohr 01/04/2012 13:17			
▶ Bohr 01/31/2012 15:41			
▶ BOHR 02/14/2012 09:35			
▶ BOHR 12/14/2011 10:01			
▶ BOHR 12/14/2011 10:49			

First level of the hierarchy expanded displays item details with link to shopping cart.

View: Cart View Shop Display Edit Delete Create Confirmation Print Preview Refresh Export Filter Settings										
Shopping Cart Name/Item Name	Shopping Cart No.	Item No.	Created By	Item Status	Created On	Unit	Item Value	Quantity	Total Cart Value	
▼ Approval Test 10 11/14/2011 13:43										
▪ microscope	3000002702	1	Z_SRMSHOP20	Awaiting Approval	11/14/2011 13:46:05	EA	6,800.00	2	6,800.00	
▼ Approval Test 3 11/14/2011 13:33										
▪ microscope	3000002700	1	Z_SRMSHOP20	Awaiting Approval	11/14/2011 13:33:54	EA	6,800.00	2	6,800.00	
▼ Biochem Training 01/31/2012 12:06										
▪ Bradford Reagent, 1 Liter	3000003393	1	Z_SRMSHOP20	Follow-on Document Created	01/31/2012 12:08:38	EA	178.22	2	228.17	
▪ Tube, Microcentrifuge, Fisherbrand, Snap	3000003393	2			01/31/2012 12:08:40	PK	49.95	5	228.17	
▼ Biochem Training 2 01/31/2012 12:15										
▪ microscope	3000003394	1	Z_SRMSHOP20	Awaiting Approval	01/31/2012 12:16:33	EA	5,200.00	2	5,200.00	
▶ Biochem Training 3 01/31/2012 13:49										