

Process: Perform this procedure the first visit to SRM to ensure successful execution of tasks. Personal data is established at Site Navigation. Default information populates into this area based on data from Human Resources org structure. Personal Settings must be confirmed and set-up for all roles. Attributes are default settings which populate into every Shopping Cart to facilitate a more efficient shopping experience. Not setting attributes will require the manual setting of default values on every Shopping Cart.

Role: SHOPPER, APPROVER, CONFIRMER

Frequency: One time

BEGINNING STEPS

SELECT TAB FOR ROLE ASSIGNED:

SHOPPER
APPROVER
CONFIRMER

1. Select Shopper tab

2. Click Settings

Review the following detail:

Personal Data
Position
User Account

Choose "EDIT" if changes are necessary

Click "SAVE"

3. Review Personal Data on both the Position tab and User Account tab

4. If changes need to be made to your Personal Data, click Edit and update information

Form of Address is required

5. Click Save

Attributes

Edit and select:

Account Assignment Category

Account Assignment Attribute dictates which type of account assignment will default into each Shopping Cart.

Display Document: 1. Select Edit

Employee ID: 31954

▼ Personal Data

Form of Address: Mr. Academic Title: Dr
First Name: Shopper Last Name: TestUser4

Position User Account

Organizational Assignment
Department: 3P018 31001663; 018 -Joe Hines
Position: C0021M9 51008878; Price Contract Coord

Functional Assignment
Department Head Of:
Purchasing Group: 3P018 31001663; 018 -Joe Hines

Department Address
Street/ House Number: 322 Peterson Serv
Postal Code/ City: 40506 Lexington
Country: US

Communication Type: Telephone
Phone Number/ Extension: 859-323-8689
Fax Number / Extension: 859-323-6165
E-Mail: kmich2@uky.edu

Attributes for Position Price Contract Coordinator Senior

Attribute:

- Account assignment category*
- Cost Center*
- Delivery address*
- Product Category*
- Request
- Request type
- WBS Element*

Choose a default assignment

Attributes for Position Price Contract Coordinator Senior

Attribute:

	Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cost Center	CC
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	G/L Account	GL
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	Order	OR
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WBS element	WBS

3. Click Standard radio button, to activate default Account Assignment Category type

Choose either the Cost Center and complete

OR

4. Select Cost Center from the drop down menu to assign a default Cost Center number

5. Select Logical System (only one choice is available)

6. Enter the Cost Center #

If Cost Center is unknown, click Possible Entries icon to search

WBS Element and complete

1. Select WBS Element

2. Select Logical System from the drop down list (there is only one choice)

3. Enter WBS Element #

Note: If WBS Element is unknown, click Possible Search Entries icon to conduct search

Delivery Address

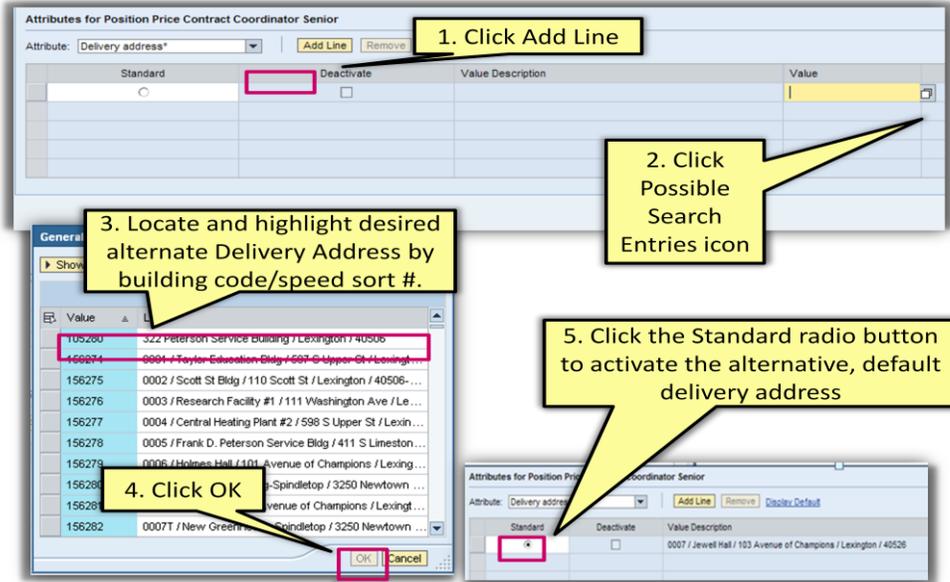
1. Select Delivery Address drop down menu

2. Verify correct Delivery Address

3. Click the Standard radio button to activate default Delivery Address

Personal Settings & Attributes

Alternate Delivery Address if location is different from default.



1. Click Add Line

2. Click Possible Search Entries icon

3. Locate and highlight desired alternate Delivery Address by building code/speed sort #.

4. Click OK

5. Click the Standard radio button to activate the alternative, default delivery address

Click SAVE