

Quick Reference Card – SRM Substitute Shopper



Process: Perform this procedure when a Substitute Shopper is allowed to view and respond on behalf of another Shopper. Only Shoppers may designate, in their Personal Settings tab, the Substitute Shopper. Any person designated as a Substitute Shoppers must have the Shopper role before assigned. Unless a Substitute Shopper is designated, no one will be able to create or view the Shopper's Shopping Cart

Role: SHOPPER

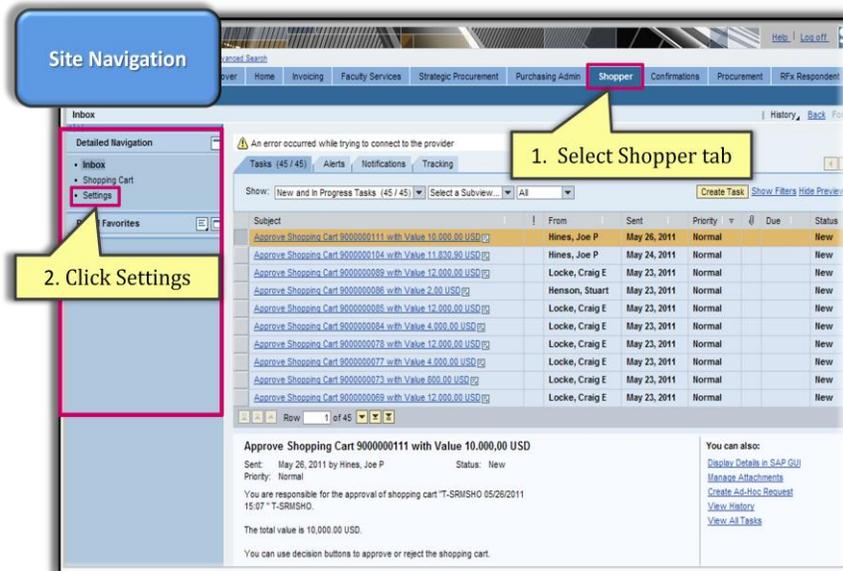
Frequency: when desired

BEGINNING STEPS

SELECT
TAB

Shopper

SETTINGS

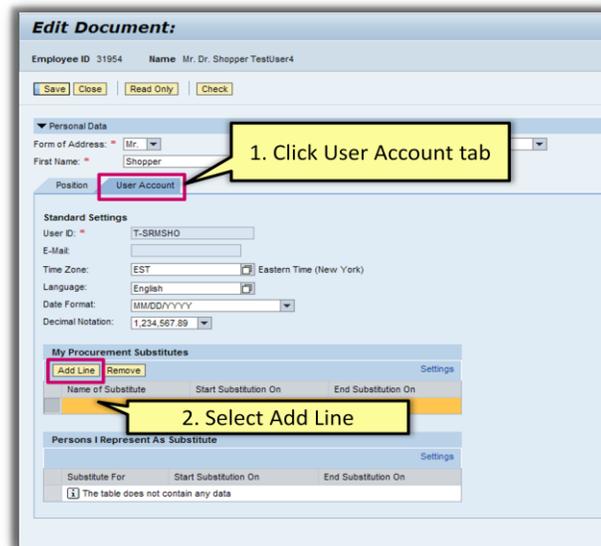


Go to immediately
to: **Edit**

View:

User Account

Add Line



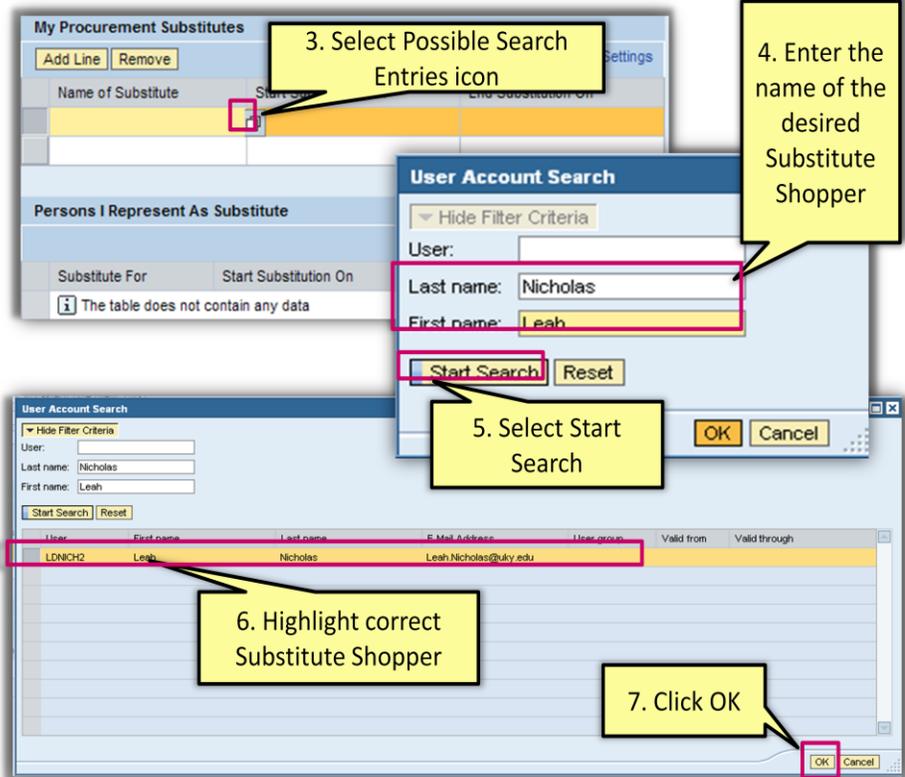
Quick Reference Card – SRM Substitute Shopper

Select the  search icon

Type in Name of Desired Substitute

Start Search

Highlight line and Click 



3. Select Possible Search Entries icon

4. Enter the name of the desired Substitute Shopper

5. Select Start Search

6. Highlight correct Substitute Shopper

7. Click OK

The screenshot shows the 'My Procurement Substitutes' interface. A search icon is highlighted in the top right. A 'User Account Search' dialog box is open, with 'Last name: Nicholas' and 'First name: Leah' entered. The 'Start Search' button is highlighted. Below, a table lists search results, with the first row highlighted. The 'OK' button in the dialog box is highlighted.

User	First name	Last name	E-Mail Address	User group	Valid from	Valid through
LDNICH2	Leah	Nicholas	Leah.Nicholas@uky.edu			

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Assign Dates

Edit Document:

Employee ID 31954 Name Mr. Dr. Shopper TestUser4

Save **Close** **Read Only** **Check**

▼ Personal Data

Form of Address: * Mr. Academic Title: Dr

First Name: * Shopper Last Name: * TestUser4

Position User Account

Standard Settings

User ID: * T-SRMSHO

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation: 1,234,567.89

My Procurement Substitutes

Add Line **Remove** **Settings**

Name of Substitute	Start Substitution On	End Substitution On
LDNICH2	07/21/2011	12/31/9999

Persons I Represent As Substitute

Settings

Substitute For	Start Substitution On	End Substitution On
The table does not contain any data		

8. Enter date on which substitute role to begin

9. Enter date on which substitute role to end or 12/31/9999

Click **Save**

Click **Close**