**The Pennsylvania State University**



**SIMBA Hands-On Guide**

**PR12\_Create Procurement Substitutions**



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# PR12\_Create Procurement Substitutions

## Overview

**Transaction Description:**

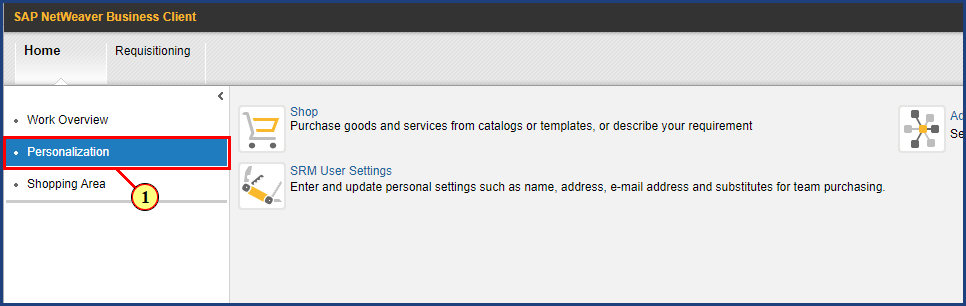
This transaction uses recommended user settings and personalization for efficient shopping including team cart capabilities.

**Penn State Purpose:**

This transaction allows users to assign procurement substitutes for workflow and to define team shopping access.

## Process Steps

### Home - Google Chrome



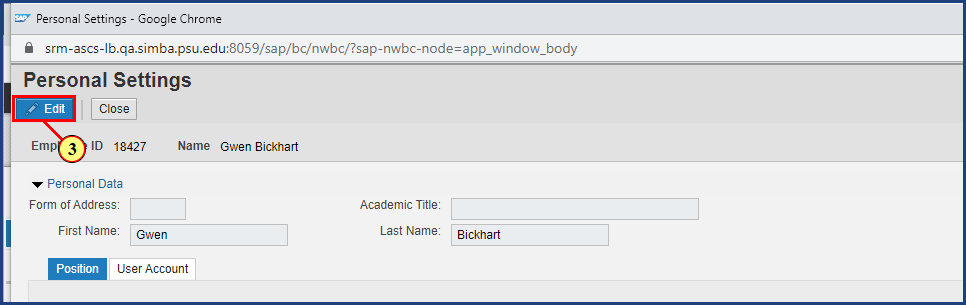
| Step | Action |
| --- | --- |
|  | This demonstration will show two tasks:     1. How to designate a Purchasing Substitute 2. How to create a Team Shopping Cart |
| 1. | The **Personalization** button is clicked. |

### Personalization - Google Chrome



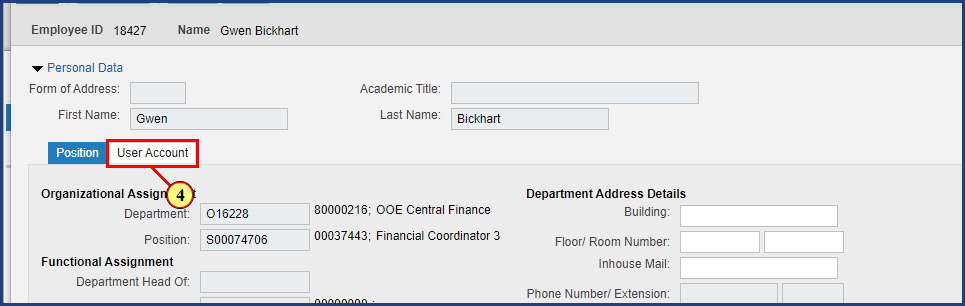
| Step | Action |
| --- | --- |
| 2. | The **SRM User Settings** button is clicked. |

### Personal Settings - Google Chrome



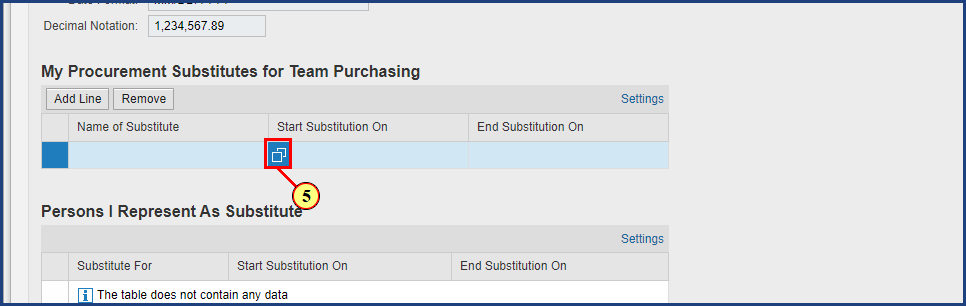
| Step | Action |
| --- | --- |
| 3. | The **Edit** button is clicked. |

### Settings - Google Chrome



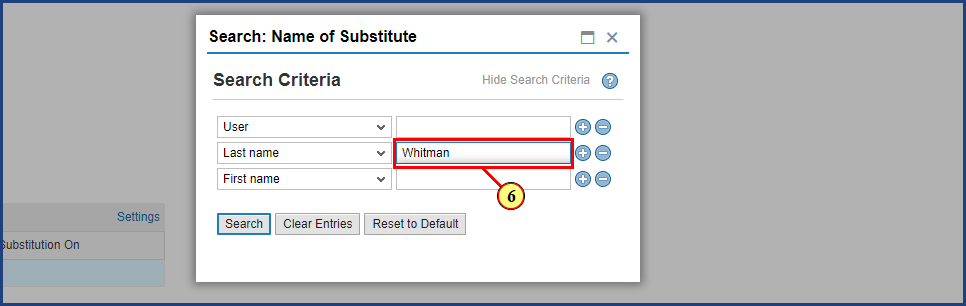
| Step | Action |
| --- | --- |
| 4. | The **User Account** button is clicked. |

### Settings - Google Chrome



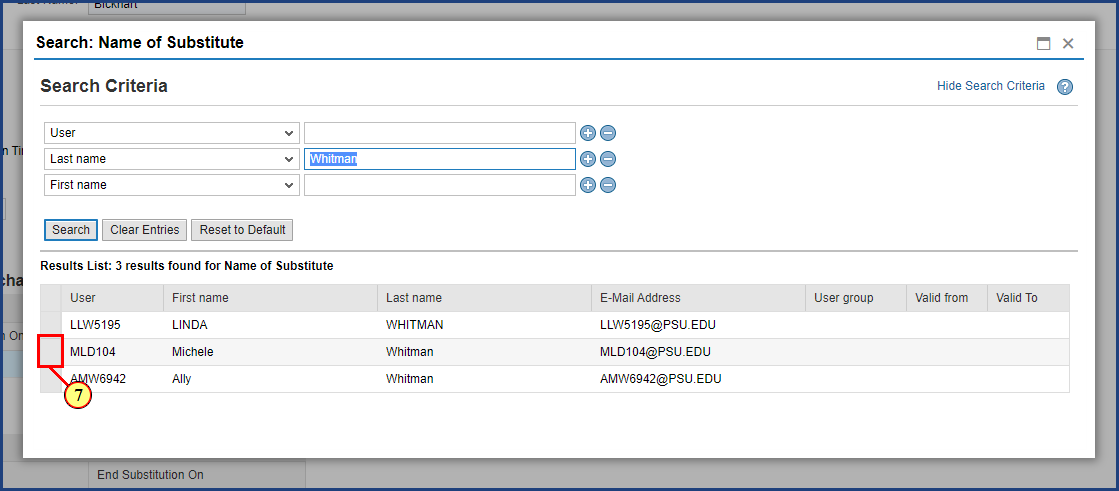
| Step | Action |
| --- | --- |
| 5. | The **Possible Values** button is clicked for **Name of Substitute**. |

### Settings - Google Chrome



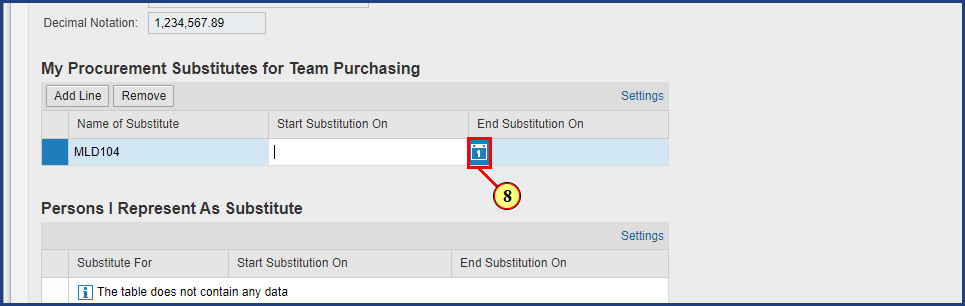
| Step | Action |
| --- | --- |
|  | If you know the person's Penn State UserID, you can enter it in the User search field. Otherwise, in the search field next to Last Name, enter a last name and press Search (or Enter). |
| 6. | **Whitman** is typed into the **search** field and **Enter** is pressed. |

### Settings - Google Chrome



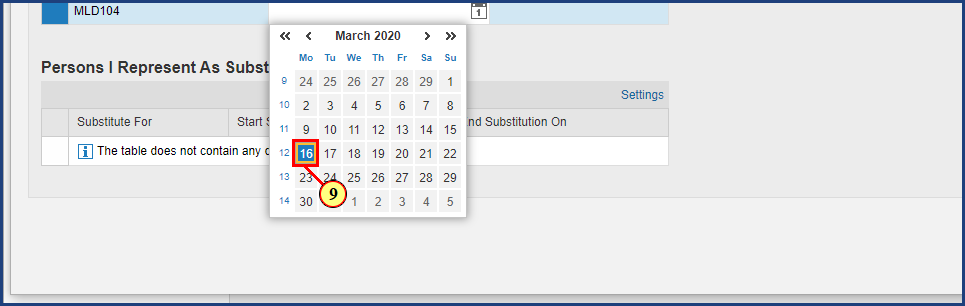
| Step | Action |
| --- | --- |
| 7. | The **line selection** button is clicked. |

### Settings - Google Chrome



| Step | Action |
| --- | --- |
|  | Substitutions can be used for a short period of time, such as in a vacation or leave situation, or can be entered with longer durations for ongoing teams. |
| 8. | The **Calendar** button is clicked for **Start Substitution On**. |

### Settings - Google Chrome



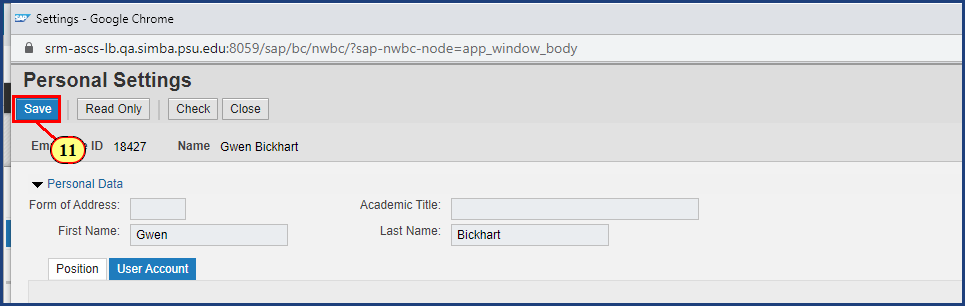
| Step | Action |
| --- | --- |
| 9. | The **Date** button is clicked. |

### Settings - Google Chrome



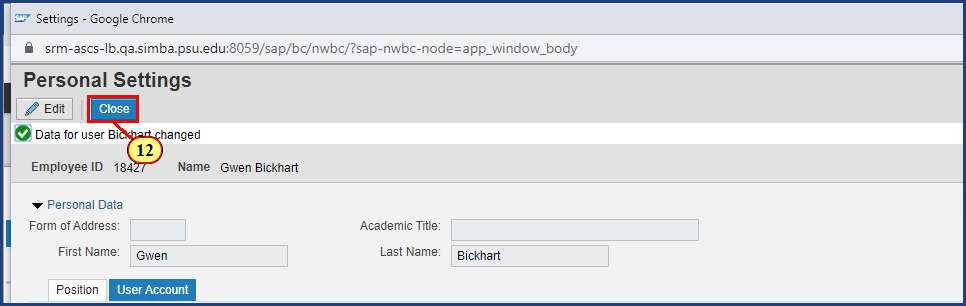
| Step | Action |
| --- | --- |
| 10. | **12/31/2020** is typed into the **End Substitution On** field and **Enter** is pressed. |

### Settings - Google Chrome



| Step | Action |
| --- | --- |
| 11. | The **Save** button is clicked. |

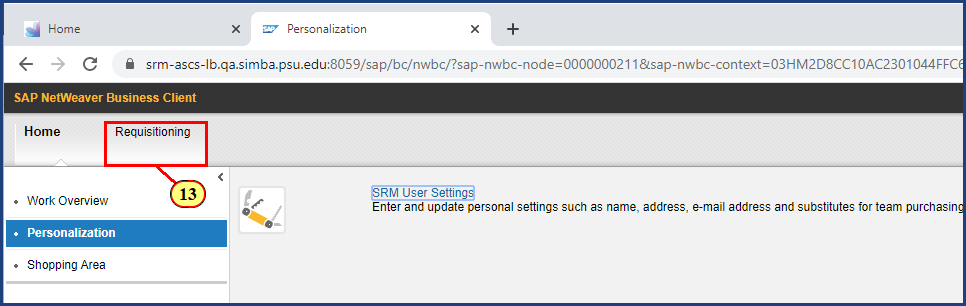
### Settings - Google Chrome



| Step | Action |
| --- | --- |
|  | The green check at the top of the screen indicates data has been changed. |

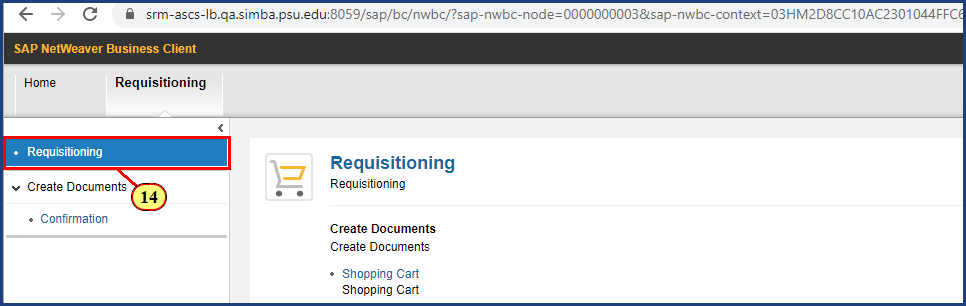
| Step | Action |
| --- | --- |
|  | **Note**: ARL personnel will be prevented from adding users outside of ARL to their team and will receive an error message when attempting to save the substitute. |
| 12. | The **Close** button is clicked. |

### Personalization - Google Chrome



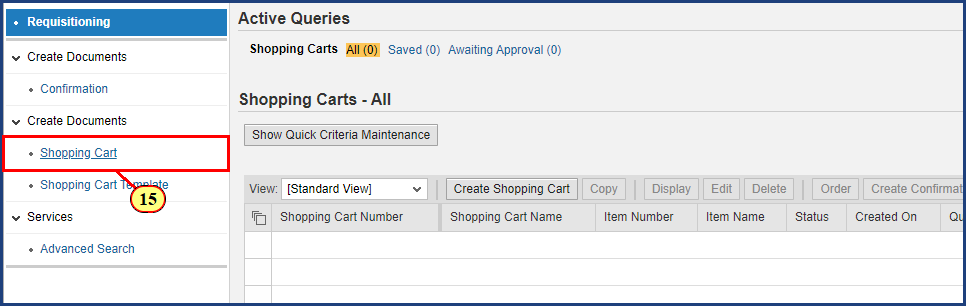
| Step | Action |
| --- | --- |
|  | Now when you create a shopping cart, you will see the option to make it available to your team. |
| 13. | The **Requisitioning** button is clicked. |

### Requisitioning - Google Chrome



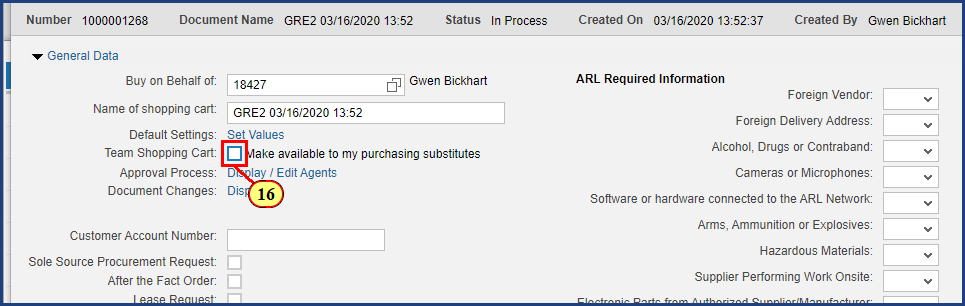
| Step | Action |
| --- | --- |
| 14. | The **Requisitioning** button is clicked. |

### Requisitioning - Google Chrome



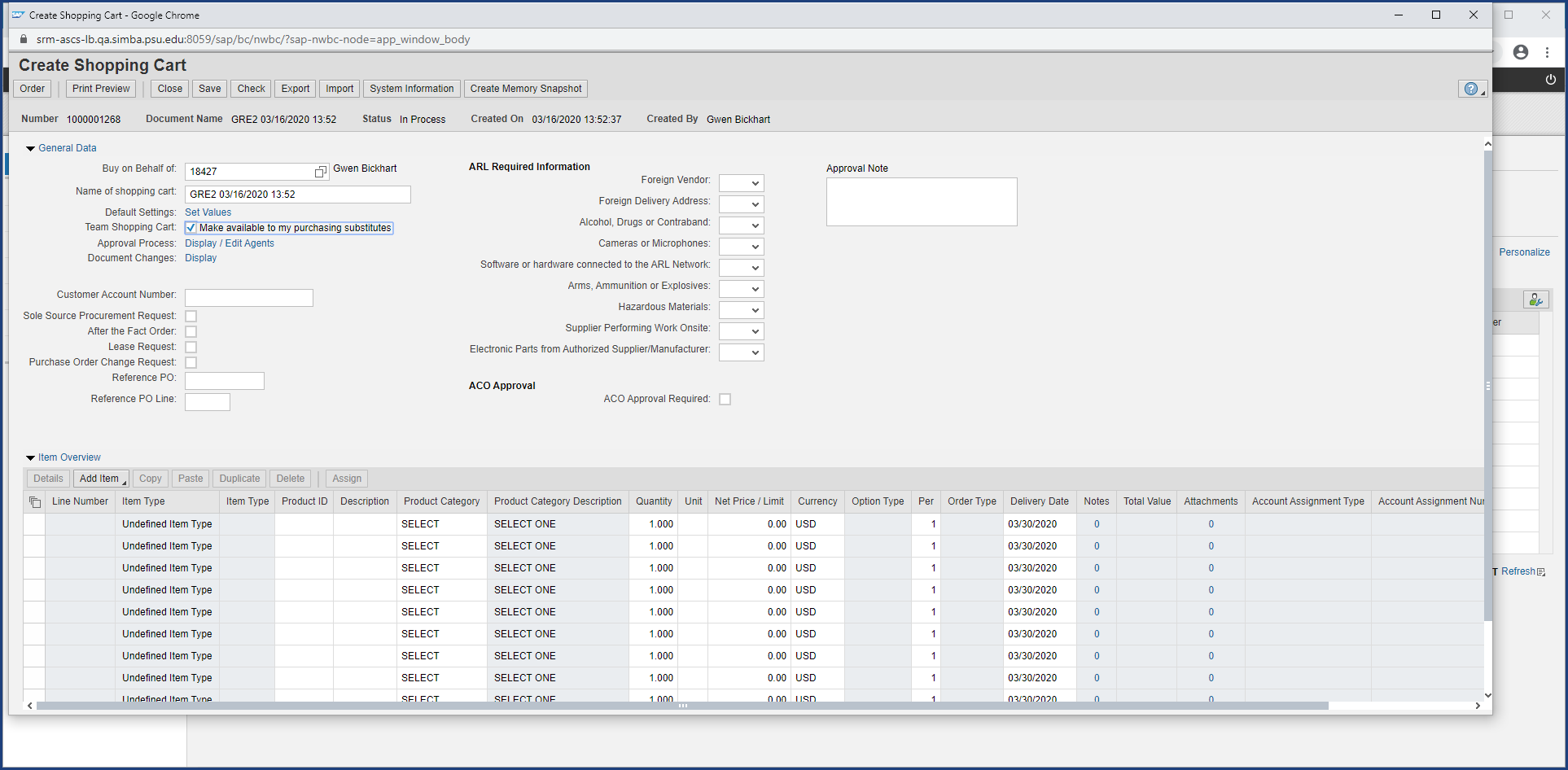
| Step | Action |
| --- | --- |
| 15. | The **Shopping Cart** button is clicked. |

### Create Shopping Cart - Google Chrome



| Step | Action |
| --- | --- |
| 16. | The **Team Shopping Cart** check box is clicked. |

### Create Shopping Cart - Google Chrome



| Step | Action |
| --- | --- |
|  | This shopping cart will now be visible for purchasing substitutes to edit or view. |

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