

## Utilizing Team Shopping Cart Functionality

### To use the Team Shopping Cart functionality:

The Requisitioner must establish substitutes in My Settings → Change Attributes → User Account tab

1. Select **My Settings**
  - a. Left navigation pane under – Services
2. Select Change Attributes



3. Select the User Account tab

The screenshot shows the 'Display Document' form for Ms. Angela Eshleman (Employee ID 317922). The form includes sections for Personal Data, Position, Organizational Assignment, Functional Assignment, Department Address, and Department Address Details. The 'User Account' tab under the Position section is highlighted with a red box. Below the tabs, there is a dropdown menu for 'Attributes for Position Admv Ofr 2'.

Field	Value
Employee ID	317922
Name	Ms. Angela Eshleman
Form of Address	Ms.
Academic Title	
First Name	Angela
Last Name	Eshleman
Position	User Account
Department	GSPR2530 00152530; GS Bus Prcs Cnsltng Div
Position	08640 50266527; Admv Ofr 2
Department Head Of	
Purchasing Group	DGS Central 50000080 ; DGS Central Purchasing Group
Street/ House Number	515 North Office B
Postal Code/ City	17125 Harrisburg
Country	US
Building	
Floor/ Room Number	
Inhouse Mail	
Communication Type	
Phone Number/ Extension	
Fax Number / Extension	
E-Mail	P00068292@PA.LCL

4. Select the EDIT button to proceed with the assignment
  - a. Your "Procurement Substitutes" will be the individual(s) processing Shopping Carts on your behalf

**Display Document:**

 Edit

Employee ID 715643      Name Angela Eshleman

**▼ Personal Data**

Form of Address:       Academic Title:

First Name:       Last Name:

**Position**      **User Account**

**Standard Settings**

User ID:

E-Mail:

Time Zone:  Eastern Time (New York)

Language:

Date Format:

Decimal Notation:

**My Procurement Substitutes for Team Purchasing**

Add Line    Remove      Settings

	Name of Substitute	Start Substitution On	End Substitution On
<input type="checkbox"/>	-----	-----	-----
<input type="checkbox"/>	-----		
<input type="checkbox"/>			

**Persons I Represent As Substitute**

Settings

	Substitute For	Start Substitution On	End Substitution On
<input type="checkbox"/>			

5. Use the search function to locate your "Procurement Substitute's" name

The screenshot shows a user profile page with the following sections:

- Personal Data:** Includes fields for Form of Address, Academic Title, First Name (Angela), and Last Name (Eshleman).
- User Account:** Contains Standard Settings such as User ID (P00068292), E-Mail (aeshleman@pa.gov), Time Zone (EST - Eastern Time (New York)), Language (English), Date Format (MM/DD/YYYY), and Decimal Notation (1,234,567.89).
- My Procurement Substitutes for Team Purchasing:** A table with columns for Name of Substitute, Start Substitution On, and End Substitution On. A red circle highlights a small icon in the first row.
- Persons I Represent As Substitute:** A table with columns for Substitute For, Start Substitution On, and End Substitution On.

6. You have the option of searching for the "Procurement Substitute's name by entering P00 (employee number) beside the "User" field

The screenshot shows a search window titled "Search: Name of Substitute" with the following details:

- Search Criteria:** Includes dropdown menus for User, Last name, and First name. The User field contains "P00" and is highlighted with a red box.
- Buttons:** Search, Clear Entries, and Reset to Default.
- Results List:** 1 results found for Name of Substitute. The table below shows the search results.

User	First name	Last name	E-Mail Address	User group	Valid from	Valid through
P00068292	Angela	Eshleman	AESHLEMAN@PA.GOV	15DGS	02/01/2003	12/31/9999

- Another method is to search by entering their Last and First name. Select the SEARCH button and the results will display.

**Search: Name of Substitute**

Search Criteria Hide Search Criteria ?

User:

Last name:  + -

First name:  + -

**Search**

**Results List: 1 results found for Name of Substitute**

User	First name	Last name	E-Mail Address	User group	Valid from	Valid through
P00068292	Angela	Eshleman	AESHLEMAN@PA.GOV	15DGS	02/01/2003	12/31/9999

- After locating the individual's name, select the gray box and/or P00 (employee number)

**Search: Name of Substitute**

Search Criteria Hide Search Criteria ?

User:

Last name:  + -

First name:  + -

**Results List: 1 results found for Name of Substitute**

User	First name	Last name	E-Mail Address	User group	Valid from	Valid through
<input type="checkbox"/> P00068292	Angela	Eshleman	AESHLEMAN@PA.GOV	15DGS	02/01/2003	12/31/9999

- The P00 (employee number) populates the Name of Substitute within “My Procurement Substitutes for Team Purchasing” area
- Complete the Start Substitute On and End Substitute On date fields by selecting the calendar match code

**Personal Data**

Form of Address:  Academic Title:

First Name:  Last Name:

**Position** **User Account**

**Standard Settings**

User ID:

E-Mail:

Time Zone:

Language:

Date Format:

Decimal Notation:

**My Procurement Substitutes for Team Purchasing** Settings

Name of Substitute	Start Substitution On	End Substitution On
<input type="checkbox"/> P00446880	<input type="text"/>	<input type="text"/>

**Persons I Represent As Substitute** Settings

Substitute For	Start Substitution On	End Substitution On
<input type="text" value="The table does not contain any data"/>		

11. If additional "Procurement Substitutes" are required, select the ADD LINE button and repeat the previous steps
12. Select the SAVE button to save the updates

**Edit Document:**

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

Employee ID 317922    Name Ms. Angela Eshleman

**Personal Data**

Form of Address: Ms.    Academic Title:

First Name: Angela    Last Name: Eshleman

**Position**    **User Account**

**Standard Settings**

User ID: P00068292

E-Mail: P00068292@pa.lcl

Time Zone:

Language:

Date Format: MM/DD/YYYY

Decimal Notation: 1,234,567.89

**My Procurement Substitutes for Team Purchasing**

**Add Line** **Remove**    [Settings](#)

Name of Substitute	Start Substitution On	End Substitution On
P00446880	07/01/2013	07/15/2013

**Persons I Represent As Substitute**

[Settings](#)

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

13. Within the Shopping Cart, the Team Shopping Cart box must be checked on Step 3 of the wizard prior to ordering the Shopping Cart (the box will not be available if Step 1 has not been completed)

**Shop in 3 steps: Step 3 (Complete and Order)**

**Previous** **Next** **Order** **Close** **Save** **Check** **System Info** **Create Memory Snapshot**

1    2    3

Select Goods/Service    Shopping Cart (1 item)    **Complete and Order**

In this step, you can order your shopping cart, or you can save it and order it at a later date. You can add further items to your s

Name of shopping cart: DR Test

Number: 10017875

Team Shopping Cart:  Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Note to Approver

14. On a copied shopping cart, the Team Shopping Cart indicator will only be available for those carts created AFTER the Team Purchasing Substitute(s) have been set

▼ General Data

Buy on Behalf of: 715759 Nicole Kennedy

Name of shopping cart: Copied Shopping Cart

Team Shopping Cart:  Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

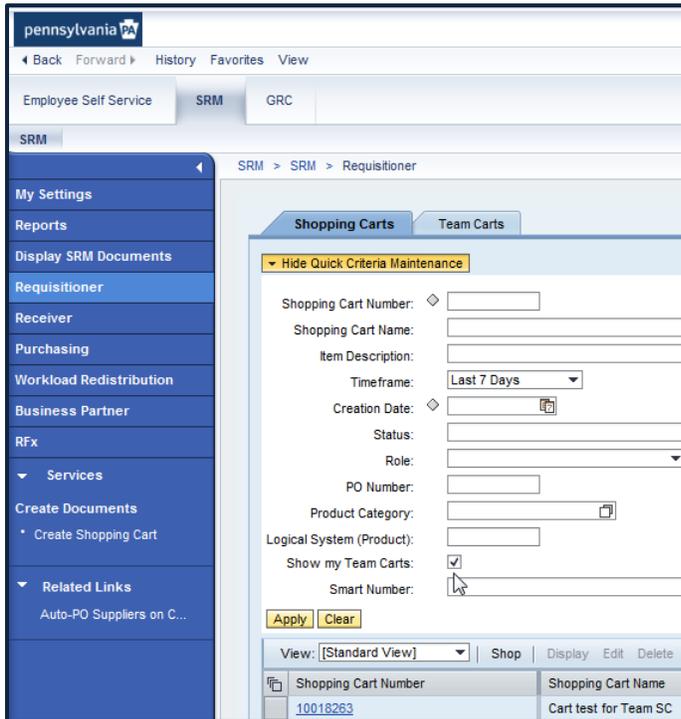
**Additional Functionality:**

- Shopping Carts must be in a *Saved* status to use the Team Shopping Cart functionality
- Team Shopping Cart functionality does not apply to Plan Driven Procurement (PDP) Shopping Carts
- To switch back and forth between users when editing a cart, the users must be set up as a substitute for each other
- Team Shopping Cart functionality includes:
  - **Find and Edit/Save carts** – This functionality keeps the cart with the original Requisitioner (Business Partner and workflow), and is done in the Team Shopping Cart POWL
  - **Take Over** - This functionality allows carts to be ordered by another user (in the event of leave/retirement...)
- In Display SRM Documents → Search All Shopping Carts, Team Shopping Carts have an indicator in the far right column

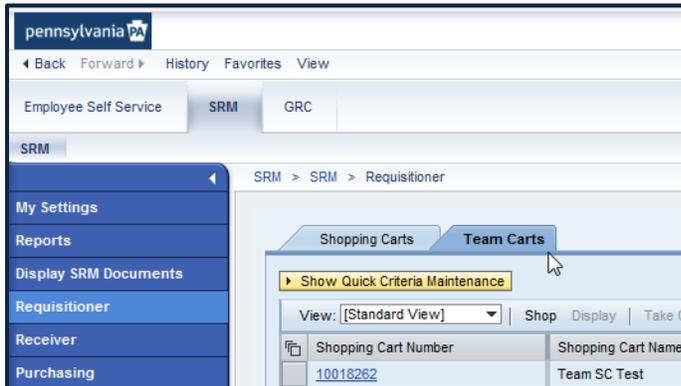
Search Result									
Object Number	Name of Shopping Cart	Created By	Created On	Status	Total Value	Currency	Messages	Message Counter	Team Cart
▶ 10018262	Team SC Test	P00504742	03/31/2014	Saved	1,000.00	USD		0	<input checked="" type="checkbox"/>

## Accessing Team Shopping Carts:

1. A Requisitioner's Team Shopping Cart will not display in the owner's Shopping Cart POWL until the box is selected for *Show My Team Carts* in the Quick Criteria Search



2. For a substitute to display a Team Shopping Cart, the Team Shopping Cart POWL must be used



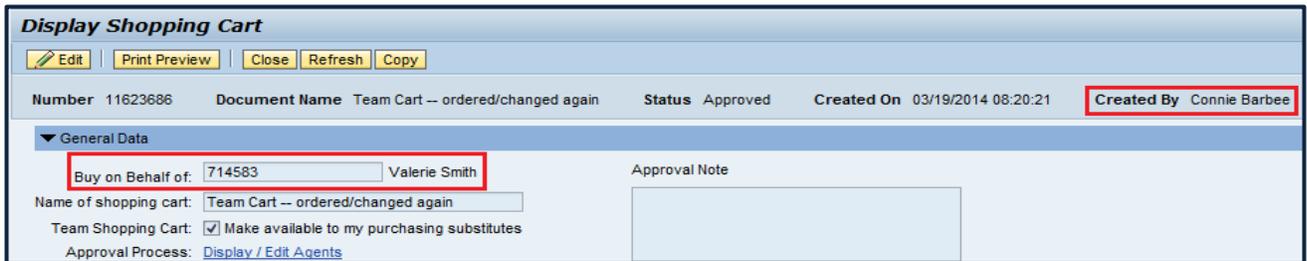
3. Team Shopping Cart functionality includes "Take Over"
  - a. Take Over allows a substitute to order a cart created by a different user
  - b. To use Take Over, highlight the cart in the Team Cart POWL
    - i. Select the TAKE OVER button



- c. Take Over functionality can also be performed by selecting the TAKE OVER button after opening a cart from Display SRM Documents → Search Shopping Carts



- d. Upon ordering, the Team Shopping Cart will show the initial requisitioner as the creator, but will follow the workflow for the user who ordered the cart. Either the original requisitioner or substitute can change the cart while in workflow.
- e. While a cart that has been taken over maintains the original requisitioner as the cart creator, the requisitioner ordering the cart is listed in the Buy on Behalf of field



- f. Once a substitute takes over and orders a cart, the cart will display in the substitute’s Team Cart POWL, as well as the Shopping Cart POWL (after checking “Show My Team Carts”)