

eProcurement Created on 12/1/10

## **Notice**

© 2010, Southern Methodist University. All Rights Reserved. Published 2010.

The information contained in this document is **proprietary** to Southern Methodist University. This document is for use by employees of Southern Methodist University ONLY.

Please address requests for exceptions, permission to duplicate, and/or distribute, to the following:

Administrative Systems Training Team Business and Information Technology Services Southern Methodist University P.O. Box 750262 Dallas, TX 75275-0262 Telephone: (214) 768-1824 Email: adminsys@smu.edu



## Table of Contents

eProcurement	
Requisition Essentials	1
Create a New Requisition	
Create a Favorite for Frequently Purchased Items	
Create a Requisition using a Favorite	
Creating a Web Requisition	
Chartfields and Split Item Costs	
Customizing Accounting Lines and Chartfields	
Split Item Costs: Individual Line Item	
Split Item Costs: Multiple Line Items	
Manage Requisitions	
Managing Shipping Information	
Change Shipping Address: Individual Line Item	
Change Shipping Address: Multiple Line Items	
Price Justification and Comments	
Updating Comments on a Requisition	45
Attaching a file: Adding Price Justification	
Working with Vendors	
Searching for Vendors	
Suggest a New Vendor	56
Approving Requisitions	
First Approver	62
Second Approver: Approving and Denying Requisitions	67
Second Approver: Pushback Requisitions	72
Managing Requisition Approvals	
Additional Resources	79
Combination Edit Rules Made Easy	79
Catalog and Sub Category Listings	80



## eProcurement

## **Requisition Essentials**

#### Create a New Requisition

#### Procedure

eProcurement is an electronic purchase requests (requisitions) and approval module in SMU Financials. eProcurement streamlines and automates the entry and approval of purchase requisitions. Once approved the requisitions are automatically sourced into Purchase Orders by the Purchasing Department.

Step	Action
1.	Click the <b>Main Menu</b> button. Main Menu
2.	Click the eProcurement menu.
3.	Click the Create Requisition link. Create Requisition

SMU Financials						Home Add to Favorites Sign	out
Favorites   Main Menu > eProcure	ement > Create Requisition					I nome   Addito ravontes   Sign	out.
					(2) Help		
Create Requisition						Requisition Summary	į.
1. Define Requisition	n <u>2. Add Items and</u>	1 Services	3. Review and Sub	mit		There are no lines on this request. Please add new line in order to save this requisition.	
Review the details of your requisi	ition, make any necessary changes, and sub	omit it for approval.					
							0
	IETH Southern Methodist University					Total Allouit (03D).	1
	000000X Q G	ary Wilson	*Currency:	USD			
Requisition Name:			Priority:	Medium 🔻			
	lines on this request. n order to save this requisition.						
Save & submit	Save & preview approvals	× Cancel requisition					
٠					۲		



Action
You will begin with Step 1. Define Requisition. Your ID will default in the <b>Requester:</b> field.
A custom <b>Requisition Name</b> may be entered. (If you choose not to enter a requisition name the requisition number will default once the requisition has been submitted.)
Enter a name in the <b>Requisition Name</b> field.
Click the <b>2. Add Items and Services</b> link. The <b>Special Request</b> page will be displayed.
2. Add Items and Services

SMU						
Financials						Home   Add to Favorites   Sign out
avorites Main Menu > eProcure	iment > Create Requ	lisition			0	
					(2) Help	
Create Requisition						Requisition Summary There are no lines on this request.
1. Define Requisition		2. Add Items and Services	1	3. Review and Submit		Please add new line in order to save this
			1	3. Review and Subinit		requisition.
	ying the information ne	cessary to procure each item or service.				Total Lines: 0
Search:				Search		Total Amount (USD): 0
Eavorites Web Special P	Request					
Select a Request Type						
Special Item	Request an item th	at is not listed in the Catalog.				
Review and Submit						
t 🗌		III			+	

Step	Action
6.	Click the Special Item link. Special Item



Financials		
tes Main Menu > eProcurement > Create Requisition		tes   Sig
eate Requisition	Help Requisition Summary There are no lines on this required.	uest
1. Define Requisition	Please add new line in order t requisition.	
lines to the requisition, specifying the information necessary to procure each item or service.	Total Lines:	
Search	Total Amount (USD).	
vontes Web Special Request		
ecial Item		
em Description:		
rice: 0.00000 *Currency: USD		
uantity: "Unit of Measure:		
ategory: Due Date:		
endor ID: Suggest New Vendor		
endor Name:		
endor Item ID:		
ig ib:		
lanufacturer:		
Ifg Item ID: dditional Information Request New Item		
Request New Item		
And the band of the second framework in the second se		
Send to Vendor Show at Receipt Show at Voucher		
Add Item Cancel Add or Start New Type		

Step	Action
7.	Enter the desired information into the Item Description field.
8.	Enter the desired information into the <b>Price</b> field.
9.	Enter the desired information into the <b>Quantity</b> field.
10.	Click the Look up Unit of Measure button.
11.	Select the desired Unit of Measure link.
12.	Click the <b>Category Lookup</b> button.



SMU Financials								Home   Add to Favorites   Sign out
Favorites Main Mer	nu > eProcur	ement > Crea	te Requisition					
Create Requisiti							(3) Help	Requisition Summary There are no lines on this request. Please add new line in order to save this requisition.
Look Up Cat								Total Lines: 0
Note: You may eithe		rowse to look up	the appropria	te category for yo	our special requ	iest.		Total Amount (USD): 0
👻 Search Categori								
Search By	Category	•			Find			
Categories				Customize   Find	1 🖉 📔 Firs	I CI 1 of 1 DI Last		
Catalog	c	ategory		Description		Find in Tree		
1						÷		
▶ Browse Category	/ Tree							
Return								
1								
1								

Step	Action
13.	Click the <b>Expand section</b> button located on the far left of the <b>Browse Category</b> <b>Tree</b> row.



SMU Financials					Home Add to Favorites
	eProcurement > Create Re	auisition			nome   Add to navorites
eate Requisition	Ť			() Help	Requisition Summary There are no lines on this request. Please add new line in order to save th requisition.
ook Up Catego	ory				Total Lines:
	ch or Browse to look up the a	ppropriate category for your spec	tial request.		Total Amount (USD):
Search Categories					
Search By Cal	tegory 🔻	Fin	d		
Categories		Customize   Find   💷	First K 1 of 1 Last		
Catalog	Category	Description	Find in Tree		
1			4		
			-		
Browse Category Tree					
select a catalog:	Building	-			
-	Building				
.eft   Right 🗈 All Items	Computers Equipment				
	Furniture Lab				
	Miscellaneous				
	Office Printing				
Return					

Step	Action
14.	Click an entry in the Select a Catalog drop down list.
	Equipment

Wang Menu > ehougement > Create Requisition     Provide Requisition     Cock Up Category     obs: You may either Search or Brows to look up the appropriate category for your special request.     Search Dr Category     Category     Category     Find     Category     Category     Browse Category Tree	File       International       International       International       International         ptess       Main Menu > eProcupement > Create Requisition       Image: Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Up Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Up Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Up Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition         ck       Category       Procupement > Create Requisition       Image: Procupement > Create Requisition				
Wang Menu > ehougement > Create Requisition     Provide Requisition     Cock Up Category     obs: You may either Search or Brows to look up the appropriate category for your special request.     Search Dr Category     Category     Category     Find     Category     Category     Browse Category Tree	state Requisition         act Requisition         box Up Category         :: You may either Stark or Brows to Itook up the appropriate category for your special request.         action Categories         catalog       Category         i       i	Financials			
Construction       Requisition         Cock Up Category       The are no loss on than Press and the Vise in ord requisit.         > Search & Category       Find         Category       Category         Category       Find         Browse Category       Find         Category       Find         Category       Find         Browse Category       Find         Search Category       Find         Browse Category       Find         Search C	Atter Requisition       Resentance         bk Up Category       The are no less on than Pages and one like is not equation.         you may effect Search of Browse to look up the appropriate category for your special request.       The are no less on than Pages and one like is not equation.         acta for go and action of Engle       Find       The are no less on than Pages and one like is not equation.         acta for go and action of Engle       Find       The are no less on than Pages and one like is not equation.         acta for go action of Category       Description       Find in Tree         acta catalogo       Category       Description         acta catalogo       Epsement	avorites Main Menu > ePr	ocurement > Create Requisitio	n	
tote You may atthet Search of Browse to look up the appropriate category for your special request - search by Categories Categories Categories Category Description Find in Tree 1 Category Tree Browse Category Tree - Select a catalog: Equipment	r You may effect Search or Browse to look up the appropriate category for your special request. earch Category	reate Requisition			
ote: You may ether & Search or Browse to look up the appropriate category for your special request. - Search By Category Find Categories Category Description Find in Tree 1 Category Description Find in Tree 2 Browse Category Tree - Select a catalog: Equipment	r You may filter Search or Browse to look up the appropriate category for your special request earch Category Find ategories Category Description Find in Tree 1 Category Description Find in Tree 2 Sector 2 Category Tree Sector 2 Category Tree	ook Up Category	/		
Search By Category  Find Categories Category Cat	arch By Category  Find  Independent Category  Category  Description Find in Tree Category Tree Hect a catalog: Epigement	lote: You may either Search (	or Browse to look up the approp	riate category for your special req	uest.
Catalogories Customera ( fool ) I in real C 4 of 1 Leas Catalog Category Description Find in Tree 1 Biowas Category Tree Biowas Category Tree	Alegorius Category Description Find in Tree  Catalog Category Description Find in Tree  I Sect a catalog: Epstemant				
Catalog Catalog Category Description Find in Tree	Catalog Category Description Find in Tree  Catalog Category Tree  Description  Experiment  Experiment	Search By Catego	ory 💌		
1 Browse Category Tree Select a catalog: Egysment	towse Category Tree Nect a catalog: Equipment	Categories		Customize   Find   🖉   🗮 Firs	st 🕅 1 of 1 🗖 Last
Browse Category Tree Select a catalog: Egysprent	rowse Category Tree sect a catalog: Equipment	Catalog	Category	Description	Find in Tree
Browse Category Tree Select a catalog: Egysprent	rowse Category Tree sect a catalog: Equipment	1			2
Select a catalog:	elect a catalog:				Ŧ
		- Browse Category Tree			
Last Dick Dr. Allhow	itt i Right 🔁 All Items	*Select a catalog:	Equipment	•	
	ar Foight CD Anterns	Left Dight CD All Roma			
		Return			
Return	eturn				
Return	etura				
"Return	etura				
Return	eturn				
Return	etum				
Return	etun				
Return	eturn				
Reum	eturn				
Return	etum				
Return	etum				
Return	etun				
Return	eturn				
Return	eturn				
Return	etum				
Return	etura				
Return	etum				



Step	Action
15.	Click the Expand Folder button.
	(Hint: Be careful <u>not</u> to click the All Items link.)
16.	Click the appropriate <b>Category</b> link. Audiovisual
17.	The <b>Due Date:</b> field is an optional field and <u>will not affect</u> expediting this item.

SMU Financials					Home   Add to Favorites   Sign out
Favorites Main Menu > ePr	ocurement > Create Requisition				
Create Requisitio		tems and Services	3. Review and Submit	(?) Help	Requisition Summary There are no lines on this request. Please add new line in order to save this
	specifying the information necessary to		· · · · · · · · · · · · · · · · · · ·		requisition.
Search:	ecial Request	produce calcinitient of Service.	Search		Total Lines: 0 Total Amount (USD): 0
Special Item					
*Item Description:	Infocus DLP Projector				
*Price:	2614.26000	*Currency:			
*Quantity:	1.0000	* Unit of Measure:	EA 🔍		
*Category:	A880A	Due Date:	3		
Vendor ID:		Suggest New Vendor			
Vendor Name:	۹,				
Vendor Item ID:					
Mfg ID:	•				
Manufacturer:					
Mfg Item ID:					
Additional Information			Request New Item		
		⊡¢€	Request New Item		
Send to Vendor	Show at Receipt	Show at Voucher			
Add Item Car	Add or Start New T	pe			

Step	Action
18.	Click the Vendor ID: Lookup button.



SMU Financials				Home   Add to Favorites   Sign out
Favorites Main Menu > eProcureme	ent > Create Requisition			
Vendor Search Vendor ID: Name: Short Vendor Name:		Find Reset Surgest Vendor	(2) Help	Requisition Summary           There are no lines on this request.           Please add new line in order to save this requisition.           Total Lines:         0           Total Amount (USD):         0
Alternate Vndr Name: City: Country:	State-			
Postal Code:	State:			
Enter search criteria to find a	a vendor.			
Return to Special Request				

Step	Action
19.	Enter the desired information into the Name field.
20.	Click the <b>Find</b> button.
21.	Select the appropriate Vendor ID link.
22.	<b>Note:</b> The <b>MFG ID</b> field <u>is not used.</u> If you want to capture Manufacture ID information, you can enter it in the <b>MFG Item ID</b> : or in the <b>Additional Information</b> fields.



SMU Financials		
Favorites Main Menu > eProcurement > Create Requisition		
	(2) Help	
Create Requisition		Requisition Summary There are no lines on this request.
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Please add new line in order to save this requisition.
Add lines to the requisition, specifying the information necessary to procure each item or service.		
Search: Search		Total Lines: 0 Total Amount (USD): 0
Eavorites Web Special Request		
Special Item		
*Item Description: Infocus DLP Projector		
*Price: 2614.26000 *Currency: USD		
*Quantity: 1.0000 *Unit of Measure: EA		
*Category: A880A Q Due Date: 19		
Vendor ID: 0000027953		
Vendor Name: DREAMTECH		
Vendor Item ID:		
Mfg ID:		
Manufacturer:		
Mfg Item ID:		
Additional Information Request New Item		
a Request New Item		
Send to Vendor Show at Receipt Show at Voucher		
Add Item Cancel Add or Start New Type		
III	4	

Step	Action
23.	If needed, enter the desired information into the Mfg Item ID field.
24.	Enter the desired information into the Additional Information field.
25.	Note: The Send to Vendor, Show at Receipt, and Show at Voucher fields are not used.
26.	Click the Add Item button. Add Item
27.	The item has now been added to the <b>Requisition Summary.</b> At this point, additional items can be added to your requisition.
28.	Click the <b>3. Review and Submit</b> link to assign the appropriate, account, fund and org.  3. Review and Submit



SMU				
	curement > Create Requisition		nome   Add to ravontes	1 51
		(?) Help		
Create Requisitio	n		Requisition Summary Description Q	ty UOI
1. Define Requis	ion 2. Add Items and Services 3. Review and Submit		Infocus DLP Projector	1
	isition, make any necessary changes, and submit it for approval.		Total Lines:	1
			Total Amount (USD):	2,61
usiness Unit:	SMETH Southern Methodist University			
lequester:	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			
equisition Name:	Projector for departmental use Priority: Medium			
equisition Lines Line Description	Vendor Name Quantity UOM Price Total			
1 Infocus DLP	Projector DREAMTECH 1.0000 Each 2,614.26000 2,614.26			
Select All / Deselect A	Total Amount: 2,614.26 USD			
🖵 📴 🛛 Add to Favo				
	woo 🗘 Audio rempilate(a)			
omments		a		
		22		
Send to Vendor	Show at Receipt Shown at Voucher Approval Justification			
Save & submit	Save & preview approvals X Cancel requisition Find more items			
CS Save & Submit	Indiana Cancer requisition			
		- F		

Step	Action
29.	Click the <b>Expand Section</b> button. (This small button is located on the far left near the line number.)
	Note: If more than one line items is on this requisition, each line will have it's own <b>Expand Section</b> button. All lines may be updated at the same time if using the same account, fund and org. For instructions, see the topic "Update Chartfields for Multiple Lines"
30.	Account, Fund and Org information is located on Chartfields2.
	Click the <b>Chartfields2</b> tab.
31.	Enter the desired information into the <b>Account</b> field.
32.	Your default Fund and Dept (org #) will auto populate.
	Review the <b>Fund</b> and <b>Dept</b> and adjust if necessary. Add a <b>Project Code</b> or <b>Subclass</b> if needed.



SMU Financials		Home Add to Favorites Sign out
Favorites Main Menu > eProcurement > Create Requisition		
	(2) Help	
Create Requisition		Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Infocus DLP Projector 1 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines: 1
Business Unit: SMETH Southern Methodist University		Total Amount (USD): 2,614.26
Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Requisition Name: Projector for departmental use Priority: Medium		
Requisition Lines		
Line Description Vendor Name Quantity UOM Price Total		
∇ □ 1 Infocus DLP Projector DREAMTECH 1.0000 Each 2.614.26000 2.614.26		
Consolidate with other Reqs Verride Suggested Vendor		
Shipping Line: 1 Due Date: 1 Quantity: 1.0000 Price: 2.614.26000		
Status: Active *Ship To: MSAJOURN-S & Modify Onetime Address		
Attention To: Gary Wilson		
*Distribute By: Otv V SpeedChart:		
*Distribute By: Oty   SpeedChart:	-	
Accounting Lines Customize   find   View AI ] P   # Fest KI 1 of 1 D Last		
Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2		
Account Fund Dept Project Class		
8120 🔍 10 🔍 223250 🔍 🔍 🔍 🔍 🛨 🖃		
Select All / Deselect All 2814 28 LISD		
🖵 📴 Add to Favorites 🛝 Add to Template(s) 📑 Modify Line / Shipping / Accounting 📋 Delete		
Comments		
	1	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification		
Save & submit Save & preview approvals X Cancel regulsition Find more items		
Save & submit save & preview approvals Cancel requisition Find more items		
		1
()	*	

Step	Action
33.	Click Save & preview approvals.
	Save & preview approvals

Requisition Name: US Requisition N: 000 Busines Unit: SM Status: Opp Priority: Mec Requisition Approval Projector for depan Supervisor Approval Supervisor Approval Su	ny Wilson gedor for departmental g occocc230 HETH en dium sitrental use:Initiated	Number of Lines: Total Amount	1 2.814.26 USD	<u>ф</u> н	lp Requisiti Descript	LP Projector	247 UOM 1 EA 1 2,614.28
Requested For: Gar Requisition Name: Pero use Requisition II: ODO Business Unit: Status: Opp Priority: Meco Requisition Approval Projector for depar Supervisor Approval Met Approvel Subornt Edit	yector for departmential 00000230 IETH en dium strtmental use:Initiated Morrower 2 Morrower 2 Morrower 2 Morrower 2	Total Amount:		(Au	Requisiti Descript Infocus D	ion DLP Projector	1 EA
Requisition Name: Pro Requisition ID: 0000 Business Unit: SMI Statura: Opp Priority: Mec Requisition Approval Projector for depai Supervisor Approval Macrosoft Submit Edit	yector for departmential 00000230 IETH en dium strtmental use:Initiated Morrower 2 Morrower 2 Morrower 2 Morrower 2	Total Amount:					
Requisition ID: 0000 Business Unit: Status: Opt Priority: Mec Requisition Approval Supervisor Approval In: Projector for depar Supervisor Approval In: But Approver 1 Submit Edit	e e ooooooooooooooooooooooooooooooooo		2,814.26 USD				
Requisition ID: 000 Business Unit: SAM Status: Opp Priority: Mec Requisition Approval Projector for depan Supervisor Approval Marchand Approver Supervisor Approver	ocoocco IETH en dium atremental use:Initiated the Approver 2 Main Approver 1 Main Approver 1						
Status: Opt Priority: Mec Requisition Approval Projector for depar Supervisor Approval Mu Requisition Approvel Mu Requisition Approver	en dium rtmental use:Initiated y Hot Routed Approve 2 Approve 2 Build Regulation Approver						
Priority: Jecc Requisition Approval Projector for depai Supervisor Approval Marcia Station Approver Submit Edit	dium artmental use:Initiated r → Net Romed Mark Approver 2 SHU Requeston Approver						
Requisition Approval	artmental use:Initiated						
Projector for depai Supervisor Approval     Not Routed     Approve1     SNU Requisition Approver	r Not Routed						
Supervisor Approval Not Routed Approver 1 Submit Edit	r Not Routed						
Not Routed Approver 1 SMU Requisition Approver Submit Edit	ar Approver 2 SMU Requisition Approver						
		rova <sup>©</sup> Changes					



Step	Action
34.	Click the <b>Submit</b> button. Submit
35.	End of Procedure.

## Create a Favorite for Frequently Purchased Items

#### Procedure

Identifying a frequently purchased item as a favorite will eliminate some of the requisition process. Once you've created a favorite, it will be available for future requisitions.

Step	Action
1.	Once you have completed a requisition and are on the <b>Review and Submit</b> page, select the desired <b>Line</b> that you want to save as a favorite.
2.	Click the Add to Favorites button.

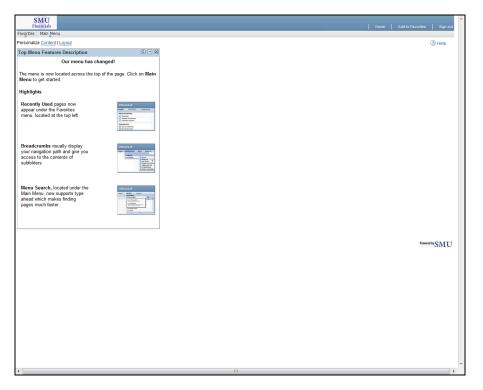
https://fsqal.smu.edu/psc/fssup_1/E     Confirmation     The following item(s) were added to your favorites:     Infocus DLP Projector		Home   Add to Favorites   Sign o
	d Services 3. Review and Submit	Description Qty UOM Infocus DLP Projector 1 EA
Do not show this message again	ibmit it for approval.	Total Lines: 1 Total Amount (USD): 2,614.26
Close	Gary Wilson *Currency: USD Priority: Medium 💌	roan Andonis (dad). Korkada
	Quantity UOM Price Total	
	1.0000 Each 2,614.26000 2,614.26	•
	Total Amount: 2,614.26 USD	
	Modify Line / Shipping / Accounting	
	J.	(E)
Send to Vendor Show at Receipt Show	vn at Voucher Approval Justification	
Save & submit 😡 Save & preview approvals	Cancel requisition     Find more items	



Step	Action
3.	A pop-up box will confirm the favorite was created. Click the <b>Close</b> button.
	The favorite will now be available for you to use the next time you create a requisition.
4.	
	End of Procedure.

## Create a Requisition using a Favorite

#### Procedure



Step	Action
1.	Click the <b>Main Menu</b> button. Main Menu
2.	Click the eProcurement menu.
3.	Click the Create Requisition link. Create Requisition



SMU Financials	Home   Add to Favorites   Sign out
Favorites Main Menu > eProcurement > Create Requisition	
Create Requisition	(2) Help Requisition Summary There are no lines on this request.
1. Define Regulsition 2. Add Items and Services 3. Review and Submit	Please add new line in order to save this requisition.
Review the details of your requisition, make any necessary changes, and submit it for approval.	Total Lines: 0
Business Unit: SMETH Southern Methodist University	Total Amount (USD): 0
Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Requisition Name: Priority: Medium	*
There are no lines on this request.	
Please add new line in order to save this requisition.	
Save & submit 😽 Save & preview approvals 🛛 🗙 Cancel regulsition	
III	4

Step	Action
4.	Enter the desired information into the <b>Requisition Name</b> field.

SMU			
Financials Favorites Main Menu > eProcurement > Create Requisition			Home   Add to Favorites   Sign out
		Help	
Create Requisition			Requisition Summary There are no lines on this request.
1. Define Requisition 2. Add Items and Services	3. Review and Submit		Please add new line in order to save this requisition.
Review the details of your requisition, make any necessary changes, and submit it for approval.			Total Lines: 0
Business Unit: SMETH Southern Methodist University			Total Amount (USD): 0
Requester: XXXXXXXXX Gary Wilson	*Currency: USD		
Requisition Name: Projector for VP office	Priority: Medium		
There are no lines on this request.			
Please add new line in order to save this requisition.			
Save & submit Save & preview approvals 🗙 Cancel requisition			
•		+	
=		•	



Step	Action
5.	Click the 2. Add Items and Services link. 2. Add Items and Services
6.	Click the Favorites tab.

SMU Financials		Home Add to Favorites Sign out
Favorites Main Menu > eProcurement > Create Requisition		Home Add to Favorites Sign out
	(2) Help	
Create Requisition		Requisition Summary There are no lines on this request.
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Please add new line in order to save this requisition.
Add lines to the requisition, specifying the information necessary to procure each item or service.		
Search: Search		Total Lines: 0 Total Amount (USD): 0
Favorites Web Special Request		Total Pandant (000).
Group Name Description		
🔲 🖘 🤷 Ungrouped Items		
Favorite Items		
Type Description Vendor Status Price UOM Quantity		
E 🌮 Infocus DLP Projector DREAMTECH Active 2614.26000 USD EA 1.0000 🐺 Add		
Select All / Deselect All		
L 😿 Add to Favorites Group(s)		
Review and Submit		
€ []	F.	

Step	Action
7.	A list of favorites previously created will display. Select the desired <b>Favorite</b> .
8.	Click the Add button.
9.	The item has now been added to the <b>Requisition Summary.</b>



Sea Man Menu > eProcupement > Create Requisition     I more / Reduisition / Reduisition       1. Define Requisition <ul> <li>2. Add items and Services</li> <li>3. Review and Submit</li> <li>Total Answer (USD):</li> <li>2 and Menu &gt; eProcupement &gt; Create Requisition / Reduisition Summary</li> <li>Becarding and Services</li> <li>3. Review and Submit</li> <li>Total Answer (USD):</li> <li>2 and Answer (USD):</li> </ul>	SMU Financials									
Native Requisition <ul> <li>Addition and concide</li> <li>Review and Subirio</li> <li>Review</li></ul>		nu > eProcurement > Cre	eate Requisition							Home Add to Favorites
Lack requisition   1. Outline Requisition 2. Add terms and Service     nes to the requisition, specifying the information necessary to procure each item or service.     Corrison Remain     Corrison Remain <th></th> <th>Č.</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>(?) Help</th> <th></th>		Č.							(?) Help	
	reate Req	uisition								
ch Said     rome Paced Request     rome Paced and rower        rome Paced and rower        rome Paced and rower                 rome Paced and rower   <	1. Define	e Requisition	2. Add	Items and Serv	ices		3. Revie	w and Submit		
ntel (te) (te) (term) Comp Name Castonica Comp Name Castonica Castonica Kerni Castonica		uisition, specifying the infor	mation necessary t	o procure each ite	m or service.					Total Lines: 1
Croup Name       Description         Type       Description       Vendor       Status       Price       0000       Operating       Control Name         If	earch:							Search		Total Amount (USD): 2,61
Type Description       Category Find (A) (Find (C)										
Controls Names     Controls Of Paris C and S       Vire     Description     Vendor     Status     Price     UOU     Cuantify       Image: Description     Vendor     Addrew     2514 25000 USD EA     1 0000     Image: Addrew       Image: Description     Vendor     Addrew     2514 25000 USD EA     1 0000     Image: Addrew       Image: Description     Vendor     Addrew     2514 25000 USD EA     1 0000     Image: Addrew       Image: Description     Image: Description     Image: Description     Image: Description     Image: Description       Image: Description     Image: Description     Image: Description     Image: Description     Image: Description       Image: Description     Image: Description     Image: Description     Image: Description     Image: Description			Description							
Type       Description       Vendor       Status       Price       OUI       Quantity         If       If       CREAUTECH       Adve       2514.2000       USD       A.       10000       If       Add         Interact All       Image: Add       Image:										
Information         OREANTECH         Adve         251420000         USD         EA         10000         Ig         Add         Add         Information         Information <thinformation< th=""> <thinformation< th=""></thinformation<></thinformation<>			Vendor	Statue	Price			1 💷 First 🖬 1 of 1 🖬 La	St.	
Add Ib Favorites Group(s) It Delete from Favorites Add to Template(s)								(3mm + 4.4		
Add     Image: Add to Favorites Circup(s)     Image: Add to Tampiate(s)	¥ #	Infocus DLP Projector	DREAMTECH	Active	2614.26000 USD	EA	1.0000	2% Add		
ex and Skihori	Select All / Des	elect All								
ex and Skihori	- 🐺 Add	Add to Favorit	tes Group(s)	Delete f	from Favorites		Add to Te	emplate(s)		
III										

Step	Action
10.	Click the <b>3. Review and Submit</b> link to continue assigning the appropriate account, fund and org. <b>3. Review and Submit</b>
11.	End of Procedure.

## Creating a Web Requisition

#### Procedure

Purchase requisitions from select Web Partners (such as Office Depot and Hewlett-Packard) can be created directly using the SMU eProcurement program.

Step	Action
1.	Click the <b>Main Menu</b> button. Main Menu
2.	Click the <b>eProcurement</b> menu.
	eProcurement
3.	Click the Create Requisition link. Create Requisition



SMU Financials	Home   Add to Favorites   Sign out
Favorites Main Menu > eProcurement > Create Requisition	
	Help     Requisition Summary
Create Requisition	There are no lines on this request. Please add new line in order to save this
1. Define Requisition 2. Add Items and Services 3. Review and Submit	requisition.
Review the details of your requisition, make any necessary changes, and submit it for approval.	Total Lines: 0
Business Unit: SMETH Southern Methodist University	Total Amount (USD): 0
Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	]
Requisition Name: Priority: Medium	•
There are no lines on this request.	
Please add new line in order to save this requisition.	
📴 Save & submit 🙀 Save & preview approvals 🗶 Cancel requisition	
4 III	•

Step	Action
4.	Enter the desired information into the <b>Requisition Name</b> field.
5.	Click the <b>2. Add Items and Services</b> link. <b>2. Add Items and Services</b>



SMU Financials		
vorites   Main_Menu > eProcurement > Create Requisition		Home Add to Favorites Sign out
vonces - Hear Arcun > Galormeur > Crears vednarou	(?) Help	
Create Requisition	-	Requisition Summary
1. Define Requisition 2. Add Items and Services 3. Review and Submit		There are no lines on this request. Please add new line in order to save this requisition.
dd lines to the requisition, specifying the information necessary to procure each item or service.		
Search: Search		Total Lines: 0 Total Amount (USD): 0
Favorites Web Special Request		
Group Name Description		
🛛 🗢 🕒 Ungrouped Items		
Favorite Items         Customice   Find   A   Image   Find   A   Image   Find   A   Image   Find   A   Image   Image		
Projector     DREAMTECH     Active     2614.26000     USD     EA     1.0000     To     Add		
Select All / Deselect All		
🖵 🐺 Add 🛛 🥻 Add to Favorites Group(s) 👔 Delete from Favorites 🛛 🎭 Add to Template(s)		

Step	Action
6.	Click the Web tab.
7.	Click the desired Merchant link. Hewlett-Packard



SMU			
	ocurement > Create Requisition		Home Add to Favorites Sign out
Welcome, SMU US Punchout	·	United States   English   USD	
			Requisition Summary There are no lines on this request.
	Search	»More options	Please add new line in order to save this
	Products	and shore options	requisition.
Ø	Products		Total Lines: 0 Total Amount (USD): 0
» HP.com Business to Business home		» Change my purchasing view	
» Products » Order status » Help	Welcome SMU to your HP Direct Business to Business Web Site	SOUTHERN METHODIST UNIVERSITY catalog:	
* neip	Purchase for buying organization:	United States	
Shopping cart	SOUTHERN METHODIST UNIVERSITY	» BladeSystem » Desktops & Workstations	
anopping can	Standard configurations	» Handhelds and Calculators	
Quick Buy Enter product number(s) address consequences address of the second address of	Desktops Honitors and Options Notebooks	Calculators a Monitors b Monitors calcula	
		HP confidential and proprietary	
	© 2010 Hewlet-Packard Development Company, L.P.	information. Do not share	

Step	Action
8.	Select the desired Category.
	+ Desktops
9.	Click the desired <b>Item.</b>
10.	Click the Add to Cart » button.
	Add to Cart »
11.	Enter the desired <b>Quantity</b> .
12.	Click the Add to Requisition » button.
	Add to Requisition »
13.	The Requisition Summary is now populated.
	<b>Note:</b> If ordering computers, you will see every part needed to assemble a computer package (keyboard, monitor, tower, etc.)



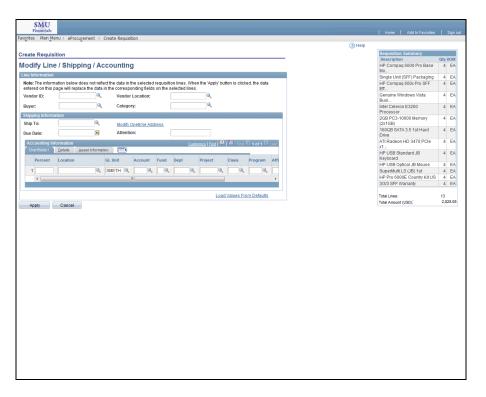
Favorite lisms         Control	ato Dog									(2) Help		
1. Define Requisition       2. Add Items and Services       3. Roview and Submit         nes to be requisition, specifying the information necessary to procure each item or service.       9. Roview and Submit         net to the requisition, specifying the information necessary to procure each item or service.       9. Roview and Submit         otc       Search         Circop Itemse       Description         Circop Itemse       Description         Type Description       Yendow Status         If Dorith Items       Search         If Dorith Items       Catatomic I Ited (F) Processor         If Dorith Items       1.0000         If Dorith Items       Add (F) Processor         If Dorith Items       Add to Template(s)         If Delete Item Favorites       Add to Template(s)         If Delete Item Favorites       Add to Template(s)         If Delete Item Favorites       Add to Template(s)         If		uisition										
mes to the requisition, specifying the information necessary to procure each item or service.												
ch: Search Processed Request P							3. Review	v and Submit			HP Compag 6000 Pro Base Mo	4
Vite:       Special Request         Croup Name       Description         Croup Name       Description         Type       Description         Vendor       Status         Processor       Processor         Vite       Status         Processor       Processor         Vite       Status         Processor       Processor         Vitex All Description       Vendor         Status       Price         Vitex All Description       Vendor         Status       Price         Vitex All Description       Vendor		uisition, specifying the info	rmation necessary	to procure each i	tem or service.			-				
Categorie Manue     Categori								Search			ЕП	
Longrouped terms      Foronti et al      Continuing 1250      Continuing 125			Description									4
Type     Description     Vendor     Status     Price     U004     Outentify       Image: Status     Price     U004     Outentify     Outentify       Image: Status     Price     U004     Outentify       Image: Status     Price     U004     Outentify       Image: Status     Price     U004     Outentify       Image: Status     Price     10000     Image: Status       Image: Status     Image: Status     Image: Status     Image: Status   <												4
Type         Description         Vendor         Status         Price         Uota         Description         1000B GATA 35 fstHand         4           IP         Infocus DLP Protector         DREAMTECH         Active         2 814 26000 USD EA         10000         Image: Add         Afd         Afd         Afd         Afd         Afd         Image: Add	Favorite Iten	ns				Custor	nize   Find   1 <sup>50</sup>	First 🛙 1 of 1 🖸	ast		2GB PC3-10600 Memory	4
P     Indous DLP Protector     Protecto	Туре	Description	Vendor	Status	Price	иом	Quantity				160GB SATA 3.5 1st Hard	4
Vield All // Descled All     HP // UB Standard, JB     4       Vig Add     Ib     Add to Favorites Group(s)     ID       Delete from Favorites     Add to Template(s)     HP // UB Optical JB House     4       Aux and Submit     Add to Template(s)     HP // UB Optical JB House     4       Vig Add to Favorites Group(s)     ID     Delete from Favorites     4       Submit     Jan 30 SFF Warranhy     4       Total Lines     15	🗉 🧨	Infocus DLP Projector	DREAMTECH	Active	2614.26000 USD	EA	1.0000	🐺 Add			ATI Radeon HD 3470 PCIe	4
Add b Favorites Group(s)     ID     Delete from Favorites     Add to Temptate(s)     HP UsB Optical JB House     4       w, and Submit     SuperMulti LS (s) (B)     HP Pro 80000C Country KLUS 4     4       J2/J 3/J SFF Warranhy     4       Total Lines     13											HP USB Standard JB	4
SuperMulti 15 (JB) 1st         4           HP Pro 6500E County KI US         4           J203 SFF Warranty         4           Total Lives:         13	🐺 Add	Add to Favor	ites Group(s)	🗊 Delete	e from Favorites		Add to Te	mplate(s)				4
w.and.Submit IHP Pro 6000E Country k1UE 3 4 3/3/3 SFF Warranhy 4 4 Total Lines 13												
Total Lineo: 13	ew and Subm	<u>u</u>									HP Pro 6000E Country Kit US	4
											3/3/3 SFF Warranty	4
											Total Lines:	13
											Total Amount (USD)	2,1

Step	Action
14.	Click the <b>3. Review and Submit</b> link. <u><b>3. Review and Submit</b></u>

_	efine Requisition		t 2. Add Items and	1 Sopulaos		3. Review and Sub	mit			Requisition Summary Description HP Compag 6000 Pro Base	Qty	UO
			cessary changes, and sul		4	s. neview and suc				Mo		
sview ute de	talls of your requisition,	make any net	cessary changes, and sur	ornic ici or approvai.						Single Unit (SFF) Packaging HP Compag 600x Pro SFF	4	
isiness Unit	SMETH	Southe	rn Methodist University							Eff		
equester:	200000			Wilson		*Currency:	USD			Genuine Windows Vista	-4	
equisition N		ters for 4 new	( employees			Priority:	Medium	•		Busi Intel Celeron E3200	4	
equisition Li			employees			Priority.	modiant			Processor		
Line	Description		Vendor Name	Quantity						2GB PC3-10600 Memory (2x1GB)	4	
								-		160GB SATA 3.5 1st Hard	4	
1 🗐	HP Compaq 6000 Pro	Base Model	HEWLETT-PACKARD COMPANY	4.0000	Each	234.60000	938.40			Drive		
_										ATI Radeon HD 3470 PCIe x1	4	
2	Single Unit (SFF) Pac	kaging	HEWLETT-PACKARD COMPANY	4.0000	Each	3.60000	14.40	<b>≝</b> √∕		HP USB Standard JB	4	
· 🕅 3	10.0	000 000	HEWLETT-PACKARD	4 0000	Cash	83,72000	334.88		Ξ	Keyboard HP USB Optical JB Mouse	4	
3	HP Compag 600x Pro	SFF Efficie	COMPANY	4.0000	Each	83.72000	334.88			SuperMulti LS (JB) 1st	4	
4	Occurring Mile down Mile	to Duclose	HEWLETT-PACKARD	4.0000	Each	88 00000	352.00			HP Pro 6000E Country Kit US	4	
4	Genuine windows vis	sta Business	COMPANY	4.0000	Each	88.00000	352.00 8			3/3/3 SFF Warranty	-4	
5 🗐 5	Intel Celeron E3200 F	Increase	HEWLETT-PACKARD	4 0000	Each	51,00000	204.00					
	11161 00101011 202001	10003301	COMPANY	4.0000	2001	51.00000	204.00 B			Total Lines: Total Amount (USD):	13 2.8	
6	2GB PC3-10600 Mem	IOTY (2x1GB)	HEWLETT-PACKARD	4.0000	Each	45 00000	180.00	10		Total Alloune (030).	2,0	-
			COMPANY					Land V <sup></sup>				
7	160GB SATA 3.5 1st F	lard Drive	HEWLETT-PACKARD	4.0000	Each	46.00000	184.00					
			COMPANY									
8 🔲 🕈	ATI Radeon HD 3470	PCIe x16 1s	HEWLETT-PACKARD	4.0000	Each	76.00000	304.00	<b>₽</b> \$				
			COMPANY									
9 📃 9	HP USB Standard JB	Keyboard	HEWLETT-PACKARD COMPANY	4.0000	Each	5.00000	20.00					
_												
10 🗐	HP USB Optical JB M	ouse	HEWLETT-PACKARD COMPANY	4.0000	Each	3.00000	12.00	<b>≝</b> √/				
	Constant of the second		HEWLETT-PACKARD	4.0000	Fach	05.05	400					
11 📃	SuperMulti LS (JB) 1s	1	COMPANY	4.0000	each	25.00000	100.00					
12	HP Pro 6000E Countr	WHI ID	HEWLETT-PACKARD	4 0000	Each	2.00000	8.00	• O				
- 12	1.1. 110 0000E COUIII	1101.000	COMPANY	4.0000		2.00000	0.00 g	- V-				
13	3/3/3 SFF Warranty		HEWLETT-PACKARD COMPANY	4.0000	Each	44.10000	176.40					
Select	All / Deselect All					Total Amount:	2.828.08 USD					
L 🔥	Add to Favorites	(B)	Add to Template(s)	Modify Li		Accounting	Delete					
- <b>1</b> 22	Aud to FavoriteS		Auu to Template(s)	38 Modify Li	ne / Snipping	/ Accounting	Delete					



Step	Action
15.	Enter <b>Comments</b> as needed.
16.	Click the Select All / Deselect All link. Select All / Deselect All
17.	Click the Modify Line / Shipping / Accounting button to add account information. Modify Line / Shipping / Accounting
18.	<ul> <li>You have two choices when entering the shipping address:</li> <li>1. One time address change</li> <li>2. Load shipping address from default values.</li> <li>In an instance where you want something sent to a different location than your default shipping address, click on the Modify Onetime Address link and enter the</li> </ul>
	address information. Proceed with entering Account, Fund and Dept codes.



Step	Action
19.	To load your default shipping address <u>and</u> use your default Fund and Dept, click the <b>Load Values From Defaults</b> link. Load Values From Defaults
20.	The default Ship To:, Fund, and Dept fields are now populated.



Step	Action
21.	Enter the desired information into the Account field.
22.	Click the <b>Apply</b> button.
23.	Change the radio button if needed.
	<b>Note:</b> - Select <b>All Distribution Lines</b> when using one Dept (org) to pay for all items.
	Select <b>Replace Distribution Lines</b> when splitting charges between orgs. For more information, see the Split Item Costs: Multiple Line Items topic.

ŚMU			_
Financials		Home Add to Favorites	Sigr
avorites Main Menu > eProcurement > Create Requisition			
	(2) Help		
		Requisition Summary	
istribution Change Options			Qty UO
		HP Compaq 6000 Pro Base Mo	4 E
For the selected requisition lines, apply distribution changes to		Single Unit (SFF) Packaging	4 E
		HP Compag 600x Pro SFF	4 E
All Distribution Lines		ЕП	
Apply changes to all existing distribution lines.		Genuine Windows Vista	4 E
© Matching Distribution Lines		Busi Intel Celeron E3200	4 E
		Processor	4 1
Apply changes to each existing distribution line by matching the distribution line numbers.		2GB PC3-10600 Memory	4 1
🗇 Replace Distribution Lines		(2x1GB)	
Remove the existing distribution lines and replace with the distribution lines changes.		160GB SATA 3.5 1st Hard	4
		Drive ATI Radeon HD 3470 PCIe	4
		x1	4 1
OK Cancel		HP USB Standard JB	4 1
Gaicer		Keyboard	
		HP USB Optical JB Mouse	4
		SuperMulti LS (JB) 1st	4
		HP Pro 6000E Country Kit US 3/3/3 SFF Warranty	4
		3/3/3 SFF Waltanty	4
		Total Lines:	13
		Total Amount (USD);	2,828
		Total Amount (050).	2,020.

Step	Action
24.	Click the <b>OK</b> button.



SMU								
Favorites Mair	Menu > eProcurement > Create	Requisition					I nome   Madio Paroneo	1 Orgines
		COMPANY				-		
▶ 🔽 5	Intel Celeron E3200 Processor	HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000	204.00 🎥 🖓			Qty UOM
▶ 🛛 6	2GB PC3-10600 Memory (2x1GB)	HEWLETT-PACKARD COMPANY	4.0000 Each	45.00000	180.00 🔡 🖓		HP Compaq 6000 Pro Base Mo	4 EA
P 🟹 7	160GB SATA 3.5 1st Hard Drive	HEWLETT-PACKARD	4.0000 Each	46.00000	184.00 🎠 🖓		Single Unit (SFF) Packaging HP Compaq 600x Pro SFF Eff	4 EA 4 EA
▶ 🛛 8	ATI Radeon HD 3470 PCIe x16 1s	COMPANY HEWLETT-PACKARD	4.0000 Each	76.00000	304.00		Genuine Windows Vista Busi	4 EA
P 🛛 9	HP USB Standard JB Keyboard	COMPANY HEWLETT-PACKARD	4.0000 Each	5.00000	20.00		Intel Celeron E3200 Processor	4 EA
		COMPANY HEWLETT-PACKARD					2GB PC3-10600 Memory (2x1GB)	4 EA
10	HP USB Optical JB Mouse	COMPANY	4.0000 Each	3.00000	12.00 🔡 🖓		160GB SATA 3.5 1st Hard Drive ATI Radeon HD 3470 PCIe	4 EA
P 📝 11	SuperMulti LS (JB) 1st	HEWLETT-PACKARD COMPANY	4.0000 Each	25.00000	100.00 浩📿		ATI Radeon HD 3470 PCIe x1 HP USB Standard JB	4 EA
P 🛛 12	HP Pro 6000E Country Kit US	HEWLETT-PACKARD COMPANY	4.0000 Each	2.00000	8.00 🏙🖓		Keyboard HP USB Optical JB Mouse	4 EA
N		HEWLETT-PACKARD	4.0000 Each	44,10000	176.40		SuperMulti LS (JB) 1st	4 EA
P 📝 13	3/3/3 SFF Warranty	COMPANY	4.0000 Each	44.10000	176.40		HP Pro 6000E Country Kit US	4 EA
2 Select /	All / Deselect All						3/3/3 SFF Warranty	4 EA
L 🕞		Add to Template(s)	Modify Line / Shipping / Ac	otal Amount:	2,828.08 USD Delete		Total Lines: Total Amount (USD);	13 2.828.08
🖉 Send to Ve:			Voucher Approv	al Justification		Ξ		

Step	Action
25.	Click the Save & preview approvals button.
	Save & preview approvals

SMU Financials					Home   Add to Favorites	1 5	Sian out
Favorites Main Menu > eProc	urement > Create Requisition						
				Saved	Requisition Summary		
Confirmation					Description	Qty U	
Commation					HP Compaq 6000 Pro Base Mo	4	EA
Requested For:	Gary Wilson	Number of Lines:	13		Single Unit (SFF) Packaging HP Compag 600x Pro SFF	4	EA
Requisition Name:	Computers for 4 new	Total Amount:	2,828.08 USD		Eff Genuine Windows Vista		EA
Requisition ID:	employees 0000000240				Busi		
Business Unit:	SMETH				Intel Celeron E3200 Processor		EA
Status:	Open				2GB PC3-10600 Memory (2x1GB)	4	EA
Priority:	Medium				160GB SATA 3.5 1st Hard Drive	4	EA
					ATI Radeon HD 3470 PCIe x1	4	EA
Requisition Approval					HP USB Standard JB Keyboard	4	EA
	r 4 new employees:Initia	ited			HP USB Optical JB Mouse	4	EA
IT Approval					SuperMulti LS (JB) 1st		EA
Not Routed					HP Pro 6000E Country Kit US	4	EA
<b>A</b>					3/3/3 SFF Warranty	4	EA
Approval							
					Total Lines:	13	
Supervisor Approval					Total Amount (USD).	2,82	8.08
Approver 1 SMU Requisition Ap	eprover 2 SMU Requisition	Approver					
View printable version	Manage Reguisitions	Create New Reguisition					



Step	Action
26.	Click the <b>Submit</b> button. Submit
27.	End of Procedure.

#### Chartfields and Split Item Costs

#### **Customizing Accounting Lines and Chartfields**

#### Procedure

As you begin to work with the Accounting Lines and Chartfield tabs, you may want to hide those fields that are not applicable to you. This topic will show you how to customize information in the **Accounting Lines** portion of the requisition.

SMU Financials		Home Add to Favorites Sign (
avorites Main Menu > eProcurement > Create Requisition		
Create Requisition	Help	Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		DMI Eclipse Corner Office 1 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines: 1
Business Unit: SMETH Southern Methodict University		Total Amount (USD): 3,599.9
ausiness Unit: SMETH Southern Methodist University Requester: X00000000X Gary Wilson *Currency; USD		
Requisition Name: Office Furniture for PAB move Priority: Medium		
equisition Lines		
Line Description Vendor Name Quantity UOM Price Total		
T 1 DMI Eclipse Corner Office PAck FURNITURE 1.0000 Each 3.599.99000 3.599.99 BC		
CONSULTANTS INC		
Consolidate with other Reqs 🛛 Override Suggested Vendor		
Shipping Line: 1 Due Date: Quantity: 1.0000 Price: 3,599,99000		
Status: Adive *Ship To: MSAJOURN-S A Modify Onetime Address Attention To: Garv Wilson		
	_	
*Distribute By: Qty   SpeedChart:	=	
Accounting Lines		
Chartfields1 Chartfields2 Details Details 2 Asset Information 2 Fine		
Account Fund Dept Project Class Program Affiliate		
Select All / Deselect All Total Amount: 3,599.99 USD		
🖵 📴 🕹 Add to Favorites 🔍 Add to Template(s) 🐘 Modify Line / Shipping / Accounting 🗍 Delete		
Comments		
	2	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification		
Save & submit Save & preview approvals X Cancel requisition Find more items		
Save & submit 😽 Save & preview approvals X Cancel requisition Find more items		
	-	
III.	4	

Step	Action
1.	From the <b>Review and Submit</b> page, click the <b>Customize</b> link located in the <b>Accounting Lines</b> panel.



SMU Financials				
	to Resultation		Home Add to Favorites	Sign out
Favorites Main Menu > eProcurement > Crea	te kequisition			
Accounting Lines		(2) Help	Requisition Summary Description DMI Eclipse Corner Office	Qty UOM 1 EA
Personalize Column Order			Total Lines: Total Amount (USD);	1 3,599.99
To order columns, highlight column name, the Frozen columns display under every tab.	n press the appropriate button.		rosar Amount (USU).	3,388.88
Column Order Column Order Tab Chartfields1 Line Status Diet Type Lacation Percent Merchandise Amt GL Unit Tab Chartfields2 Account Dird Project Class Frogan Afiliate Tab Details Rist Rist Bat Dopen Oly GL Base Amount Tab Details Rist Bat Bat Bat Bat Bat Bat Bat Ba	C T I Haden Trozen			
OK Cancel Preview Copy Settin	105			

Step	Action
2.	Select the Column you want to hide.  Program
3.	Then, click the <b>Hidden</b> option.
4.	Select the next Column to be hidden. Affiliate
5.	Click the <b>Hidden</b> option.
6.	Repeat as necessary.
	Note: Both individual fields and entire tabs can be hidden.
7.	Click <b>Preview</b> to review how the <b>Accounting Lines</b> section will display.
8.	Click the <b>OK</b> button to save your changes.
9.	End of Procedure.



#### Split Item Costs: Individual Line Item

#### Procedure

This topic will explain how to use two or more Dept (org #'s) to pay for an individual item.

SMU Financials		
Favorites   Main_Menu > eProcurement > Create Requisition		I nome   Add to ravontes   Sign ou
	(2) Help	
Create Requisition		Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Replace water coolers for 4 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines; 1
Business Unit: SMETH Southern Methodist University		Total Amount (USD): 2,080.00
Business Unit:         SMETH         Southern Methodist University           Requester:         XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Requisition Name: Priority: Medium		
Requisition Lines		
Line Description Vendor Name Quantity UOM Price Total		
▶ 🖓 1 Replace water coolers for divi 4.0000 Each 520.00000 2.080.00		
Select All / Deselect All Z,080.00 USD		
🖵 媷 Add to Favorites 🛝 Add to Template(s) 📑 Modify Line / Shipping / Accounting 📋 Delete		
Comments		
	12	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification		
Save & submit 😽 Save & preview approvals X Cancel requisition Find more items		
(   III	+	

Step	Action
1.	From the <b>Review and Submit</b> page, click the <b>Expand Section</b> button.
2.	Make sure you are on the <b>Chartfields 1</b> tab. Enter the desired <b>Percent</b> that the primary org will be paying.



SMU Financials		
Favorites Main Menu > eProcurement > Create Requisition		
	(2) Help	×
Create Requisition		Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Replace water coolers for 4 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines: 1
Business Unit: SMETH Southern Methodist University		Total Amount (USD): 2,080.00
Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Requisition Name: Priority: Medium		
Requisition Lines		
Line Description Vendor Name Quantify UOM Price Iotal		
▼ 7 1 Replace water coolers for divi 4.0000 Each 520.00000 2.080.00 Pach		
Consolidate with other Reqs 🗹 Override Suggested Vendor		
Shipping Line: 1 Due Date: Quantity: 4.0000 Price: 520.00000		
Status: Active *Ship To: MSAJOURN-S A Modify Onetime Address Attention To: Gary Wilson		
Attenuori ro: Gary Wilson		
*Distribute By: Qty - SpeedChart: Q		=
Accounting Lines		
Chartfields1 Chartfields2 Details Defails 2 Asset Information Asset Information 2		
Line Dist Type 'Location Quantity Percent Merchandise Amt GL Unit		
1 Open MAIN 4.0000 50 2.080.00 SMETH 4		
Select All / Deselect All Total Amount: 2,080.00 USD		
📙 📴 🕹 Add to Favorites 🐘 Add to Template(s) 📑 Modify Line / Shipping / Accounting 🗐 Delete		
Comments		
	5	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification		
Save & submit in Save & preview approvals X Cancel requisition Find more items		
1		*

Step	Action
3.	Click the Chartfields2 tab.
4.	Enter the desired information into the <b>Account</b> field.



SMU Financials	21444739 On ESSUP	Home Add to Favorites Sign out
Favorites Main Menu > eProcurement > Create Requisition		
Create Requisition	() Help	Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Replace water coolers for 4 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines: 1
Business Unit: SMETH Southern Methodist University		Total Amount (USD): 2,080.00
Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Requisition Name: Priority: Medium -		
Requisition Lines		
Line Description Vendor Name Quantity UOM Price Total		
♥ ♥ 1 Replace water coolers for divi 4.0000 Each 520.00000 2,080.00 ₩0		
Consolidate with other Regs		
Shipping Line: 1 Due Date: 1 Quantity: 4.0000 Price: 520.00000		
Status: Active *Ship To: MSAJOURN-S Modify Onetime Address		
Attention To: Gary Wilson		
*Distribute By: Oty  SpeedChart:		
	-	
Accounting Lines           Customize   Find   Vew All   Part         Prist II 1 of 1 D Lost           Chartfields1         Chartfields2         Details2         Asset Information         Asset Information 2         TTTP		
Account Fund Dept Project Class		
Select All / Deselect All     Total Amount: 2.080.00 USD		
Add to Favorites		
Comments	1	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification		
📴 Save & submit 🐻 Save & preview approvals 🗙 Cancel requisition Find more items		
	-	
()		

Step	Action
5.	Return to the <b>Chartfields1</b> tab.
6.	Click the Add a new row button.
7.	A new row has been added and the remaining percent was automatically generated. Review the Percent field and adjust if necessary. (Additional lines can also be added if needed.)
8.	Click the Chartfields 2 tab.
9.	Adjust the Account code for line 2 if needed.
10.	Adjust the <b>Fund</b> if needed.
11.	Notice the <b>Dept</b> number from line one automatically populated on the second line. Highlight the <b>Dept</b> field on line two. Press <b>[Delete]</b> .
12.	Enter the desired information into the <b>Dept</b> field.
13.	Review shipping information as needed. Upon completion, click the Save & preview approvals button.



Step	Action
14.	Click the Submit button. Submit
15.	End of Procedure.

## Split Item Costs: Multiple Line Items

#### Procedure

This topic will explain how to use two or more Dept (org #'s) to pay for multiple items on a requisition.

cyrement > Create F lows Vista Business E3200 Processor 00 Memorr (2x1GB) 3.5 1st Hard Drive	پ کی کہ اور	earch + +		et 👻 💽 SMU 🔡 I	Insi 🕖 Acc	slate • » 🔌 •	Sign o
cyrement > Create F lows Vista Business E3200 Processor 00 Memorr (2x1GB) 3.5 1st Hard Drive	Requisition HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	Show. Shar	Sup Site (2) Ge 88.0000 51.0000	et ▼ 🐨 SMU 🚺 1	Insi 🕖 Acc	e PIA SGOOG Page ▼ Safety ▼ Tools Home   Add to Favorites Requisition Summary	• 😧 •
cyrement > Create F lows Vista Business E3200 Processor 00 Memorr (2x1GB) 3.5 1st Hard Drive	Reguistion HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	88.00000 51.00000	352.00		Page - Safety - Tools	Sign o
tows Vista Business E3200 Processor E3200 Memory (2x1GB) 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000	352.00	·	Home Add to Favorites	Sign o
tows Vista Business E3200 Processor E3200 Memory (2x1GB) 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000		Î	Requisition Summary	
tows Vista Business E3200 Processor E3200 Memory (2x1GB) 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000		^		
E3200 Processor 00 Memory (2x1GB) 3.5 1st Hard Drive	COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000		*		01-1011
00 Memory (2x1GB) 3.5 1st Hard Drive	COMPANY HEWLETT-PACKARD COMPANY			204.00 🖺 🖓			Qty UOM
3.5 1st Hard Drive	COMPANY	4.0000 Each	45,00000			HP Compaq 6000 Pro Base Mo	4 EA
	HEWLETT-PACKARD		43.00000	180.00 🎥 🖓		Single Unit (SFF) Packaging HP Compaq 600x Pro SFF Eff	4 EA 4 EA
	COMPANY	4.0000 Each	46.00000	184.00 🔀 💭		Genuine Windows Vista Busi	4 EA
D 3470 PCIe x16 1s	HEWLETT-PACKARD COMPANY	4.0000 Each	76.00000	304.00 陆 🖓		Intel Celeron E3200 Processor 2GB PC3-10600 Memory	4 EA
dard JB Keyboard	HEWLETT-PACKARD COMPANY	4.0000 Each	5.00000	20.00		(2x1GB) 160GB SATA 3.5 1st Hard	4 EA
al JB Mouse	HEWLETT-PACKARD COMPANY	4.0000 Each	3.00000	12.00 陆 💭		Drive ATI Radeon HD 3470 PCIe	4 EA
	HEWLETT-PACKARD COMPANY	4.0000 Each	25.00000	100.00 📳 🖓		HP USB Standard JB Keyboard	4 EA
Country Kit US	HEWLETT-PACKARD COMPANY	4.0000 Each	2.00000	8.00 陆 🖓		SuperMulti LS (JB) 1st	4 EA 4 EA 4 EA
rrantv	HEWLETT-PACKARD COMPANY	4.0000 Each	44.10000	176.40 🔜 📿	Ξ	3/3/3 SFF Warranty	4 EA
			Total Amount:	2,828.08 USD		Total Lines: Total Amount (USD).	13 2,828.08
ites 🔥 .	Add to Template(s)	Modify Line / Shipping / J	Accounting	Delete			
	(JB) 1st : Country Kit US ranty	COMPANY LIBITS COMPANY COMPANY Company Company HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	COMPANY COMPANY (JB) 1a) COMPANY COMPA	Columnity Set US         Columnity         Columnity <thcolumnity< th=""></thcolumnity<>	County Mit         County	Colume/WY         Colume/WY <t< th=""><th>Country Kit US         Country Kit US         Country</th></t<>	Country Kit US         Country

Step	Action
1.	In order to complete this task you must be on the <b>Review and Submit</b> page.
	Two options are available when splitting charges for multiple line items. To split charges only for <u>specific line items</u> , select the desired lines.
	To split charges directly among all line items, click the <b>Select All / Deselect All</b> option.



Step	Action
2.	Click the Modify Line / Shipping / Accounting button.
	Modify Line / Shipping / Accounting

	on - Windows Interne	et Explorer	and the second	in the second second		and in case of	5 - 4				1	х
	https://fsqal.smu.edu	/psp/fssup/EMPLO	YEE/ERP/c/F	V_MAIN_MENU.	PV_REQ_EN	TRY.GBL?F	olderPa	ath=P 🔻 🔒 😽 🗙 🛽	🧕 Bing			ρ.
File Edit View	v Favorites Tools	Help								🗴 🖢 Sna	gIt	2 6
× Google			🛃 Search	• • 🛷 • 💠 • 💈	Share 🔹 🧕	🕨 🔍 Side	ewiki *	😫 Bookmarks * 🏾 🍄 Cheo	k 🔹 🔠 Trans	slate • » 🔌 •	🔵 Si	ign In
🚖 Favorites	🍲 🚻 Cale 🔢	Supp 🏉 Supp	🔻 🏉 si	how 🙆 Shar	. 🍠 iSup	. 🔫 Site.	. 🧭	Get 🔻 😽 SMU 🚹 In	si 🏉 Acc	:e 💌 PIA 猪 Goog		
Ø Create Requis	ition							🟠 🕶 🔝 📼 🖬	-	Page   Safety   Tools	- 6	)-
<b>SMU</b> Financials										Home Add to Favorites		
avorites   Main Menu	> eProcurement > Cr	eate Requisition				_			_	Home Add to Pavonies		Signi out
									Help			
Create Requisitio	on									Requisition Summary		
Modify Line /	Shipping / Acc	ounting						-		Description HP Compaq 6000 Pro Base Mo	Qty U 4	EA
Line Information										Single Unit (SFF) Packaging	4	EA
Note: The information entered on this pag	on below does not reflect je will replace the data in	the data in the selecte the corresponding field	d requisition lin is on the selec	nes. When the 'Apply ted lines.	/ button is clic	ked, the data				HP Compag 600x Pro SFF Eff		EA
Vendor ID:	٩	Vendor Location:		٩						Genuine Windows Vista Busi	4	EA
Buyer:	٩	Category:		٩,						Intel Celeron E3200 Processor	4	EA
Shipping Information	on Q	Modify Onetime Ad	Idress							2GB PC3-10600 Memory (2x1GB)	4	EA
Due Date:	H	Attention:	<u>Mittaa</u>							160GB SATA 3.5 1st Hard Drive	4	EA
Accounting Inform	mation			Customize   Find	🖉   🐂 First	KI 1 of 1 D	Last			ATI Radeon HD 3470 PCIe x1	4	EA
	etails Asset Information					-				HP USB Standard JB Keyboard	4	EA
Percent L	ocation G	L Unit Account	Fund De	pt Project	Class	Program	Affi			HP USB Optical JB Mouse	4	EA
1	۹. (	SMETH 🔍 📃 🍳	. 🔍 🗌	<b>A</b>	۹ 🗖 ۹	. 📃 🍳				SuperMulti LS (JB) 1st	4	EA
4		m								HP Pro 6000E Country Kit US 3/3/3 SFF Warranty		EA
											4	-
				L	oad Values F	rom Defaults				Total Lines:	13	28.08
Apply	Cancel									Total Amount (USD).		

Step	Action			
3.	Enter the desired <b>Percent</b> to be assigned to the primary Dept (org).			
4.	Enter the desired Account code.			
5.	Enter the desired <b>Fund</b> number.			
6.	Enter the desired <b>Dept</b> .			
7.	Scroll to the right and click the <b>Add a new row</b> (+) button.			
8.	Enter the desired <b>Percent</b> to be assigned to the secondary Dept (org).			
9.	Enter the desired Account.			
10.	Enter the desired <b>Fund</b> number.			
11.	Enter the secondary org into the <b>Dept</b> field.			
12.	Click the Apply button.			



Step	Action
13.	Click the Replace Distribution Lines option.
	Replace Distribution Lines

Attps://tsqai.smuedu/psp/fssup/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL/FolderPath=P + & + × © Bing File Edit View Favorites Tools Help     Coogle     Favorites @ Cale © Supp ♥ @ Show @ Share . @ · @ · Sidewiki · @ Bookmarks · ⑦ Check · 题 Transla     Favorites @ Cale © Supp ♥ @ Show @ Share ♥ ISup ♥ Site @ Get ▼ • SMU     Favorites @ Cale © Supp ♥ @ Show @ Share ♥ ISup ♥ Site @ Get ▼ • SMU     Favorites @ Cale @ Cale @ Cale @ Supp ▼ @ Show @ Share ♥ Isup ♥ Site @ Get ▼ • SMU     Favorites @ Cale @ Cale @ Supp ♥ @ Show @ Share ♥ Isup ♥ Site @ Get ▼ • SMU     Favorites @ Stare ♥ Stare ♥ Site @ Get ▼ • SMU	💌 PIA 猪 Goog	i Si	⊷ ¢ 11 🖬 9n In • >>
x Google ▼ 3 Gearch +	nte • » 🔌 • 💌 PIA 猪 Goog	i Si	gn In •
Favorites     For Cale     Supp     Supp     Show     Shar     Shup     Shup	💌 PIA 猪 Goog		<i>2</i>
Ø Create Requisition 🖄 ▼ 🖾 👘 ▼ Pa SMU			>>
SMU	age ▼ Safety ▼ Tools	_	
		- C	)- <sup>»</sup>
			Sian out
Favorites Main Menu > eProcurement > Create Regulation			3.001
(3) Help			
	Requisition Summary		
	Description HP Compaq 6000 Pro Base	Qty L	EA
	Mo	-	EA
	Single Unit (SFF) Packaging		EA
	HP Compaq 600x Pro SFF Eff	4	EA
Apply changes to each existing distribution line by matching the distribution line numbers.	Genuine Windows Vista Busi	4	EA
	Intel Celeron E3200 Processor	4	EA
	2GB PC3-10600 Memory (2x1GB)	4	EA
OK Cancel	160GB SATA 3.5 1st Hard Drive	4	EA
	ATI Radeon HD 3470 PCIe x1		EA
	HP USB Standard JB Keyboard		EA
	HP USB Optical JB Mouse		EA
	SuperMulti LS (JB) 1st		EA
	HP Pro 6000E Country Kit US 3/3/3 SFF Warranty		EA
	Total Lines:	13	_
	Total Amount (USD).	2,82	8.08

Step	Action
14.	Click the <b>OK</b> button.
15.	Proceed with completing your requisition. Then, click <b>Save &amp; Preview</b> approvals. <b>End of Procedure.</b>



## Manage Requisitions

#### Procedure

This topic will provide an overview of the available items in the Manage Requisitions page.

Step	Action
1.	Click the <b>Main Menu</b> button. Main Menu
2.	Click the eProcurement menu.
3.	Click the <b>Manage Requisitions</b> link. <u>Manage Requisitions</u>
4.	Requesters and Approvers can view requisitions they have created or ones for which they have approval responsibility.
	You can utilize the <b>Search Requisitions</b> box to enter specific search criteria.
5.	Under the <b>Status</b> listing, you may find requisitions labeled with one of the following descriptions:
	•Open - Requisition created but not submitted.
	•Pending - Submitted but is waiting for some level of approval.
	•Approved - Approved and forwarded to Purchasing.
	<ul> <li>Denied - Denied at some level of the approval process.</li> <li>Canceled - Canceled by the requester from the Manage Requisition page.</li> </ul>
	•PO Created - A Purchase Order has been written.
	•PO Dispatched - The Purchase Order is available for payment.
	•Completed - A payment has been sent to the vendor.



qui te f	ess Unit: sition ID: From: ester:	11/24/2010 3	Requisition Request St Date To: Entered By:	Name: atus:	All but Complete   I2/01/2010  All additional additionad additionad additiona	PO ID:			_ _		
	Search	Clear									
	sitions										
		and line items for a requisition nother action on a requisition,			e icon: e Action dropdown list and click Go.						
_		Requisition Name	80	Date	<u>Status</u>	Total					
0	000000241	000000241	SMETH	11/30/2010	Pending	2,080.00 USD	<select action=""></select>	•	Go		
0	000000240	Computers for 4 new emp	SMETH	11/30/2010	Denied	2,828.08 USD	<select action=""></select>	•	Go		
0	000000239	000000239	SMETH	11/29/2010	Open	10.00 USD	<select action=""></select>	•	Go		
0	000000238	000000238	SMETH	11/29/2010	Open	10.00 USD	<select action=""></select>	•	Go		
0	000000237	000000237	SMETH	11/29/2010	Pending	10.00 USD	<select action=""></select>	-	Go		
0	000000236	000000236	SMETH	11/29/2010	Pending	2,644.26 USD	<select action=""></select>	•	Go		
0	000000235	000000235	SMETH	11/29/2010	Pendina	10.00 USD	<select action=""></select>	-	Go		
		000000234		11/29/2010		50.00 USD	<select action=""></select>	-	Go		
_		000000233		11/29/2010		10.00 USD	<select action=""></select>	•	Go		
				11/29/2010		10.00 USD	<select action=""></select>		Go		
		Projector for departmen		11/29/2010			<select action=""></select>	-	Go		
_	000000225			11/29/2010		1.00 USD	<select action=""> Copy Requisition</select>		Go		
							Edit Requisition View Approvals View Printable Version				
ate	New Requisi	ition Review Char	nge Reques	t	Review Change Tracking	Manage Receipts	Requisition Report				

Step	Action
6.	Editing a Requisition:
	You can edit a requisition by selecting <b>Edit Requisition</b> on the desired row.
7.	Click the <b>Go</b> button.
8.	A message box will display. Click the <b>OK</b> button to proceed with editing. You will need to resubmit the requisition. In addition, the approval process will need to begin again.
	Click the <b>Cancel</b> button to return to the requisition page.



Business Unit: Requisition ID: Date From: Requester:	11/24/2010 10	Requisition Request St Date To: Entered By:	Name: atus:	All but Complete   I2/01/2010	PO ID:		Q		
Search	Clear								
	an and line items for a requisition			icon: Action dropdown list and click Go.	4				
Reg ID	Requisition Name	BU		Status	Total				
0000000241	000000241	SMETH	11/30/2010	Pending	2,080.00 USD	<select action=""></select>	▼G0		
000000240	Computers for 4 new emp	SMETH	11/30/2010	Denied	2,828.08 USD	<select action=""></select>	▼ G0		
000000239	000000239	SMETH	11/29/2010	Open	10.00 USD	<select action=""></select>	▼ Go		
000000238	000000238	SMETH	11/29/2010	Open	10.00 USD	<select action=""></select>	▼ Go		
0000000237	000000237	SMETH	11/29/2010	Pending	10.00 USD	<select action=""></select>	- G0		
000000236	000000236	SMETH	11/29/2010	Pending	2,644.26 USD	<select action=""></select>	▼ Go		
0000000235	000000235	SMETH	11/29/2010	Pending	10.00 USD	<select action=""></select>	▼ Go		
0000000234	000000234	SMETH	11/29/2010	Open	50.00 USD	<select action=""></select>	▼ Go		
0000000233			11/29/2010		10.00 USD	<select action=""></select>	▼ Go		
0000000232			11/29/2010		10.00 USD	<select action=""></select>	- G0		
0000000231			11/29/2010			<select action=""></select>	▼ Go		
0000000230			11/29/2010	-	2 614 26 USD	<select action=""></select>	▼ G0		
0000000225			11/29/2010		1.00 USD	<select action=""> Copy Regulsition Edit Regulsition</select>	Go		
reate New Requ	isition Review Char	nge Reques	t	Review Change Tracking	Manage Receipts	View Approvals View Printable Version Requisition Report			

Step	Action
9.	Viewing Approvals:
	At any time you can view approvals for requisitions. Click the <b>View Approvals</b> list item. View Approvals
	Click the Go button.



SMU				Home Add to Favorites Sign out
Favorites Main Menu > e	eProcurement > Manage Requisition	5		
Approval Status				-
Business Unit:	SMETH			
Requisition ID:	0000000230			
Requisition Name:	Projector for departmental use			
Requester:	Gary Wilson			
Entered on:	11/29/2010			
Status:	Pending	Total Amount:	2.614.26 USD	
Priority:	Medium	Total Aniounc	2,014.20 03D	
Requester's Justification				
No justification entere				
NO JUSTICATION ENTER	ru by requester.			
			View printable version	
▶ Line Information				
✓ Review/Edit Approvers				
Requisition Appro	vai			
- Projector fo	or departmental use:Pending	1		
Supervisor Approv		,		
Pending	Not Routed			
Approver 1 SMU Reguls Itio	n Approver 2 SMU Reguls Ition /	Approver		
Return to Manage Reguisit	tions			
•		Ш		Þ

Step	Action
10.	Approvals are now displayed. Click the Return to Manage Requisitions link
	Return to Manage Reguisitions

SMU Financials							
Favorites Main Men	u > eProcurement > Ma	nage Requisitions					
						🖉 New Window	🕐 Help 🛛 🗹 Customize Page 📰 http
Manage Rec							
<ul> <li>Search Requisitio</li> <li>To locate requisitio</li> </ul>	ons ns, edit the criteria below and	click the Search button					
Business Unit:		Requisition Name:				Q	
Requisition ID:	٩,	Request Status:	All but Complete 👻				
Date From:	11/24/2010	Date To:	12/01/2010				
Requester:	21444739	Entered By:	٩	PO ID:		٩	
Search	Clear						
Requisitions							
	and line items for a requisition nother action on a requisition,		le icon: e Action dropdown list and click Go.	Þ			
Reg ID	Requisition Name	<u>BU Date</u>	<u>Status</u>	Total			
▶ 0000000241	000000241	SMETH 11/30/2010	Pending	2,080.00 USD	<select action=""></select>	▼ Go	
▶ <u>000000240</u>	Computers for 4 new emp	SMETH 11/30/2010	Denied	2,828.08 USD	<select action=""></select>	▼ Go	
▶ <u>0000000239</u>	000000239	SMETH 11/29/2010	Open	10.00 USD	<select action=""></select>	▼ Go	
▶ <u>000000238</u>	000000238	SMETH 11/29/2010	Open	10.00 USD	<select action=""></select>	Go	
▶ <u>000000237</u>	000000237	SMETH 11/29/2010	Pending	10.00 USD	<select action=""></select>	Go	
Þ <u>000000236</u>	000000236	SMETH 11/29/2010	Pending	2,644.26 USD	<select action=""></select>	- G0	
▶ <u>000000235</u>	000000235	SMETH 11/29/2010	Pending	10.00 USD	<select action=""></select>	Go	
▶ <u>000000234</u>	000000234	SMETH 11/29/2010	Open	50.00 USD	<select action=""></select>	▼ Go	
▶ <u>000000233</u>	000000233	SMETH 11/29/2010	Pending	10.00 USD	<select action=""></select>	- Go	
▶ <u>000000232</u>	000000232	SMETH 11/29/2010	Open	10.00 USD	<select action=""></select>	Go	
▶ <u>000000231</u>	000000231	SMETH 11/29/2010	Pending	5,228.52 USD	<select action=""></select>	GO	
▶ <u>000000230</u>	Projector for departmen	SMETH 11/29/2010	Pending	2,614.26 USD	<select action=""></select>	Go	
▶ <u>0000000225</u>	TEST	SMETH 11/29/2010	Pending	1.00 USD	<select action=""></select>	▼ Go	
Create New Requis	iion Review Cha	inge Request	Review Change Tracking	Manage Receipts	Requisition Repo	đ	



Step	Action
11.	View Requisition Comments:
	Click the desired <b>Requisition</b> link.

Requisition Details							P	🗹 Customize Page	
	isition ID Unit	Date	Status	To	tal				
rojector for departmental use000	0000230 SMET	H 11/29/2010	Pending	2	614.26				
ne Item Description	Source Status	Amount Only	Qty	Price	Status Tol	al			
Infocus DLP Projector Line Comments: Line Comments 1: On s	Not Source ale through the end of the	N month.	1.0000 Each	2,614.26000 USD	Pending	2,614.26			
Edit Requisition									
turn to Manage Requisitions	Rec	uisition Schedule and	Distribution						

Step	Action
12.	You can edit the requisition from this page or return to the Manage Requisitions
	page.
	Click the Return to Manage Requisitions link.
	Return to Manage Requisitions
13.	View the Lifespan of a Requisition:
	Select the desired requisition, click the <b>Collapse Section</b> triangular button.
14.	The <b>Request Lifespan:</b> section is displayed. Click on the highlighted <b>links</b> to display information.



*	· · ·	u > eProcurement >													
	_										100	New Window	() Help	📝 Customize Pag	e 💷 http
	rch Requisition	uisitions													
		ns, edit the criteria below a	nd click the Sea	arch button.											
	iess Unit:	SMETH	Requisition	Name:								٩			
	isition ID:		Request St	tatus:	All but C		-								
	From:		Date To: Entered By		12/01/20	10		POIE							
equ	ester:	21444739	Cittered by	•				POIL	•						
	Search	Clear													
equ	isitions														
		and line items for a requis nother action on a requisiti					P dick Co								
		Requisition Name	BU BU		Action dropo Status	own list and	CIICK GU.	Total							
_		0000000241		11/30/2010					80.00 USD	<select action=""></select>	•	Go			
\$	000000240	Computers for 4 new emp	SMETH	11/30/2010	Denied			2,8	28.08 USD	<select action=""></select>	•	Go			
9	000000239	000000239	SMETH	11/29/2010	Open				10.00 USD	<select action=""></select>	-	Go			
6	000000238	000000238	SMETH	11/29/2010	Open				10.00 USD	<select action=""></select>	•	Go			
(	000000237	000000237	SMETH	11/29/2010	Pendina				10.00 USD	<select action=""></select>	•	Go			
		000000236		11/29/2010				2.6	44.26 USD	<select action=""></select>		Go			
		0000000235		11/29/2010	-					<select action=""></select>	•	Go			
		000000234		11/29/2010	-					<select action=""></select>		Go			
		0000000233		11/29/2010						<select action=""></select>		Go			
					-					<select action=""></select>		Go			
		000000232		11/29/2010								Go			
		000000231		11/29/2010						<select action=""></select>					
		Projector for departmen Gary Wilson	SMETH Entered By	11/29/2010		Prior			14.26 USD	<select action=""></select>	•	Go			
R	quester:	Gary Wilson	Entered By	Gary Wils		PTIO	ing. Me	ədium							
				-	-										
	*		990		1		8		8		-57-	$\Rightarrow$			
	Requisition	Approvab	Inventory	Purch		Change Request	Receiving	2	Returns	Invoice	Payment				
	quest Lifespa									_		_			
	ine Informatio									End   🔤   📜 Fist	KI 1 of 1 D	Lost			
Li			Status		rice		Quantity	UOM	Vendor		~				
1			Pending Appro	val	2,614.2	6000 USD	1.00	100 EA	DREAMTE		×				
9	000000225	TEST	SMETH	11/29/2010	Pending				1.00 USD	<select action=""></select>	-	Go			

Step	Action
15.	A requisition can be canceled by clicking the <b>Cancel x</b> button.

anage Rec	uisitions										iew willdow	( Help	📝 Customize Page	
Search Requisiti														
locate requisitio	ns, edit the criteria below ar													
isiness Unit:	SMETH	Requisition	Name:								Q			
equisition ID:		Request St	atus:		Complete	-								
ate From:		Date To:		12/01/2	010	<b>1</b>		<b>D</b> .						
equester:	21444739	Entered By					PO	U:						
Search	Clear													
quisitions														
view the lifespan	and line items for a requisi						Þ							
	nother action on a requisitio	,			down list and	click Go.								
Reg ID 0000000241	Requisition Name	80		<u>Status</u>			Total		- O - I	_	0.			
000000000			11/30/2010					080.00 USD	<select action=""></select>	-	Go			
0000000240	Computers for 4 new emp	SMETH	11/30/2010	Denied			2	828.08 USD	<select action=""></select>	•	Go			
000000239	000000239	SMETH	11/29/2010	Open				10.00 USD	<select action=""></select>	-	Go			
000000238	000000238	SMETH	11/29/2010	Open				10.00 USD	<select action=""></select>	•	Go			
0000000237	000000237	SMETH	11/29/2010	Pendina				10.00 USD	<select action=""></select>	•	Go			
000000236	000000236	SMETH	11/29/2010	Pending			2	644.26 USD	<select action=""></select>	-	Go			
0000000235	0000000235		11/29/2010	-			-	10.00 USD	<select action=""></select>		Go			
000000234	000000234	SMETH	11/29/2010	Open				50.00 USD	<select action=""></select>	-	Go			
000000233	000000233	SMETH	11/29/2010	Pending				10.00 USD	<select action=""></select>	•	Go			
000000232	000000232	SMETH	11/29/2010	Open				10.00 USD	<select action=""></select>	•	Go			
000000231	000000231	SMETH	11/29/2010	Pending			5	228.52 USD	<select action=""></select>	•	Go			
000000230	Projector for departmen	SMETH	11/29/2010	Pendina			2	614.26 USD	<select action=""></select>	•	Go			
Requester:	Gary Wilson	Entered By		-	Pric	rity:	Medium							
_	_	~^		=1	-1		~		57					
*	×			3	1	6					$\Rightarrow$			
Requisition	Approvab	Inventory	Purc		Change Request	Rec	seiving	Returns	Invoice	Payment				
Request Lifespo														
Line Informatio	n							<u>Customize</u>	lind   🗖   🐂 First	KI 1 of 1	Lost			
Line Desc	ription	Status		Price		Quantity	UOM	Vendor						
1 Infoc	tus DLP Projector	Pending Appro	val	2,614.3	26000 USD		1.0000 EA	DREAMTE	ж	×				
0000000225	TEST	SMETH	11/29/2010	Pending				1.00 LISD	<select action=""></select>	-	Go			



Step	Action
16.	To return to the Manage Requisitions page, click the <b>Collapse Section</b> button
17.	End of Procedure.

## Managing Shipping Information

Change Shipping Address: Individual Line Item

#### Procedure

This topic will demonstrate how to modify your shipping address for a requisition that contains one item. To do this, you must be on the **Review and Submit** page.

ŚMU	
Financials	Home Add to Favorites Sign
vojites   Main Menu > eProcujement > Create Requisition	() Help
Create Requisition	Requisition Summary
	Description Qty UOM Replace water coolers for 4 EA
	Replace water coolers for 4 EA
teview the details of your requisition, make any necessary changes, and submit it for approval.	Total Lines: 1 Total Amount (USD); 2,080.01
usiness Unit: SMETH Southern Methodist University	Total Amount (USD): 2,080.0
equester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
equisition Name: Priority: Medium 🔻	
lequisition Lines	
Line Description Vendor Name Quantity UOM Price Total	
▼ I Replace water coolers for divident 4.0000 Each 520.00000 2,080.00 ■	
Consolidate with other Regs Øverride Suggested Vendor	
Shipping Line: 1 Due Date: 9 Quantity: 4.0000 Price: 520.00000 Common Status: Active *Ship To: MSAJOURN-S A Modify Onetime Address	
Attention To: Gary Wilson	
	=
*Distribute By: Oty   SpeedChart:	
Accounting Lines Customize   Find   View AL   💯   🗮 First 🕅 1-2 of 2 💟 Last	
Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2	
Account Fund Dept Project Class	
6305 4 10 4 223250 4 4 -	
6305 🔍 10 🔍 220300 🔍 🔍 🔍 🔍 🖿 🖃	
Select All / Deselect	
📙 🚱 Add to Favorites 🖏 Add to Template(s) 📑 Modify Line / Shipping / Accounting 🧃 Delete	
ionments	
	(3)
Send to Vendor Show at Receipt Shown at Voucher Approval Justification	
Save & submit i Save & preview approvals X Cancel requisition Find more items	
	_

Step	Action
1.	To ship an item to an address that is not your default address, click the <b>Modify</b> <b>Onetime Address</b> link. <u>Modify Onetime Address</u>
2.	Your current default address will display. Highlight and delete address fields as necessary.



SM Financ	U als			_		Home   Add to Favorites   Sign out
Favorites Ma	n Menu > eProcurement > Create R	equisition			0	
	Address				(2) Help	Requisition Summary Description Qty UOM
Line	Replace water coolers for divi	Quantity	Price			Replace water coolers for 4 EA
1	Replace water cooler	4.0000 Each	520.00000 USD			Total Lines: 1
Sched Num	Ship To Quantity		Total			Total Amount (USD): 2,080.00
1	MSAUOURNA 4.0	000	USD 2,080.00			
✓ Address						
Country:	USA 🔍 United States	Prefix:				
Address 1:		Phone: Postal Sea	rch			
Address 2:	3300 DYER ST	Ext:				
		Fax:				
City:	DALLAS					
County:		Postal:	75205			
State:	TX Cexas					
ок	Cancel Load Default Ship	pping Address				

Step	Action
3.	Enter the new address into the Address 1 field.
4.	If needed, enter the desired information into the Address 2: field.
5.	Change additional address fields as needed.
6.	Click the <b>OK</b> button.



SMU			
Financials			
Favorites Main Menu > eProcurement > Creat	e Requisition		
			(2) Help
Create Requisition			Requisition Summary Description Qty UOM
1. Define Requisition	2. Add Items and Services	3. Review and Submit	Replace water coolers for 4 E/
Review the details of your requisition, make any r	ecessary changes, and submit it for approval.		Total Lines: 1
Business Unit: SMETH South			Total Amount (USD): 2,080.0
Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	nern Methodist University	*Currency: USD	
Requisition Name:	Gary Wilson	Priority: Medium -	
Requisition Lines		i nongi	
Line Description	Vendor Name Quantity UC	M Price Total	
▼ ▼ 1 Replace water coolers for divi	4.0000 Ea	ach 520.00000 2,080.00	
		2,000.000	
Consolidate with other Reqs	✓ Override Suggested Vendor		
Shipping Line: 1 Due Date:	D Quantity:	4.0000 Price: 520.00000 + -	
Status: Active *Ship To: Attention To: Gary Wilson	MSAJOURN-S C Edit Onetime Address		
Galy Wison			-
*Distribute By: Qty 💌	SpeedChart:		
Accounting Lines	Cu	stomize   Find   View All   🕮   First 🚺 1-2 of 2 🖸 Last	
Chartfields1 Chartfields2 Details De		(****)	
Line Dist Type "Location	Quantity Percent	Merchandise Amt GL Unit	
1 Open MAIN	2.0000 50.000	0 1,040.00 SMETH 🔍 🛨 🖃	
2 Open MAIN	2.0000 50.000	0 1,040.00 SMETH 🔍 🛨 🖃	
Select All / Deselect All		Total Amount: 2,080.00 USD	
🖵 📴 🛛 Add to Favorites 🛛 🛝	Add to Template(s) 📑 Modify Line /	Shipping / Accounting 📋 Delete	
Comments			
			(a)
Send to Vendor Show at F	Receipt Shown at Voucher	Approval Justification	
📑 Save & submit 😽 Save	e & preview approvals X Cancel requis	ition Find more items	
•			

Step	Action
7.	Click the Save & preview approvals button.
	Save & preview approvals

<b>SMU</b> Financials					
	eProcurement > Create Requisiti	on			Home Add to Favorites Sign out
Confirmation	· ·			(2) Help	Requisition Summary           Description         Qty UOM           Replace water coolers for         4         EA
Requested For: Requisition Name: Requisition ID:	Gary Wilson 0000000241 000000241	Number of Lines: Total Amount:	1 2,080.00 USD		Total Lines: 1 Total Amount (USD): 2,080.00
Business Unit: Status: Priority:	SMETH Open Medium				
Uew prinka Appr Sull Regult Sull Regult View prinkable version	Not Routed	Approver Changes Appl: Approver Changes Create New Requisition			



Step	Action
8.	Click the <b>Submit</b> button. Submit
9.	This completes this tutorial. End of Procedure.

Change Shipping Address: Multiple Line Items

reate F	Requisition							Requisition Summary Description	Qty UOI
¥ 1.0	efine Requisition	2. Add Items and	Services		3. Review and Sub	mit		HP Compag 6000 Pro Base	4 E
eview the de	atails of your requisition, make any ne	cessary changes, and sub	mit it for approval.					Mo Single Unit (SFF) Packaging	4 E
								HP Compag 600x Pro SFF	4 E
usiness Uni	t: SMETH Southe	m Methodist University						Eff Genuine Windows Vista	4 E
equester:	X000000X		Wilson		*Currency:	USD		Busi	
equisition N		v employees			Priority:	Medium 👻		Intel Celeron E3200 Processor	4 E
equisition Li	Description	Vendor Name	Quantity			Total		2GB PC3-10600 Memory	4 E
Line			Quantity	UOM	PIRE	1018		(2x1GB) 160GB SATA 3.5 1st Hard	4 E
1 🗐 🕅	HP Compag 6000 Pro Base Model	HEWLETT-PACKARD COMPANY	4.0000	Each	234.60000	938.40 🔡 🖓		Drive	
		HEWLETT-PACKARD						ATI Radeon HD 3470 PCIe x1	4 E
2	Single Unit (SFF) Packaging	COMPANY	4.0000	Each	3.60000	14.40 陆	=	HP USB Standard JB Keyboard	4 E
P 🔲 3	HP Compag 600x Pro SFF Efficie	HEWLETT-PACKARD COMPANY	4.0000	Each	83.72000	334.88 🔡 🖓	-	HP USB Optical JB Mouse	4 E
								SuperMulti LS (JB) 1st HP Pro 6000E Country Kit US	4 E
1	Genuine Windows Vista Business	COMPANY	4.0000	Each	88.00000	352.00 陆 📿		3/3/3 SFF Warranty	4 E
5	Intel Celeron E3200 Processor	HEWLETT-PACKARD	4.0000	Each	51.00000	204.00		Total Lines:	13
		COMPANY						Total Amount (USD).	2,828.
6	2GB PC3-10600 Memory (2x1GB)	HEWLETT-PACKARD COMPANY	4.0000	Each	45.00000	180.00 뭩 🖓		-	
7 🔲 🕈	160GB SATA 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY	4.0000	Each	46.00000	184.00 🔡 🖓			
8 🔲 🕈	ATI Radeon HD 3470 PCIe x16 1s	HEWLETT-PACKARD COMPANY	4.0000	Each	76.00000	304.00 🎘 🖓			
9 🔲 9	HP USB Standard JB Keyboard	HEWLETT-PACKARD COMPANY	4.0000	Each	5.00000	20.00 🔡 🖓			
10	HP USB Optical JB Mouse	HEWLETT-PACKARD COMPANY	4.0000	Each	3.00000	12.00 陆 🖓			
11 🔲 🕅	SuperMulti LS (JB) 1st	HEWLETT-PACKARD COMPANY	4.0000	Each	25.00000	100.00 🔡 🖓			
12	HP Pro 6000E Country Kit US	HEWLETT-PACKARD COMPANY	4.0000	Each	2.00000	8.00 🎥🖓			
13 🗐 🕅	3/3/3 SFF Warranty	HEWLETT-PACKARD COMPANY	4.0000	Each	44.10000	176.40 🔡 💭			
Select	All / Deselect All				Total Amount:	2,828.08 USD			
Ц 🌆	Add to Favorites	Add to Template(s)	Modify Li	ne / Shipping /	Accounting	Delete			

Step	Action				
1.	In order to complete this task you must first be on the <b>Review and Submit</b> page.				
	Two options are available when modifying shipping for multiple line items. To change a shipping address for <u>specific line items</u> , select the desired lines.				
	To modify shipping for <u>all line</u> items, click the <b>Select All / Deselect All</b> option. Click the <b>Select All / Deselect All</b> option.				
2.	Click the Modify Line / Shipping / Accounting button.				



Step	Action
3.	Click the Modify Onetime Address link.
	Modify Onetime Address



SMU Financials				id to Favorites   Sign out
Favorites Main Men	I > eProcurement > Create Requisition			
Shipping Addres	5		Help Requisition Sum Description HP Compaq 600	Qty UOM
Business Unit:	SMETH Requisition Date:	12/01/2010	Mo Single Unit (SFF)	Packaging 4 EA
Requisition ID:	NEXT Status:	Open	HP Compag 600	
Address			Eff Genuine Window	vs Vista 4 EA
Country:	USA Q United States	Prefix:	Busi intel Celeron E33 Processor	
Address 1:		Phone: Ext:	2GB PC3-10600 (2x1GB)	Memory 4 EA
Address 2: Address 3:		Fax:	160GB SATA 3.5 Drive	
City:			ATI Radeon HD 3 x1	3470 PCIe 4 EA
County:	Postal:		HP USB Standar Keyboard	
State:	Q		HP USB Optical	
			SuperMulti LS (JE HP Pro 6000E C	
OK Cance	н		3/3/3 SFF Warran	
			Total Lines: Total Amount (USD)	13 ; 2,828.08

Step	Action
4.	Enter the desired information into the Address 1: field.
5.	Enter the desired information into the Address 2: field.
6.	Enter the desired information into the <b>City</b> field.



Business Unit:     SMETH     Requisition Date:     1201/2010       Business Unit:     SMETH     Requisition Date:     1201/2010       Business Unit:     SMETH     Requisition Date:     1201/2010       Requisition ID:     NEXT     Status:     Open       Address 1:     United Bates     Prefix:     Canual Windows Poss       Address 2:     ROOM 1008     Ext:     Canual Windows Poss       Address 3:     Fax:     Canual Windows Poss     Carual Windows Poss       Carual     Postat:     Fax:     Canual Windows Poss       OK     Canual     Canual Windows Poss     Carual Windows Poss	ng	2ty U 4 4 4 4	EA EA EA
ipping Address          Particulations Summary         Description         Her Compage 3000 Pro 8         Model         Model         Sumple Line (EFF) Packa         Genum         Model	se ng	4 4 4 4	EA EA EA
Participa         Prediction           siness Unit:         SMETH         Requisition Date:         1201/2010         Mc.           siness Unit:         NEXT         Status:         Open         Mc.         Mc.           infrass         Open         Precision         HP Compa 300 Pro B         Mc.         Mc.           Scattry:         USA & United States         Prefix:         Mc.         Mc.         Mc.           Scattry:         USA & United States         Prefix:         Mc.         Mc.         Mc.           Address 1:         1414 HLLTOP LAVE         Ext         200 Processor         200 Processor         200 Processor           Chross 3:         Contry:         DALAS         Fax:         Mc.         An Radeen HD 3470 Processor           State:         Contry:         Postat:         Postat:         HP UBS Standard JB Krybard JB K	se ng	4 4 4 4	EA EA EA
ainess Unit: SMETH Regulation Date: 12012010 Second	se ng	4 4 4 4	EA EA EA
ees Unit:     SME[TH     Requisition Date:     1201/2010     Mm	ng	4 4 4	EA EA EA
SMETH     Requisition Date:     1201/010     Status:     Open       isition Ub:     NEXT     Status:     Open     EFC.       mtp:     USA     United States     Prefix:     Base       http:     Prefix:     Prefix:     Cancel		4 4 4	EA
Joint D.         NEXT         Status:         Open         HF Comail 9000 PP0 SER         Eff.           yr.         USA		4 4 4	EA
y:     UBA     Prefbc:     Can can kindows Vista       y:     UBA     Ublade States     Prefbc:       ss 1:     Phone:     Phone:     Phone:       ss 2:     ROOM 1006     Fax     Phone:       ss 3:     Phone:     Phone:     Phone:       DALLAS     Fax     Phone:     Phone:       r:     Postat:     Phone:     Phone:       Z<		4	
ry:         USA		4	
rg: UBA Unded States research County Processor ss t: 1414 HILTOP UNE Ext 2008 Memori ss 2: ROOM 100B F Fax 2008 Memori DALLAS A County Processor Processor DALLAS ROOM 100B F Fax 2008 Memori Cut Processor Cancel F Postab F Fax 2008 Memori Cut Processor Cancel F Postab F Fax 2008 Memori Processor Cancel F Postab F Fax 2008 Memori DALLAS F Postab F Fax 2008 Memori Processor Cancel F Postab F Fax 2008 Memori Processor Cancel F Postab F Fax 2008 Memori Processor Total Less:			-
s 1: 1414 HILTOP LANE Phone: 200 Processor 200 Processor 201 Processor 202 ROOM 1008 Frax 202 ROOM 1008 Frax			EA
2x         ROOM 008         Fax:         1906 BS/1X 35 51 HH           5 x         Index on Virus         PALA         1906 BS/1X 35 51 HH           5 x         Index on Virus         PALA         PALA           0 ALAS         Index on Virus         PALAS         Index on Virus           1 v UB8 Broadd         Hr UB8 Optical JB Hour         Hr UB8 Optical JB Hour           1 HP Pro 6000C Country         Support         Support			
E ROOM 1008 SAT 35 154 Ha R DALLAS DALLAS Postak Cancel Cancel		4	EA
s 2: Drive DALLAS AND DATE OF THE DATE OF	P	4	EA
DALLAS Postat Po		4	
Postat: HP UBS Standard JB Keyboard // Q Texas Supervised Standard JB Keyboard // PUBS Optical JB Hou Supervised Standard JB Keyboard Supervised Standard JB Keyboard Supervised JB Keyboard // PP no 6000C Country 1 // J2/J 3PF Warrany Total Lines		4	EA
Cancel		4	EA
Cancel Superfluid IS (20) 1st HP Pro 6000E Country 3/3/3 SFF Warranty Total Lines		-	
IHP Pro 60002 3039 Sector 2010 Total Lines		4	EA EA
303 SFF Warrany Total Lines			EA
			EA
		13	
Total Amount (USD).		13 2,82	8.08

Step	Action
7.	Enter the <b>State:</b> .

SMU Financials				Home   Add to Favorites	l si	ion out
Favorites Main Menu	> eProcurement > Cre	ate Requisition				
				(2) Help		_
Shipping Address				Reguisition Summary Description	Qty U	2016
ompping murcos				HP Compag 6000 Pro Base	4	
Business Unit:	0115711	Requisition Date:	12/01/2010	Mo		
Requisition ID:				Single Unit (SFF) Packaging HP Compag 600x Pro SFF	4	
Address	NEXT	Status:	Open	Eff		-
Address				Genuine Windows Vista Busi	4	EA
Country:	USA 🔍 United States		Prefix:	Intel Celeron E3200	4	EA
			Phone:	Processor		
Address 1:	1414 HILLTOP LANE		Ext:	2GB PC3-10600 Memory (2x1GB)	4	EA
Address 2:	ROOM 100B		Fax:	160GB SATA 3.5 1st Hard	4	EA
Address 3:				Drive ATI Radeon HD 3470 PCIe	4	EA
City:	DALLAS			xt		
County:		Postal:		HP USB Standard JB Keyboard	4	EA
State:	🖂 🔍 Texas			HP USB Optical JB Mouse	4	
				SuperMulti LS (JB) 1st	4	
OK Cancel				HP Pro 6000E Country Kit US 3/3/3 SFF Warranty	4	
OK Caller				Solo of Fithering		LIN
				Total Lines:	13	
				Total Amount (USD).	2,828	5.08



Step	Action
8.	Enter the desired information into the City field.
9.	Click the OK button.

Financials		
tes   Main Menu > eProcurement > Create Requisition		5
@H		
ate Requisition	Requisition Summary Description Q	ity UC
dify Line / Shipping / Accounting		4
Information		4
te: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data tered on this page will replace the data in the corresponding fields on the selected lines.		4
ndor ID: Q. Vendor Location: Q.	Busi	4
yer: Category: Q.	Intel Celeron E3200 Processor	4
ip To: Modify Onetime Address	(2x1GB)	4
e Date: Attention:	160GB SATA 3.5 1st Hard Drive	4
Counting Information Customize   End   P   First C 1 of 1 D Last	x1	4
Percent Location GL Unit Account Fund Dept Project Class Program Affi	Keyboard	4
		4
		4
€ III →		4
Load Values From Defaults		13
Apply Cancel	Total Amount (USD).	2,82

Step	Action
10.	Click the <b>Apply</b> button.



SMU Financials		
prites Main Menu > eProcurement > Create Requisition		
	(2) Help	
	Requisition Summary	
tribution Change Options	Description	Qty U
	HP Compaq 6000 Pro Base Mo	4
the selected requisition lines, apply distribution changes to	Single Unit (SFF) Packaging	4
All Distribution Lines	HP Compag 600x Pro SFF Eff	4
Apply changes to all existing distribution lines.	Genuine Windows Vista Busi	4
© Matching Distribution Lines	Intel Celeron E3200	4
Apply changes to each existing distribution line by matching the distribution line numbers.	Processor	
	2GB PC3-10600 Memory (2x1GB)	4
Replace Distribution Lines	(2X1GB) 160GB SATA 3.5 1st Hard	4
Remove the existing distribution lines and replace with the distribution lines changes.	Drive	1
	ATI Radeon HD 3470 PCIe x1	4
OK Cancel	HP USB Standard JB Keyboard	4
	HP USB Optical JB Mouse	4
	SuperMulti LS (JB) 1st	4
	HP Pro 6000E Country Kit US	4
	3/3/3 SFF Warranty	4
	Total Lines:	13
	Total Amount (USD):	2.82

Step	Action
11.	The radio button should have <b>Replace Distribution Lines</b> selected.
	ок
12.	Continue editing your requisition as needed. Click <b>Save &amp; Preview Approvals</b> when complete. <b>End of Procedure.</b>

### **Price Justification and Comments**

## Updating Comments on a Requisition

Step	Action
1.	Once you have entered a comment, the <b>Comments</b> icon will be shaded. A comment can be edited as needed.



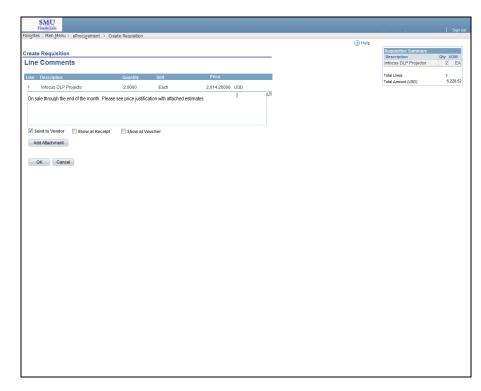
SMU Finacias		
Favorites Main Menu > eProcurement > Create Requisition		Sign out
serificant serificant series ender a serificant series ender ende	() Help	
Create Requisition		Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Infocus DLP Projector 2 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines: 1
Business Unit: SMETH Southern Methodist Liniversity		Total Amount (USD): 5,228.52
2001/km/ weatorist outsets/it		
Requester:         XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Requisition Lines		
Line Description Vendor Name Quantity UOM Price Total		
∇ □ 1 Infocus DLP Projector DREAMTECH 2.0000 Each 2.614.26000 5.228.52 □ 0     □		
Consolidate with other Reqs Vorride Suggested Vendor		
Shipping Line:         1         Due Date:         III         Quantity:         2 0000         Price:         2.614.26000		
Status: Adlve *Ship To: MSAJOURN-S A Modify Onetime Address		
Attention To: Waters, Gary		
*Distribute By: Oty  SpeedChart:	=	
Accounting Lines           Constricted         Const		
Line Dist Type 'Location Quantity Percent Merchandise Amt GL Unit		
1 Open MAIN Q 2.0000 100.0000 5,228.52 SMETH Q 🛨 🖃		
Select All / Deselect All Total Amount: 5,228.52 USD		
🖵 😥 🛛 Add to Favorites 🔤 🕰 🗛 Add to Template(s) 🛛 📑 Modify Line / Shipping / Accounting 👘 Delete		
Comments		
	5	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification		
Send to Vendor Show at Receipt		
Save & submit Save & preview approvals X Cancel requisition Find more items		
	-	•

Step	Action
2.	Click the Add/Edit Comments button.

SMU Financials							
Favorites Main Menu > eProcurement > Crea	te Requisition				0		
					(2) Help	Requisition Summary	
Create Requisition						Description	Qty UOM
Line Comments						Infocus DLP Projector	2 EA
Line Description	Quantity	Unit	Price			Total Lines: Total Amount (USD):	1 5,228.52
1 Infocus DLP Projecto	2.0000	Each	2,614.26000 USD			Total Amount (03D).	0,220.02
On sale through the end of the month.				3			
Send to Vendor Show at Receipt	Show at Vo	ucher					
OK Cancel							
					Main Content		



Step	Action
3.	Add, remove or edit comment text into the Line Comments field as needed.



Step	Action
4.	Once you have edited your comment, click <b>OK</b> .
5.	End of Procedure.



# Attaching a file: Adding Price Justification

#### Procedure

Attachments such as estimates or price justification can be added to a requisition.

10.200			
SMU Financials			
Favorites   Main Menu > eProcurement > Create Requisition			
	() Help		
Create Requisition		Requisition Summary Description	Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Infocus DLP Projector	2 EA
Review the details of your requisition, make any necessary changes, and submit it for approval.		Total Lines:	1
Business Unit: SMETH Southern Methodist University		Total Amount (USD):	5,228.52
Requester: XXXXXXX Water, Gary *Currency: USD			
Requisition Name: Projector for VP office Priority: Medium -			
Requisition Lines			
Line Description Vendor Name Quantity UOM Price Total			
T I Infocus DLP Projector DREAMTECH 2.0000 Each 2,614.26000 5,228.52			
Consolidate with other Reqs ØVerride Suggested Vendor			
Shipping Line: 1 Due Date: Quantity: 2.0000 Price: 2.614.25000			
Status: Adive *Ship To: MSAJOURN-S & Modify Onetime Address			
Attention To: Waler, Gary			
*Distribute By: Oty  SpeedChart:		=	
Accounting Lines  Customize   End   View AL   JA   The First CL 1 of 1 D Last  Chartfields Chartfields Details Details Asset Information Asset Information The Second Seco			
Line Dist Type 'Location Quantity Percent Merchandise Amt GL Unit			
1 Open MAIN Q 2.0000 100.0000 5.228.52 SMETH Q H			
Select All / Deselect All 5,228,52 USD			
Add to Favorites 🔍 Add to Template(s) 📑 Modify Line / Shipping / Accounting 👔 Delete			
Comments			
Comments	1		
Send to Vendor Show at Receipt Shown at Voucher Approval Justification			
Save & submit 😡 Save & preview approvals × Cancel requisition Find more items			
		-	

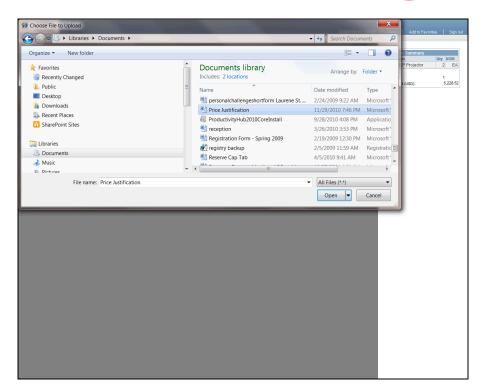
Step	Action
1.	From the Review and Submit page, click the Add/Edit Comments button.



	SMU Financials							
Favorite	s Main Menu > eProcurement > Creat	e Requisition				() Help		
Creat	e Requisition					(i) rieip	Requisition Summary	
	Comments						Description Infocus DLP Projector	Qty UOM 2 EA
					_		Total Lines:	1
	Description	Quantity	Unit	Price			Total Amount (USD).	5,228.52
1	Infocus DLP Projecto	2.0000	Each	2,614.26000 USD	2			
C	n sale through the end of the month.							
<b>▼</b> s	end to Vendor 🛛 Show at Receipt	Show at Vo	icher					
A	dd Attachment							
	OK Cancel							

Step	Action
2.	Click the Add Attachment button. Add Attachment
3.	Click the <b>Browse</b> button.
4.	Select the desired File Name.





Step	Action
5.	Click the <b>Open</b> button.
	Open 🔽
6.	Click the Upload button.
	Upload
7.	Your file has now been uploaded. Repeat this process to add additional attachments.
8.	Upon completion, click the <b>OK</b> button.
9.	
	End of Procedure.



# Working with Vendors

## Searching for Vendors

#### Procedure

SMU Financials will allow you to search for Vendors by Name (Name 1 field) and Vendor ID number.

Step	Action
1.	Click the Main Menu button. Main Menu
2.	Click the Vendors menu.
3.	Click the <b>Vendor</b> link. Vendor
4.	You can search for a Vendor by entering the appropriate criteria in the <b>Vendor ID</b> or <b>Name 1</b> fields.
	<b>Note:</b> When searching in the <b>Name 1:</b> field, filter the criteria if necessary, e.g., " <i>begins with</i> " or " <i>contains</i> ".

SMU		
Financials		Home Add to Favorites Sign out
Favorites   Main Menu	Vendors > Vendor Information > Add/Update > Vendor	
		🔁 New Window 🕜 Help 📰 http
Vendor Informatio	_	
venuor informatio	1	
Enter any information you	have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	<u> </u>	
Maximum number of rows	to return (up to 300): 300	
SetID:	= V SMETH	
Vendor ID:	begins with 🔻	
Persistence:	= •	
Short Vendor Name:	begins with 🔻 🔍	
Our Customer Number:	begins with 🔻	
Name 1:	begins with 🔻	
Name 2:	begins with 🔻	
Include History		



Step	Action
5.	Enter the desired information into the Name 1 field.
6.	Click the Search button. Search

SMU Financials					
				Home Add to Favorites	Sign o
avorites Main Menu	Vendors > Vendo	/ Information > Add/	Update > Vendor		
				🔎 New Window 🕜 Help	📄 http
/endor Informatio	n				
nter any information you	have and click Search. L	eave fields blank for a lis.	st of all values.		
Find an Existing Value	6				
Tind an Existing Value					
laximum number of rows	s to return (up to 300): 3	00			
SetID:	= • SMETH				
/endor ID:	begins with 🔻	•			
Persistence:	= <b>•</b>		•		
			-		
Short Vendor Name:	begins with 🔻				
Our Customer Number:		<u></u>			
Name 1:	begins with < PARK	CITIES			
Name 2:	begins with 🔻				
Name 2:		~			
Name 2:					
		e Search Criteria			
Include History		re Search Criteria			
Search Clear		e Search Criteria			
Search Clear		e Search Criteria		First ( 1-22 of 22 ) Lass	
Include History Search Clear Search Results //ew All	Basic Search 🖉 Sav	Our Customer	Name 1		
Search Clear Search Results Arew All Sett D Vendor ID Pers	Basic Search 2 Sav	<u>Our Customer</u> Number	Name 1	Name 2	
Search Clear Search Results frew All SetID Vendor ID Pers SMETH 0000008116 Reg	Basic Search R Sav	Our Customer Number 1 (blank)	PARK CITIES ACLD	Name 2 PARK CITIES ASSOC CHILDREN W/LRNG DISAB	
Include History Search Clear Gearch Results Frew All Settl Vendor ID Perrs SMETH 000006116 Reg METH 0000060413 Reg	Basic Search 2 Sav	Our Customer Number 1 (blank) 12 (blank)	PARK CITIES ACLD PARK CITIES CHIROSPORT	Name 2 PARK CITIES ASSOC CHILDREN W/LRNG DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP	
Include History  Search Clear  Search Results  Annu All  SettD Vendor ID Pers SMETH 0000068148 Reg SMETH 0000088488 Reg	Basic Search R Sav sistence Short Vendor Name Jular PARKCITE-0 Jular PARKCITES-0 Jular PARKCITES-0	Our Customer Number 1 (blank) 12 (blank) 08 (blank)	PARK CITIES ACLD PARK CITIES CHIROSPORT PARK CITIES ELECTRICAL COMPANY	Name 2 PARK CITIES ASSOC CHILDREN W/LRNG DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (blank)	
Search Clear Search Results //ew All SetID Vendor ID Perrs SMETH 000008116 Reg SMETH 000008143 Reg SMETH 0000082429 Reg	Basic Search 📓 Sav sistence Short Vendor Name ular PARKCITE-00 plar PARKCITE-00 ular PARKCITE-00 ular PARKCITE-00	Our Customer Number 1 (blank) 12 (blank) 08 (blank) 22 (blank)	PARK CITIES ACLD PARK CITIES CHIROSPORT PARK CITIES ELECTRICAL COMPANY PARK CITIES FAMILY DENTISTRY, PA	Name 2 PARK CITIES ASSOC CHILDREN W/LRNG DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (blank) (clank)	
Search Clear Search Results //ew All SettD Vendor ID Pers SMETH 000004118 Reg SMETH 0000043938 Reg SMETH 000004293 Reg SMETH 000004293 Reg	Basic Search 🚰 Sav sistence Short Vendor Name tular PARKCITE-00 tular PARKCITE-00 tular PARKCITE-00 tular PARKCITE-00 tular PARKCITE-00	Our Customer Number 1 (blank) 112 (blank) 08 (blank) 2 (blank) 2 (blank)	PARK CITIES ACLD PARK CITIES CHIROSPORT PARK CITIES ELECTRICAL COMPANY PARK CITIES FAMILY DENTISTRY, PA PARK CITIES FORD	Name 2 PARK CITES ASSOC CHILDREN WILRIG DISA6 DISA HEALTHSOURCE OF HIGHLAND PARK CORP (Bark) (Bark) (Bark)	
Include History  Search Clear  Search Results  View All  SetID Vendor ID Perrs SMETH 000008116 Reg SMETH 000008443 Reg SMETH 000008429 Reg SMETH 0000064252 Reg SMETH 000001552 Reg SMETH 000001552 Reg	Basic Search R Say sistence Short Vendor Name utar PARKCITE-00 utar PARKCITE-00 utar PARKCITE-00 utar PARKCITE-00 utar PARKCITE-00 utar PARKCITE-00	Our Customer Number           1         (blank)           12         (blank)           03         (blank)           12         (blank)           12         (blank)           12         (blank)           12         (blank)           12         (blank)           11         (blank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES ELECTRICAL COMPANY PARK CITIES FAMILY DENTISTRY, PA PARK CITIES FORD PARK CITIES FORD	Name 2 PARK CITIES ASSOC CHILDREN W/LRNG DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (Vank) (Vank) (Vank) (Vank) Cark) DO NOT USE///SEE VENDOR # 8117	
Include History  Search Clear  Search Results  ////  Settl Vendor ID Perr  SMETH 000006415 Reg SMETH 000006438 Reg METH 000006417 Reg METH 000006417 Reg METH 000001502 Reg METH 000001502 Reg METH 000001321 Reg	Basic Search R Sav sistence Short Vender Hame Jular PARKCITE-So Jular PARKCITE-So Jular PARKCITE-So Jular PARKCITE-So Jular PARKCITE-So Jular PARKCITE-So Jular PARKCITE-So	Our Customer Number           1         (blank)           12         (blank)           12         (blank)           12         (blank)           12         (blank)           11         (blank)           12         (blank)           11         (blank)           11         (blank)	PARK CITIES ACLD PARK CITIES CHROSPORT PARK CITIES ELECTRICAL COMPANY PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD	Name 2 PARK CITES ASSOC CHILDREN WILRING DISA8 DBA HEALTHSOURCE OF HIGHLAND PARK CORP (Barks) (Barks) (Charks) DD NOT USE///ISEE VENDOR # 8117 DD NOT USE///ISEE VENDOR # 8117	
Include History     Search Clear     Search Results     //ew All     SetID Vendor ID Perr     SMETH 000008116 Reg     SMETH 000008178 Reg     SMETH 000008388 Reg     SMETH 000004432 Reg     SMETH 000004432 Reg     SMETH 000004437 Reg     SMETH 000004437 Reg	Basic Search R Say sistence Short Vendor Name pular PARKCITE-00 pular PARKCITE-00 pular PARKCITE-00 pular PARKCITE-00 pular PARKCITE-00 pular PARKCITE-00 pular PARKCOB	Our Customer Number           1         (blank)           2         (blank)           08         (blank)           22         (blank)           22         (blank)           21         (blank)           21         (blank)           21         (blank)           21         (blank)           21         (blank)           23         (blank)	PARK CITIES ACLD PARK CITIES CHROSPORT PARK CITIES FLECTICAL COMPANY PARK CITIES FLECTICAL COMPANY PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES MAGING LP.	Name 2 PARK CITIES ASSOC CHILDREN WILRING DISAB DRA HEALTHSOURCE OF HIGHLAND PARK CORP (klark) (klark) (klark) DD NOT USE#//SEE VENDOR # 8117 DD NOT USE#//SEE VENDOR # 8117 (klark)	
Include History           Search         Clear           Search Results         ////////////////////////////////////	Basic Search R Sav aistonce Short Vender Hame Jular PARKCITE-0 Jular PARKCITE-0 Jular PARKCITE-0 Jular PARKCITE-0 Jular PARKCITE-0 Jular PARKCITE-00 Jular PARKCITE-00 Jular PARKCITE-00 Jular PARKCITE-00 Jular PARKCITE-00	Our Customer Number           1 (Dank)           12 (Dlank)           12 (Dlank)           12 (Dlank)           12 (Dlank)           12 (Dlank)           10 (Dlank)           11 (Dlank)           12 (Dlank)           13 (Dlank)           3 (Dlank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES ELECTICAL COMPANY PARK CITIES FAMILY DENTISTRY, PA PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES IMAGING, LP. PARK CITIES IMAGING, LP.	Name 2 PARK CITES ASSOC CHILDREN WILRING DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (blank) (blank) (blank) DD NOT USE///ISEE VENDOR # 6117 DD NOT USE///ISEE VENDOR # 6117 (blank) (blank)	
Include History     Search Clear     Search Results     /// Clear     Search Results     /// Clear     Search Results     /// Clear     Search Results     /// Clear     Search Results     // Clear     Search Results     // Clear     /	Basic Search R Sav	Our Customer Number           1         (blank)           12         (blank)           132         (blank)           142         (blank)           152         (blank)           16         (blank)           17         (blank)           18         (blank)           19         (blank)           11         (blank)           12         (blank)           13         (blank)           14         (blank)	PARK CITIES ACLD PARK CITIES CHICKSPORT PARK CITIES FLECTRICAL COMPANY PARK CITIES FLECTRICAL COMPANY PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES INAGING, LP. PARK CITIES INAGING DISABILITIES AS	Name 2 PARK CITIES ASSOC CHILDREN W/LRNG DISA8 DBA HEALTHSOURCE OF HIGHLAND PARK CORP (klarik) (klarik) CARk) DD NOT USE///SEE VENDOR # 6117 DD NOT USE///SEE VENDOR # 6117 (klarik) (klarik) (klarik) (klarik)	
Include History           Search         Clear           Search Results         New All           Settl Vendor ID         Perr           SMETH 000008116         Res           SMETH 000008138         Res           SMETH 000004139         Res           SMETH 000008138         Res           SMETH 00000817         Res           SMETH 0000075751         Res           SMETH 0000075761         Res           SMETH 0000075761         Res	Basic Search R Say sistence Short Vender Name Jular PARKCITE-00 Jular PARKCITE-00	Our Customer Number           1         (blank)           2         (blank)           08         (blank)           10         (blank)           11         (blank)           12         (blank)           13         (blank)           14         (blank)           15         (blank)           16         (blank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES ELECTRICAL COMPANY PARK CITIES FAMILY DENTISTRY, PA PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES ING MIS, LP PARK CITIES LEARNING DISABILITIES AS PARK CITIES MALWORK INC	Name 2 PARK CITES ASSOC CHILDREN WILRING DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (blank) (blank) (blank) (blank) DD INOT USE/INSEE VENDOR # 8117 DD INOT USE/INSEE VENDOR # 8117 (blank)	
Include History           Search         Clear           Search Results         View All           Search Results         Search Results           View All         Search Results           SMETH 0000068116 Reg         SMETH 0000068143 Reg           SMETH 0000016922 Reg         SMETH 000004310 Res           SMETH 000004310 Res         SMETH 0000044310 Reg           SMETH 0000044310 Reg         SMETH 0000044310 Reg           SMETH 0000044310 Res         SMETH 0000044310 Reg           SMETH 0000044310 Reg         SMETH 0000046118 Reg           SMETH 0000046118 Reg         SMETH 0000046118 Reg           SMETH 0000046118 Reg         SMETH 0000046119 Reg	Basic Search R Sav	Our Customer Humber           1         (black)           12         (blank)           132         (blank)           14         (blank)           15         (blank)           16         (blank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES LECTRICAL COMPANY PARK CITIES FLORE PARK CITIES FORD PARK CITIES FORD PARK CITIES IMAGING, L.P. PARK CITIES IMAGING, L.P. PARK CITIES INMAG DISABILITIES AS PARK CITIES ILLARING DISABILITIES AS PARK CITIES MELWOORK INC PARK CITIES MELWOORK INC PARK CITIES MELWOORK INC	Name 2 PARK CITES ASSOC CHILDREN WILRING DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (Bark) (Bark) (Bark) Chark) DD NOT USE///ISEE VENDOR # 8117 DD NOT USE///ISEE VENDOR # 8117 (Bark) (Bark) (Bark) (Bark) (Bark) (Bark) (Bark)	
Include History           Search         Clear           Search         Clear           Search         Results           Wew All         Setter to 000008116           SMETH 000008413         Reg           SMETH 000008413         Reg           SMETH 00000443         Reg           SMETH 000008117         Reg           SMETH 000008117         Reg           SMETH 000008117         Reg           SMETH 000008117         Reg           SMETH 0000076118         Reg           SMETH 0000076418         Reg           SMETH 0000076448         Reg	Basic Search R Say sistence Short Vender Name PARKCITE-0. ular PARKCITE-0. ular PARKCITE-0.	Our Customer. Number           1         (blank)           2         (blank)           12         (blank)           12         (blank)           12         (blank)           11         (blank)           12         (blank)           13         (blank)           14         (blank)           15         (blank)           14         (blank)           15         (blank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES FLECTRICAL COMPANY PARK CITIES FLECTRICAL COMPANY PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES ING DISABILITIES AS PARK CITIES IMAL WORK INC PARK CITIES MILL WORK INC PARK CITIES ORIENTAL RUGS	Name 2 PARK CITES ASSOC CHILDREN WILRING DISAB DBA HEAL THSOURCE OF HIGHLAND PARK CORP (Bark) (Bark) (Bark) (Cark) DD NOT USE##SEE VENDOR # 8117 DD NOT USE##SEE VENDOR # 8117 (Bark) (Cark) (C	
Include History           Search         Clear           Search         Clear           Search         Search           Stearch         Pars           SMETH         000008116           SMETH         000008117           SMETH         000008117           SMETH         000008117           SMETH         000008117           SMETH         000008117           SMETH         000008117           SMETH         000008118           SMETH         0000628449           SMETH         0000628408           SMETH         0000628408           SMETH         0000628418           SMETH         0000628443	Basic Search Rame sistence Short Vendor Hame ular PARKCITIE-00 ular PARKCITIE-00	Our Customer Humbar           1         (blatk)           12         (blank)           132         (blank)           14         (blank)           152         (blank)           14         (blank)           15         (blank)           14         (blank)           15         (blank)           16         (blank)           16         (blank)           16         (blank)           16         (blank)           16         (blank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES LECTRICAL COMPANY PARK CITIES FLORD PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES IN PARK CITIES IN PARK CITIES IN PARK CITIES IN PARK CITIES MENTS PARK CITIES PASSPORT LLC	Name 2 PARK CITES ASSOC CHILDREN WILRING DISAB DBA HEALTHSOURCE OF HIGHLAND PARK CORP (Kark) (Kark) (Kark) CONOT USE///SEE VENDOR # B117 DO NOT USE///SEE VENDOR # B117 (Kark) (K	
Include History           Search         Clear           Search         Clear           Search         Results           Wew All         Setter to 000008116           SMETH 000008413         Reg           SMETH 000008413         Reg           SMETH 00000443         Reg           SMETH 000008117         Reg           SMETH 000008117         Reg           SMETH 000008117         Reg           SMETH 000008117         Reg           SMETH 0000076118         Reg           SMETH 0000076418         Reg           SMETH 0000076448         Reg	Basic Search R Say aistence Short Vendor Name PARKCITE-00 Nular PARKCITE-00 Nular PA	Our Customer Humbar           1         (blatk)           12         (blank)           132         (blank)           14         (blank)           152         (blank)           14         (blank)           15         (blank)           14         (blank)           15         (blank)           16         (blank)           16         (blank)           16         (blank)           16         (blank)           16         (blank)	PARK CITIES ACLD PARK CITIES ACLD PARK CITIES FLECTRICAL COMPANY PARK CITIES FLECTRICAL COMPANY PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES FORD PARK CITIES ING DISABILITIES AS PARK CITIES INNING DISABILITIES AS PARK CITIES MILLWORK INC PARK CITIES ORIENTAL RUGS	Name 2 PARK CITES ASSOC CHILDREN WILRING DISAB DBA HEAL THSOURCE OF HIGHLAND PARK CORP (Bark) (Bark) (Bark) (Cark) DD NOT USE##SEE VENDOR # 8117 DD NOT USE##SEE VENDOR # 8117 (Bark) (Cark) (C	

Step	Action
7.	Review your search results carefully.
	<b>Note:</b> The <b>Name 2</b> column may contain a pertinent note regarding inactive vendors, how a company may be currently "doing business as", or a reference to a specific vendor number you should be using.
8.	Once you have reviewed the vendor information, select the appropriate vendor link.



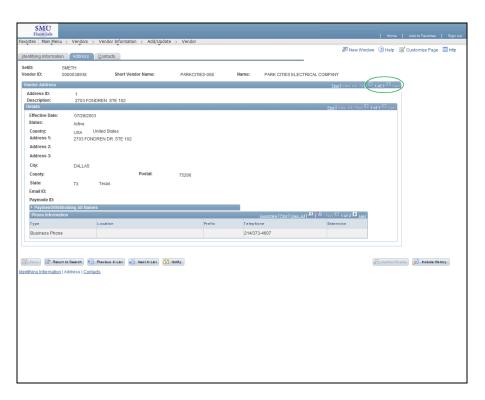
SMU							
Favorites Main Menu > Vendors	> Vendor Information > Ac	dd/Update > Vendor			Home	Add to Favorites	Sign out
		· •		🔊 New Window	Help	📝 Customize Page	📰 http
Identifying Information Address	Contacts						
SetID:	SMETH	Vendor Name 1:	PARK CITIES ELECTRICAL COMPANY				
Vendor ID:	0000038938	Vendor Name 2:					
Vendor Short Name:	PARKCITIES	PARKCITIES-008	Withholding				
Classification: HCM Class:	Outside Party		Open For Ordering     VAT Registration				
Persistence:	Regular		VAT Registration				
Vendor Status:	Approved						
			Expand All	Collapse All			
Vendor Relationships							
	Corporate Vendor		InterUnit Vendor				
Corporate SetID:	SMETH	InterUnit Vendor ID:					
Corporate Vendor ID:	0000038938	PARK CITIES ELECTRICAL COMPANY					
Create Bill-To Customer							
	Create Bill To Custome	r					
Additional ID Numbers							
Duplicate Invoice Settings     Government Classifications							
Standard Industry Codes							
Additional Reporting Elements							
Comments							
Expand All Collaps	e All						
🔛 Sove) 🔯 Return to Search	Previous in List 🚛 Next in I	List 🔛 Notify	🖉 - Update/Dis play	Include History			
Identifying Information   Address   Cont	tacts						
					Ma	in Content	
						content	

Step	Action
9.	The first tab, <b>Identifying Information</b> , displays Vendor ID, Short Name, and Vendor Status.

SMU Financials					Home	Add to Favorites	Sign out
Favorites Main Menu > Vendors >	Vendor Information > Ad	d/Update > Vendor					
				🖉 New Window	/ 🕐 Help	📝 Customize Page	📰 http
Identifying Information	Contacts						
SetID:	SMETH	Vendor Name 1:	PARK CITIES ELECTRICAL CO	MPANY			
Vendor ID:	0000038938	Vendor Name 2:					
Vendor Short Name:	PARKCITIES	PARKCITIES-008	Withholding				
Classification:	Outside Party		Open For Ordering				
HCM Class:			VAT Registration				
Persistence:	Regular						
Vendor Status:	Approved						
			Expand All	Collapse All			
Vendor Relationships							
	Corporate Vendor		InterUnit Vendor				
Corporate SetID:	SMETH	InterUnit Vendor ID:					
Corporate Vendor ID:	0000038938	PARK CITIES ELECTRICAL COMPANY					
Create Bill-To Customer							
Create Bill-To Customer	Create Bill To Customer						
Additional ID Numbers							
Duplicate Invoice Settings							
Government Classifications							
Standard Industry Codes							
<ul> <li>Additional Reporting Elements</li> </ul>							
► Comments							
Expand All Collapse /	411						
🖫 Sove	Previous in List 🛛 🚛 Next in L	ist 🔛 Notify	🖉 - Update/Dis p	loy 🔊 Include History			
Identifying Information   Address   Contact	ts						



Step	Action
10.	Click the Address tab.
	Address



Step	Action
11.	Use the arrows to view additional addresses if available.



Termidality       Vendor 1/formation > Add/update > Vendor         Setting:       Control 1/formation > Add/update > Vendor         SetD:       Sulf:TH         Vendor Address       Control 1/formation > Add/update > Vendor         Vendor Address 3:       County:       Usa Vendor Address > Vendor Normation > Vendor Address > Vendor         County:       Destate       Vendor Address > Vendor Vendor Normation > Vendor Address > Vendor Ven	
Setter St.     State S	lize Page
etil: SHETH endor fit: 0000033938 Short Vendor Name: PARK CITIES-008 Name: PARK CITIES ELECTRICAL COMPANY Vendor Address D: 1 Descriptor: 2703 FONDREN STE 102 Descriptor: 2703 FONDREN STE 102 Descriptor: 0,g, United States Address 1: 2703 FONDREN DR STE 102 Address 3: County: 0,g, United States Address 3: City: 0,g, United States Address 4: County: 0,g, United States County	
Indefinition         Short Vendor Hame:         PARK CITIES 608         Name:         PARK CITIES ELECTRICAL COMPANY           Reference in the state	
Address 12: 2703 FONDREN STE 102  Effective Date: 7203 FONDREN STE 102  Effective Date: 7203 FONDREN DR 3TE 102  Address 1: 2703 FONDREN DR 3TE 102  Address 1: 2703 FONDREN DR 3TE 102  Address 3:  City: 04LLAS  County: Postat: 75206  State: TX Texas  Email C:  PerformestVinithoding At Hames  PerformestVinithoding At Hames  Tgree Location Prefix Telephone Cottension	
beecrigion: 203 PONDREN ISTE 192 Effective Date: 207282003 State: Active Contry: USA United States Address 1: 2703 FONDREN DR ISTE 192 Address 2: Cotry: DLLLS Contry: Postat 75205 State: TX Texas Email: Paymode DI: Paymode States Paymode Att Istans Postate 75205 State: TX Texas Email: Postate 75205 State: TX Texas Email: Postate 75205 State: TX Texas Email: Postate 75205 State: TX Texas Postate 75205 State: TX Texas State: TX Texas State	
Operation     Country:     Used Types Att rest Clines       States:     Active       Country:     USA United States       Address 1:     2703 FONOREIN DR STE 102       Address 2:     Address 3:       Cotters 3:     Country:       Operation:     Postat:       Ty:     Postat:       75206       State:     Trans       PremettVethoding At terms       PremettVethoding At terms       Type     Country:	
Effective Date: 07282003 State: Active Country: USA United States Address 1: 2703 FONDREN DR STE 102 Address 2: City: DALLAS Country: Postat 75206 State: TX Texas Email D: Paymode ID: Paymode ND: Paymode Att Names Paymode Att Names Cationals / For Yave Att Anges Train Units D Lass Cationals / For Yave Att Anges Train Units D Lass Cationals / For Yave Att Anges Train Units D Lass	
Statis: Active Country: USA United States Address 1: 2703 FONDERN DR STE 102 Address 2: Address 3: Country: Posta: 75206 Country: Posta: 75206 State: TX Texas Famille: Pagmed BC: Pagmed BC: Type: Country: Count	
Address 1:         2703 FONDREN DR TEE 102           Address 2:	
Address 2: Address 2: City: DALLAS Comy: Postat: 75206 State: TX Texas Email D: Paymode ID: Paymode Add Names Poblose Information 1/20 Casteriose 2 Foot [Vaee.Ad] <sup>Add</sup> Texas 1 (1 or 2 D Lass from the casterion of the	
Address 3:         City:         D-LLS         Pestat:         75206           State:         T         Tesa	
Chy:     DuLLAS       County:     Postal:       TX:     T2:00       State:     TX:       Paymode ID:       Paymode Alt Homes       Promote Motional on       Type     Location       Prefix     Telephone	
County:     Postai:     75206       State:     TX     Texas       Francito:     -       Paymode ID:     -       * Paymode At Itams     -       Phone Information     -       Type     Location       Verting     Telephone	
State: TX Texas Email D: Peymode ID: * Peymode ID: //Poole Information Type Location Prefix Talephone Extension	
Email ID: Paymodol ID: > Paymont/Withholding Alt Names Phose Information <u>Califorcia   End   Vanual</u>     <sup>2</sup> - <sub>Fail</sub>   <sup>2</sup> + <sub>and 2</sub>   <sup>2</sup> tang Type Location Prefix Telephone Extension	
Paymode ID: > Payment Withinking At Names Phone Montation ( <u>Station in Station in Stat</u>	
> Payment/Withholding At Names Phone Information <u>Constrolse   End   Vers. At</u>   <sup>AB</sup>   <sup>BB</sup> First <sup>C</sup>   set 2 D <sub>Last</sub> Type Location Prefix Telephone Stension	
Type Location Prefix Telephone Extension	
Business Phone 214/373-4607	
Enery & Rekents Search To Person a List To Netta List 2 Notly	

Step	Action
12.	Phone Information is displayed at the bottom of the page. You can toggle between numbers by using the arrow buttons on the right or by selecting to view all which will display a scroll area. Click the View All link.
13.	A scroll area is now available. Use the vertical scroll arrows to see the multiple phone types.
14.	Click the Contacts tab.



SMU	I												_					
Financia Favorites Main		> Vendors	s > Vendor	Informatio	n > Add/∪	odate >	Vendor									Hom	e Add to Favorites	Sign out
	·	Ť		Ť											🖉 New Windo	w 🕐 Help	📝 Customize Pag	e 📰 http
Identifying Infor	rmation	Addres	s Contact:															
SetID:	s	METH																
Vendor ID:		000038938		Short Ve	ndor Name:		PARK	CITIES-008		Name:	PARK CI	TIES ELE	CTRICAL (	COMPANY	,			
Vendor Cont			-				T / U U U	11120 000			First KI 1 of							
Contact ID:			1										1					
Description	c																	
Details									Eind	View AT Fi	1 of 1	D Last						
Effective I			7/28/2003															
Effective : Type:	Status:	Ad	ctive															
Name:		IF	EANNIE BROW	/N														
Title:																		
Address:			1 2703	FONDREN	N STE 102													
		27	703 FONDREM	DR STE	102													
		D	ALLAS, TX 75	206														
Internet:		ht	tp://			View	v Internet	Address										
Email ID:												.						
Phone In	itormatic	on	Prefix		Telephone	2	austomize	End View A	.   tea	Extension								
Type			Frenx		relephone					Extension								
🖫 Seve 🔀	Return t	to Search	t Previous i	List	Next in List	Noti	fy					🖉 Upda	ate/Dis play	🥖 inck	ude History			
Identifying Inform	mation I A	Address   C	ontacts															

Step	Action
15.	Vendor contacts are displayed if available. Click the <b>Return to Search</b> button.
16.	End of Procedure.

## Suggest a New Vendor

#### Procedure

If a specific vendor does not exist in the system, you may suggest they be setup with a Vendor ID. This does not guarantee the Vendor ID will be created and you may need to follow-up on your request.



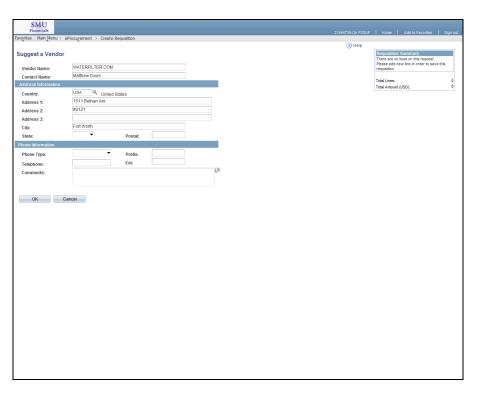
SMU Financials	21444739 On FSSUP Home Add to Favorites Sign out
Favorites Main Menu > eProcurement > Create Requisition	
Create Requisition	Help     Requisition Summary     There are no lines on this request.     Please add new line in order to save this
1. Define Requisition 2. Add Items and Services 3. Review and Submit	requisition.
Add lines to the requisition, specifying the information necessary to procure each item or service.	Total Lines: 0
Search.	Total Amount (USD): 0
Eavorites Web Special Request	
Special Item	
*Item Description: Replace water coolers for division	
*Price: 520.00000 *Currency: USD	
*Quantity: 4.0000 *Unit of Measure: EA	
*Category: 0600 Q Due Date:	
Vendor ID: Suggest New Vendor	
Vendor Name:	
Vendor Item ID:	
Mfg ID:	
Manufacturer:	
Mfg item ID:	
Additional Information Request New Item	
Request New Item	
Send to Vendor Show at Receipt Show at Voucher	
Add Item Cancel Add or Start New Type	
Add terr	
٠ III	P

Step	Action
1.	On the Special Request page, click the <b>Suggest New Vendor</b> link. Suggest New Vendor

SMU Financials						21444739 On ESSUE	Home   Add to Favorites   Sign out
Favorites Main Menu > ePr	ocurement > Create Re	quisition					
Suggest a Vendor						() Help	Requisition Summary There are no lines on this request. Please add new line in order to save this requisition.
Contact Name:							requisition.
Address Information			,				Total Lines: 0 Total Amount (USD) <sup>1</sup> 0
Country:	Q.						Total Amount (USD): 0
Address 1:							
Address 2:							
Address 3:							
City:							
State:	-	Postal:					
Phone Information							
Phone Type:	•	Prefix:					
Telephone:		Ext:					
Comments:				2			
			[	Main Content			
OK Can	cel						



Step	Action
2.	Enter the desired information into the Vendor Name field.
3.	Enter the desired information into the <b>Contact Name</b> field.
4.	You can enter the country code directly into the <b>Country</b> field or select a value from the list of country codes. Click the <b>Look up Country</b> button to select a value from the list.
5.	Click the appropriate <b>Country</b> link.
6.	Enter the desired information into the Address 1 field.
7.	Enter the desired information into the Address 2 field.
8.	Enter the desired information into the <b>City</b> field.



Step	Action
9.	You can either select the appropriate <b>State</b> : from the drop down list or enter the state code directly into the <b>State</b> field. Press <b>Enter</b> to continue.



Step	Action
10.	Enter the desired information into the <b>Postal:</b> field.

SMU							
Financials							
	eProcurement > Create Re	auisition			21444739 On FSSUP	Home A	dd to Favorites
					(?) Help		
uggest a Vendo	or				-	Requisition Sur	nmary
						There are no lines Please add new I	s on this request.
Vendor Name:	WATERFILTER.COM					requisition.	
Contact Name:	Matthew Davis			_		Total Lines:	
Address Information						Total Amount (USI	D).
Country:	USA 🔍 United St	ates					
Address 1:	1511 Bethan Ave						
Address 2:	#2121						
Address 3:							
City:	Fort Worth						
State:	TX 💌	Postal:	76082				
none Information							
Phone Type:	-	Prefix:					
Telephone:		Ext					
Comments:				17			
ок	Cancel						
ок	Cancel						
ок	Cancel						
ок	Cancel						
ОК	Cancel						
ОК	Cancel						
ок	Cancel						
ОК	Cancel						
ок	Cancel						
ок	Cancel						
ок	Cancel						
ОК	Cancel						
OK	Cancel						
ОК	Cancel						
OK	Cancel						
ок	Cancel						
ок	Cancel						
ОК	Cancel						
ОК	Cancel						

Step	Action
11.	You can either click an entry in the <b>Phone Type</b> list or enter a valid value into the <b>Phone Type:</b> field. Press <b>Enter</b> to continue.



SMU Financials							_
Favorites Main Menu > e	Procurement > Create R	equisition			21444739 On FSSUP	Home Add to Favorites	Sign out
		equiner in			(2) Help		
Suggest a Vendor						Requisition Summary There are no lines on this request.	
Vendor Name:	WATERFILTER.COM					Please add new line in order to save the requisition.	8
Contact Name:	Matthew Davis						
Address Information						Total Lines: Total Amount (USD).	0
Country:	USA 🔍 United S	itates					
Address 1:	1511 Bethan Ave						
Address 2:	#2121						
Address 3:							
City:	Fort Worth						
State:	TX 💌	Postal:	76082				
Phone Information							
Phone Type:	Business Phon 🔻	Prefix:					
Telephone:		Ext					
Comments:							
ОКС	ancel						

Step	Action
12.	Enter the phone number into the <b>Telephone</b> field.
13.	Click the <b>OK</b> button.



SMU		
Financials	rocurement > Create Requisition	21444739 On FSSUP   Home   Add to Favorites   Sign out
ravonces main menu > ep	rocurement > Create Requisition	(?) Help
Create Requisiti	on	Requisition Summary
1. Define Requis		There are no lines on this request. Please add new line in order to save this
	specifying the information necessary to procure each item or service.	requisition.
Search:	specilying the information necessary to procure each item or service.	Total Lines: 0
	pecial Request	Total Amount (USD): 0
Special Item		
*Item Description:	Replace water coolers for division 520.00000 *Currency: USD	
*Price:		
*Quantity:	4.0000 * Unit of Measure: EA 4 O600 Q Due Date: B	
*Category: Vendor ID:	Due Date:	
Vendor Name:	Suggested Vendor: WATERFILTER.COM	
Vendor Item ID:		
Mfg ID:		
Manufacturer:		
Mfg Item ID:		
Additional Information	Request New Item	
	Request New Item	
Send to Vendor	Show at Receipt Show at Voucher	
Add Item Ca	ancel Add or Start New Type	
•	III	•

Step	Action
14.	Continue entering the information for your requisition. Upon completion, click the Add Item button.
15.	You will receive a message indicating that Purchasing must approve this vendor. Click the <b>OK</b> button to continue.
16.	Complete your requisition by clicking on <b>3. Review and Submit</b> and continue. <b>End of Procedure.</b>



# **Approving Requisitions**

# First Approver

0 8	9 8	🗙 🔊 🗧 Admir	nistrative	Systems	Training - eProcure	ment training items - N	lailbox - Administr	rative Sy:	stems Tra	aining -	Microsot	ft Outlook		<b>X</b>
	Hor	me Send / Receive	Folder	View	Add-Ins								1000	△ ?
New E-mail	New Items *	Ignore iso Clean Up → Delete Delete	Reply	All	orward Spond	inside.SMUTraining Team E-mail Reply & Delete Ouick	To Manager  Done  Create New  Steps	4 × ¥	Move	Rules O	<b>N</b> OneNote	Categorize * Follow Up * Tags	Find a Contact Address Bo Filter E-mai	
>									Administ		terre Terrie	ning - eProcurement		
	10 D	I From S	ubject						Received	w syst	Size	Categories	u anning items ( 🗴	
	⊿ Date	e: Yesterday Epperson, Windy A	oproval is	Remieste	d for Requisition ID "0	000000241*			ue 11/30	/2010 7:2/	4 P 2 KB		7	12:00 PM: AWS
									40 22/50	2020 712				N: AV
		oval is Requeste	ed tor	Requis		0000241								S
		Derson, Windy ue 11/30/2010 7:24 PM												*
		Administrative Systems T	Fraining											
ers	A req	uisition has been ent	ered wh	iich requ	ires your attentio	n.								Today: 13 Tasks
Folders	Requ	ester employer ID: 2	144473	9										asks
		isition ID: 00000002 isition Name: 0	241	244										8
	Date:			241										
	Clink	the link helew to lea	on to Sh	ALL Cinor	sials After lagor	n you will be taken dir	estly to the page	. to opp		donu th	o roquio	ition		ick Co
	https	://fsgal.smu.edu/psp	o/fssup/l	EMPLOY	EE/ERP/c/PV MA	IN MENU.PV REQ A		e to app	1046 01	ueny m	erequis	acion.		Quick Contacts
	<u>Actio</u>	n=U&BUSINESS_UNI	IT=SME1	TH&REQ	ID=000000241									4
													÷	
8.	Conn	ect to social networks	to show	profile ph	notos and activity up	odates of your colleagu	es in Outlook. Clic	k here to	add net	works.			,	
-					-								-	
2		$\frown$		0									=	
*													-	
Items: 1	2 Unre	ead: 7									🔮 Online	. 🔟 🖽 100% (	9-0-	+

Step	Action
1.	After the Requester completes and submits the requisition, an email will be sent to the First Approver notifying them they have a requisition to review.
	Click the Message link from the Approval Request notification email.
2.	Enter your Login ID and Password.
	Click the Sign In button.



SMU Financials							
avorites Main M	1enu						
Requisition A	Approval						
Business Unit:	SMETH						
Requisition ID:	000000230						
Requisition Nan		partmental use					
Requester:	Gary Wilson						
Entered on:	11/29/2010						
Status:	Pending		Total Amount:		2,614.26 USD		
Priority:	Medium						
Requester's Ju							
No justifica	tion entered by requester.						
				v	ew printable version		
👻 Line Informat	lon			-		_	
Line Information				Customize   Eind   2	Fist K 1 of 1 Last		
					Requester's		
Line	Item Description	Vendor Name	Quantity UOM	Price	Comments		
	1 Infocus DLP Projector	DREAMTECH-001	1.0000 EA	2,614.26000 USD	ø		
Select All / I	Decelect All						
L Vie	w Line Details						1
🕶 Review/Edit A	pprovers						
Requisition	n Approval						
		Description of the second s					
	ector for departmental	use:Pending					
	sor Approval						
Pendi		Not Routed					
C API	prover 1 U Requisition Approver	Approver 2 SMU Requisition Approver					
Enter Approver	Comments						
					24		
	Appr	ove 🔗 Deny					
Return to Worklis	st						
(							Þ

Step	Action
3.	To view requisition information, click the <b>Select All/Deselect All</b> option.
4.	Click the View Line Details button. View Line Details



Fin	MU ancials													Home	Add to Fav	orites   Sign	out
Favorites	Main Men	u															
Requisi	tion Ap	proval															Â
Business Requisiti Requisiti Requeste	on ID: on Name:	C F	SMETH 0000000230 Projector for de Goodson,Lisa	epartmental u	se												
R	equisitio		ws Internet							and the second	-						
F O	0	<u> </u>	s://fsqal.sm	_	_	/V_3/td20:	5b-a0e 🔻 🔓	47   X	🔁 Bing				-				
1	e Edit Google	View F	avorites T	ools Help					nare • 👰 • 💷		X	SnagIt					
				<b>1</b>	<i>.</i>	hannad			əare * 🔊 * 💚 Disup 😽				gn In *				
	Favorit		Cale	. 🔟 Supp	🟉 51	pp 👻 🧶							. »				
	Requisit	tion					1	• 🔊 .	- 🖷 🖷 -	• Page • Sa	afety 🔻	Tools 🔻 🖁	·				
		nit: SMETH				uester: XXXXX				Pending Approval			٦Â				
			ctor for departm			uested By: Ga red Date: 11/2	29/10			ion Total: 2,614.2							Ξ
E L	ine: 1	Item Desc	ription: Infocus	DLP Projector		(	Quantity: 1.0000	UON	: EA Price: 2,61		tal: 2,614 atus: Per						
	ine Comm < On Sale t	ents: hrough Feb, 2	011. >>														
	hip Line: .ttention: (	1 Gary Wilson		Ship To: Due Date			Addree UMPHI DALLA		3300 DYER ST ited States	Shipping Shipping	Quantity: Fotal: 2,6	1.0000 14.26					
	Dist 1	Status Open	Locatio MAIN	n	Qty 1.0000	PCT 100.00	Amount 2,614,26	GL Unit SMETH	Account 8120								
	Dept	Fund	MAIN	_	1.0000	100.00	2,014.20	SMETH	0120				=				
	223250	10															
	Open QT 1.0000		en Amt 1.000														
l li		Amount	Currency	Sequence													
B	2,614.26		USD	0									_				
													-				-
													•			•	

Step	Action
5.	The requisition information displays. Click the <b>Close</b> button when the review is complete.
6.	If a requester has left comments a comment bubble will display. Click the <b>Comments</b> button.



<b>SMU</b> Financials						Home Add to Favorites	Sian ou
Favorites Main Menu							
Requisition Commer	its						
Line Information							
Lines			Constanting   Start	A Frat C 1 of 1 D Last			
	n Description	Vendor Name		Price			
✓ 1 Info	ocus DLP Projector	DREAMTECH-001	1.0000 EA	2,614.26000 USD			
Comments				End View All First KI 1 of 1	Last		
On sale through the end	i of the month.				[ <b>7</b> ]		
Attachments				e   Find   🖉 First 🕅 1 of 1 🖸 L	ant		
Attached File			View	Send to Vendor			
1			View				

Step	Action
7.	Comment information displays. Click the <b>Return to Previous Page</b> link. Return to Previous Page

SMU Financials								
avorites Main M	enu						L sector L sector avertes	1
Requisition A	pproval							
Business Unit:	SMETH							
Requisition ID: Requisition Nam	000000230 Projector for dep	artmental use						
Requester:	Gary Wilson	aiunentai use						
Entered on:	11/29/2010							
Status:	Pending	Tota	I Amount:		2,614.26 USD			
Priority:	Medium							
Requester's Jus	stification: ion entered by requester.							
NO JUSTINCAL	ion entered by requester.							
				View	printable version			
<ul> <li>Line Informati</li> <li>Line Information</li> </ul>				Customize   End   (1) First				
Line	Item Description	Vendor Name	Quantity UOM	Price	Comments			
¥	1 Infocus DLP Projector	DREAMTECH-001	1.0000 EA	2,614.26000 USD	$\sim$			
Select All / D	eselect All							
L View	w Line Details							
- Review/Edit A	oprovers							
Requisition								
		and a Disco allocati						
	ector for departmental	use:Pending	_					
	or Approval	lot Routed						
Pendi Pendi	rover 1 I Requisition Approver							
SM.	Requisition Approver	Approver 2 SMU Requisition Approver						
Enter Approver	Comments							
					(J	1 C		
	🗹 Appro	we ⊘ Deny						
Return to Worklis	t	Main	Content					
	2	Mair	Content					
							_	
								Þ



Step	Action
8.	Enter the desired information into the <b>Enter Approver Comments</b> field. <b>Note:</b> Comments are required when denying a request.

SMU							
Financials					Home	Add to Favorites	Sign out
Favorites Main Menu							
Requisition Approval							<u>^</u>
Business Unit: SMETH Requisition Un: 000000 Requisition Name: Projector Requester: <u>Garr Wit</u> Entered on: 11/2/202 Status: Pendig Priority: Medium Requester Justification: <i>No justification</i> : entered by request	for departmental use <u>son</u> 10 T	otal Amount:		2.614.26 USD			
			VIEWS	officaçõe version			
Line Information     Line Information			Customize   Find   E	K tott D ture			
Line Item Description	Vendor Name	Quantity UOM	Price	Comments			
1 Infocus DLP Proje	ector DREAMTECH-001	1.0000 EA	2.614.26000 USD	$\odot$			
Satistat/Upsatistat/ Very line Details Projector for departure Projector for departure Pr	Not Routed			ø	-		Ξ
٢							÷

Step	Action
9.	Click the Approve or Deny button.
10.	Once the first approver has reviewed the requisition, the approval path will indicate <b>Approved</b> or <b>Denied</b> .
	If a Second Approver is in the approval path, then an email will be sent to the next Approver on the path.
11.	
	End of Procedure.



# Second Approver: Approving and Denying Requisitions

0	🛓 🕘 😓 🗙 😖 💷 Administrative Systems Training - eProcurement training i	tems - Mailbox - Administ	trative Systems Tr	aining - Microso	ft Outlook		-	x			
File	Home Send / Receive Folder View Add-Ins					100		∞ (?)			
New E-mail	New & Junk + Delete Reply Forward & Reply & De	ail 🖌 Done	→ → → → → → → → → → → → → →	Rules OneNote	<ul> <li>☐ Unread/ Read</li> <li>☐ Categorize *</li> <li>♥ Follow Up *</li> </ul>	Find a Contact					
	Vew Delete Respond Quick Steps Fi Move Tags Find										
>	Search Administrative Systems Training - eProcurement training items ( A										
_	! (立) D (0) From Subject		Received	<ul> <li>Size</li> </ul>	Categories						
	Date: Yesterday							12:00 PM:			
	Epperson, Windy Approval is Requested for Requisition ID "000000241"		Tue 11/30	/2010 7:24 P 2 KB	I	$\nabla$	•	PM: £			
Folders	Approval is Requested for Requisition ID "000000241"  Experson, Windy Sent: Tue 11/30/2010 724 PM To: Administrative Systems Training A requisition has been entered which requires your attention. Requester employer ID: 21444739 Requisition 10: 000000241						Ĩ	AWS 🎐 Today: 13 Tasks			
	Requisition Name: 000000241 Date: 2010-11-30 Click the link below to logon to SMU Financials. After logon you will be t https://fsgal.smu.edu/psp/fssup/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV Action=U&BUSINESS_UNIT=SMETH&REQ_ID=0000000241			deny the requis	sition.			🛯 Quick Contacts			
							-				
							5				
	v										
8.	Connect to social networks to show profile photos and activity updates of your	colleagues in Outlook. Clic	ck here to add ne	tworks.		د م					
2	$\mathbf{\Omega}$					E					
• Items: 1	12 Unread: 7			🕥 Online	e 🔲 🔡 100% (			(+)			

Step	Action
1.	After the First Approver approves a requisition, an e-mail will be sent to the Second Approver notifying them they have a requisition to review.
	Click the Message link from the Approval Request notification e-mail.



https://fsqal.smu.edu/psp/fssup/EMPLOYEE/ERP/	/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINE - Windows Internet Explorer	- 0 X
() () https://fsqal.smu.edu/psp/fssup/	EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVALGBL?Action=L 👻 🔒 🗛 🗶 💽 Bing	<del>ب</del> م
File Edit View Favorites Tools Help	x é	SnagIt 🖪 🖆
× Google	💽 🛂 Search 🕂 🧔 • 🖶 🛛 🙋 Share • 👰 • 💻 Sidewiki • 🏠 Bookmarks • 🦃 Check • 🔠 Translate • » 🛛 🔌	🗞 • 🔘 Sign In •
🚖 Favorites 🛛 🙀 🚻 Cale 👪 Supp 🏈	🖞 Supp 🔻 🍘 Show 🕘 Shar 🎅 iSup 🐨 Site 🍘 Get 👻 SMU 🚹 Insi 🍘 Acce 🐨 PIA 🚼 Go	
https://fsqal.smu.edu/psp/fssup/EMPL	🟠 👻 🔜 👘 👻 Page 🛩 Safety 🕶 To	ools 🕶 🕜 🕶 🦈
<b>SMU</b> Financials		
Financials? Let Us Know	lease enter your Login ID and Password, then press the Sign In button.	
	Sopo In	
private purposes of any kind, includi University personnel and volunteers	inanciale is confidential and maintained by Southern Methodist University for its exclusive purposes. It is not available for ing commercial solicitations or the expression of personal, political, social, or economic views. This policy applies to all caring on behalf SMUE. Buploges found to be in violation of this Polyar are subject to discline in accordence with Fraudulent and Illegal Practices," University Policy 6.1, University Policy 6.16, and University-Policies 9.12 and 9.13, as	н
© 2010 Southern Methodist University. All rights reserv	red. III.	*

Step	Action
2.	Enter your Login ID and Password.
	Click the <b>Sign In</b> button.



is Main Menu							
				Ā	ew printable version		
Information							
Information			Quantity	Customize   Find   2 F	ist KI tof 1 Di Last		
	tem Description	Vendor Name					
	nfocus DLP Projector	DREAMTECH-001	2.00	000 EA 2,	514.26000 USD		
elect All / Deselect View Line D							
ew/Edit Approver:							
uisition Approver							
	n 0000000231:Pendi	na	7				
Purchasing Direc		"'Y	-				
Pending							
SMJ Purchas	ing Director						
Reviewer 63	_						
6ð <sub>Review er</sub>							
Supervisor Appr	oval						
Approved	Pendi						
Approver 1 SMU Requisit	tion Approver	orover 2 J Requisition Approver					
12/01/10 - 01	:00 PM						
Approver Comme	nts						
						1946 1946	
	Approve	Ø Deny		Pushback			
to Markint	Approve	Ø Deny		E. Pushback			
to Worklist	C Approve	Ø Deny		Pushback			
to Worklist	C Approve	O Deny		Pushback			
to Worklist	C Approve	O Deny		E Pushback			
<u>to Worklist</u>	C Approve	Ø Deny		E Pushback			
to Worklist	C Approve	O Deny		Pushback			
to Worklist	C Approve	O Deny		Pushback			
to Worklist	C Approve	Ø Deny		Pushback			
to Worklist	C Approve	O Deny		E. Pushback			

Step	Action
3.	To view requisition information, click the <b>Select All / Deselect All</b> option.
4.	Click the View Line Details button. View Line Details



G	0	Requisitio	on - Windo	ws Internet	Explorer				and the second	-	1 2 3		x		• ۹		x
1	G	00-	🧭 http:	s://fsqal.sm	u.edu/fssu	ıp/psft/tmp/	V_fbe1ce4	kc-2dt 🔻 🔓	₩ <b>X</b>	🔁 Bing	1.00.00	-	• ۹	:e 💽 PIA .	. 猪 Goog		>>
6	4		View F	avorites 1	ools He						×	SnagIt		Page 👻 Saf	ety 👻 Tools 🖲	• 🔞 •	»
Lin		Google Favori	ter 🍐	Cale	Sur						Sidewiki • 🏫 » iite 彦 Get •	🔌 • 🔘 S	gn In ∙ ≫				
		Requisi		o Carca	. 🛄 ၁၀	,p 🕑 Jup	P 6				Page - Safety -		• »				
	F		Jnit: SMETH			Banna	ster: X00000		<u> </u>		inding Approval						
<b>▼</b> R(		Requisition	n: 0000000231 n Name: 0000	1		Reque	isted By: <sub>Ga</sub> id Date: 11/2	ry Wilson		Currency:							
Re		Line: 1		cription: Infocus	DLP Project			uantity: 2.0000	UOM: E								
		Ship Line: Attention:	1 Gary Wilson		Ship 1 Due D	'o: MSAJOURN-S ate:	3		ss: REY LEE CTR 33 S TX 75205 United		Shipping Quantity Shipping Total: 5,2	: 2.0000 !28.52					
		Dist 1	Status Open	Locatio MAIN		Qty 2.000	PCT 100.00	Amount 5.228.52	GL Unit SMETH	Account 8120							
		Dept	Fund														
		223250 Open QT	10 IY Ope	en Amt									=				
		2.000	C Amount	0.000	Sequence	Capitalize		1									
		5,228.52		Currency USD	0 0	N											
Ent																	Ĩ
Retu																	
													-				
	•						1						F				
													_				
														_			Ŧ

Step	Action
5.	Review requisition information. Click the Close X button to return to the approval page.



SMU Financials									
Favorites Main Menu									
					View printa	ole version			
- Line Information									
Line Information					ind Ba First K 1 o	1 Di Last			
	scription	Vendor Name	Quantity	UOM	Price				
	DLP Projector	DREAMTECH-001	2	0000 EA	2,614.26000	USD			
Select All / Deselect All     View Line Details									
							_		
<ul> <li>Review/Edit Approvers</li> <li>Requisition Approval</li> </ul>									
			-						
Purchasing Director	00000231:Pendi	ng	-						
Pending									
SMJ Purchasing Dir									
Reviewer									
6ð <sub>Review er</sub>									
Supervisor Approval									
Approved	Pendi	na							
Approver 1 SMU Requisition Ap		rover 2 Regulsition Approver							
12/01/10 - 01:00 PM	Since Since	Requisition Approver							
			-				_		
Enter Approver Comments						24			
	Approve	Ø Deny		E Pu	shback				
Return to Worklist									
			111						•

Step	Action
6.	Enter the desired information into the <b>Comments</b> field.
7.	Click the Approve or Deny button.
8.	Your approver box will display <b>Approved</b> or <b>Denied.</b> If approved, the Purchasing Director status box will display the pending action. An e-mail will be sent to the requestor indicating the status of the requisition.
9.	
	End of Procedure.



## Second Approver: Pushback Requisitions

#### Procedure

0	2 🔅	X 🔝 📦 🖙 Adr	ministrative	e Systems Tra	ning - eProcure	ement training items - M	failbox - Administi	rative Sy	stems Tr	aining -	Microsof	t Outlook		X
File	Hom	e Send / Receive	Folder	View Ac	d-Ins									△ (3)
	New Items *	lgnore to Clean Up → Delet So Junk →	te Reply	Reply Forw All	nore 🔹	<ul> <li>inside.SMUTraining</li> <li>Team E-mail</li> <li>Reply &amp; Delete</li> </ul>	✓ Done ♀ Create New	4 	Move	*	OneNote	Gategorize *	Find a Contact	
N	2W	Delete		Respor	d	Quick	Steps	G.		Move		Tags	Find	
>								Search	Administ	rative Sys	tems Train	ing - eProcurement	training items ( 🔎	<
_	章  日		Subject						Received	*	Size	Categories	* •	
	<u></u>	Epperson, Windy Epperson, Windy			r Requisition IE Requisition ID "						07 2 KB		V =	12:0
Folders	Appro Epp Sent: Tu To: A requ Reque	by all is Reques berson, Windy e 11/30/2010 7:24 PM Administrative System uisition has been e ester employer ID: sition ID: 000000 sition Name: 2010-1	ted for s Training ntered wl 2144473 10241 0000000	<b>Requisiti</b> nich requires	on ID "000	0000241"							4	12:00 PM: AWS 🎐 Today: 13 Tasks 🕫
	https: Action	//fsqal.smu.edu/p ⊨U&BUSINESS_U	isp/fssup/ NIT=SME	EMPLOYEE/	ERP/c/PV MA	n you will be taken di IN MENU.PV REQ . pdates of your colleage	APPROVAL. <u>GBL</u> ?				ne requis	ition.	× × (III)	Quick Contacts
-			1										~	
	2 Unrea							A -	1.00		<b>A</b>	E 100%		

Step	Action
1.	Click the Message link.
2.	Enter your Login ID and Password. Click the Sign In button.



SMU Financials				
Favorites Main Menu	l .			
Requisition App	roval			·
Business Unit: Requisition ID: Requisition Name: Requester: Entered on: Status: Priority: Requester's Justific No justification	SMETH 000000241 000000241 Sarv Vilison 11/30/2010 Pending Medium cation: entered by requester.	Total Amount:	2,080.00 USD	
			View printable version	
- Line Information				
Line Information		Vendor Name	Customize   Find   2 First KI t of t D Last Quantity UOM Price	
	Item Description	vendorname		
	1 Replace water coolers for di		4.0000 EA 520.00000 USD	
Select All / Dese				
	ne Details			=
Requisition Ap				
	ition 0000000241:Pending			
Supervisor A				
Approved		2		
SMU Rec 12/01/10	er 1 quisition Approver - 10:26 AM	2 sition Approver		
Enter Approver Con	nments			
	Approve	Ø Deny	Pushback	
		-		
Return to Worklist				
				-
		M	ain Contont	
		M	ain Content	
4				

Step	Action
3.	To view requisition information, click the <b>Select All / Deselect All</b> option.
4.	Click the View Line Details button. View Line Details



SMU Financials				Sign out
Favorites Main Menu				
Requisition App	roval			^
Business Unit: Regulation ID:	SMETH  Reguisition - Windows Internet Explorer	x	D	
Requisition Name:				
Requester: Entered on:	🕞 🕘 🖉 https://fsqal.smu.edu/fssup/psft/tmp/V_2127e2cb-bfe 🔻 🔒 🍫 🗙 🖸 Bing	+ م		
Status:	File Edit View Favorites Tools Help 🗴 😓 SnagIt	9 6		
Priority: Requester's Justifie	🗴 Google 💽 😽 Search 🕂 🧔 * 👘 🛛 🔯 Share * 🔊 * 🔍 Sidewiki * 😭 😕 🔦 * 🔘 Sig	in In 🔹		
No justification	👷 Favorites 🛛 🎭 🚹 Cale 🚹 Supp 🌮 Supp 👻 Show 🕲 Shar 🎐 iSup 👻 Site 🔗 Get 👻 SMU	»>		
		>>		
- Line Information	🥬 🕫 🐨 🔝 👻 🖾 🖷 🔻 Page 👻 Safety 🕶 Tools 👻 🔞			
Line Information	Business Unit: SMETH Requester: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<b>-</b> ^		
Line	Requisition: 000000241 Requested By: Gary Wilson Currency: USD			
	Requisition Name: 0000000241         Entered Date: 11/30/10         Requisition Total: 2,080.00           Line: 1         Item Description: Replace water coolers for division         Quantity: 4,0000         UOM: EA         Price: 520.00         Line Total: 2,080.00	-		
Select All / Des	Line Status: Pending			
view e	Ship Line: 1 Ship To: MSAJOURN-S Address: Shipping Quantity: 4,0000			=
Requisition A	Attention: Gary Wilson Due Date: FONDREN LIBRARY 1414 HILLTOP LANE Shipping Total: 2,080.00 DALLAS TX 75205 United States			
	Dist Status Location Qty PCT Amount GL Unit Account			
Supervisor A	1 Open MAIN 2.000 50.00 1,040.00 SMETH 6305			
Approved Khimiti	Dept Fund 22320 10			
SMU Re 12/01/10	Open QTY Open Amt	Ξ		
	2.000 0.000			
Enter Approver Co	GL Base Amount Currency Sequence			
	1,040.00 USD 0			
	Dist         Status         Location         Qty         PCT         Amount         GL Unit         Account           2         Open         MAIN         2.0000         50.00         1.040.00         SMETH         6335			
	Dept Fund			
Return to Worklist	220300 10			
	Open QTY Open Amt			
	2,000 0.000			
	GL Base Amount Currency Sequence Capitalize 1,040,000 USD 0 N			
	•	F		
		-		
				-
•				1

Step	Action
5.	After the review is complete, click the <b>Close</b> button.

e e e e e e e e e e e e e e e e e e e	SMU						1	Add to Favorites	
	Main Men	U					Home	Add to Pavorites	Sign out
Denui									
Requi	isition Ap	brovai							
Requis	d on:	SMETH 0000000241 <u>Gary Wilson</u> 11/30/2010 Pending	Total Amount:		2,080.00 US	D			
Priority	y:	Medium							
	ster's Justil								
N	o justificatio	entered by requester.							
					View printable version				
	Information								
Line I	nformation				Frat Cl 1 of 1 Cl Last				
	Line	Item Description	Vendor Name	Quantity UOM	Price				
		1 Replace water coolers for di		4.0000 EA	520.00000 USD				
¥ Se	elect All / Des	elect All							
L	View L	ine Details							
- Revie	ew/Edit App	rovers							=
	uisition A								
		sition 0000000241:Pending							
	12/01/	d ver1 equisition Approver 0 - 10:26 AM	ion Approver						
Enter /	Approver Co	mments							
		Approve	> Deny	Pusht		9 <b>%</b>			
		(		e. Tubit					
Return	to Worklist								
									-
•			111						P.



Step	Action
6.	Enter the desired information into the field.
7.	Click the <b>Pushback</b> button.
8.	The requisition has been pushed back. The First Approver will receive an email indicating the push back.
9.	
	End of Procedure.

# Managing Requisition Approvals

#### Procedure

Step	Action
1.	In addition to approving requisitions directly through an email link, you can also approve requisitions through the <b>Manage Requisition Approvals</b> page. Click the <b>Main Menu</b> button. Main Menu
2.	Click the eProcurement menu.



SMU				
Financials				
Favorites Man Menu > eProcurement +Rocurement eProcurement				
eProcurement				
eProcurement				
Set up eProcurement; manage or approve eProcurement requisitions or POs.				
Create Requisition Create a new requisition by browsing or searching company or external catalogs.	Manage Requisitions Review requisitions, edit or view status, cancel, receive, and return to vendor.	Manage Requisition Approvals Take actions on requisitions that requ	uire your approval.	
Buver Center     Create/edd/approve purchase order; source requisition; process change     request:     W_Vendors.				

Step	Action
3.	Click the Manage Requisition Approvals link. Manage Requisition Approvals
4.	Select the desired <b>Req ID</b> link.



SMU Financials					24	160595 On FSSUP	Home	Add to Favorites	Sign o	ut
Favorites Main Men	nu > eProcurement > Manage R	equisition Approvals								
Requisition App	proval									^
Business Unit: Requisition ID: Requisition Name:	SMETH 000000234 Departmental Projector									
Requester:	Goodson,Lisa									
Entered on: Status:	12/08/2010				_					
Priority:	Pending Medium	Total Amount		2,614.00 US	Ð					
Requester's Justif										
	n entered by requester.									
				View printable version						
- Line Information										
Line Information			Customize I	End Brst K 1 of 1 Last						
Line	Item Description	Vendor Name	Quantity UOM	Price						
	1 Inforcus DLP Projector	DREAMTECH-001	1.0000 EA	2.614.00000 USD						
Select All / Des	eelect All									
	Line Details									
										=
Review/Edit App										
< Depart	tmental Projector:Pending									
Supervisor	Approval									
Pending	Not Rou	ted m.Zhanat								
C SMU R	Tiffany Dawn Requisition Approver	equisition Approver								
Enter Approver Co	omments				J.					
					En la					
	Approve	Ø Deny								
	-									
Return to Approve F	Requisitions	Previous in List	Next in List							
1										
1										
										-
4			111						E.	

Step	Action						
5.	To view line details on all lines, click the Select All / Deselect All option.						
	To view line details for specific lines, click the checkbox on the individual line(s).						
6.	Click the View Line Details button.						
	View Line Details						



SN Fina	1U ncials															
Favorites I	Main Me	nu > ePr	rocuremen	t > Manag	e Requisition	Approvals										
Requisit	ion Ar	nroval														*
requisit		provar														
Business			SMETH													
Requisitio			0000000			-								~	1	
Requeste	🙆 Re	equisition	n - Windo	ws Interne	t Explorer									x		
Entered ¢	0	0-1	(a) http://doi.org/10.1000/000000000000000000000000000000	s://fsgal.sn	nu.edu/fssu	o/psft/tmp	V 83bb34	84-33 👻 🔒	4 ×	🔁 Bing			\$	- C		
Status:	0											12				
Priority: Request(	1		View F	avorites	Tools Hel	p						X	🕏 SnagIt 🖻	E.		
Noji	×	Google					💌 🛃 Sea	rch 🏽 🛉 🧮 🍷	📲 🕈 🔯 SI	nare ፣ 🔊 ፣ 🏫	Bookmarks*	»	🦴 🔹 🥚 Sign	In •		
		Favorite	es 🤞	y 💽 Offi.	🔠 Cale.	🚻 Supp	o 🧭 Su	pp 🔻 🧭	Show 🧣	🕽 Shar 🎐 i	Sup 💽 Site	e 🥭	Get 🔻	»		
🛨 Line In	1	Requisiti	on						- 🔊 -	- 🖃 🚔 🗸	Page 🔻 Sat	fety 🔻	Tools 👻 🔞	•		
Line Info								:								
			it: SMETH 000000023				ester: 214447			Status: F Currency	Pending Approval					
				4 artmental Proje	ctor		ested By: Go ed Date: 12/8				on Total: 2,614.00					
Sele	L	ine: 1	Item Des	cription: Inford	us DLP Projecto	r	٩	uantity: 1.0000	UOM	EA Price: 2,61				-		
_											Line Sta	tus: Pend	ing	-		=
Review Requise		hip Line: 1			Ship To	MSAJOURN-	s	Addres	s:		Shipping Q	uantity: 1	.0000			
Requi	A	ttention: G	oodson,Lisa		Due Da	te:		UMPH		3300 DYER ST	Shipping To	otal: 2,61	1.00			
4	l la	Dist	Status	Locati	on	Qty	PCT	Amount	GL Unit	Account						
St		1	Open	MAI		1.0000	100.00	2,614.00	SMETH	8120						
	l li	Dept	Fund													
		223250	10											=		
4	l li	Open QTY	r Op	en Amt										-		
Enter Ap		1.0000		0.000												
	11	GL Base /	Amount	Currency	Sequence	Capitalize										
		2,614.00		USD	0	N										
Return to																
														-		
	•							11						•		
	-	-	-	_	-	_	-	-	_			-	_			-
•																4

Step	Action
7.	Shipping information, GL distribution information, item description and cost will be displayed.
	After reviewing requisition information, click the <b>Close</b> button.



SMU Financials									
vorites Main Menu	> eProcurement > Manage	Requisition Approvals							
Requisition Appr	oval						_		
Business Unit:	SMETH								
Requisition ID:	000000234								
Requisition Name:	Departmental Projector								
Requester:	Goodson,Lisa								
Entered on:	12/08/2010								
Status:	Pending	Total Amou	nt:		2,614.00 US	3D			
Priority:	Medium								
Requester's Justifica	ation:								
No justification e	intered by requester.								
					View printable version	1			
<ul> <li>Line Information</li> <li>Line Information</li> </ul>					First KI 1 of 1 D Last				
Line Information	Item Description	Vendor Name	Quantity	UOM Price					
		vendor name							
	1 Inforcus DLP Projector	DREAMTECH-001	1.0000	EA	2,614.00000 USD				
Select All / Desel	loct All								
	e Details								
view Lin	e Details								
Review/Edit Approv	vers								
Requisition Ap	proval								
Demester	antel Desis stars Describe	-							
	nental Projector:Pending	g							
Supervisor Ap									
Pending	Not Ro								
C SMI Reg	fany Dawn uis ition Approver $\longrightarrow$ Ellist SMU	ton.Zhanat Requisition Approver							
Enter Approver Com	ments								
						10 C			
	Approve	Ø Deny							
		<b>•</b>							
Return to Approve Rei	quisitions	Previous in List	Next in Lis						
								1	Þ

Step	Action
8.	Click the Approve or Deny button.
9.	
	End of Procedure.

## **Additional Resources**

## Combination Edit Rules Made Easy

Combo Edit rules are set up to allow only certain chartfields to be used together. If the combination is outside the range of possibilities, an error will display and the requisition cannot be saved until the chartfields are corrected.

1. Account 1280 requires the use of a 5 digit sub-class code.

2. Orgs beginning with a 5, for example **5**43215, requires the use of a 7 digit Project.

3. Orgs beginning with a 4, for example **4**32154, requires the use of a Fund Code 12 or 20. (You can find a list of those orgs which require a 12 by visiting http://smu.edu/controller/dept\_fss/ - Under "Search" click on the "Designated Fund 12 Orgs" link.)

4. Orgs beginning with a 2, for example 215432, usually calls for a Fund Code of 10.

More detailed information may be obtained by contacting the Controller's Office



# Catalog and Sub Category Listings

Building	
Code	Description
A031	Air Cond Equip/Supplies
A045	Appliances-Household
A906	Architect/Design Services
B910	Bldg Maintenance/Repair
B910	Blog Maintenance/Repair
B150	Builders Supplies
C211	Construction-New
C212	Construction-Renovation
E285	Electrical Equip/Supplies
E295	Elevators/Service & Parts
F362	Floor/Vinyl/Tile
A031A	Heat Equip/Supplies
J485	Janitorial Supplies
P635	Paint Equipment/Supplies
P630	Paint/Varnish/Wallpaper
P670	Plumbing Fixtures
P670A	Plumbing Supplies
R745	Roads
R745A	Sidewalks
A031B	Ventilating Equip/Supplies
<b>c</b>	
<u>Computer</u>	
C476	Computer Equip/Hardware
C480	Computer Software
C481	Computer Supplies
C482	Computer Printers
E930	Equip Maint/Computers
P640	Paper/Computer
-	
<u>Equipment</u>	
A050	Art Equip/Supplies
A880	Audio Equip/Supplies
A880A	Audiovisual
E285	Electrical Equip/Supplies
E928	Equip Maint/General
E936	Equip Maint/Repair
F340	Fire Equip/Supplies
0545	Grounds
G515	Equip/Maintenance
J485	Janitorial Supplies
L490	Lab Equipment/Supplies
L525	Library Equipment/Supplies
M545	Machinery/Heavy Hardware
M580	Musical Instruments/Supplies
	Photographic
P655	Equip/Supplies
P680	Police Equip/Supplies
R982	Rental Equipment
S805	Sports Equipment
S805A	Sports Supplies
T855	Theatre Equipment
T855A	Theatre Supplies
	incutic supplies

Description
Draperies/Upholstery
Materials
Floor/Vinyl/Tile
Floors/Carpet
Furniture/Apts & Houses
Furniture/Classroom
Furniture/Dorms
Furniture/Labs
Furniture/Offices
Furniture/Outdoor
Animals
Chemicals-Educational
Drugs/Human Therapeutic
Furniture/Labs
A duce eticine
Advertising
Art Equip/Supplies
Auto Parts/Maint
Automobiles
Clothing Uniforms
Clothing/Not Uniforms
Conferences
Drugs/Human Therapeutic
Environmental Clean-up
Freight
Installation/Set Up
Janitorial Services/Contract
Moving/Relocation
Office Machines/Equipment
Office Supplies
Outsource Consulting
Outsource Janitorial
Paper/Computer
Paper/Copy/Fax
Security/Alarms
Security/Keys
Security/Locks
Seminars
Signs/Traffic Control
Special Events
Teaching Supplies
Telephone Service
Telephone Supplies
Uniforms/Staff
Advertising
Awards/Certificates
Badges/ID Supplies
Forms
Markers/Placques