



eProcurement
Created on 12/1/10

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eProcurement

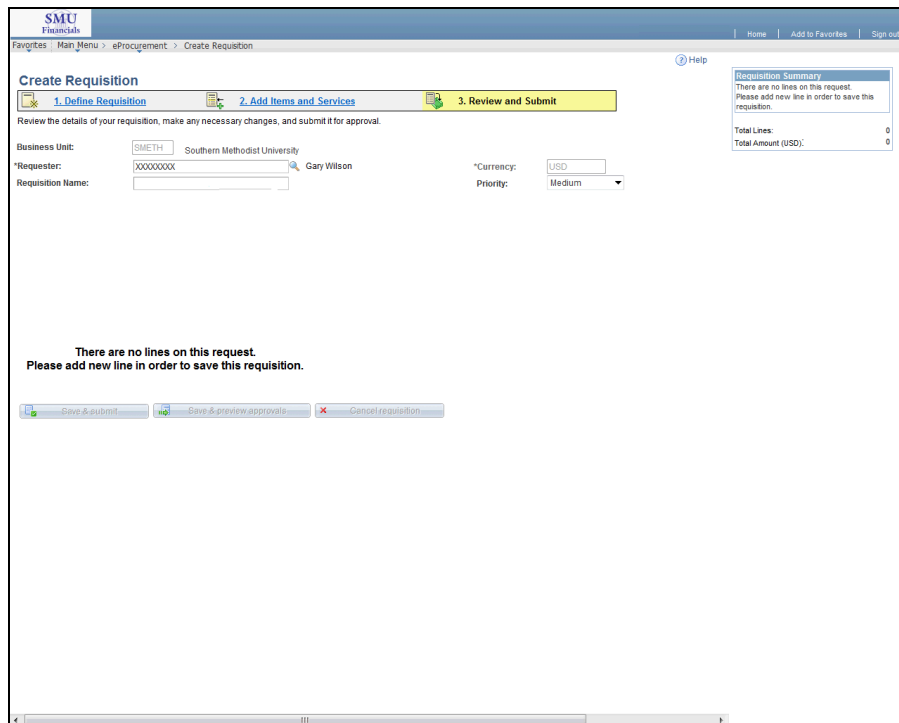
Requisition Essentials

Create a New Requisition

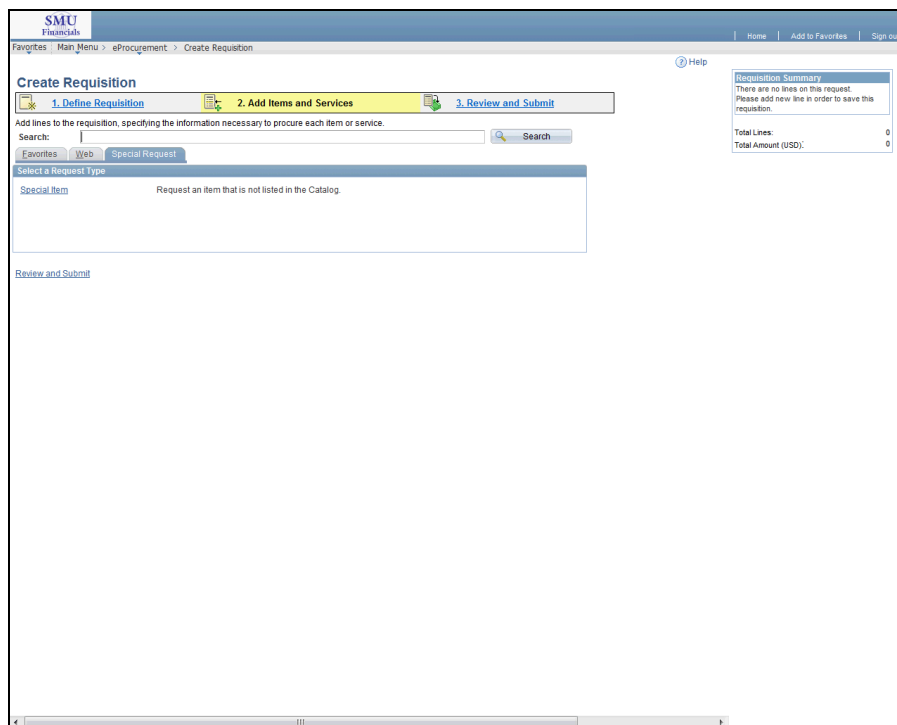
Procedure

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.

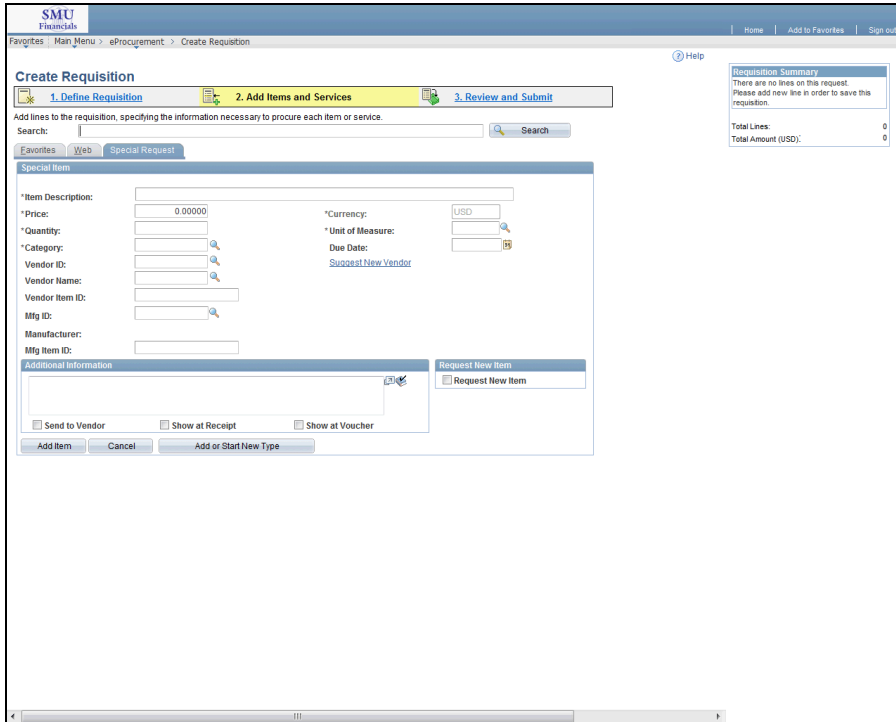
Step	Action
1.	Click the Main Menu button. 
2.	Click the eProcurement menu. 
3.	Click the Create Requisition link. 





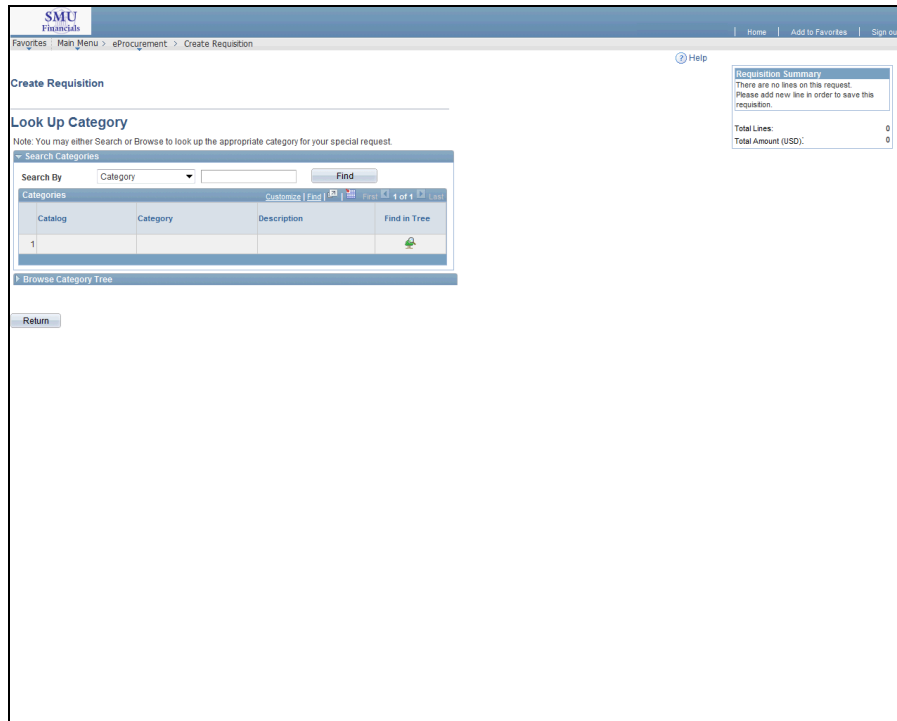
Step	Action
4.	<p>You will begin with Step 1. Define Requisition. Your ID will default in the Requester: field.</p> <p>A custom Requisition Name may be entered. (If you choose not to enter a requisition name the requisition number will default once the requisition has been submitted.)</p> <p>Enter a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



Step	Action
6.	<p>Click the Special Item link.</p> <p>Special Item</p>



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



SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition


Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Category


Catalog	Category	Description	Find in Tree
1			

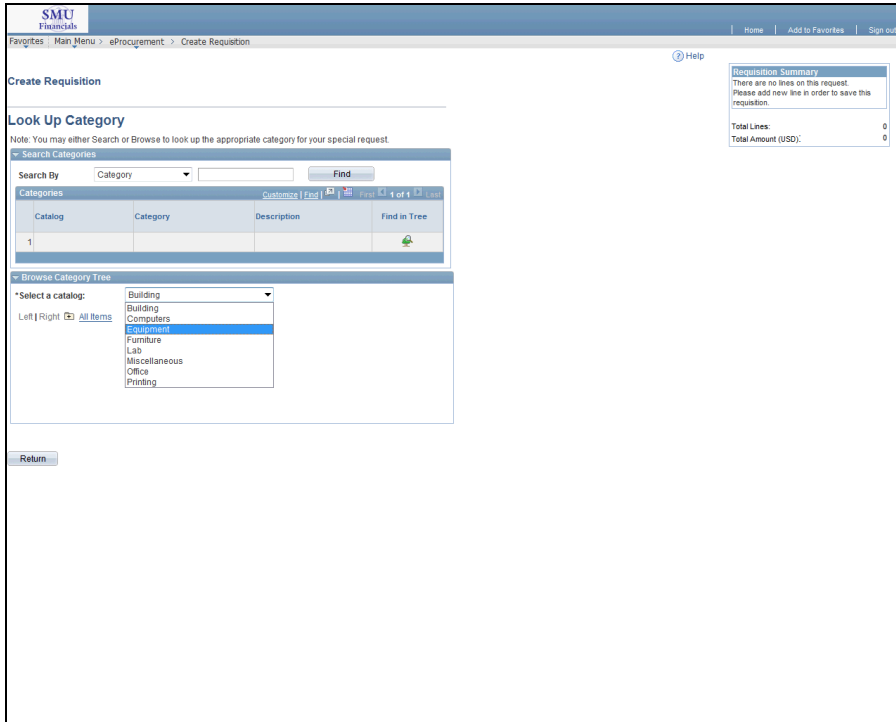
Browse Category Tree

Requisition Summary

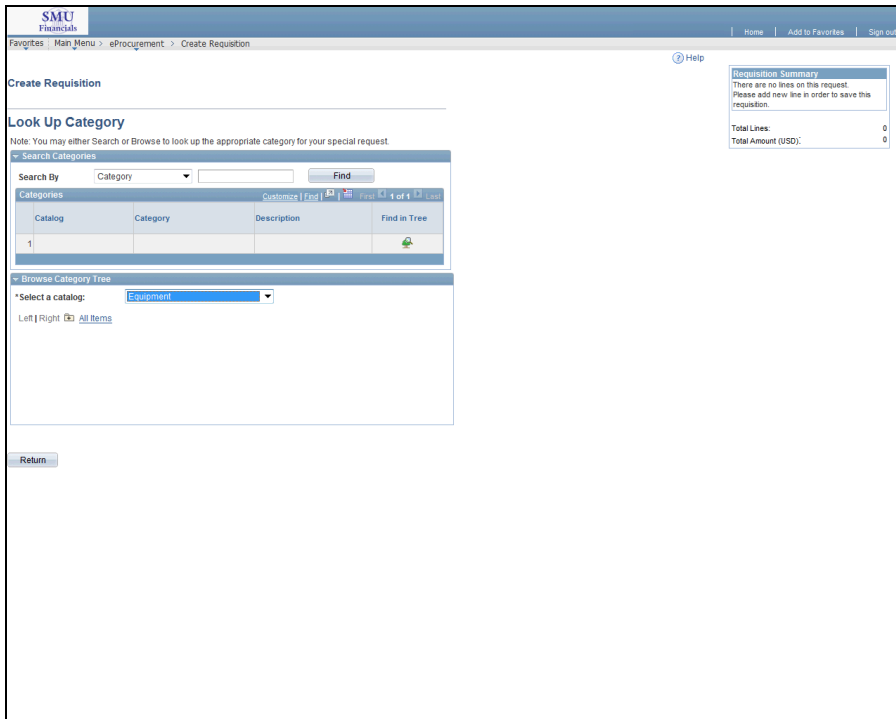
There are no lines on this request.
Please add new line in order to save this requisition.


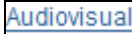
Total Lines: 0
Total Amount (USD): 0

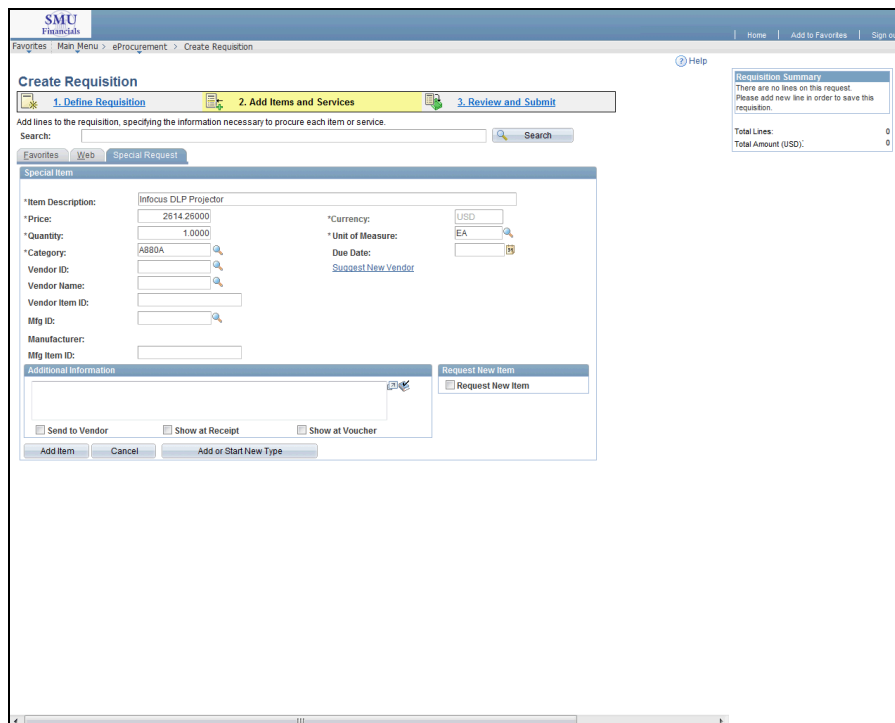
Step	Action
13.	Click the Expand section button located on the far left of the Browse Category Tree row. 




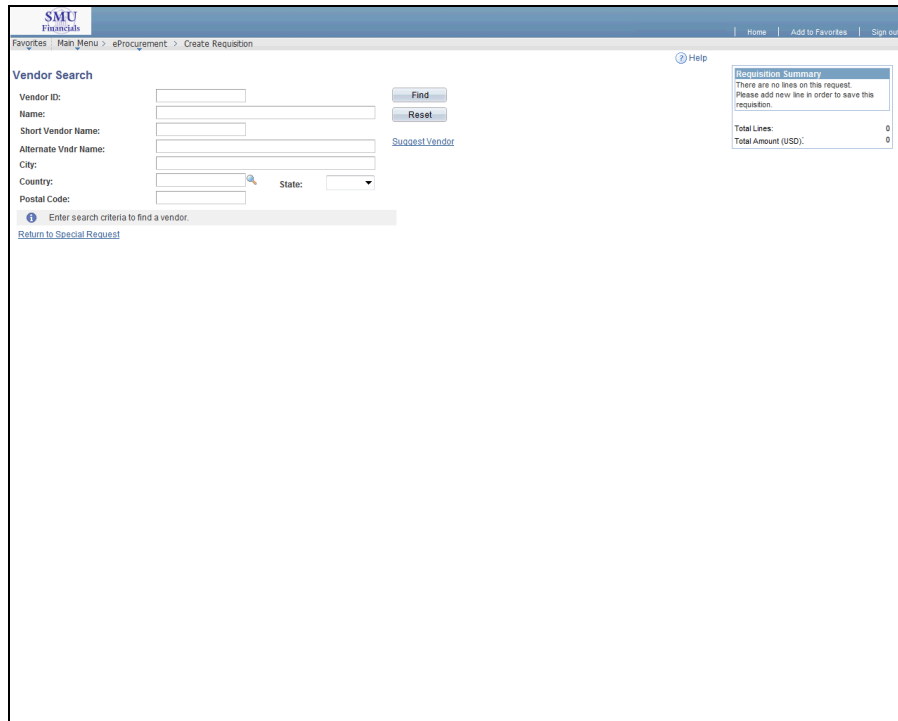
Step	Action
14.	Click an entry in the Select a Catalog drop down list. <div style="border: 1px solid black; background-color: #007bff; color: white; padding: 2px 5px; display: inline-block;">Equipment</div>



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



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



SMU
Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition

Help

Vendor Search

Vendor ID:

Name: **Find**

Short Vendor Name: **Reset**

Alternate Vndr Name: [Suggest Vendor](#)

City:

Country: State:

Postal Code:

Enter search criteria to find a vendor.

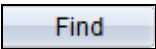
[Return to Special Request](#)

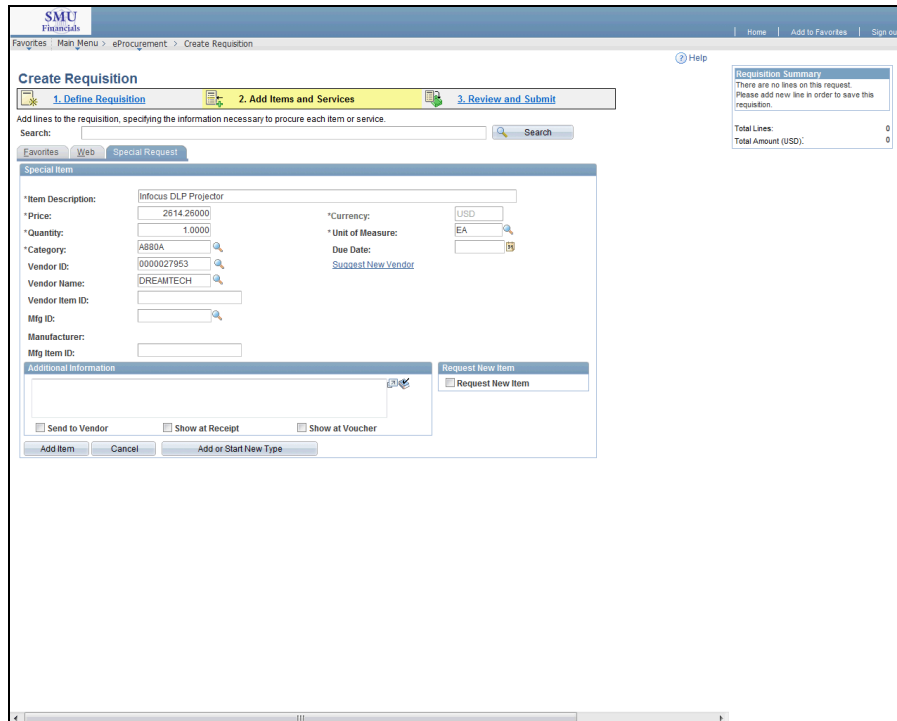
Requestion Summary

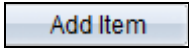

There are no lines on this request.
Please add new line in order to save this requisition.

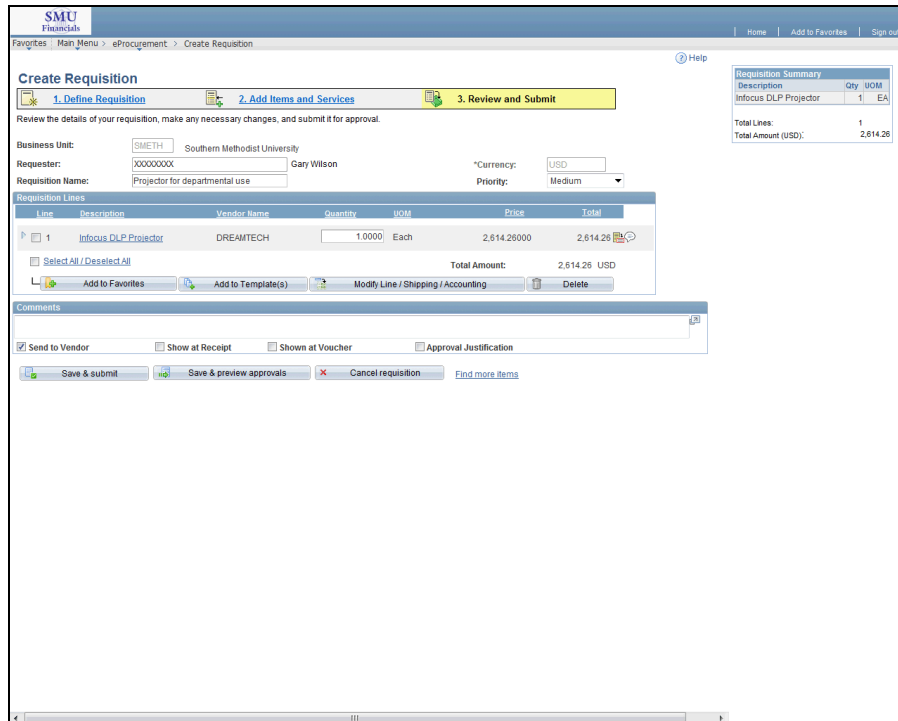
Total Lines: 0



Total Amount (USD): 0

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



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 <u>are not used</u> .
26.	Click the Add Item button. 
27.	The item has now been added to the Requisition Summary . At this point, additional items can be added to your requisition.
28.	Click the 3. Review and Submit link to assign the appropriate, account, fund and org. 



Step	Action
29.	<p>Click the Expand Section button. (This small button is located on the far left near the line number.)</p> <p>Note: If more than one line items is on this requisition, each line will have it's own Expand Section 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"</p> 
30.	<p>Account, Fund and Org information is located on Chartfields2.</p> <p>Click the Chartfields2 tab.</p> 
31.	Enter the desired information into the Account field.
32.	<p>Your default Fund and Dept (org #) will auto populate.</p> <p>Review the Fund and Dept and adjust if necessary. Add a Project Code or Subclass if needed.</p>

Training Guide

eProcurement



SMU Financials

Favorites | Main Menu > eProcurement > Create Requisition

Home | Add to Favorites | Sign out

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University

Requester: XXXXXXXX Gary Wilson *Currency: USD

Requisition Name: Projector for departmental use Priority: Medium

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 ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: *Ship To: MSJOURN-S *Quantity: 1.0000 Price: 2,614.26000

Status: Active Attention To: Gary Wilson *Distribute By: City SpeedChart:

Accounting Lines

Account	Fund	Dept	Project	Class
8120	10	223250		

Total Amount: 2,614.26 USD

Comments

☒ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

[Save & submit](#) [Save & preview approvals](#) [Cancel requisition](#) [Find more items](#)

Step	Action
33.	Click Save & preview approvals . <div>Save & preview approvals</div>

SMU Financials

Favorites | Main Menu > eProcurement > Create Requisition

Home | Add to Favorites | Sign out

Confirmation

Requested For: Gary Wilson Number of Lines: 1

Requisition Name: Projector for departmental use Total Amount: 2,614.26 USD

Requisition ID: 0000000230

Business Unit: SMETH

Status: Open

Priority: Medium

Requisition Approval


Projector for departmental use: Initiated

Supervisor Approval

Not Routed Approver 1 SMU Requisition Approver → Not Routed Approver 2 SMU Requisition Approver

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#)


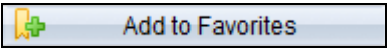
[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

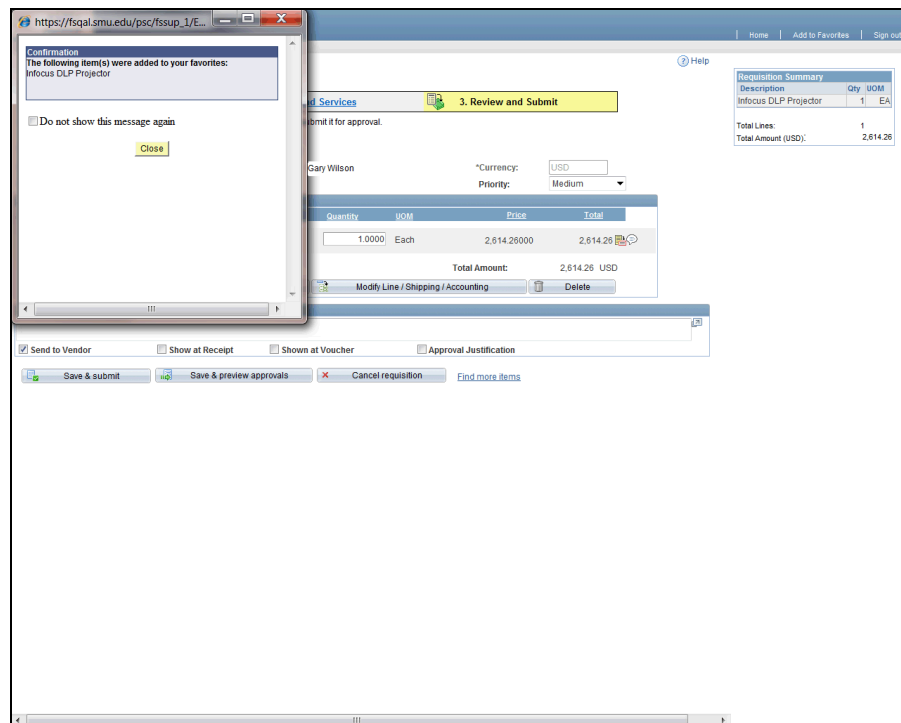
Step	Action
34.	Click the Submit button. 
35.	End of Procedure.

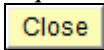
Create a Favorite for Frequently Purchased Items

Procedure

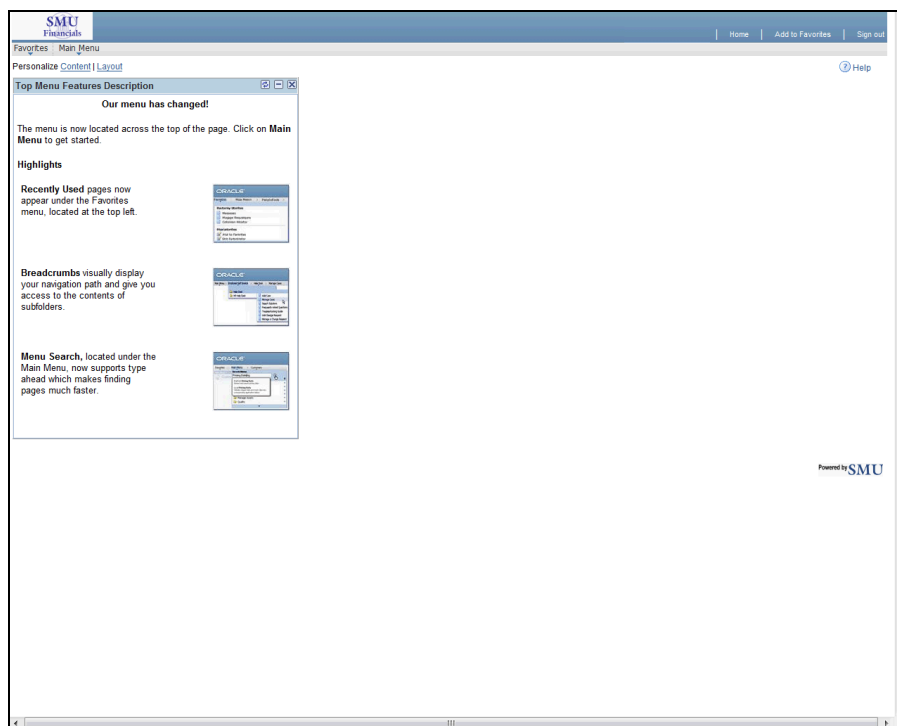
Identifying a frequently purchased item as a favorite will eliminate some of the requisition process. Once you've created a favorite, it will be available for future requisitions.

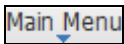


Step	Action
1.	Once you have completed a requisition and are on the Review and Submit page, select the desired Line that you want to save as a favorite. 
2.	Click the Add to Favorites button. 

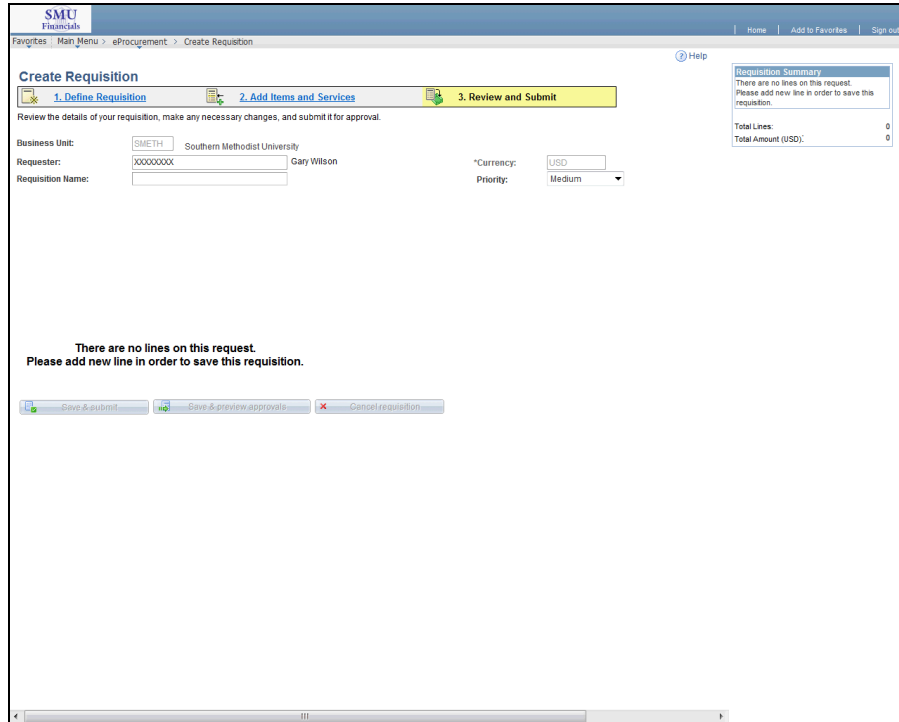


Step	Action
3.	<p>A pop-up box will confirm the favorite was created. Click the Close button.</p> <p>The favorite will now be available for you to use the next time you create a requisition.</p> 
4.	<p>End of Procedure.</p>

Create a Requisition using a Favorite Procedure



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



SMU Financials

Favorites | Main Menu | eProcurement | Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University

Requester: XXXXXXX Gary Wilson

*Currency: USD

Requisition Name:

Priority: Medium

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

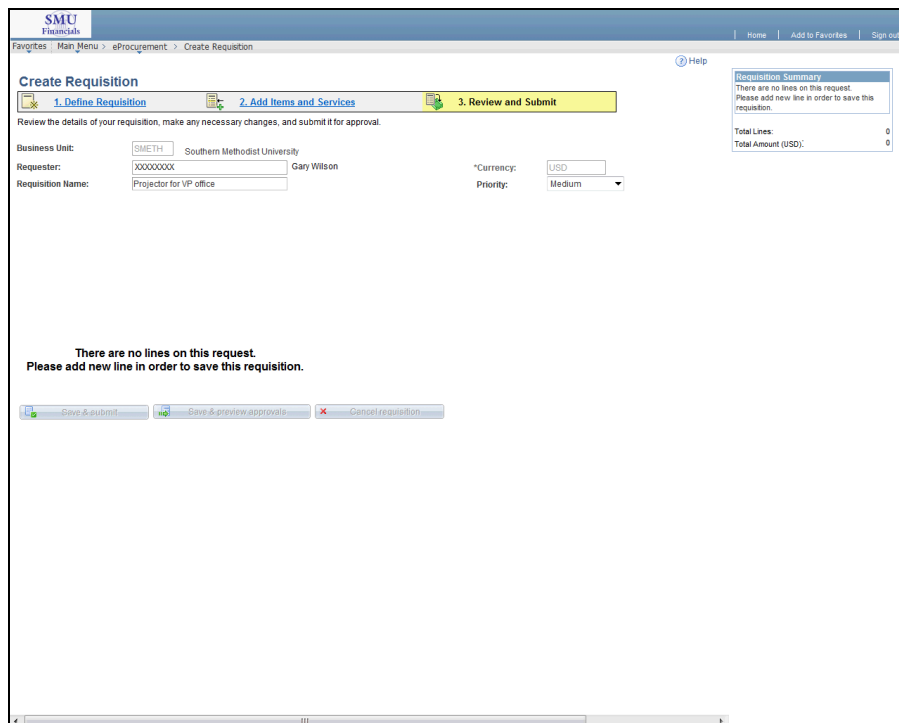
Total Lines: 0

Total Amount (USD): 0

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
4.	Enter the desired information into the Requisition Name field.



SMU Financials

Favorites | Main Menu | eProcurement | Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University

Requester: XXXXXXX Gary Wilson

*Currency: USD

Requisition Name: Projector for VP office

Priority: Medium

Requisition Summary

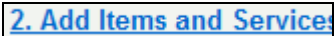
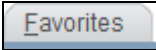
There are no lines on this request. Please add new line in order to save this requisition.

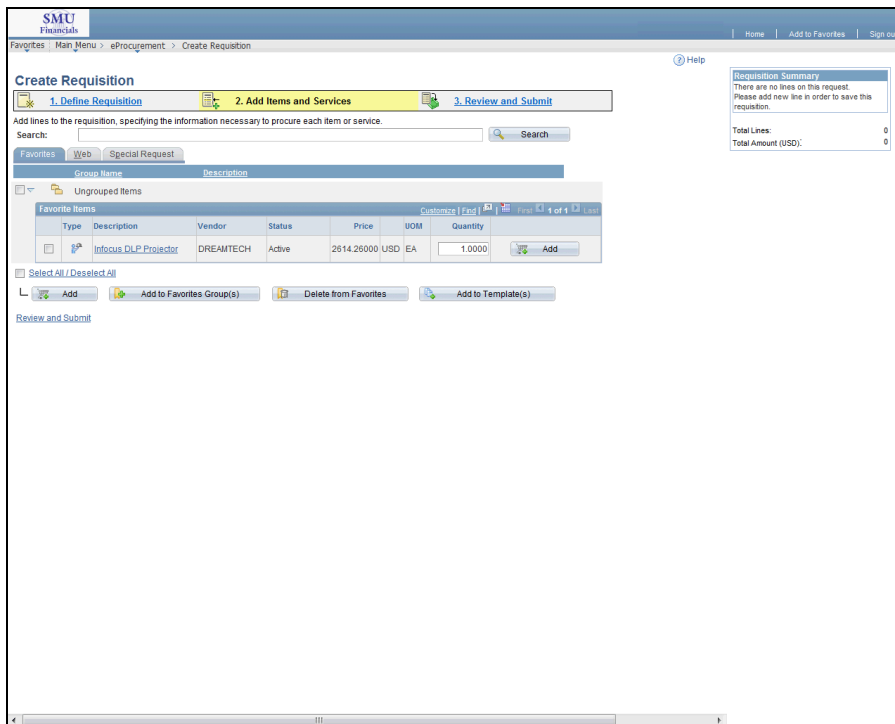
Total Lines: 0

Total Amount (USD): 0

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. 
6.	Click the Favorites tab. 



SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition

Help

Create Requisition

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Favorites | Web | Special Request

Group Name: Description:

Ungrouped Items

Type	Description	Vendor	Status	Price	UOM	Quantity	Customize	End	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th
IP	Infocus DLP Projector	DREAMTECH	Active	2614.26000	USD	EA												

Select All / Deselect All


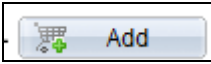
Add | Add to Favorites Group(s) | Delete from Favorites | Add to Template(s)

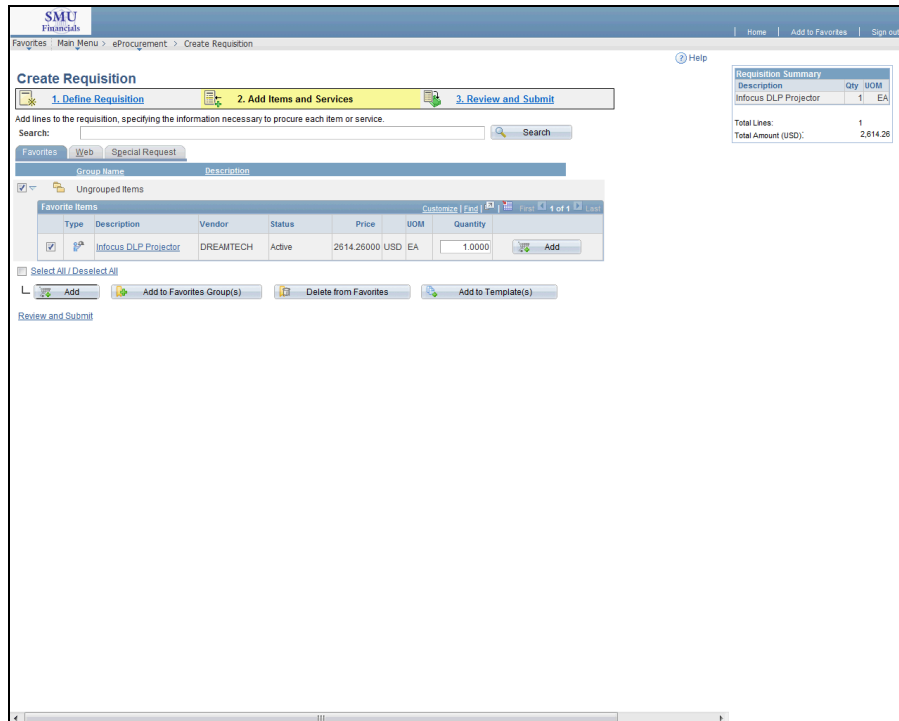
Review and Submit

Requisition Summary

There are no lines on this requisition. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

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



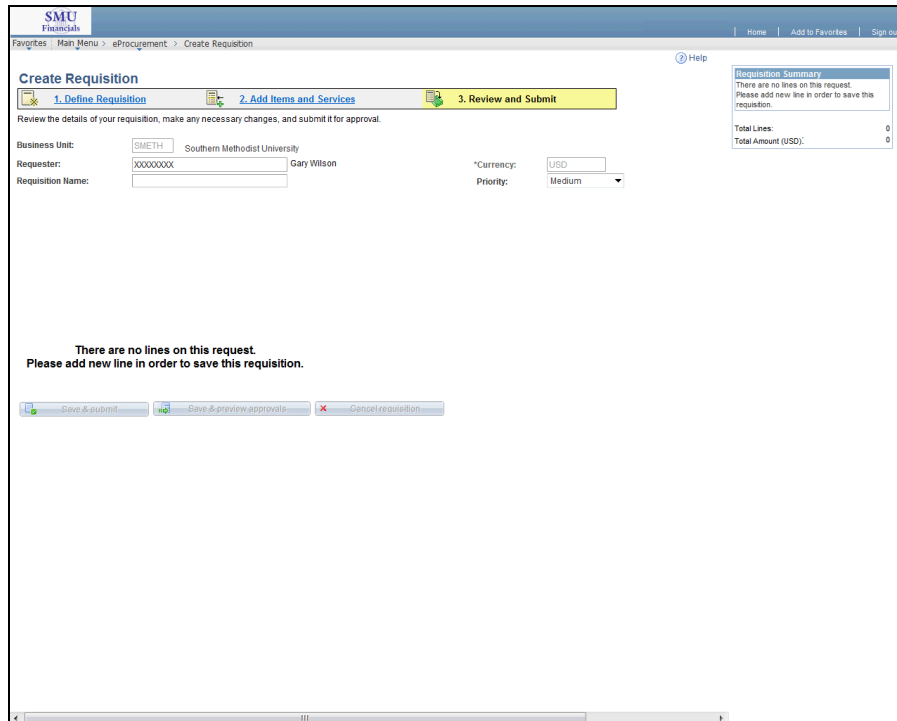
Step	Action
10.	Click the 3. Review and Submit link to continue assigning the appropriate account, fund and org. 3. Review and Submit
11.	End of Procedure.

Creating a Web Requisition

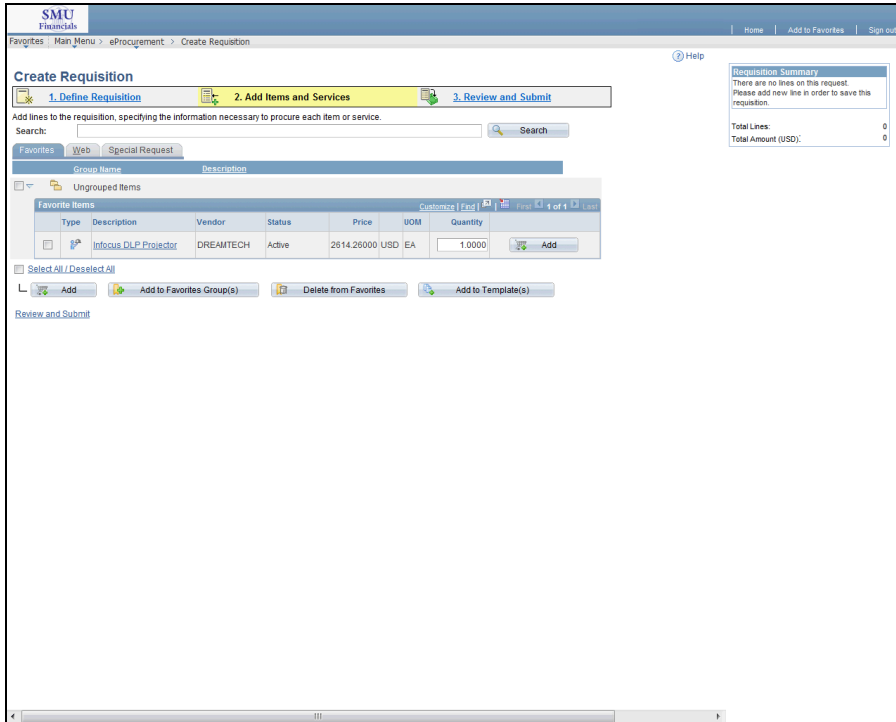
Procedure

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 Main Menu button. Main Menu
2.	Click the eProcurement menu. eProcurement
3.	Click the Create Requisition link. Create Requisition



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



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Favorites | **Web** | **Special Request**



Group Name	Description
Ungrouped Items	

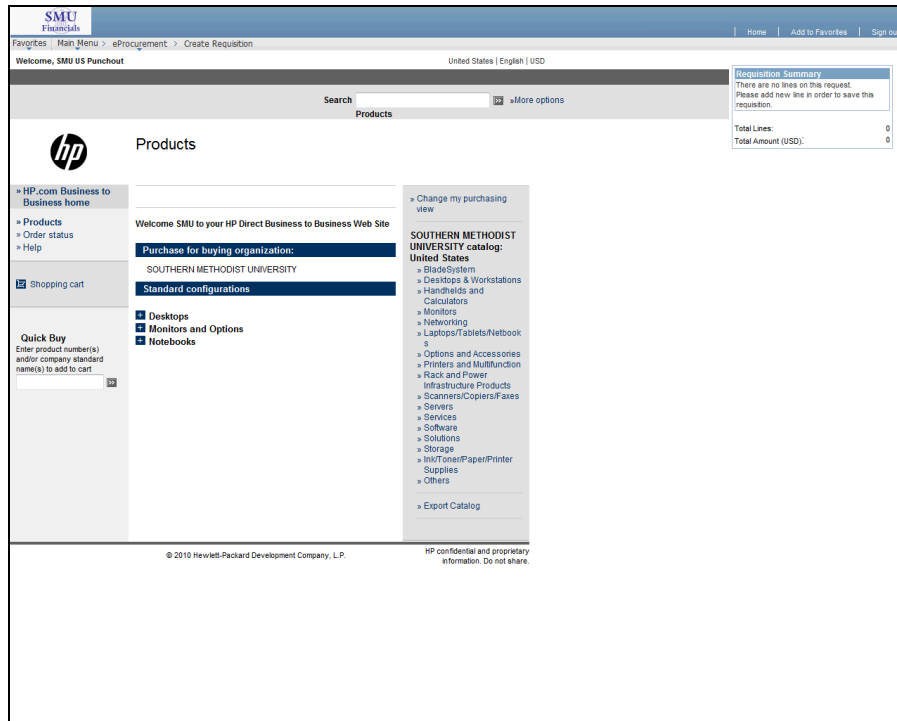
Type	Description	Vendor	Status	Price	UOM	Quantity
<input type="checkbox"/>	Infocus DLP Projector	DREAMTECH	Active	2614.26000 USD	EA	1.0000

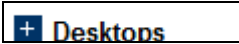

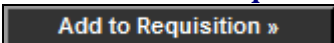
[Review and Submit](#)

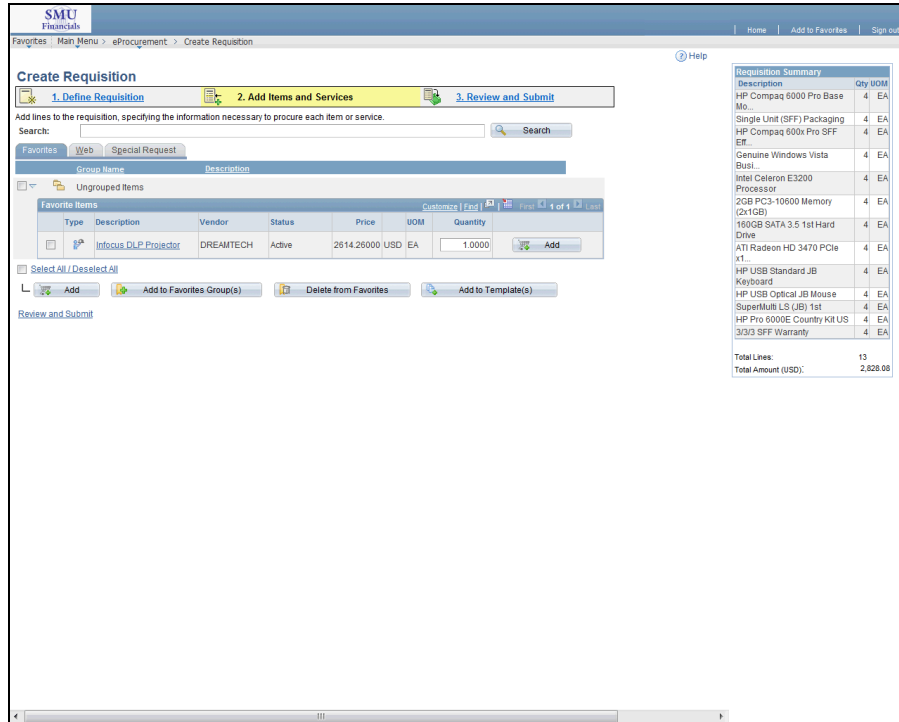
Requisition Summary
There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

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



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



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Favorite Items

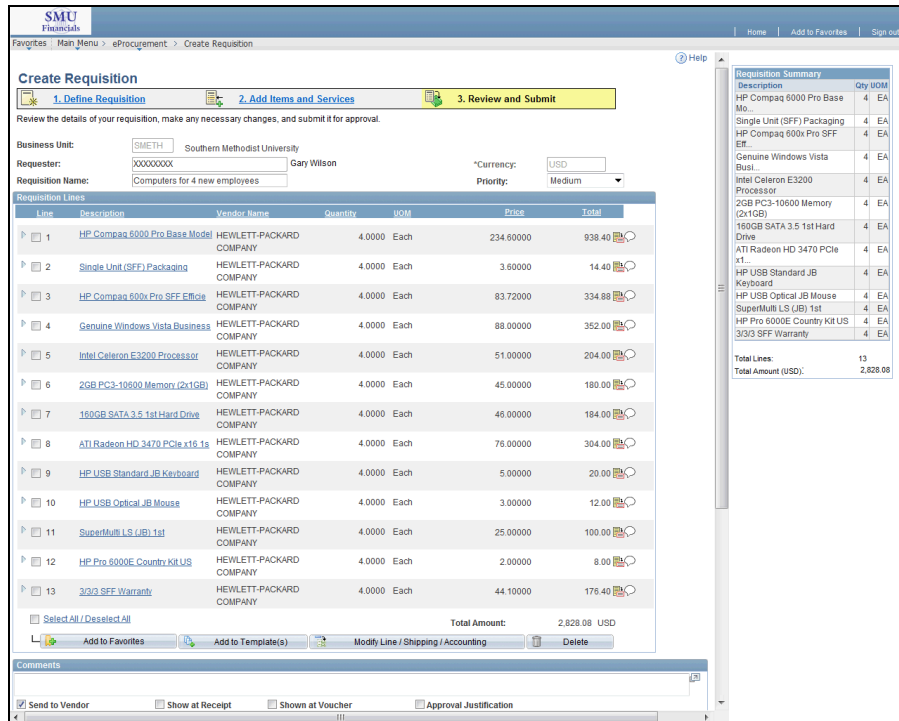
Type	Description	Vendor	Status	Price	UOM	Quantity
Infocus DLP Projector	DREAMTECH	Active	2614.26000 USD	EA	1.0000	

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF Eff...	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1...	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3/3 SFF Warranty	4	EA

Total Lines: 13
Total Amount (USD): 2,828.08

Step	Action
14.	Click the 3. Review and Submit link. 3. Review and Submit



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University
Requester: XXXXXXXX Gary Wilson
Request Name: Computers for 4 new employees
Priority: Medium

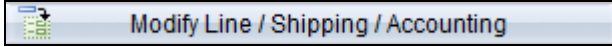
Requisition Lines

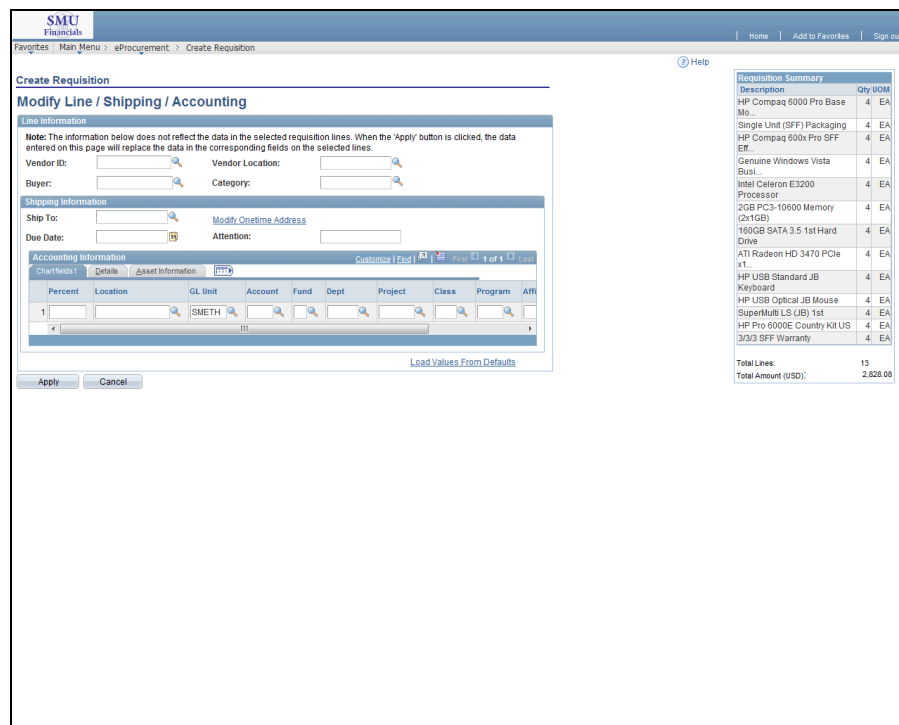
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	HP Compaq 6000 Pro Base Model	HEWLETT-PACKARD COMPANY	4.0000	Each	234.60000	938.40
2	Single Unit (SFF) Packaging	HEWLETT-PACKARD COMPANY	4.0000	Each	3.60000	14.40
3	HP Compaq 600x Pro SFF Office	HEWLETT-PACKARD COMPANY	4.0000	Each	83.72000	334.88
4	Genuine Windows Vista Business	HEWLETT-PACKARD COMPANY	4.0000	Each	88.00000	352.00
5	Intel Celeron E3200 Processor	HEWLETT-PACKARD COMPANY	4.0000	Each	51.00000	204.00
6	2GB PC3-10600 Memory (2x1GB)	HEWLETT-PACKARD COMPANY	4.0000	Each	45.00000	180.00
7	160GB SATA 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY	4.0000	Each	45.00000	180.00
8	ATI Radeon HD 3470 PCIe x16 1s	HEWLETT-PACKARD COMPANY	4.0000	Each	76.00000	304.00
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
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

Total Amount: 2,828.08 USD

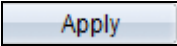
Comments

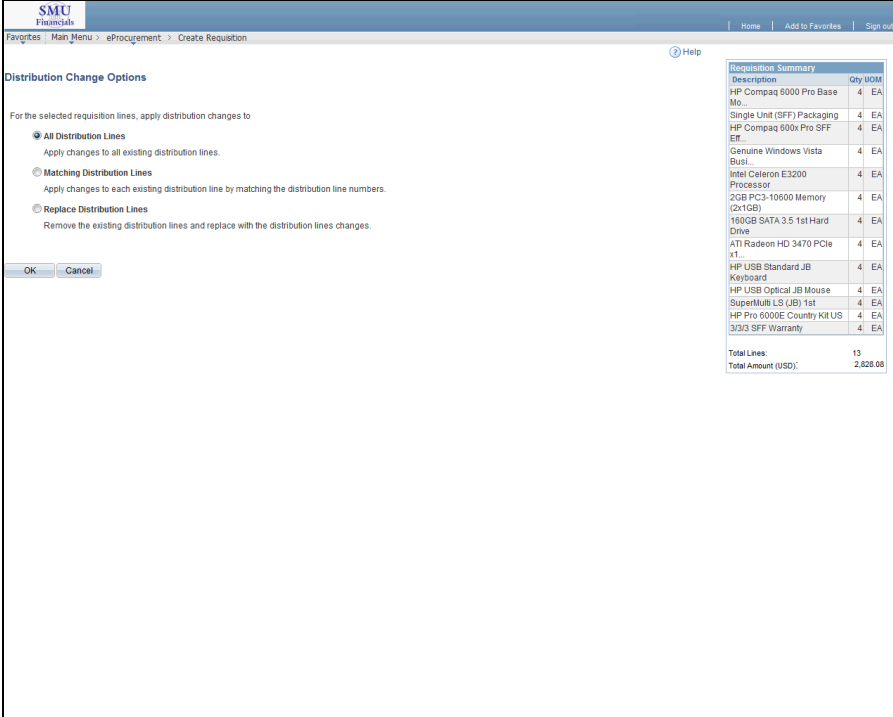
☒ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

Step	Action
15.	Enter Comments 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. 
18.	<p>You have two choices when entering the shipping address:</p> <ol style="list-style-type: none"> 1. One time address change 2. Load shipping address from default values. <p>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 address information.</p> <p>Proceed with entering Account, Fund and Dept codes.</p>



Step	Action
19.	To load your default shipping address <u>and</u> use your default Fund and Dept, click the Load Values From Defaults 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 Apply button. 
23.	Change the radio button if needed. Note: - Select All Distribution Lines when using one Dept (org) to pay for all items. Select Replace Distribution Lines when splitting charges between orgs. For more information, see the Split Item Costs: Multiple Line Items topic.



SMU Financials
Favorites | Main Menu | eProcurement | Create Requisition | Home | Add to Favorites | Sign out

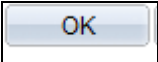
Distribution Change Options

For the selected requisition lines, apply distribution changes to:

- ☒ **All Distribution Lines**
Apply changes to all existing distribution lines.
- ☐ **Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.
- ☐ **Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF ET...	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

Step	Action
24.	Click the OK button. 

SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition

Item	Description	Quantity	Unit	Price	Total
5	Intel Celeron E3200 Processor	4.0000	Each	51.00000	204.00
6	2GB PC3-10600 Memory (2x1GB)	4.0000	Each	45.00000	180.00
7	160GB SATA 3.5 1st Hard Drive	4.0000	Each	46.00000	184.00
8	ATI Radeon HD 3470 PCIe x16 1s	4.0000	Each	76.00000	304.00
9	HP USB Standard JB Keyboard	4.0000	Each	5.00000	20.00
10	HP USB Optical JB Mouse	4.0000	Each	3.00000	12.00
11	SuperMulti LS (JB) 1st	4.0000	Each	25.00000	100.00
12	HP Pro 6000E Country Kit US	4.0000	Each	2.00000	8.00
13	3/3/3 SFF Warranty	4.0000	Each	44.10000	176.40

Total Amount: 2,828.08 USD

[Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)

Comments

Computers for four new recruiters

☒ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification


[Save & submit](#) [Save & preview approvals](#) [Cancel requisition](#) [Find more items](#)

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF EF	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1...	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3/3 SFF Warranty	4	EA

Total Lines: 13
Total Amount (USD): 2,828.08

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

 **Save & preview approvals**

SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition

Confirmation

Requested For: Gary Wilson
Request Name: Computers for 4 new employees
Request ID: 0000000240
Business Unit: SMETH
Status: Open
Priority: Medium

Number of Lines: 13
Total Amount: 2,828.08 USD

Requisition Approval

Computers for 4 new employees: Initiated

IT Approval

Not Routed

Supervisor Approval

Not Routed

Approver 1 SMU Request Approver

Approver 2 SMU Request Approver

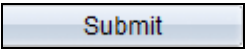
[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF EF	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1...	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3/3 SFF Warranty	4	EA

Total Lines: 13
Total Amount (USD): 2,828.08

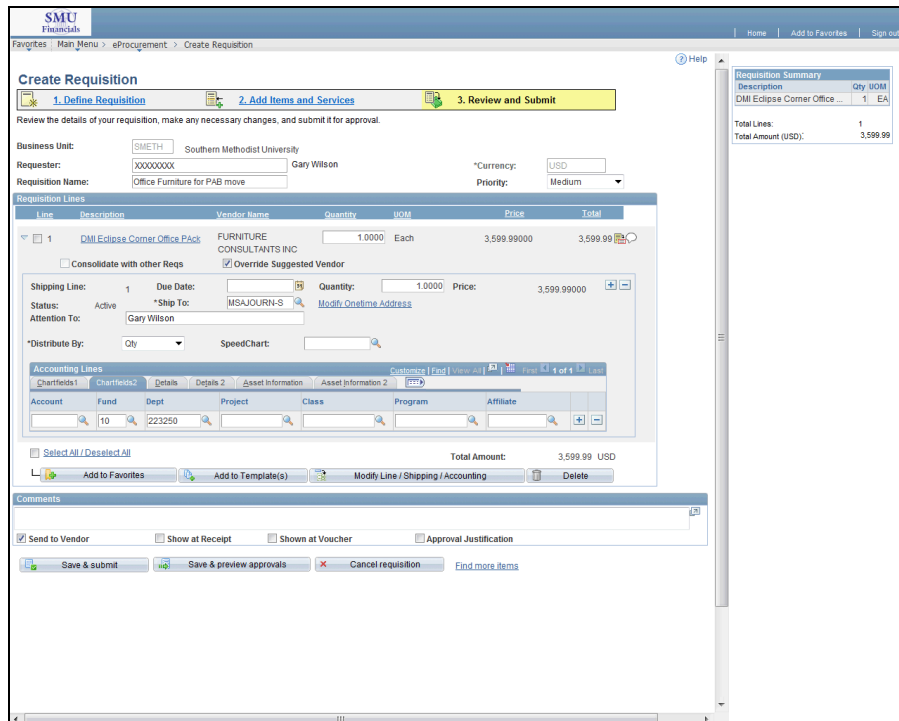
Step	Action
26.	Click the Submit button. 
27.	End of Procedure.

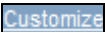
Chartfields and Split Item Costs

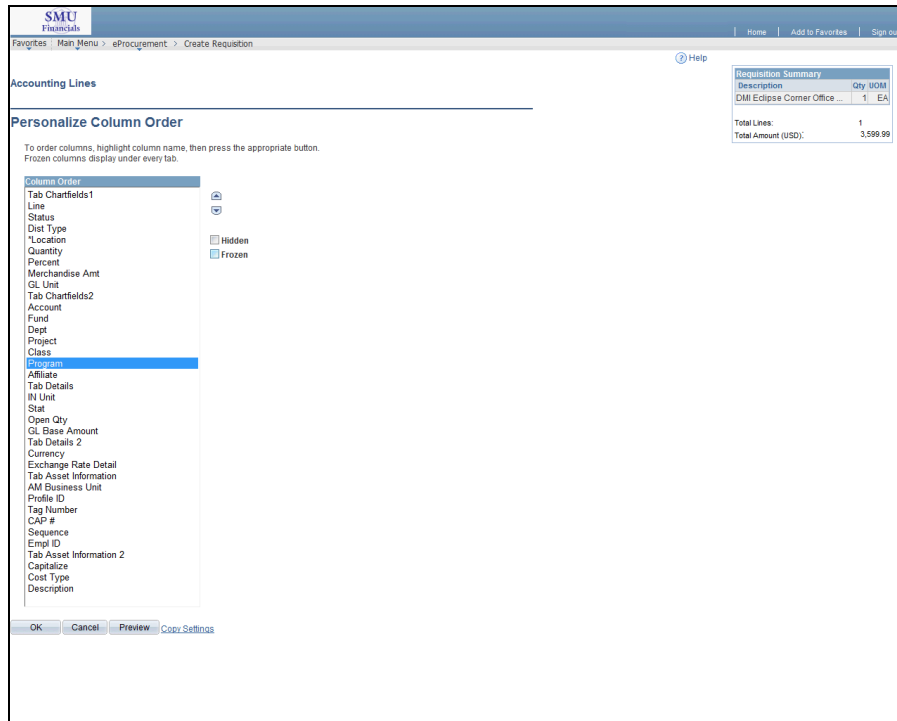
Customizing Accounting Lines and Chartfields

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.



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



SMU Financials

Home | Add to Favorites | Sign out

Accounting Lines

Personalize Column Order

To order columns, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

Tab Chartfields 1

- Line
- Status
- Dist Type
- Location
- Quantity
- Percent
- Merchandise Amt
- GL Unit
- Tab Chartfields2
- Account
- Fund
- Dept
- Project
- Class
- Program**
- Affiliate
- Tab Details
- IN Unit
- Stat
- Open Qty
- GL Base Amount
- Tab Details 2
- Currency
- Exchange Rate Detail
- Tab Asset Information
- AM Business Unit
- Profile ID
- Tag Number
- CAP #
- Sequence
- Empl ID
- Tab Asset Information 2
- Capitalize
- Cost Type
- Description

☐ Hidden
☒ Frozen

OK Cancel Preview Copy Settings

Requisition Summary

Description	Qty	UOM
DMT Eclipse Corner Office	1	EA

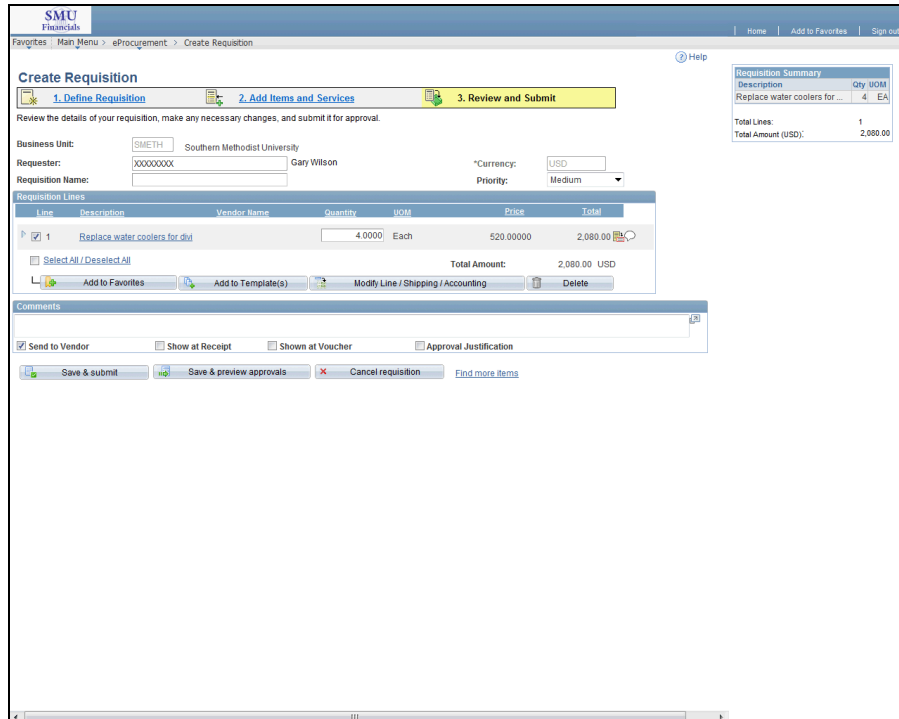
Total Lines: 1
Total Amount (USD): 3,599.99


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



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

Training Guide eProcurement



SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University

Requester: XXXXXXXX Gary Wilson *Currency: USD

Requisition Name: Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Replace water coolers for dht		4.0000	Each	520.00000	2,080.00

☐ Consolidate with other Reqs ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: *Quantity: 4.0000 Price: 520.00000

Status: Active *Ship To: MSAJOURN-S Modify Onetime Address

Attention To: Gary Wilson

*Distribute By: Qty SpeedChart:

Line	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	MAIN	4.0000	50	2,080.00	SMETH

Total Amount: 2,080.00 USD

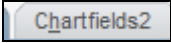
☒ Select All / Deselect All

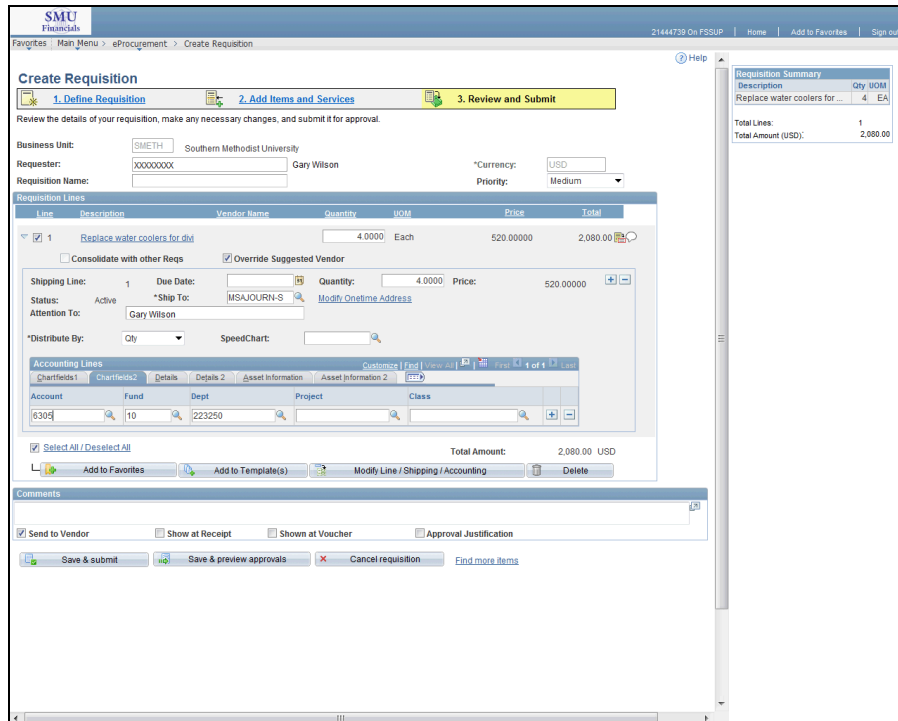
Add to Favorites | Add to Template(s) | Modify Line / Shipping / Accounting | Delete




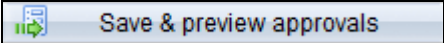
Comments

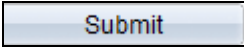
☒ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

Save & submit | Save & preview approvals | Cancel requisition | Find more items

Step	Action
3.	Click the Chartfields2 tab. 
4.	Enter the desired information into the Account field.



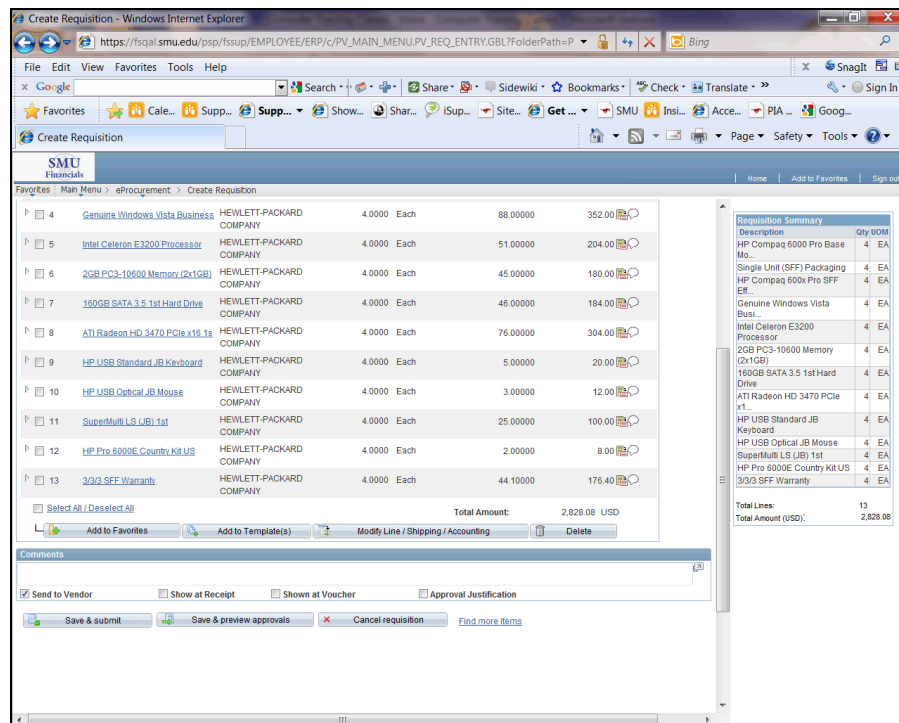
Step	Action
5.	Return to the Chartfields1 tab. 
6.	Click the Add a new row button. 
7.	A new row has been added and the remaining percent was automatically generated. Review the Percent field and adjust if necessary. (Additional lines can also be added if needed.)
8.	Click the Chartfields 2 tab. 
9.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

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


Split Item Costs: Multiple Line Items


Procedure

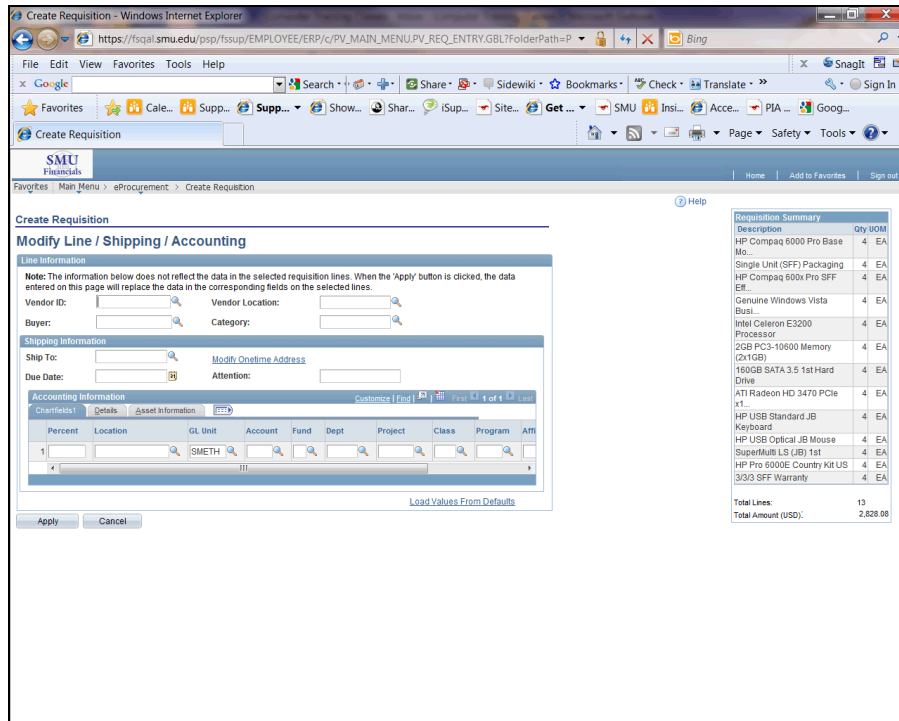
This topic will explain how to use two or more Dept (org #'s) to pay for multiple items on a requisition.


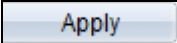



Line Item	Description	Quantity	Unit	Price	Total
4	Genuine Windows Vista Business	4.0000	Each	88.00000	352.00
5	Intel Celeron E3200 Processor	4.0000	Each	51.00000	204.00
6	2GB PC3-10600 Memory (2x1GB)	4.0000	Each	45.00000	180.00
7	160GB SATA 3.5 1st Hard Drive	4.0000	Each	46.00000	184.00
8	ATI Radeon HD 3470 PCIe x16 1s	4.0000	Each	76.00000	304.00
9	HP USB Standard JB Keyboard	4.0000	Each	5.00000	20.00
10	HP USB Optical JB Mouse	4.0000	Each	3.00000	12.00
11	SuperMulti LS (JB) 1st	4.0000	Each	25.00000	100.00
12	HP Pro 6000E Country Kit US	4.0000	Each	2.00000	8.00
13	3/3/3 SFF Warranty	4.0000	Each	44.10000	176.40
Total Amount:				2,828.08 USD	

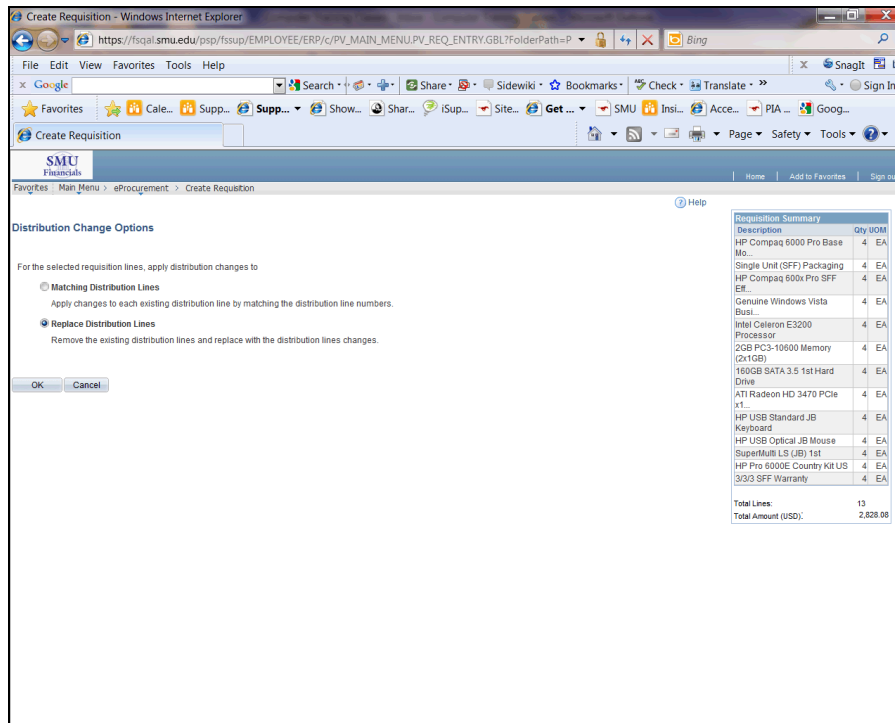
Step	Action
1.	<p>In order to complete this task you must be on the Review and Submit page.</p> <p>Two options are available when splitting charges for multiple line items. To split charges only for <u>specific line items</u>, select the desired lines.</p> <p>To split charges directly among all line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

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



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

Step	Action
13.	Click the Replace Distribution Lines option. 



Distribution Change Options

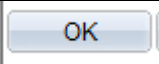
For the selected requisition lines, apply distribution changes to

☐ Matching Distribution Lines
 Apply changes to each existing distribution line by matching the distribution line numbers.

☒ Replace Distribution Lines
 Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel




Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 6000 Pro SFF ET...	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1...	4	EA
HP USB Standard JB	4	EA
Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3/3 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

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

Manage Requisitions

Procedure

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

Step	Action
1.	Click the Main Menu button. 
2.	Click the eProcurement menu. 
3.	Click the Manage Requisitions link. 
4.	Requesters and Approvers can view requisitions they have created or ones for which they have approval responsibility. You can utilize the Search Requisitions box to enter specific search criteria.
5.	Under the Status listing, you may find requisitions labeled with one of the following descriptions: <ul style="list-style-type: none"> •Open - Requisition created but not submitted. •Pending - Submitted but is waiting for some level of approval. •Approved - Approved and forwarded to Purchasing. •Denied - Denied at some level of the approval process. •Canceled - Canceled by the requester from the Manage Requisition page. •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.

SMU Financials

Home | Add to Favorites | Sign out

Manage Requisitions

[New Window](#) [Help](#) [Customize Page](#) [http](#)

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SMETH Requisition Name:

Requestion ID: Request Status: All but Complete

Date From: 11/24/2010 Date To: 12/01/2010

Requester: 21444739 Entered By: PO ID:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Requisition ID	Requisition Line	BU	Date	Status	Total	Action	Go
0000000241	0000000241	SMETH	11/30/2010	Pending	2,080.00 USD	<Select Action>	Go
0000000240	Computers for 4 new emp...	SMETH	11/30/2010	Denied	2,828.08 USD	<Select Action>	Go
0000000239	0000000239	SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
0000000238	0000000238	SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
0000000237	0000000237	SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
0000000236	0000000236	SMETH	11/29/2010	Pending	2,644.26 USD	<Select Action>	Go
0000000235	0000000235	SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
0000000234	0000000234	SMETH	11/29/2010	Open	50.00 USD	<Select Action>	Go
0000000233	0000000233	SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
0000000232	0000000232	SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
0000000230	Projector for departmen...	SMETH	11/29/2010	Pending	2,614.26 USD	<Select Action>	Go
0000000225	TEST	SMETH	11/29/2010	Pending	1.00 USD	<Select Action>	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tractions](#) [Manage Receipts](#) [Requisition Report](#)

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

SMU
Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Manage Requisitions

New Window | Help | Customize Page | http

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SMETH

Request Name:

Requestion ID:

Request Status: All but Complete

Date From: 11/24/2010

Date To: 12/01/2010

Requester: 21444739

Entered By:

PO ID:

Search | Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Requisition ID	Requisition Line Item	BU	Date	Status	Total		
P 0000000241	0000000241	SMETH	11/30/2010	Pending	2,980.00 USD	<Select Action>	Go
P 0000000240	Computers for 4 new emp...	SMETH	11/30/2010	Denied	2,828.08 USD	<Select Action>	Go
P 0000000239	0000000239	SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
P 0000000238	0000000238	SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
P 0000000237	0000000237	SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
P 0000000236	0000000236	SMETH	11/29/2010	Pending	2,644.26 USD	<Select Action>	Go
P 0000000235	0000000235	SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
P 0000000234	0000000234	SMETH	11/29/2010	Open	50.00 USD	<Select Action>	Go
P 0000000233	0000000233	SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
P 0000000232	0000000232	SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
P 0000000231	0000000231	SMETH	11/29/2010	Pending	5,228.52 USD	<Select Action>	Go
P 0000000230	Projector for departmen...	SMETH	11/29/2010	Pending	2,614.26 USD	<Select Action>	Go
P 0000000225	TEST	SMETH	11/29/2010	Pending	1.00 USD	<Select Action>	Go

View Approval
View Printable Version

[Create New Requisition](#) | [Review Change Request](#) | [Review Change Tracking](#) | [Manage Receipts](#) | [Requisition Report](#)

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

SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Manage Requisitions

Approval Status

Business Unit: SMETH
 Requisition ID: 0000000230
 Requisition Name: Projector for departmental use
 Requester: Gary Wilson
 Entered on: 11/29/2010
 Status: Pending
 Priority: Medium
 Requester's Justification: No justification entered by requester.

Total Amount: 2,614.26 USD

[View printable version](#)

Line Information

Review/Edit Approvers

Requisition Approval

Projector for departmental use: Pending

Supervisor Approval

Pending

Approver 1
SMU Requisition Approver

Not Routed

Approver 2
SMU Requisition Approver

[Return to Manage Requisitions](#)

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

SMU Financials

Home | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Manage Requisitions

New Window | Help | Customize Page | http

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SMETH
 Requisition ID:
 Date From: 11/24/2010
 Requester: 21444739
 Requisition Name:
 Request Status: All but Complete
 Date To: 12/01/2010
 Entered By:
 PO ID:

Search Clear

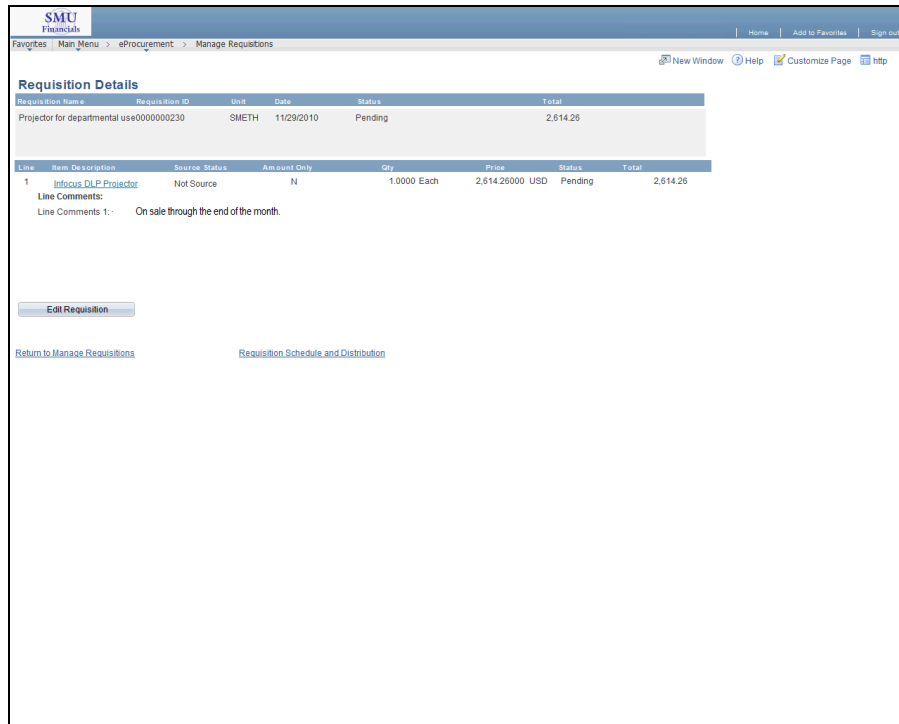
Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Total		
0000000241		SMETH	11/30/2010	Pending	2,080.00 USD	<Select Action>	Go
0000000240	Computers for 4 new emp...	SMETH	11/30/2010	Denied	2,828.08 USD	<Select Action>	Go
0000000238		SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
0000000238		SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
0000000237		SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
0000000236		SMETH	11/29/2010	Pending	2,644.26 USD	<Select Action>	Go
0000000235		SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
0000000234		SMETH	11/29/2010	Open	50.00 USD	<Select Action>	Go
0000000233		SMETH	11/29/2010	Pending	10.00 USD	<Select Action>	Go
0000000232		SMETH	11/29/2010	Open	10.00 USD	<Select Action>	Go
0000000231		SMETH	11/29/2010	Pending	5,228.52 USD	<Select Action>	Go
0000000230	Projector for departmen...	SMETH	11/29/2010	Pending	2,614.26 USD	<Select Action>	Go
0000000225	TEST	SMETH	11/29/2010	Pending	1.00 USD	<Select Action>	Go

Create New Requisition | Review Change Request | Review Change Tracking | Manage Receipts | Requisition Report

Step	Action
11.	View Requisition Comments: Click the desired Requisition link.



SMU eProcurement

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Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
Projector for departmental use0000000230		SMETH	11/29/2010	Pending	2,614.26

Line	Item Description	Source	Status	Amount Only	Qty	Price	Status	Total
1	Infocus DLP Projector	Not Source	N		1,0000 Each	2,614.26000 USD	Pending	2,614.26

Line Comments:

Line Comments 1: On sale through the end of the month.

[Edit Requisition](#)

[Return to Manage Requisitions](#) [Requisition 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 Collapse Section triangular button. <input type="checkbox"/>
14.	The Request Lifespan: section is displayed. Click on the highlighted links to display information.

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Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SMETH | Request Name: |
 Requisition ID: | Request Status: All but Complete |
 Date From: 11/24/2010 | Date To: 12/01/2010 |
 Requester: 21444739 | Entered By: | PO ID: |

Search | Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Requisition	Requisition Line	BU	Date	Status	Total	
0000000241	0000000241	SMETH	11/30/2010	Pending	2,080.00 USD	<Select Action> Go
0000000240	Computers for 4 new emp...	SMETH	11/30/2010	Denied	2,828.08 USD	<Select Action> Go
0000000239	0000000239	SMETH	11/29/2010	Open	10.00 USD	<Select Action> Go
0000000238	0000000238	SMETH	11/29/2010	Open	10.00 USD	<Select Action> Go
0000000237	0000000237	SMETH	11/29/2010	Pending	10.00 USD	<Select Action> Go
0000000236	0000000236	SMETH	11/29/2010	Pending	2,644.26 USD	<Select Action> Go
0000000235	0000000235	SMETH	11/29/2010	Pending	10.00 USD	<Select Action> Go
0000000234	0000000234	SMETH	11/29/2010	Open	50.00 USD	<Select Action> Go
0000000233	0000000233	SMETH	11/29/2010	Pending	10.00 USD	<Select Action> Go
0000000232	0000000232	SMETH	11/29/2010	Open	10.00 USD	<Select Action> Go
0000000231	0000000231	SMETH	11/29/2010	Pending	5,228.52 USD	<Select Action> Go
0000000230	Projector for departmen...	SMETH	11/29/2010	Pending	2,614.26 USD	<Select Action> Go

Requester: Gary Wilson | Entered By: Gary Wilson | Priority: Medium

Requisition Lifespan: Request | Approval | Inventory | Purchase Orders | Change Request | Receiving | Returns | Invoice | Payment

Request Lifespan:

Line	Description	Status	Price	Quantity	UOM	Vendor	
1	Infocus DLP Projector	Pending Approval	2,614.26000 USD	1.0000	EA	DREAMTECH	Cancel X
0000000225	TEST	SMETH	11/29/2010	Pending	1.00 USD	<Select Action> Go	

Step	Action
15.	A requisition can be canceled by clicking the Cancel x button.

SMU Financials

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New Window | Help | Customize Page | http

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SMETH | Request Name: |
 Requisition ID: | Request Status: All but Complete |
 Date From: 11/24/2010 | Date To: 12/01/2010 |
 Requester: 21444739 | Entered By: | PO ID: |

Search | Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.


Requisition	Requisition Line	BU	Date	Status	Total	
0000000241	0000000241	SMETH	11/30/2010	Pending	2,080.00 USD	<Select Action> Go
0000000240	Computers for 4 new emp...	SMETH	11/30/2010	Denied	2,828.08 USD	<Select Action> Go
0000000239	0000000239	SMETH	11/29/2010	Open	10.00 USD	<Select Action> Go
0000000238	0000000238	SMETH	11/29/2010	Open	10.00 USD	<Select Action> Go
0000000237	0000000237	SMETH	11/29/2010	Pending	10.00 USD	<Select Action> Go
0000000236	0000000236	SMETH	11/29/2010	Pending	2,644.26 USD	<Select Action> Go
0000000235	0000000235	SMETH	11/29/2010	Pending	10.00 USD	<Select Action> Go
0000000234	0000000234	SMETH	11/29/2010	Open	50.00 USD	<Select Action> Go
0000000233	0000000233	SMETH	11/29/2010	Pending	10.00 USD	<Select Action> Go
0000000232	0000000232	SMETH	11/29/2010	Open	10.00 USD	<Select Action> Go
0000000231	0000000231	SMETH	11/29/2010	Pending	5,228.52 USD	<Select Action> Go
0000000230	Projector for departmen...	SMETH	11/29/2010	Pending	2,614.26 USD	<Select Action> Go

Requester: Gary Wilson | Entered By: Gary Wilson | Priority: Medium

Requisition Lifespan: Request | Approval | Inventory | Purchase Orders | Change Request | Receiving | Returns | Invoice | Payment

Request Lifespan:

Line	Description	Status	Price	Quantity	UOM	Vendor	
1	Infocus DLP Projector	Pending Approval	2,614.26000 USD	1.0000	EA	DREAMTECH	Cancel X
0000000225	TEST	SMETH	11/29/2010	Pending	1.00 USD	<Select Action> Go	

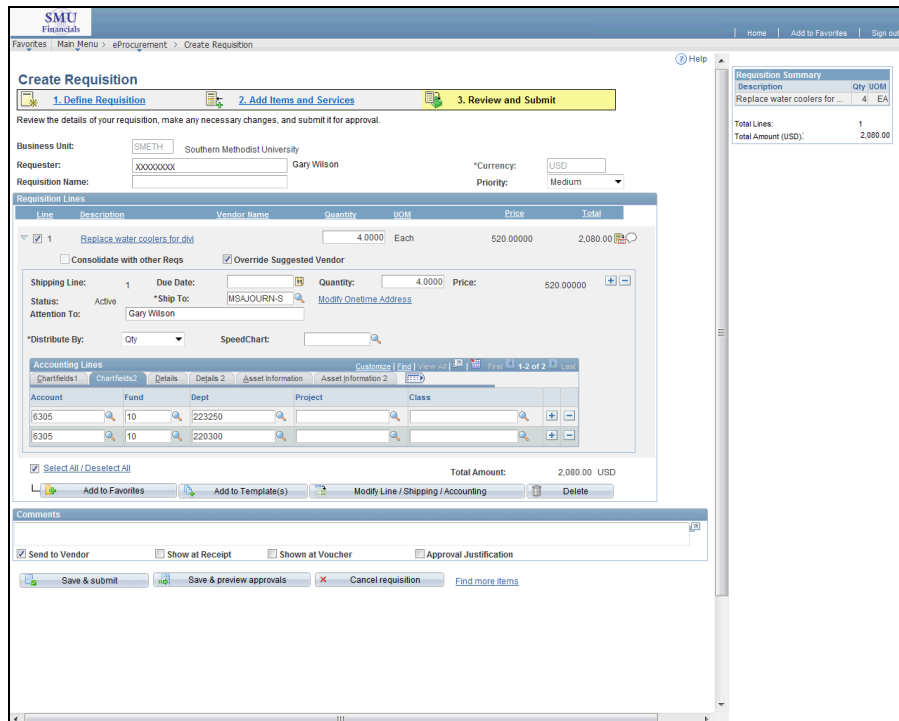
Step	Action
16.	To return to the Manage Requisitions page, click the Collapse Section button 
17.	End of Procedure.


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.



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

SMU Financials

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Help

Shipping Address

Line	Replace water coolers for dist	Quantity	Price
1	Replace water cooler	4.0000 Each	520.00000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	MSAJOURNA	4.0000		USD 2,080.00

Address

Country: United States Prefix:

Address 1: Phone: Postal Search:

Address 2: Ext:

Fax:

City:

Country: Postal:

State: Texas

OK Cancel Load Default Shipping Address

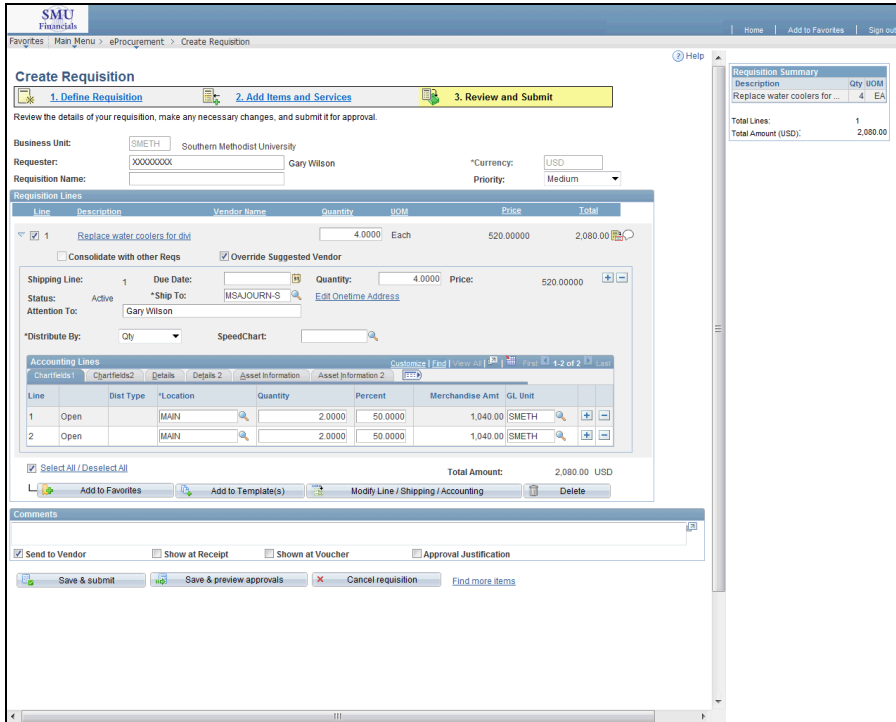
Requisition Summary

Description	Qty	Unit
Replace water coolers for	4	EA

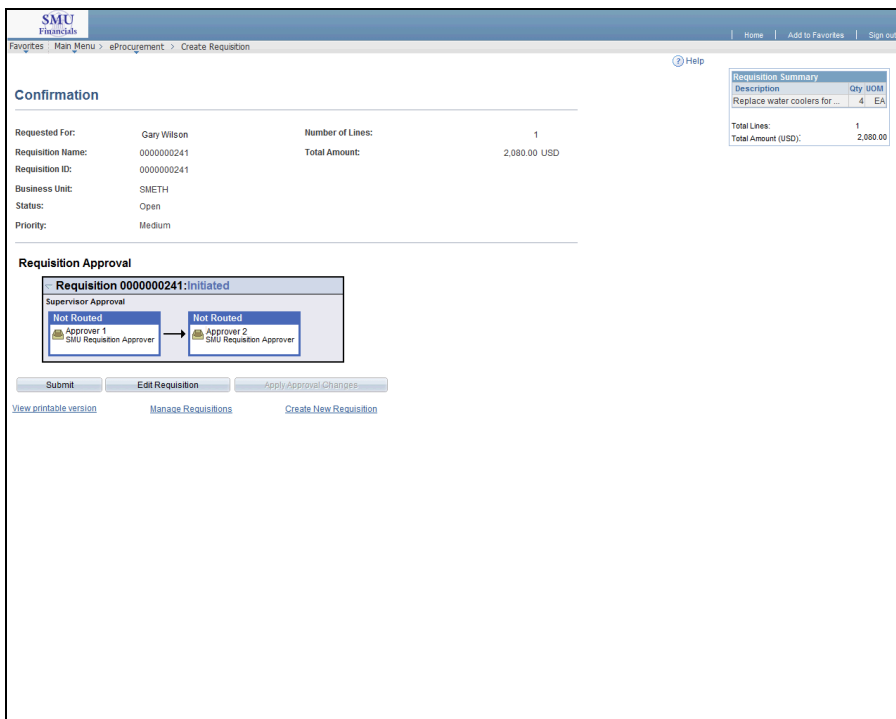
Total Lines: 1

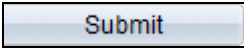
Total Amount (USD): 2,080.00

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 OK button. <div>OK</div>

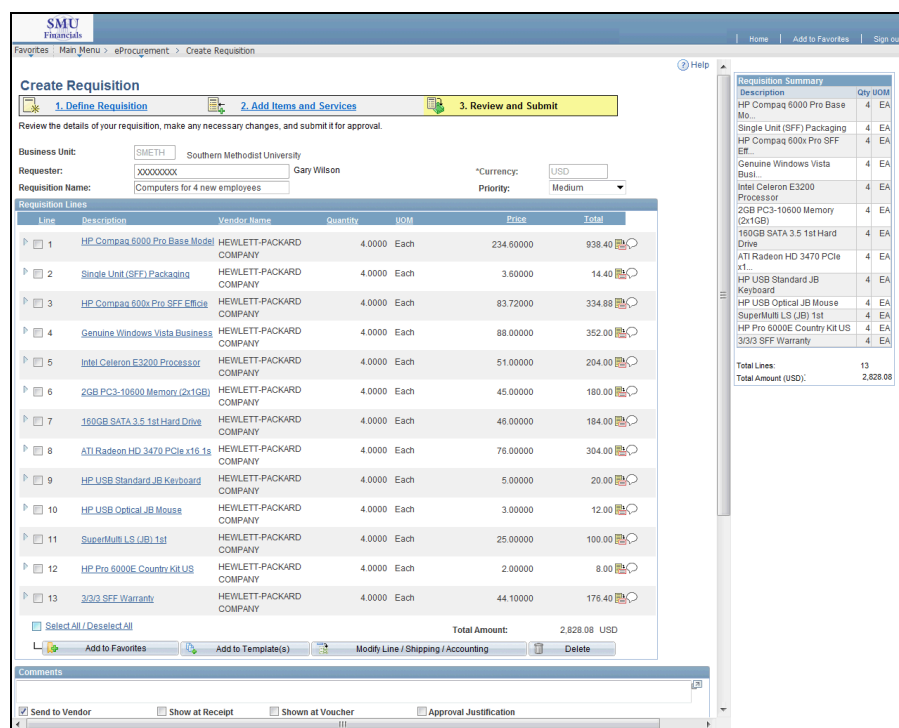


Step	Action
7.	Click the Save & preview approvals button.



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

Change Shipping Address: Multiple Line Items Procedure



SMU Financials

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1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University
Requester: XXXXXXXX Gary Wilson
Requestion Name: Computers for 4 new employees
*Currency: USD
Priority: Medium


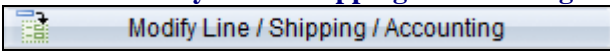
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	HP Compaq 6000 Pro Base Model	HEWLETT-PACKARD COMPANY	4.0000	Each	234.60000	938.40
2	Single Unit (SFF) Packaging	HEWLETT-PACKARD COMPANY	4.0000	Each	3.60000	14.40
3	HP Compaq 600x Pro SFF E850a	HEWLETT-PACKARD COMPANY	4.0000	Each	83.72000	334.88
4	Genuine Windows Vista Business	HEWLETT-PACKARD COMPANY	4.0000	Each	88.00000	352.00
5	Intel Celeron E3200 Processor	HEWLETT-PACKARD COMPANY	4.0000	Each	51.00000	204.00
6	2GB PC3-10600 Memory (2x1GB)	HEWLETT-PACKARD COMPANY	4.0000	Each	45.00000	180.00
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	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
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 SFF Warranty	HEWLETT-PACKARD COMPANY	4.0000	Each	44.10000	176.40
					Total Amount:	2,828.08 USD

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Model	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF E850a	4	EA
Genuine Windows Vista Business	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x16 1s	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

Comments

☒ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

Step	Action
1.	In order to complete this task you must first be on the Review and Submit 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 Select All / Deselect All option. Click the Select All / Deselect All option. 
2.	Click the Modify Line / Shipping / Accounting button. 

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Help

Create Requisition

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location:

Buyer: Category:

Shipping Information

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Information

Chartfields: Details Asset Information

Percent	Location	GL Unit	Account	Fund	Dept	Project	Class	Program	Alt
1		SMETH							

[Load Values From Defaults](#)

Apply Cancel

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF EE	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1...	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/33 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

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

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Help

Shipping Address

Business Unit: SMETH Requisition Date: 12/01/2010
 Requisition ID: NEXT Status: Open

Address

Country: United States Prefix:
 Address 1: Phone:
 Address 2: Ext:
 Address 3: Fax:
 City:
 County: Postal:
 State:

OK Cancel

Requisition Summary	
Description	Qty UOM
HP Compaq 6000 Pro Base Mo...	4 EA
Single Unit (SFF) Packaging	4 EA
HP Compaq 600x Pro SFF E...	4 EA
Genuine Windows Vista Busi...	4 EA
Intel Celeron E3200 Processor	4 EA
2GB PC3-10600 Memory (2x1GB)	4 EA
160GB SATA 3.5 1st Hard Drive	4 EA
ATI Radeon HD 3470 PCIe x1...	4 EA
HP USB Standard JB Keyboard	4 EA
HP USB Optical JB Mouse	4 EA
SuperMulti LS (JB) 1st	4 EA
HP Pro 6000E Country Kit US	4 EA
3/30 SFF Warranty	4 EA
Total Lines:	13
Total Amount (USD):	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 City field.

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Help

Shipping Address

Business Unit: SMETH

Requisition Date: 12/01/2010

Requisition ID: NEXT

Status: Open

Address

Country: United States

Address 1:

Address 2:

Address 3:

City:

County:

State: Texas

Prefix:

Phone:

Ext:

Fax:

Postal:

OK

Cancel

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF EF	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
16GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3Y3 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

Step	Action
7.	Enter the State: .

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Help

Shipping Address

Business Unit: SMETH

Requisition Date: 12/01/2010

Requisition ID: NEXT

Status: Open

Address

Country: United States

Address 1:

Address 2:

Address 3:

City:

County:

State: Texas

Prefix:

Phone:

Ext:

Fax:

Postal:

OK

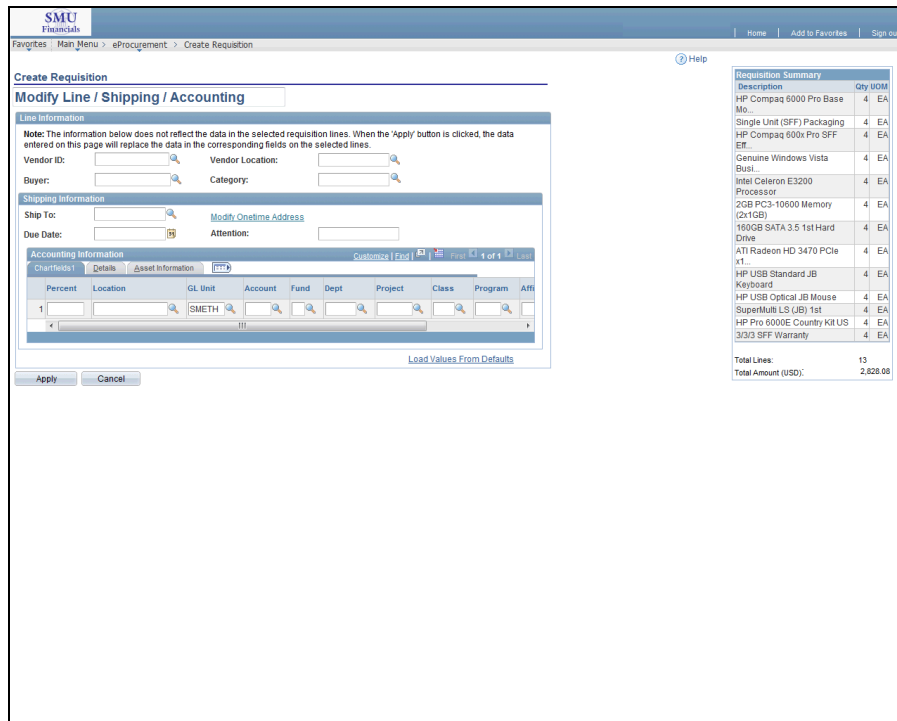
Cancel

Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF EF	4	EA
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
16GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3Y3 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

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

OK



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Create Requisition

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location:

Buyer: Category:

Shipping Information

Ship To: Modify Onetime Address

Due Date: Attention:

Accounting Information

Chartfields: Details Asset Information

Customize / Find 1 of 1

Percent	Location	GL Unit	Account	Fund	Dept	Project	Class	Program	Aff
1		SMETH							

Load Values From Defaults

Apply Cancel

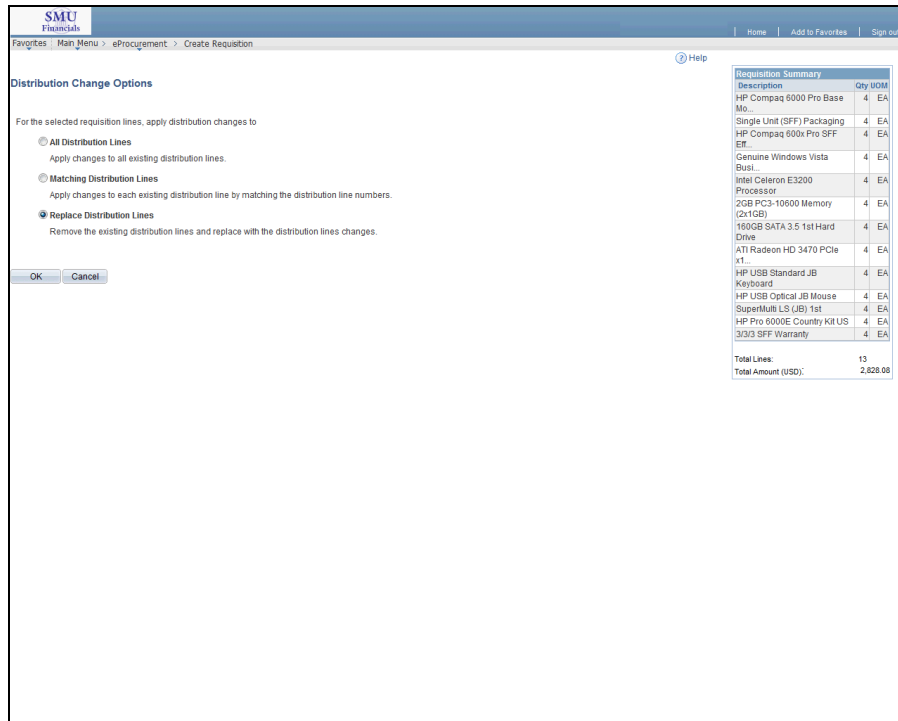
Requisition Summary

Description	Qty	UOM
HP Compaq 6000 Pro Base Mo.	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF ET	4	EA
Genuine Windows Vista Busi.	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/30 SFF Warranty	4	EA

Total Lines: 13
Total Amount (USD): 2,828.08

Step	Action
10.	Click the Apply button.

Apply



Distribution Change Options

For the selected requisition lines, apply distribution changes to:

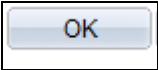
☐ All Distribution Lines
Apply changes to all existing distribution lines.

☐ Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

☒ Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

Requisition Summary		
Description	Qty	UOM
HP Compaq 6000 Pro Base Mo...	4	EA
Single Unit (SFF) Packaging	4	EA
HP Compaq 600x Pro SFF	4	EA
EF		
Genuine Windows Vista Busi...	4	EA
Intel Celeron E3200 Processor	4	EA
2GB PC3-10600 Memory (2x1GB)	4	EA
160GB SATA 3.5 1st Hard Drive	4	EA
ATI Radeon HD 3470 PCIe x1...	4	EA
HP USB Standard JB Keyboard	4	EA
HP USB Optical JB Mouse	4	EA
SuperMulti LS (JB) 1st	4	EA
HP Pro 6000E Country Kit US	4	EA
3/3/3 SFF Warranty	4	EA
Total Lines:	13	
Total Amount (USD):	2,828.08	

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

Price Justification and Comments

Updating Comments on a Requisition

Procedure

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

Training Guide eProcurement



SMU Financials

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Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University

Requester: XXXXXXXX Waters, Gary *Currency: USD

Requisition Name: Projector for VP office Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Infocus DLP Projector	DREAMTECH	2.0000	Each	2,614.26000	5,228.52

☐ Consolidate with other Reqs ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: *Ship To: MSAJOURN-S Modify Onetime Address

Status: Active Attention To: Waters, Gary

*Distribute By: Qty SpeedChart:


Line	Description	Quantity	UOM	Price	Total
1	Open	2.0000	100.0000	5,228.52	SMETH

Total Amount: 5,228.52 USD

Comments

☒ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification

Save & submit Save & preview approvals Cancel requisition Find more items

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

SMU Financials

Sign out

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Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Infocus DLP Projecto	2.0000	Each	2,614.26000 USD

On sale through the end of the month.

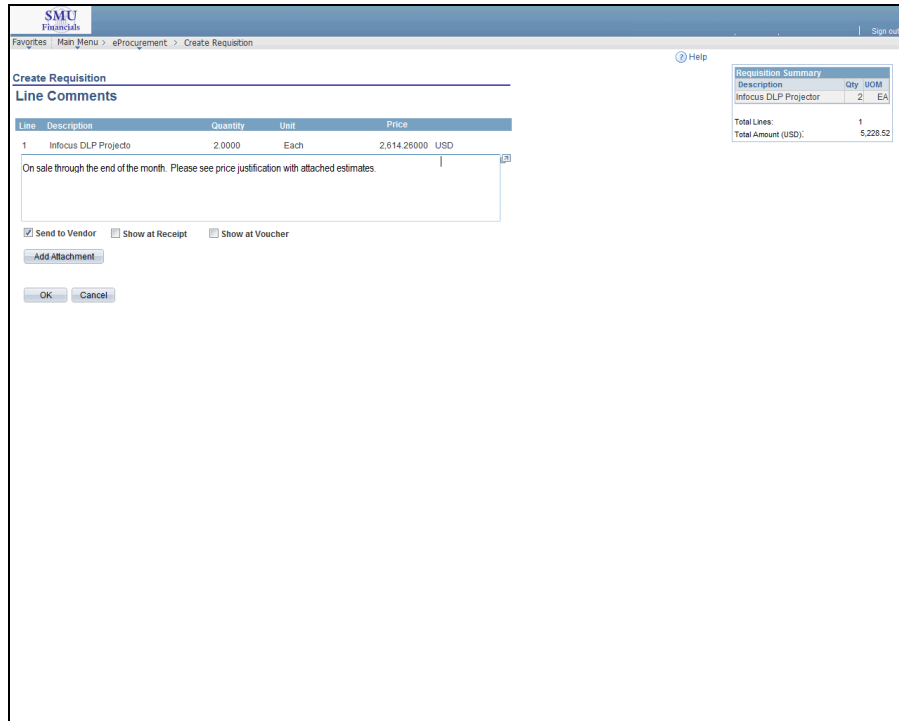
☒ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

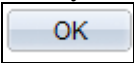
Add Attachment

OK Cancel

Main Content

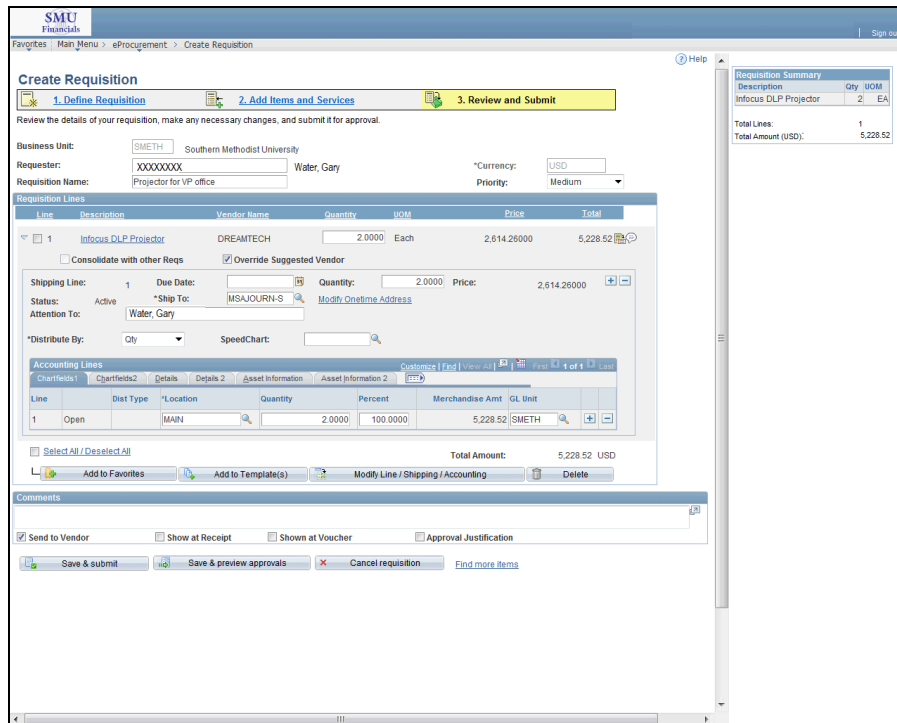
Step	Action
3.	Add, remove or edit comment text into the Line Comments field as needed.



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

Attaching a file: Adding Price Justification Procedure

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



SMU Financials
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Create Requisition
1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SMETH Southern Methodist University
Requester: XXXXXXXX Water, Gary *Currency: USD
Requisition Name: Projector for VP office Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Infocus DLP Projector	DREAMTECH	2.0000	Each	2,614.26000	5,228.52

☐ Consolidate with other Reqs ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: *Ship To: MSAJOURN-S Quantity: 2.0000 Price: 2,614.26000
Status: Active Attention To: Water, Gary *Distribute By: City SpeedChart:

Accounting Lines
Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2


Line	Diet Type	Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	MAIN	2.0000	100.0000	5,228.52	SMETH

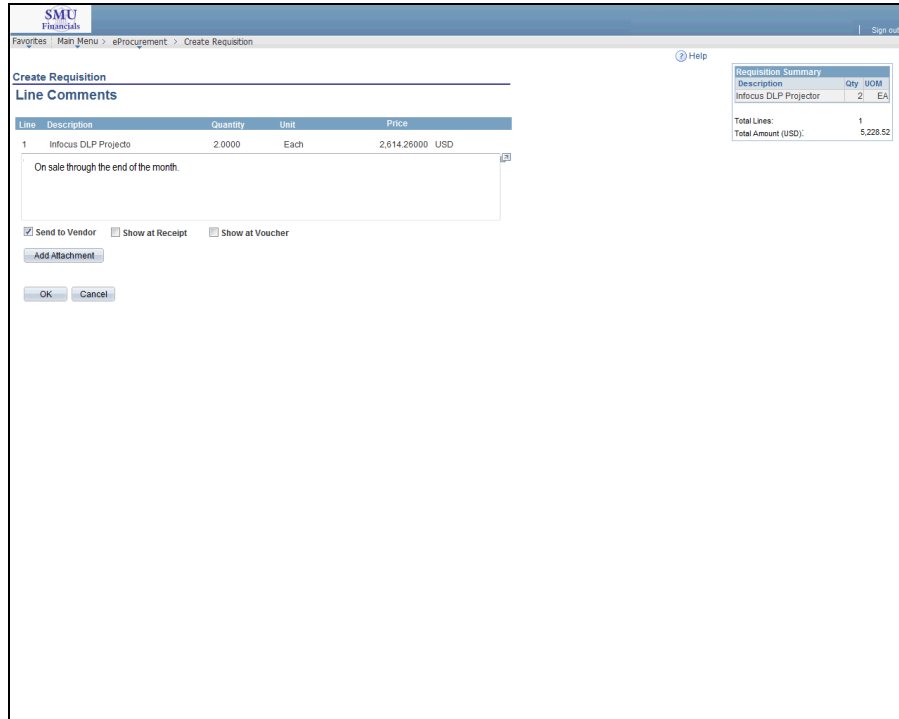
Total Amount: 5,228.52 USD

☐ Select All / Deselect All
Add to Favorites | Add to Template(s) | Modify Line / Shipping / Accounting | Delete

Comments
☒ 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. 



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Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Infocus DLP Projector	2.0000	Each	2,614.26000 USD

On sale through the end of the month.

☒ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

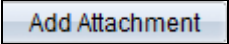

[Add Attachment](#)

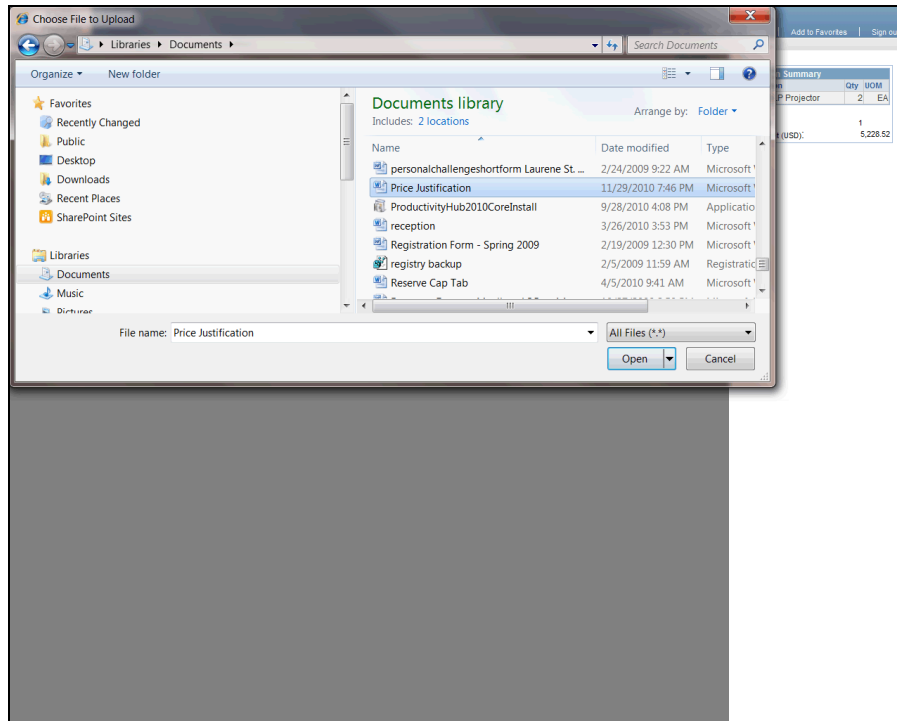
[OK](#) [Cancel](#)

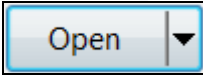
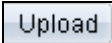
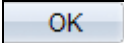
Requisition Summary

Description	Qty	UOM
Infocus DLP Projector	2	EA

Total Lines: 1
Total Amount (USD): 5,228.52

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





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

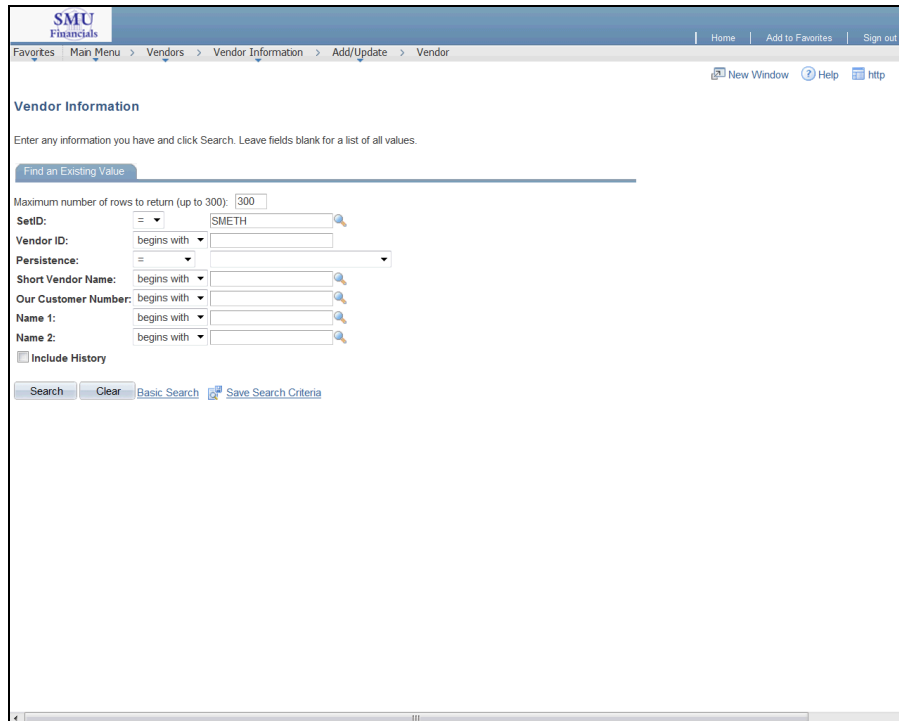
Working with Vendors

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



The screenshot shows the 'Vendor Information' search page in the SMU Financials system. The page has a blue header with the SMU Financials logo and navigation links: Home, Add to Favorites, and Sign out. Below the header is a breadcrumb trail: Favorites > Main Menu > Vendors > Vendor Information > Add/Update > Vendor. There are also links for New Window, Help, and http.

The main section is titled 'Vendor Information' and includes the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button.

The search criteria section includes the following fields and options:

- Maximum number of rows to return (up to 300): 300
- SetID: = 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

At the bottom of the search criteria section are buttons for Search, Clear, Basic Search, and Save Search Criteria.

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 out

Favorites | Main Menu | Vendors | Vendor Information | Add/Update | Vendor

Vendor Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

SetID: SMETH

Vendor ID: begins with

Persistence: begins with

Short Vendor Name: begins with

Our Customer Number: begins with

Name 1: PARK CITIES

Name 2: begins with

☐ Include History

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-22 of 22 Last

SetID	Vendor ID	Persistence	Short Vendor Name	Our Customer Number	Name 1	Name 2
SMETH0000008116	Regular	PARKCITE-001	(blank)	PARK CITIES ACID	PARK CITIES ASSOC CHILDREN W/LRNG DISAB	
SMETH0000006443	Regular	PARKCITE-012	(blank)	PARK CITIES CHIROSPORT	DRA HEAL THSOURCE OF HIGHLAND PARK CORP	
SMETH0000038938	Regular	PARKCITES-008	(blank)	PARK CITIES ELECTRICAL COMPANY	(blank)	
SMETH0000042929	Regular	PARK CITE-002	(blank)	PARK CITIES FAMILY DENTISTRY, PA	(blank)	
SMETH0000008117	Regular	PARKCITE-002	(blank)	PARK CITIES FORD	(blank)	
SMETH0000018502	Regular	PARKCITES-001	(blank)	PARK CITIES FORD	DO NOT USE//SEE VENDOR # 8117	
SMETH0000024310	Regular	PARK CITE-001	(blank)	PARK CITIES FORD	DO NOT USE//SEE VENDOR # 8117	
SMETH0000044837	Regular	PARK-008	(blank)	PARK CITIES IMAGING, L.P.	(blank)	
SMETH0000008118	Regular	PARKCITE-003	(blank)	PARK CITIES INN	(blank)	
SMETH0000028449	Regular	PARKCITES-005	(blank)	PARK CITIES LEARNING DISABILITIES ASSN	PARK CITIES LDA	
SMETH0000027561	Regular	PARKCITES-004	(blank)	PARK CITIES MILLWORK INC	(blank)	
SMETH0000008119	Regular	PARKCITE-004	(blank)	PARK CITIES NEWS	(blank)	
SMETH0000059946	Regular	PARKCITES-011	(blank)	PARK CITIES ORIENTAL RUGS	(blank)	
SMETH0000056214	Regular	PARKCITES-010	(blank)	PARK CITIES PASSPORT,LLC	DRA PREMIUM PASSPORT	
SMETH0000008120	Regular	PARKCITE-005	(blank)	PARK CITIES PEOPLE	***SEE VENDOR 8294***	
SMETH0000055669	Regular	PETALS-001	(blank)	PARK CITIES PETALS	(blank)	

Step	Action
7.	Review your search results carefully.
	Note: The Name 2 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 Financials

Favorites | Main Menu | Vendors | Vendor Information | Add/Update | Vendor

Identifying Information | Address | Contacts

SetID: SMETH Vendor Name 1: PARK CITIES ELECTRICAL COMPANY
 Vendor ID: 0000038938 Vendor Name 2: PARKCITIES-008
 Vendor Short Name: PARKCITIES
 Classification: Outside Party
 HCM Class:
 Persistence: Regular
 Vendor Status: Approved

☐ Withholding
☒ Open For Ordering
☐ VAT Registration

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

Additional ID Numbers
 Duplicate Invoice Settings
 Government Classifications
 Standard Industry Codes
 Additional Reporting Elements
 Comments

Expand All Collapse All

Return to Search Previous in List Next in List Notify Update/Display Include History

Identifying Information | Address | Contacts

Main Content

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

SMU Financials

Favorites | Main Menu | Vendors | Vendor Information | Add/Update | Vendor

Identifying Information | Address | Contacts

SetID: SMETH Vendor Name 1: PARK CITIES ELECTRICAL COMPANY
 Vendor ID: 0000038938 Vendor Name 2: PARKCITIES-008
 Vendor Short Name: PARKCITIES
 Classification: Outside Party
 HCM Class:
 Persistence: Regular
 Vendor Status: Approved

☐ Withholding
☒ Open For Ordering
☐ VAT Registration

Expand All Collapse All

Vendor Relationships

☐ Corporate Vendor ☐ InterUnit Vendor
 Corporate SetID: SMETH InterUnit Vendor ID:
 Corporate Vendor ID: 0000038938 PARK CITIES ELECTRICAL COMPANY

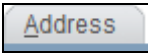
Create Bill To Customer
☐ Create Bill To Customer

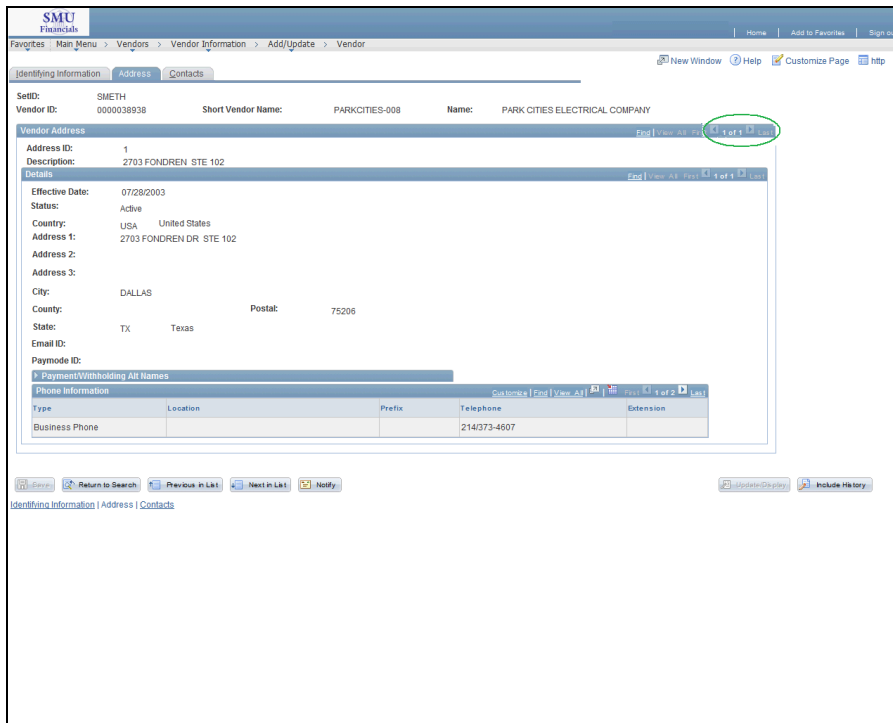
Additional ID Numbers
 Duplicate Invoice Settings
 Government Classifications
 Standard Industry Codes
 Additional Reporting Elements
 Comments

Expand All Collapse All

Return to Search Previous in List Next in List Notify Update/Display Include History

Identifying Information | Address | Contacts

Step	Action
10.	Click the Address tab. 



SMU Financials

Home | Add to Favorites | Sign out

Navigation: New Window | Help | Customize Page | http

Identifying Information | **Address** | Contacts

SetID: SMETH
Vendor ID: 0000038938
Short Vendor Name: PARKCITIES-008
Name: PARK CITIES ELECTRICAL COMPANY

Vendor Address End | View All | First | Previous | Next | Last

Address ID: 1
Description: 2703 FONDREN STE 102

Details End | View All | First | Previous | Next | Last

Effective Date: 07/28/2003
Status: Active
Country: USA United States
Address 1: 2703 FONDREN DR STE 102
Address 2:
Address 3:
City: DALLAS
County: Postalt: 75206
State: TX Texas
Email ID:
Payment ID:

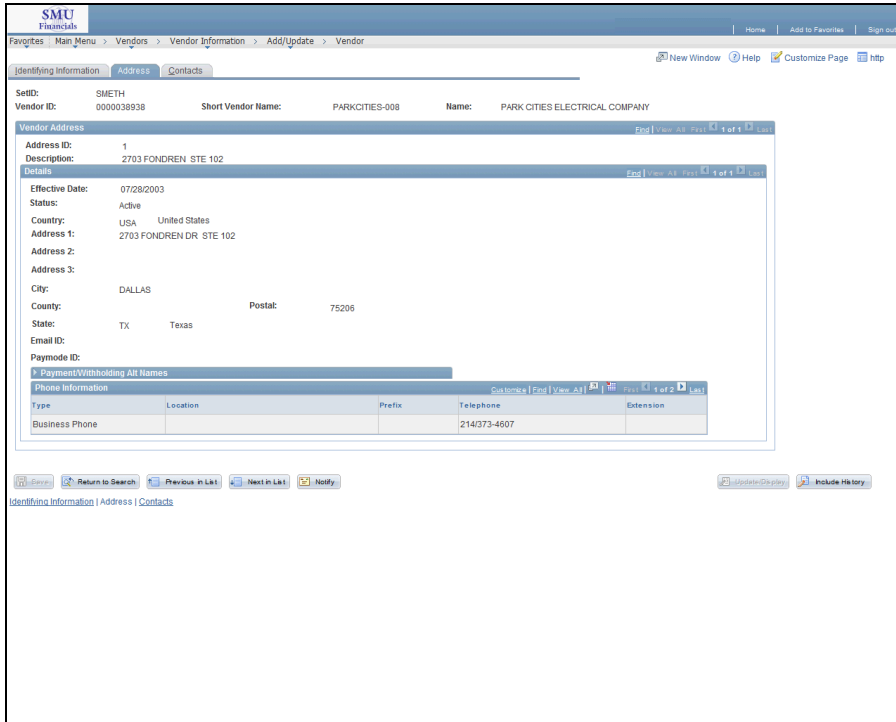
Phone Information Customize | End | View All | First | Previous | Next | Last

Type	Location	Prefix	Telephone	Extension
Business Phone			214373-4607	

Return to Search | Previous in List | Next in List | Notify

Identifying Information | Address | Contacts

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



SMU Financials

Home | Add to Favorites | Sign out

Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Identifying Information Address Contacts

SetID: SMETH Vendor ID: 0000038938 Short Vendor Name: PARKCITIES-008 Name: PARK CITIES ELECTRICAL COMPANY

Vendor Address

Address ID: 1
Description: 2703 FONDREN STE 102

Details

Effective Date: 07/28/2003
Status: Active
Country: USA United States
Address 1: 2703 FONDREN DR STE 102
Address 2:
Address 3:
City: DALLAS
Country: TX Texas Postal: 75206
Email ID:
Payment ID:



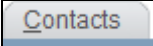
Payment/Withholding All Names

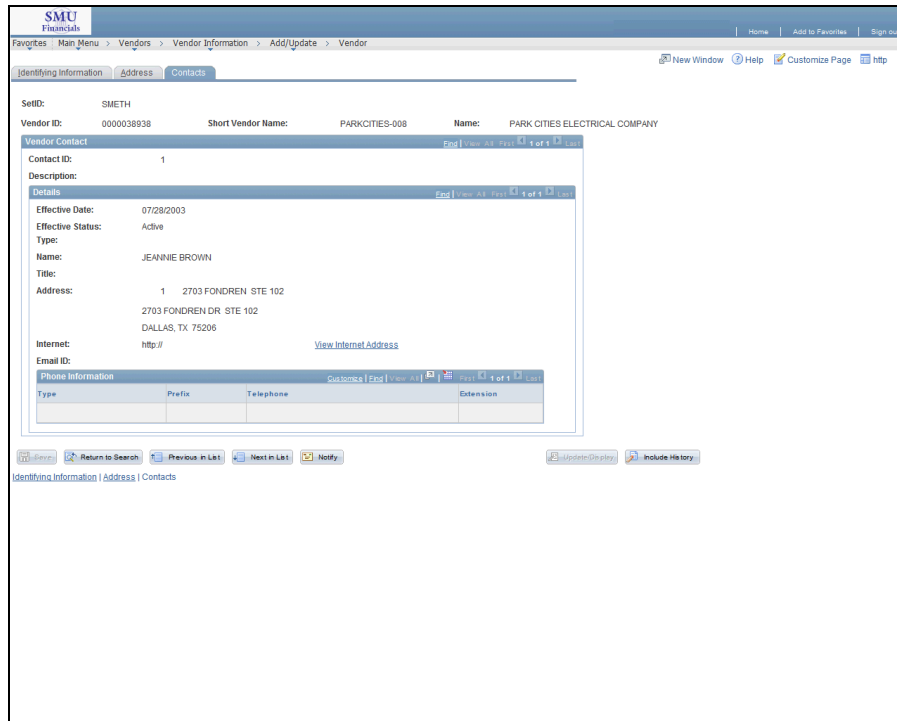
Phone Information

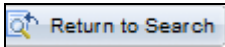
Type	Location	Prefix	Telephone	Extension
Business Phone			214/373-4607	

Return to Search Previous in List Next in List Notify

Identifying Information | Address | Contacts

Step	Action
12.	<p>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.</p> <p>Click the View All link.</p> 
13.	<p>A scroll area is now available. Use the vertical scroll arrows to see the multiple phone types.</p> 
14.	<p>Click the Contacts tab.</p> 

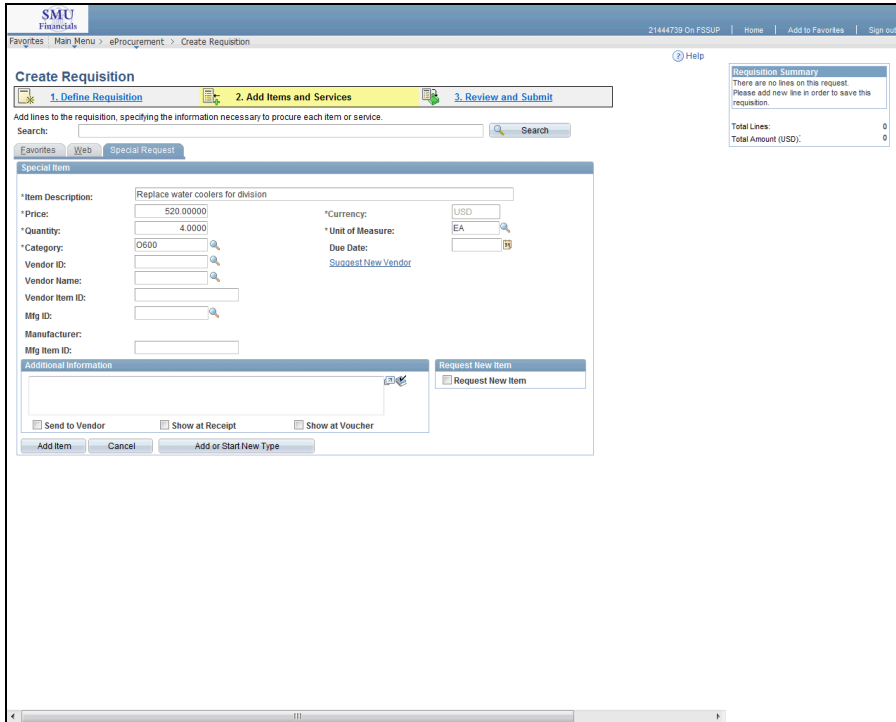


Step	Action
15.	<p>Vendor contacts are displayed if available.</p> <p>Click the Return to Search button.</p> 
16.	<p>End of Procedure.</p>

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.



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Special Request

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category:

Vendor ID:

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

[Suggest New Vendor](#)

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Request New Item

☐ Request New Item

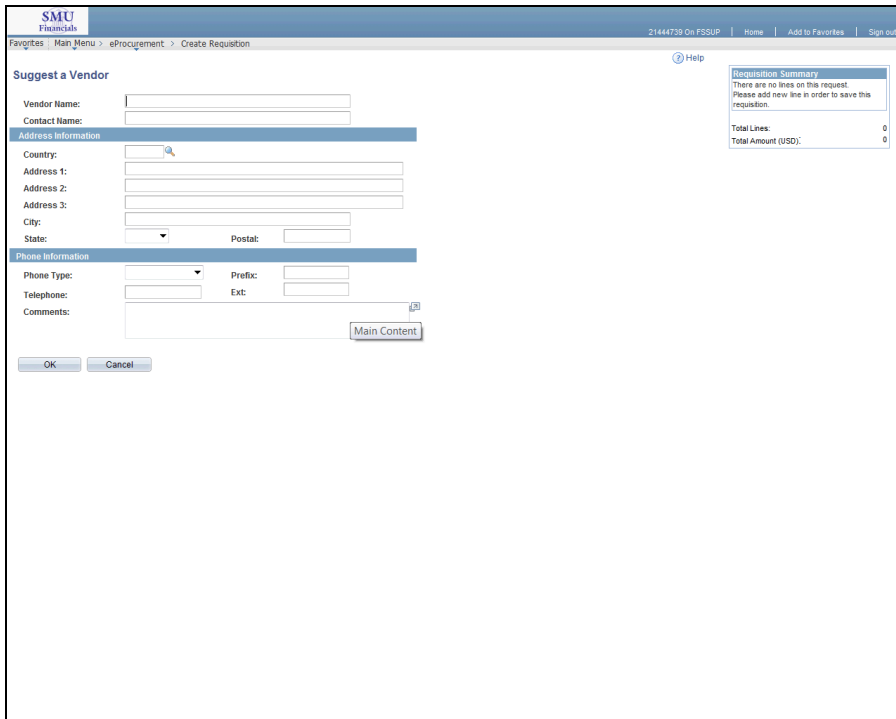
Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

Total Amount (USD): 0

Step	Action
1.	On the Special Request page, click the Suggest New Vendor link. Suggest New Vendor



Suggest a Vendor

Vendor Name:

Contact Name:

Address Information

Country:

Address 1:

Address 2:

Address 3:

City:

State: Postal:

Phone Information

Phone Type: Prefix:

Telephone: Ext:



Comments:

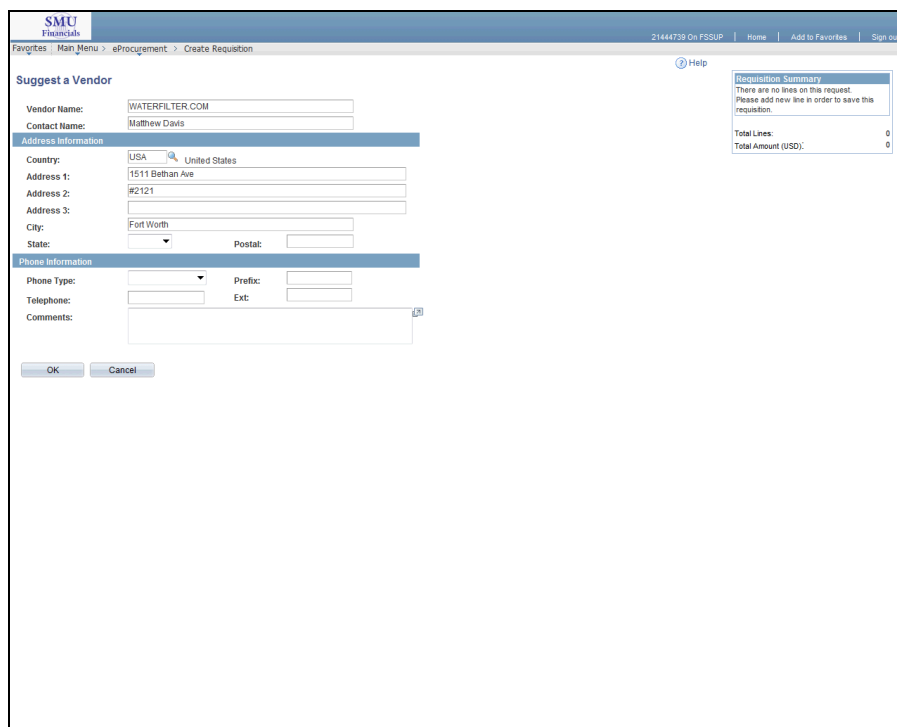
Requisition Summary


There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

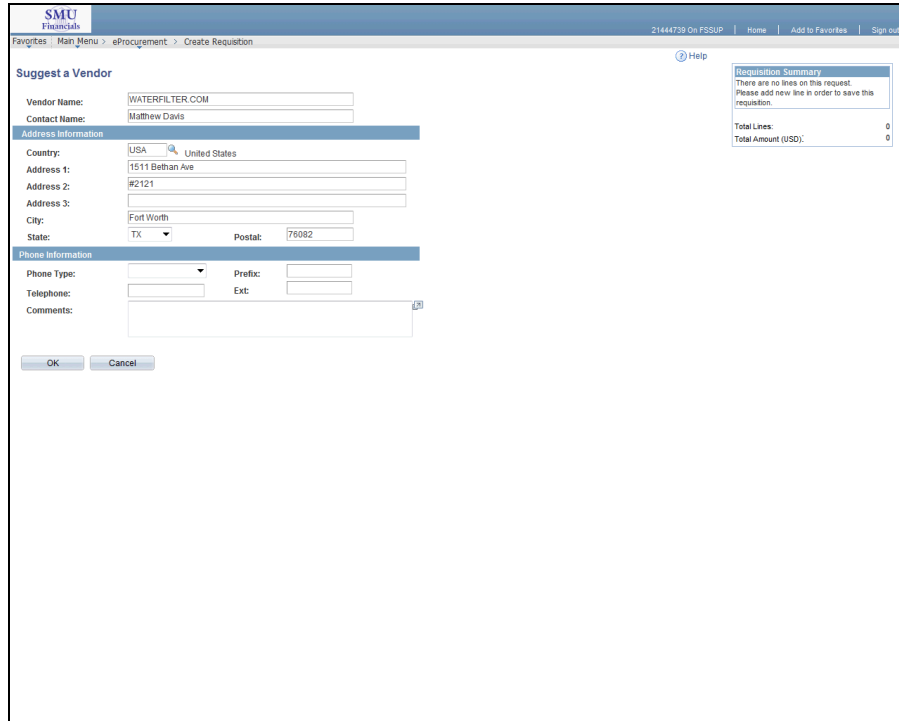
Total Amount (USD): 0

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



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

Step	Action
10.	Enter the desired information into the Postal: field.



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

SMU Financials 21444759 On FSSUP Home Add to Favorites Sign out

Favorites Main Menu eProcurement Create Requisition Help

Suggest a Vendor

Vendor Name: WATERFILTER.COM
Contact Name: Matthew Davis

Address Information

Country: USA United States
Address 1: 1511 Bethan Ave
Address 2: #2121
Address 3:
City: Fort Worth
State: TX Postal: 76082

Phone Information

Phone Type: Business Phone Prefix:
Telephone: Ext:
Comments:

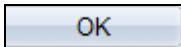
OK Cancel

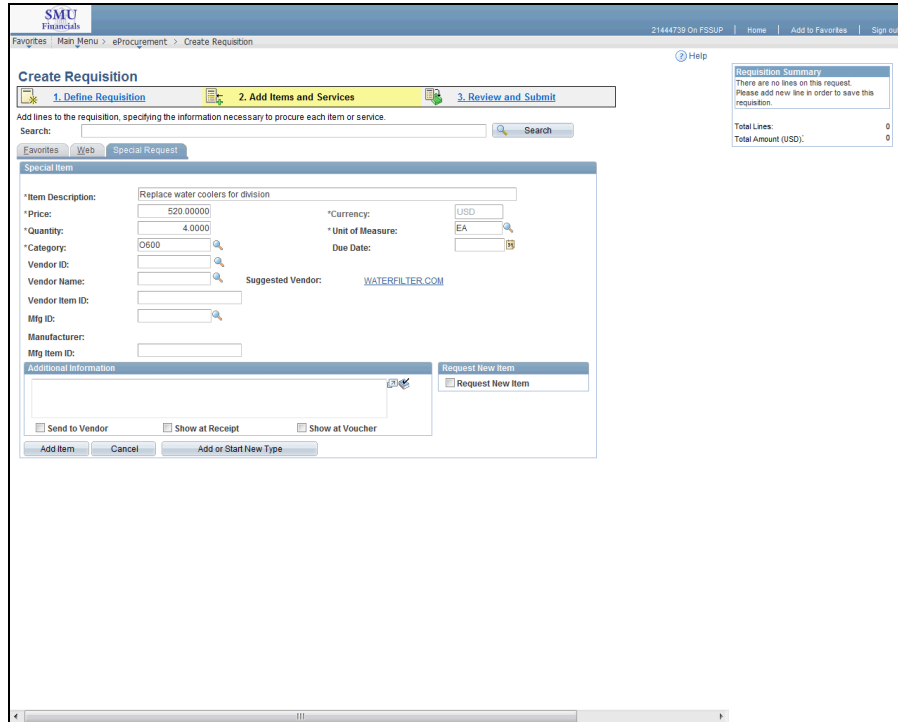
Requisition Summary

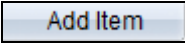

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Step	Action
12.	Enter the phone number into the Telephone field.
13.	Click the OK button.



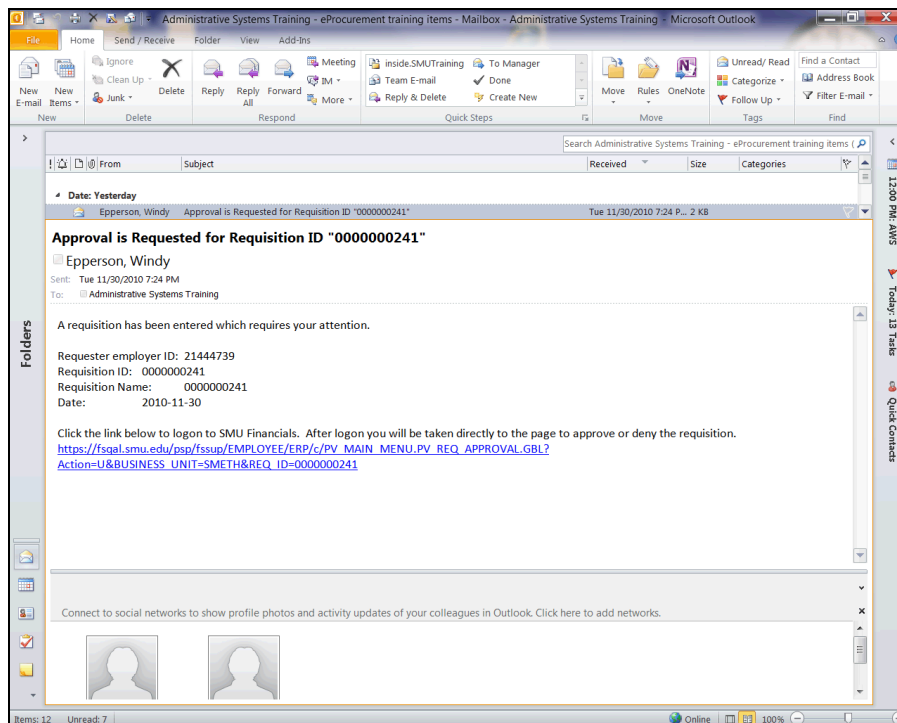



Step	Action
14.	Continue entering the information for your requisition. Upon completion, click the Add Item button. 
15.	You will receive a message indicating that Purchasing must approve this vendor. Click the OK button to continue. 
16.	Complete your requisition by clicking on 3. Review and Submit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

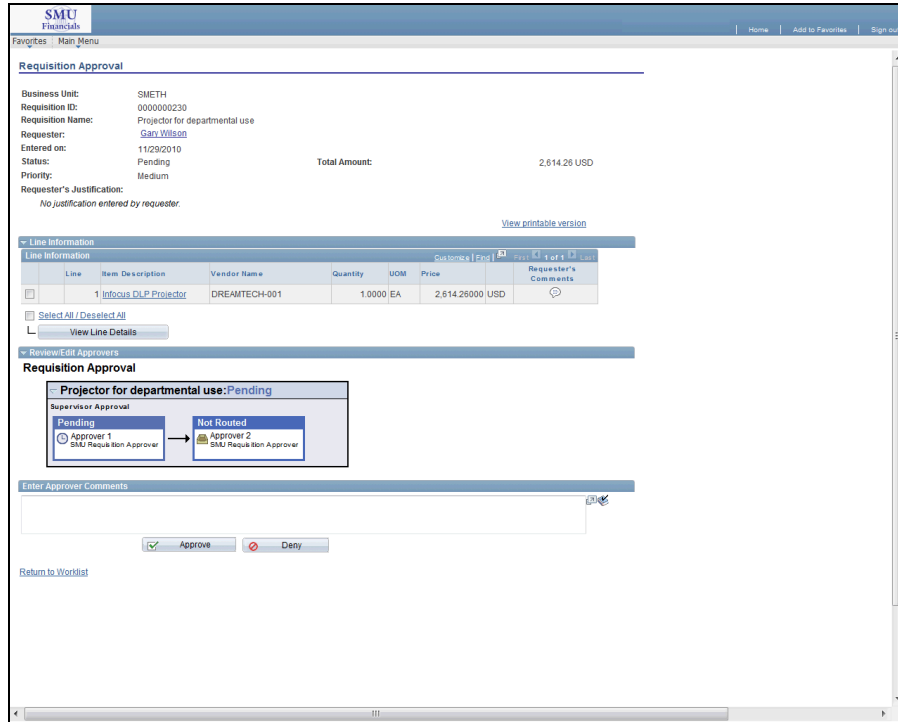
Approving Requisitions

First Approver

Procedure



Step	Action
1.	<p>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.</p> <p>Click the Message link from the Approval Request notification email.</p>
2.	<p>Enter your Login ID and Password.</p> <p>Click the Sign In button.</p> <div data-bbox="344 1556 456 1598" data-label="Image">  </div>



SMU Financials

Home | Add to Favorites | Sign out

Requisition Approval

Business Unit: SMETH
 Requisition ID: 0000000230
 Requisition Name: Projector for departmental use
 Requester: Gary Wilson
 Entered on: 11/29/2010
 Status: Pending
 Priority: Medium
 Requester's Justification: No justification entered by requester.

Total Amount: 2,614.26 USD

[View printable version](#)

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price	Requester's Comments
1	Infocus DLP Projector	DREAMTECH-001	1.0000	EA	2,614.26000 USD	

☐ Select All / Deselect All

[View Line Details](#)

Review/Edit Approvers

Requisition Approval

Projector for departmental use: Pending


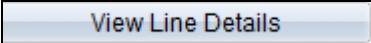
Supervisor Approval

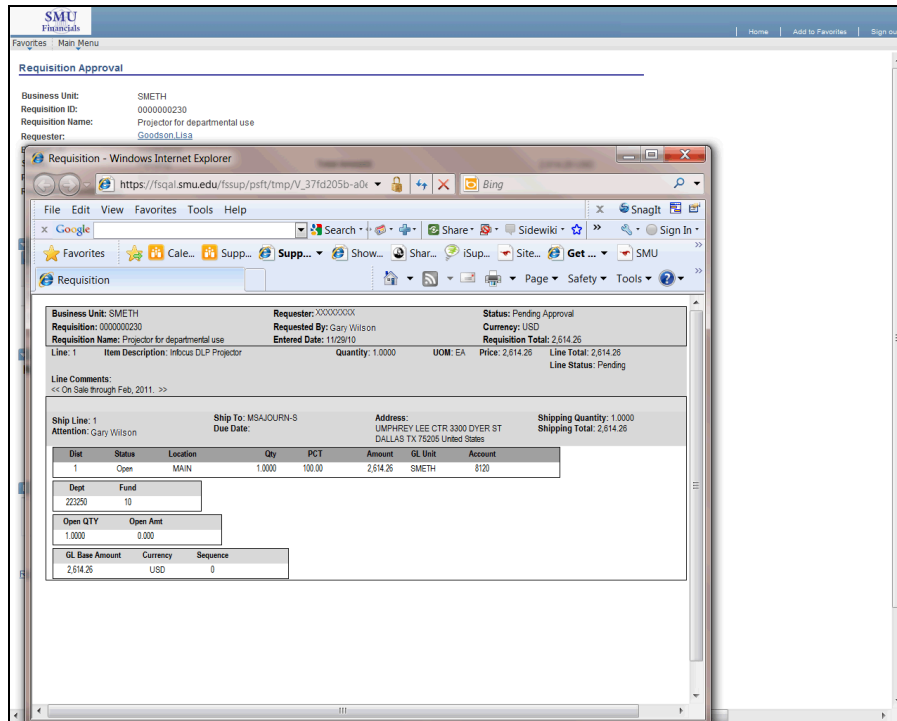
Pending → Not Routed



Approver 1: SMU Requisition Approver
 Approver 2: SMU Requisition Approver

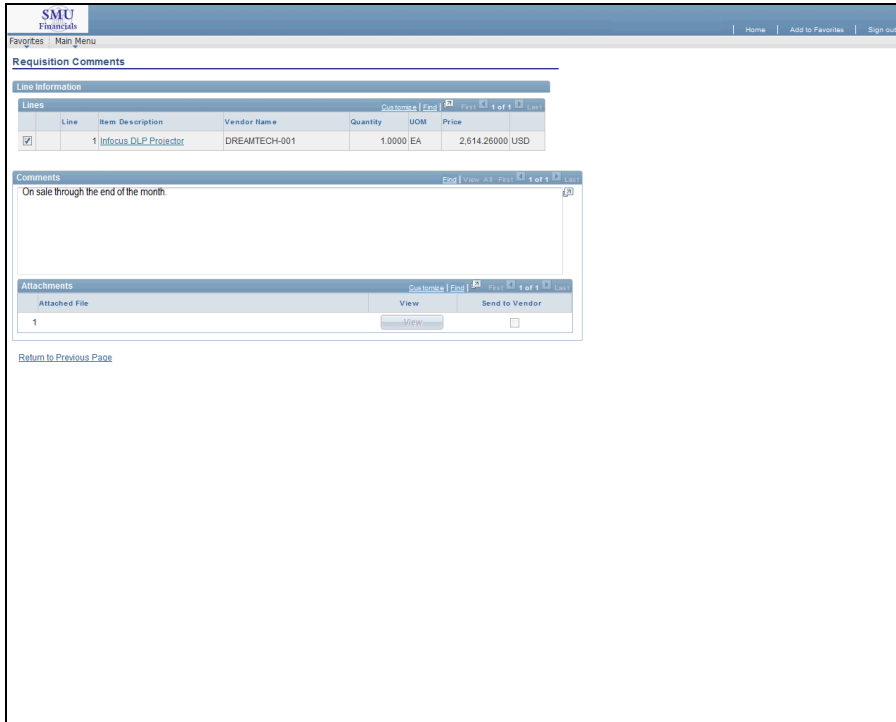
Enter Approver Comments

[Return to Worklist](#)

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



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



SMU Financials | Home | Add to Favorites | Sign out

Favorites | Main Menu

Requisition Comments

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price
1	Infocus DLP Projector	DREAMTECH-001	1.0000	EA	2,614.26000 USD

Comments

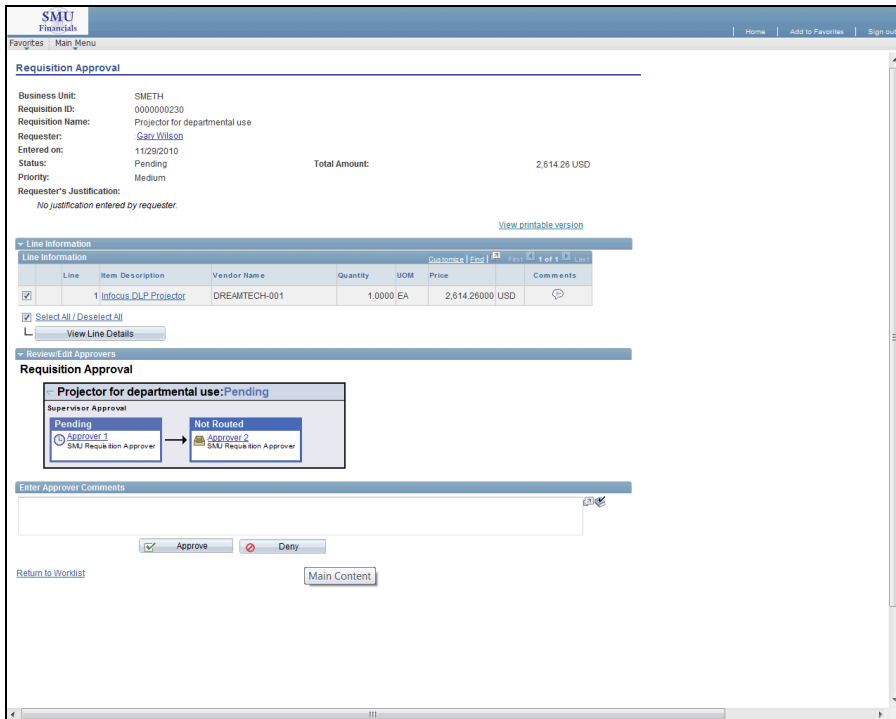
On sale through the end of the month.

Attachments

Attached File	View	Send to Vendor
1	View	<input type="checkbox"/>

[Return to Previous Page](#)

Step	Action
7.	Comment information displays. Click the Return to Previous Page link. Return to Previous Page



SMU Financials | Home | Add to Favorites | Sign out

Favorites | Main Menu

Requisition Approval

Business Unit: SMETH
 Requisition ID: 0000000230
 Requisition Name: Projector for departmental use
 Requester: Gary Wilson
 Entered on: 11/29/2010
 Status: Pending
 Priority: Medium
 Requester's Justification: No justification entered by requester.

Total Amount: 2,614.26 USD

[View printable version](#)

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price	Comments
1	Infocus DLP Projector	DREAMTECH-001	1.0000	EA	2,614.26000 USD	

☒ Select All / Deselect All
[View Line Details](#)

Requisition Approval

Projector for departmental use: Pending

Supervisor Approval

Pending → **Not Routed**

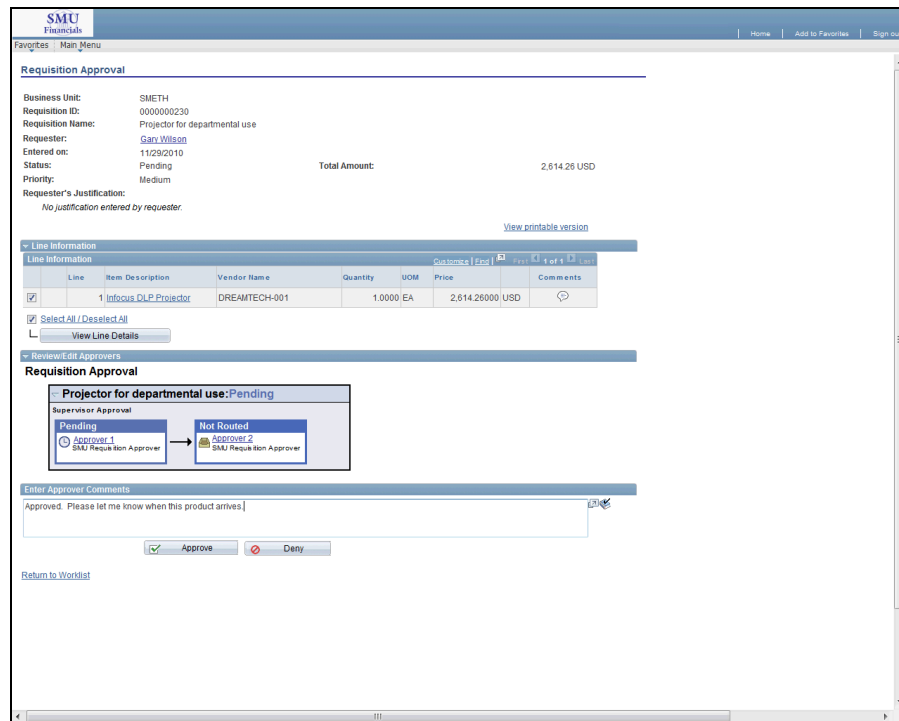
Approver 1: SMU Requisition Approver
 Approver 2: SMU Requisition Approver

Enter Approver Comments

☒ Approve ☐ Deny

[Return to Worklist](#) [Main Content](#)

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



SMU Financials

Requisition Approval

Business Unit: SMETH
 Requisition ID: 0000000230
 Requisition Name: Projector for departmental use
 Requester: Gary Wilson
 Entered on: 11/29/2010
 Status: Pending
 Priority: Medium
 Requester's Justification: No justification entered by requester.

Total Amount: 2,614.26 USD

View printable version

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price	Comments
1	Infocus DLP Projector	DREAMTECH-001	1.0000	EA	2,614.26000 USD	

Select All / Deselect All
 View Line Details

Review/Edit Approvers

Requisition Approval

Projector for departmental use: Pending

Supervisor Approval

Pending

Approver 1 SMU Requisition Approver

Not Routed


Approver 2 SMU Requisition Approver

Enter Approver Comments

Approved. Please let me know when this product arrives.

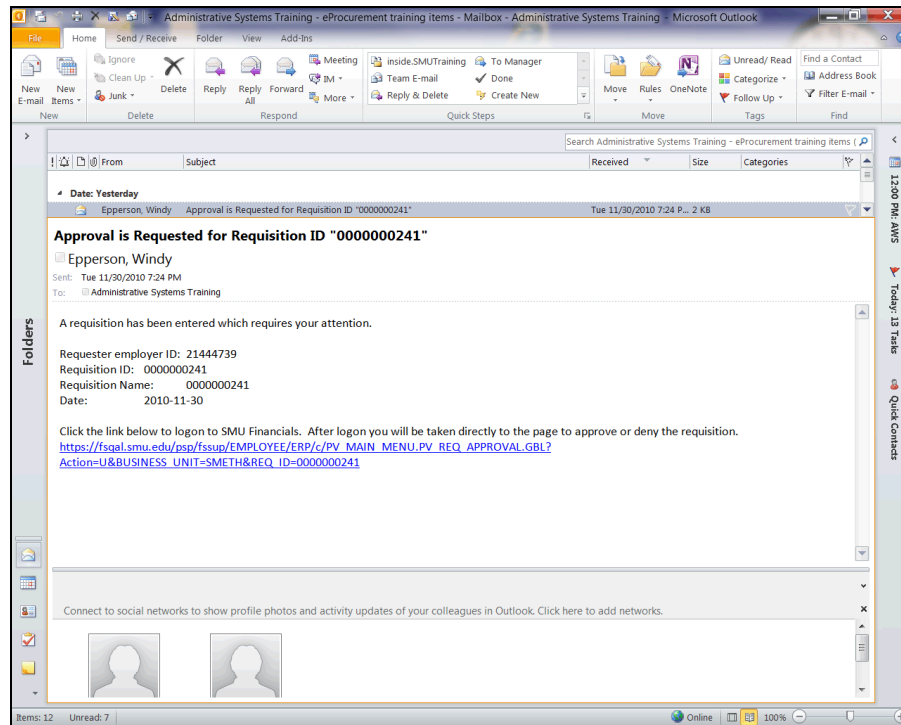
Approve Deny

Return to Worklist

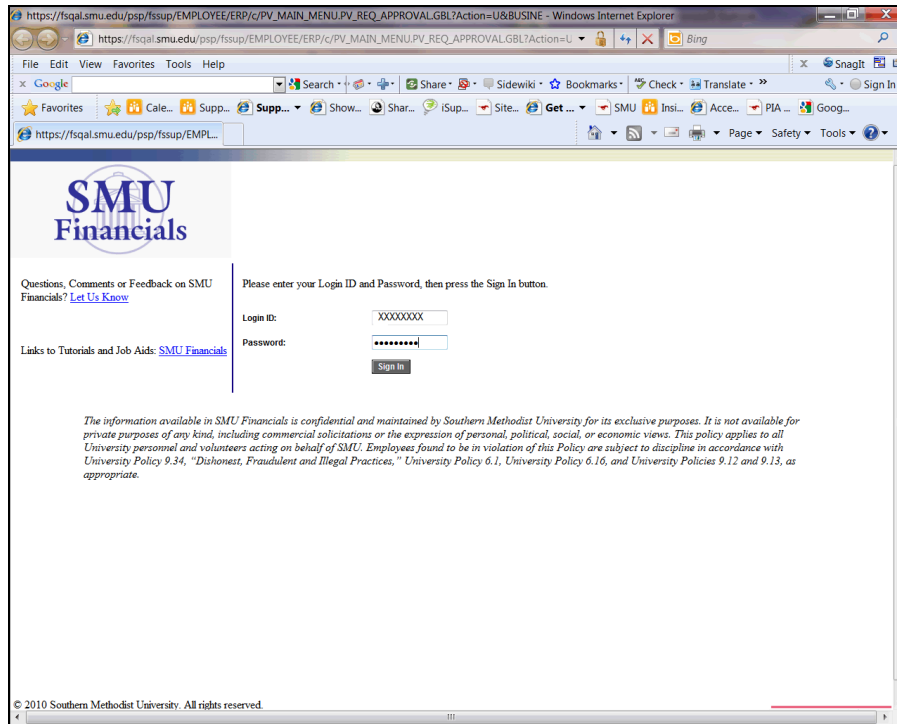
Step	Action
9.	Click the Approve or Deny button. 
10.	Once the first approver has reviewed the requisition, the approval path will indicate Approved or Denied . If a Second Approver is in the approval path, then an email will be sent to the next Approver on the path.
11.	End of Procedure.


Second Approver: Approving and Denying Requisitions

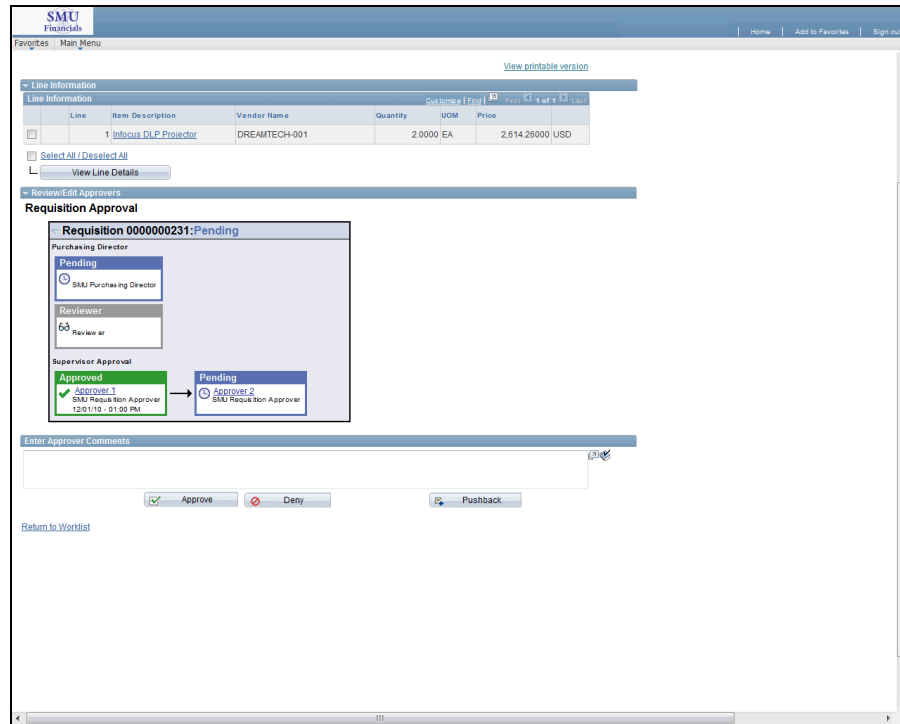
Procedure




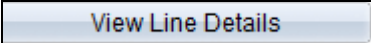
Step	Action
1.	<p>After the First Approver approves a requisition, an e-mail will be sent to the Second Approver notifying them they have a requisition to review.</p> <p>Click the Message link from the Approval Request notification e-mail.</p>

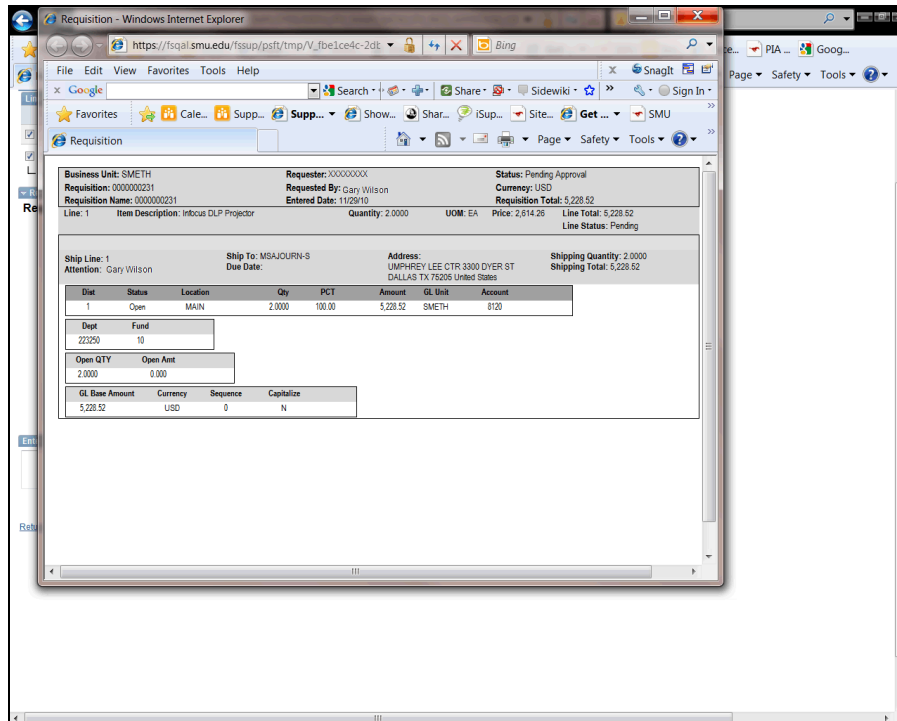


Step	Action
2.	<p>Enter your Login ID and Password.</p> <p>Click the Sign In button.</p> 



The screenshot displays the SMU eProcurement interface. At the top, there's a navigation bar with 'Home', 'Add to Favorites', and 'Sign out'. Below this is a 'Line Information' section with a table showing a single line item: 'Infocus DLP Projector' by 'DREAMTECH-001' with a quantity of 2,0000 EA and a price of 2,614.26000 USD. Below the table are buttons for 'Select All / Deselect All' and 'View Line Details'. The main section is titled 'Requisition Approval' and shows a flowchart for 'Requisition 000000231: Pending'. The flowchart includes a 'Purchasing Director' box (Pending), a 'Reviewer' box (Reviewer), and a 'Supervisor Approval' section with 'Approver 1' (Approved) and 'Approver 2' (Pending). At the bottom, there's an 'Enter Approver Comments' field and buttons for 'Approve', 'Deny', and 'Pushback'.

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



Requisition - Windows Internet Explorer

https://fsqsl.smu.edu/issup/psft/tmp/V/_fbc1ce4c-2d8...

Business Unit: SMETH Requester: XXXXXXXXX Status: Pending Approval
 Requisition: 0000000231 Requested By: Gary Wilson Currency: USD
 Requisition Name: 0000000231 Entered Date: 11/29/10 Requisition Total: 5,228.52

Line: 1 Item Description: Infocus DLP Projector Quantity: 2.0000 UOM: EA Price: 2,614.26 Line Total: 5,228.52
 Line Status: Pending

Ship Line: 1 Ship To: MSAJOURN-3 Address: UMPHREY LEE CTR 3300 DYER ST Shipping Quantity: 2.0000
 Attention: Gary Wilson Due Date: DALLAS TX 75205 United States Shipping Total: 5,228.52

Dist	Status	Location	Qty	PC1	Amount	GL Unit	Account
1	Open	MAIN	2.0000	100.00	5,228.52	SMETH	8120

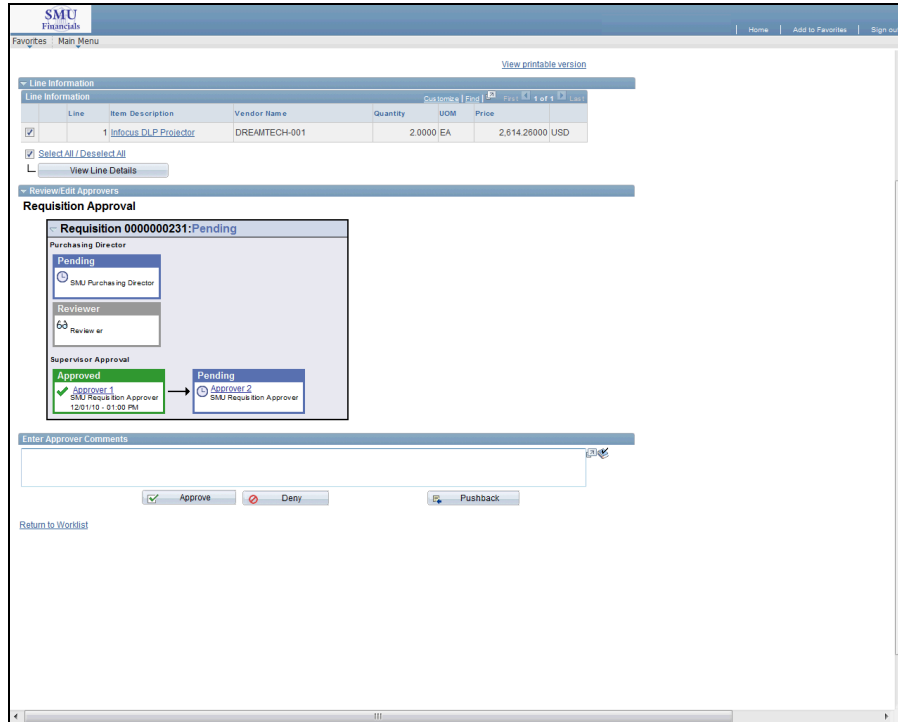
Dept: 23250 Fund: 10

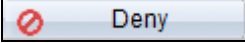
Open QTY: 2.0000 Open Amt: 0.000

GL Base Amount	Currency	Sequence	Capitalize
5,228.52	USD	0	N

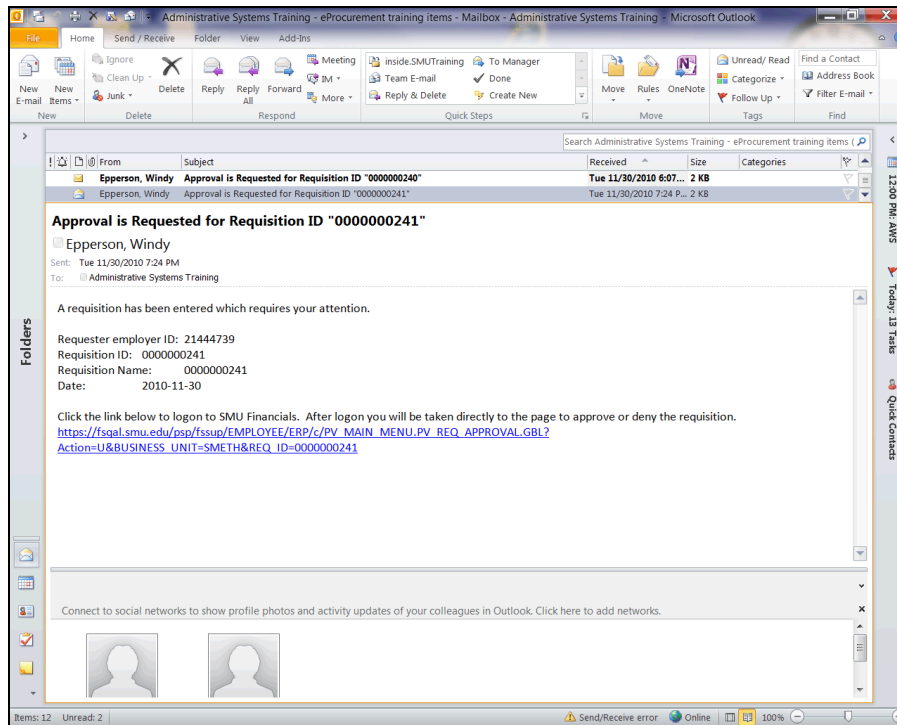
Step	Action
5.	Review requisition information. Click the Close X button to return to the approval page.




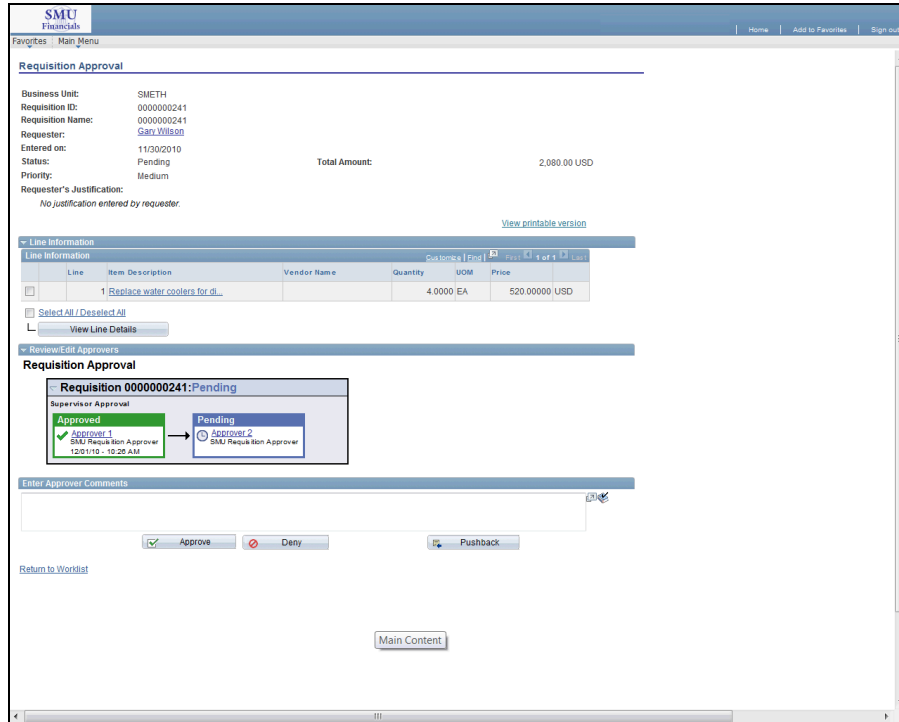


Step	Action
6.	Enter the desired information into the Comments field.
7.	Click the Approve or Deny button. 
8.	<p>Your approver box will display Approved or Denied. If approved, the Purchasing Director status box will display the pending action.</p> <p>An e-mail will be sent to the requestor indicating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

Second Approver: Pushback Requisitions Procedure



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



SMU Financials

Home | Add to Favorites | Sign out

Requisition Approval

Business Unit: SMETH
 Requisition ID: 0000000241
 Requisition Name: 0000000241
 Requester: Gary Wilson
 Entered on: 11/30/2010
 Status: Pending
 Priority: Medium
 Requester's Justification: No justification entered by requester.

Total Amount: 2,080.00 USD

[View printable version](#)

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price
1	Replace water coolers for di...		4.0000	EA	520.00000 USD

☐ Select All / Deselect All

[View Line Details](#)

Review/Edit Approvers

Requisition Approval

Requisition 0000000241: Pending

Supervisor Approval


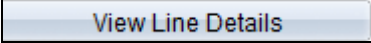
Approved: 12/01/10 - 10:20 AM
 Pending: 12/01/10 - 10:20 AM

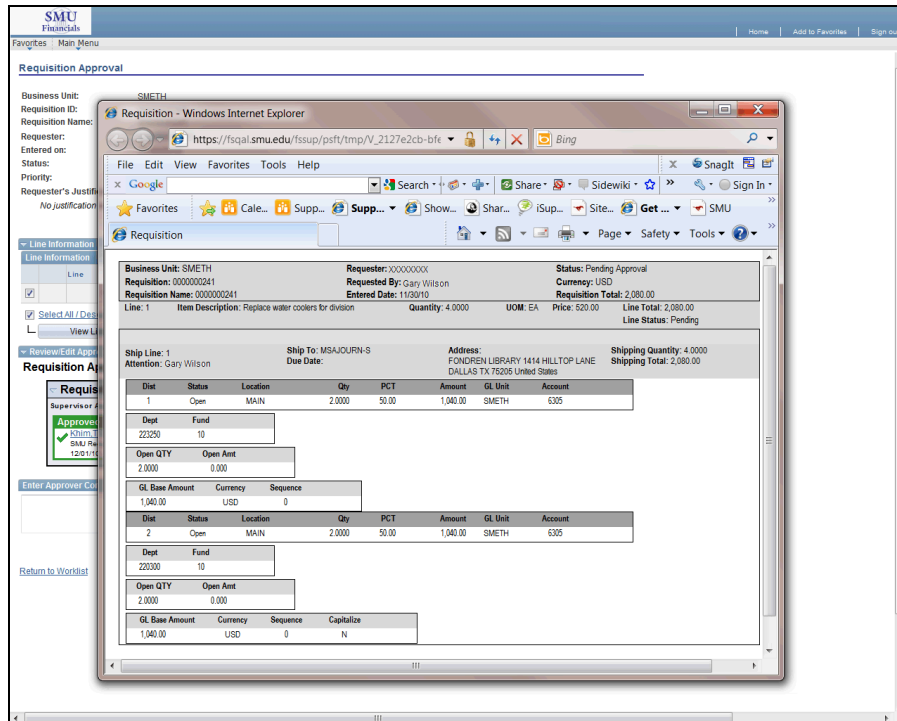
Enter Approver Comments


☐ Approve ☐ Deny ☐ Pushback

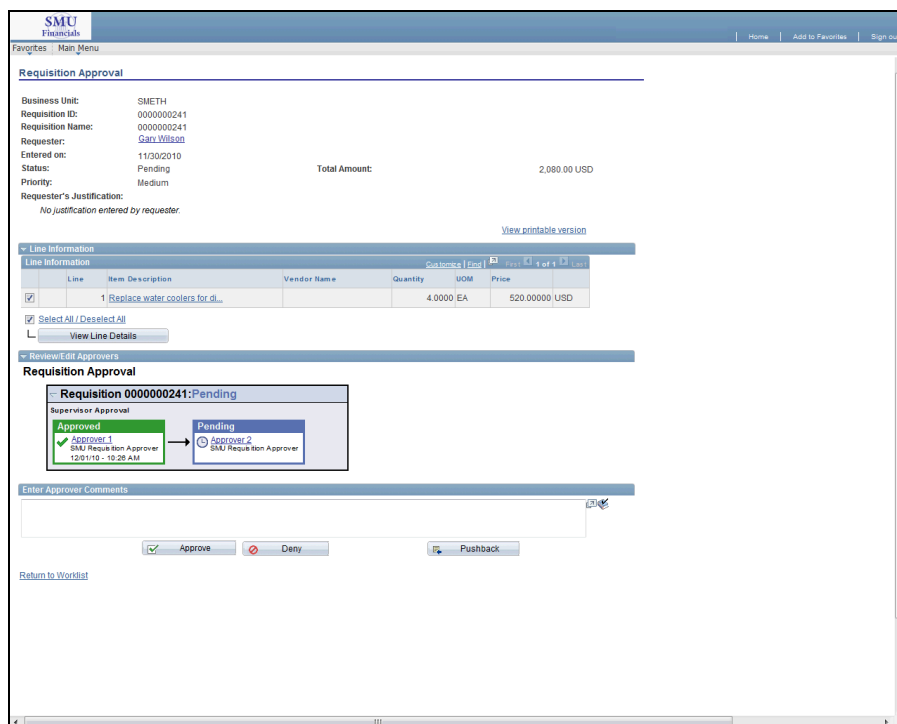
[Return to Worklist](#)

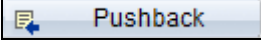
[Main Content](#)

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




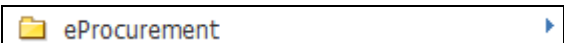
Step	Action
5.	After the review is complete, click the Close button. 

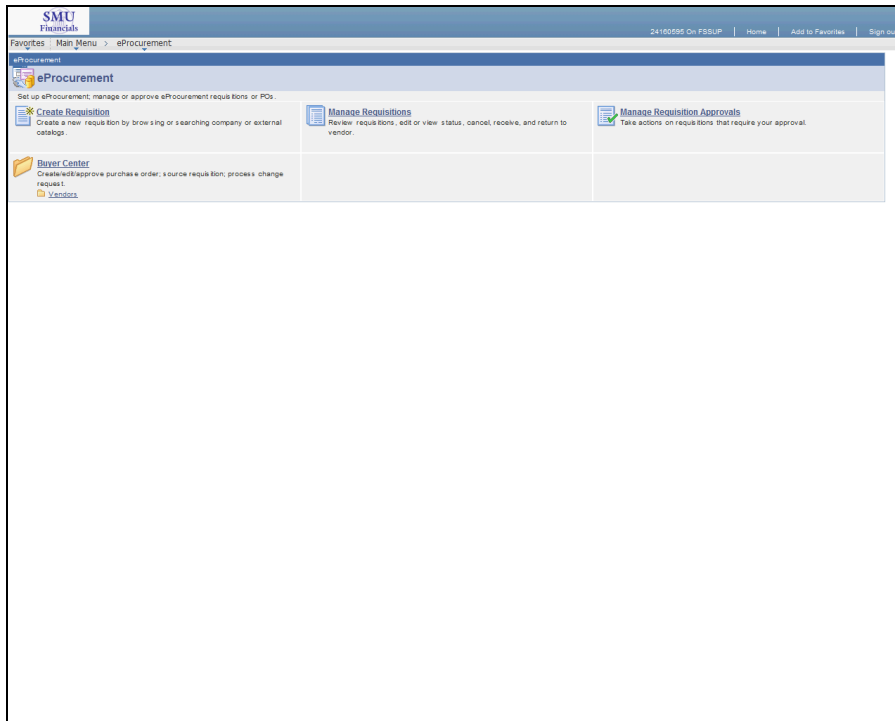


Step	Action
6.	Enter the desired information into the field.
7.	Click the Pushback button. 
8.	The requisition has been pushed back. The First Approver will receive an email indicating the push back.
9.	End of Procedure.

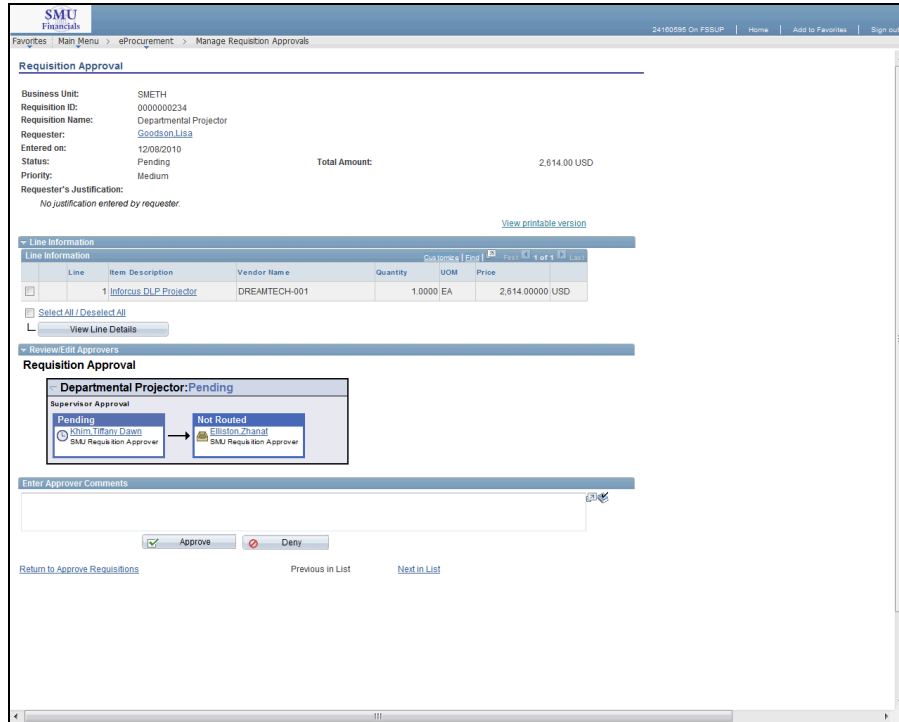
Managing Requisition Approvals

Procedure

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



Step	Action
3.	Click the Manage Requisition Approvals link. Manage Requisition Approvals
4.	Select the desired Req ID link.



Requisition Approval

Business Unit: SMETH
 Requisition ID: 0000000234
 Requisition Name: Departmental Projector
 Requester: [Goodson, Lisa](#)
 Entered on: 12/09/2010
 Status: Pending
 Priority: Medium
 Requester's Justification: No justification entered by requester.

Total Amount: 2,614.00 USD

[View printable version](#)

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price
<input type="checkbox"/>	1 Intracorp DLP Projector	DREAMTECH-001	1.0000	EA	2,614.00000 USD

[Select All / Deselect All](#)
[View Line Details](#)

Review/Edit Approvers

Requisition Approval

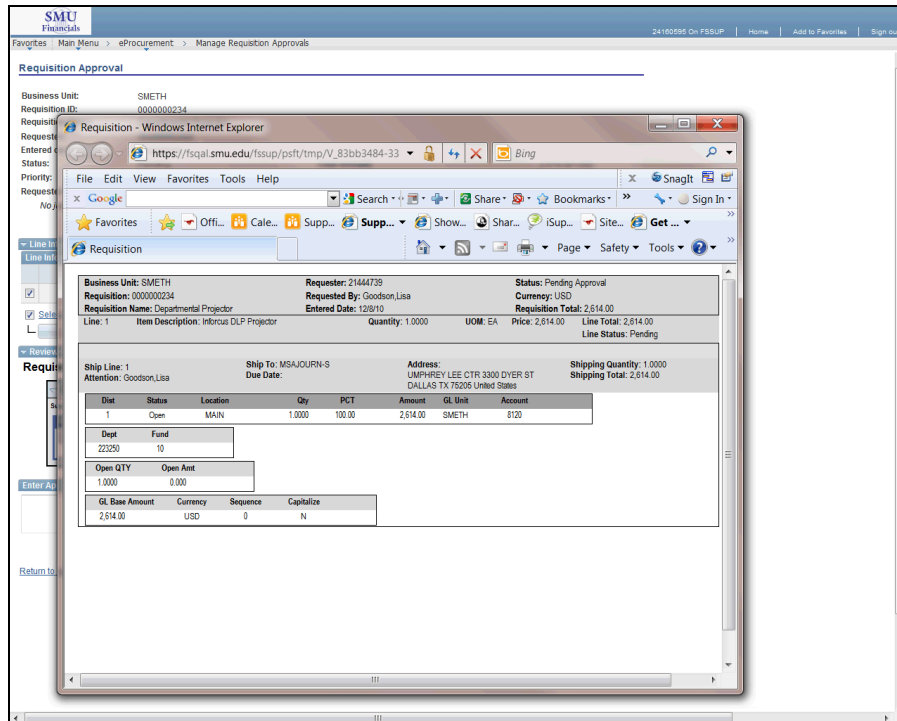
Departmental Projector: Pending


Supervisor Approval
 Pending → Not Routed
 (Thom, Lindsay) SMU Requisition Approver → (Goodson, Lisa) SMU Requisition Approver

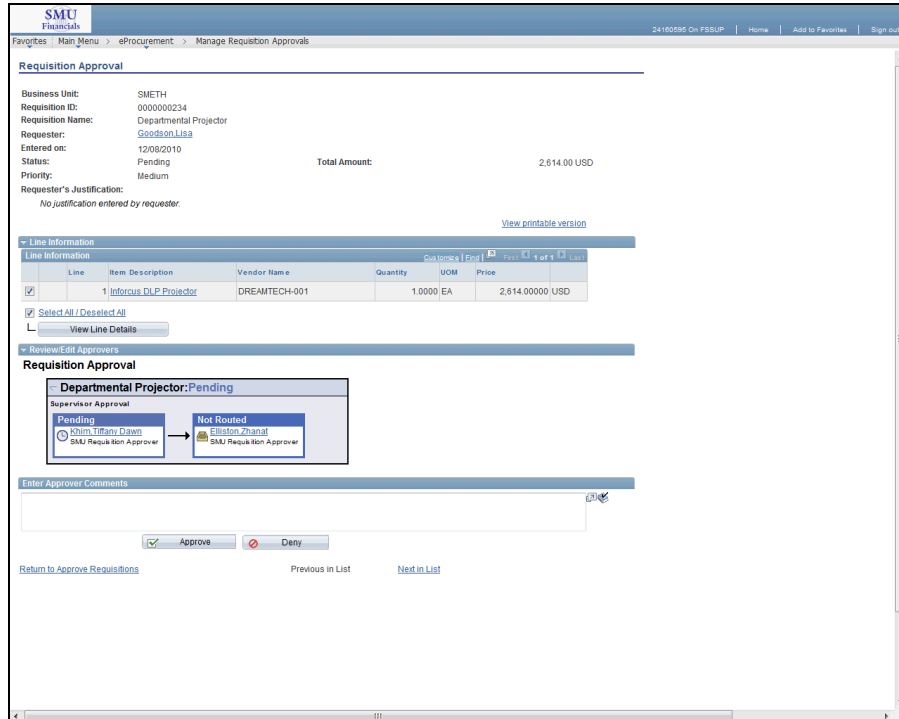
Enter Approver Comments


[Return to Approve Requisitions](#) [Previous in List](#) [Next in List](#)

Step	Action
5.	<p>To view line details on all lines, click the Select All / Deselect All option.</p> <p>To view line details for specific lines, click the checkbox on the individual line(s).</p> <div><input type="checkbox"/></div>
6.	<p>Click the View Line Details button.</p> <div><input type="button" value="View Line Details"/></div>



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



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 **543215**, requires the use of a 7 digit Project.
3. Orgs beginning with a 4, for example **432154**, 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

<u>Building</u>	
Code	Description
A031	Air Cond Equip/Supplies
A045	Appliances-Household
A906	Architect/Design Services
B910	Bldg 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
<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
G515	Grounds Equip/Maintenance
J485	Janitorial Supplies
L490	Lab Equipment/Supplies
L525	Library Equipment/Supplies
M545	Machinery/Heavy Hardware
M580	Musical Instruments/Supplies
P655	Photographic Equip/Supplies
P680	Police Equip/Supplies
R982	Rental Equipment
S805	Sports Equipment
S805A	Sports Supplies
T855	Theatre Equipment
T855A	Theatre Supplies

<u>Furniture</u>	
Code	Description
D265	Draperies/Upholstery Materials
F362	Floor/Vinyl/Tile
F361	Floors/Carpet
F415	Furniture/Apts & Houses
F410	Furniture/Classroom
F411	Furniture/Dorms
F412	Furniture/Labs
F414	Furniture/Offices
F413	Furniture/Outdoor
<u>Lab</u>	
A040	Animals
C175	Chemicals-Educational
D270	Drugs/Human Therapeutic
F412	Furniture/Labs
<u>Office</u>	
A016	Advertising
A050	Art Equip/Supplies
A060	Auto Parts/Maint
A070	Automobiles
C200A	Clothing Uniforms
C200	Clothing/Not Uniforms
R742A	Conferences
D270	Drugs/Human Therapeutic
E312	Environmental Clean-up
FRT	Freight
INSTL	Installation/Set Up
J485A	Janitorial Services/Contract
M577	Moving/Relocation
O600	Office Machines/Equipment
O615	Office Supplies
O622	Outsource Consulting
O620	Outsource Janitorial
P640	Paper/Computer
P641	Paper/Copy/Fax
S775	Security/Alarms
S775A	Security/Keys
S775B	Security/Locks
R742B	Seminars
M550A	Signs/Traffic Control
R742C	Special Events
T835	Teaching Supplies
T483	Telephone Service
T484	Telephone Supplies
U868	Uniforms/Staff
<u>Printing</u>	
A016	Advertising
A076	Awards/Certificates
B080	Badges/ID Supplies
F395	Forms
M550	Markers/Placques
P715	Publications