

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

SMU Financials						Home Add to Favorites Sign	out
Favorites Main Menu > eProcure	ement > Create Requisition					I nome Addito ravontes Sign	out.
					(2) Help		
Create Requisition						Requisition Summary	į.
1. Define Requisition	n <u>2. Add Items and</u>	1 Services	3. Review and Sub	mit		There are no lines on this request. Please add new line in order to save this requisition.	
Review the details of your requisi	ition, make any necessary changes, and sub	omit it for approval.					
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	IETH Southern Methodist University					Total Allouit (03D).	1
	000000X Q G	ary Wilson	*Currency:	USD			
Requisition Name:			Priority:	Medium 🔻			
	lines on this request. n order to save this requisition.						
Save & submit	Save & preview approvals	× Cancel requisition					
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Action
You will begin with Step 1. Define Requisition. Your ID will default in the Requester: field.
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.)
Enter a name in the Requisition Name field.
Click the 2. Add Items and Services link. The Special Request page will be displayed.
2. Add Items and Services

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Financials						Home Add to Favorites Sign out
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Create Requisition						Requisition Summary There are no lines on this request.
1. Define Requisition		2. Add Items and Services	1	3. Review and Submit		Please add new line in order to save this
			1	3. Review and Subinit		requisition.
	ying the information ne	cessary to procure each item or service.				Total Lines: 0
Search:				Search		Total Amount (USD): 0
Eavorites Web Special P	Request					
Select a Request Type						
Special Item	Request an item th	at is not listed in the Catalog.				
Review and Submit						
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Step	Action
6.	Click the Special Item link. Special Item



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eate Requisition	Help Requisition Summary There are no lines on this required.	uest
1. Define Requisition	Please add new line in order t requisition.	
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ecial Item		
em Description:		
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Request New Item		
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Send to Vendor Show at Receipt Show at Voucher		
Add Item Cancel Add or Start New Type		

Step	Action
7.	Enter the desired information into the Item Description field.
8.	Enter the desired information into the 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.



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Favorites Main Mer	nu > eProcur	ement > Crea	te Requisition					
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Look Up Cat								Total Lines: 0
Note: You may eithe		rowse to look up	the appropria	te category for yo	our special requ	iest.		Total Amount (USD): 0
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Catalog	c	ategory		Description		Find in Tree		
1						÷		
▶ Browse Category	/ Tree							
Return								
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Step	Action
13.	Click the Expand section button located on the far left of the Browse Category Tree row.



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

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

Wang Menu > ehougement > Create Requisition Provide Requisition Cock Up Category obs: You may either Search or Brows to look up the appropriate category for your special request. Search Dr Category Category Category Find Category Category Browse Category Tree	File International International International International ptess Main Menu > eProcupement > Create Requisition Image: Procupement > Create Requisition Image: Procupement > Create Requisition ck Up Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Up Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Up Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition ck Category Procupement > Create Requisition Image: Procupement > Create Requisition				
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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. Audiovisual
17.	The Due Date: field is an optional field and <u>will not affect</u> expediting this item.

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

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



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

Step	Action
19.	Enter the desired information into the Name field.
20.	Click the 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.



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

Step	Action
23.	If needed, enter the desired information into the Mfg Item ID field.
24.	Enter the desired information into the Additional Information field.
25.	Note: The Send to Vendor, Show at Receipt, and Show at Voucher fields are not used.
26.	Click the Add Item button. Add Item
27.	The item has now been added to the 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. 3. Review and Submit



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

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



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

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



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

Create a Favorite for Frequently Purchased Items

Procedure

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

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

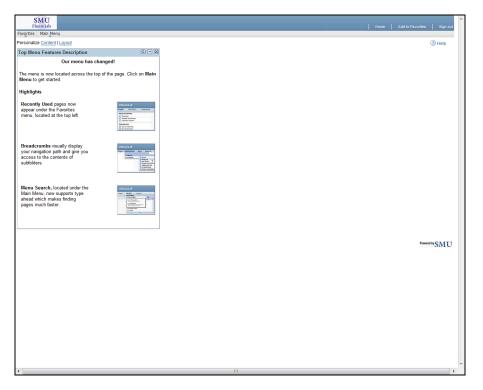
https://fsqal.smu.edu/psc/fssup_1/E Confirmation The following item(s) were added to your favorites: Infocus DLP Projector		Home Add to Favorites Sign o
	d Services 3. Review and Submit	Description Qty UOM Infocus DLP Projector 1 EA
Do not show this message again	ibmit it for approval.	Total Lines: 1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



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

Create a Requisition using a Favorite

Procedure



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



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

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

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

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



Sea Man Menu > eProcupement > Create Requisition I more / Reduisition / Reduisition 1. Define Requisition 2. Add items and Services 3. Review and Submit Total Answer (USD): 2 and Menu > eProcupement > Create Requisition / Reduisition Summary Becarding and Services 3. Review and Submit Total Answer (USD): 2 and Answer (USD): 	SMU Financials									
Native Requisition Addition and concide Review and Subirio Review		nu > eProcurement > Cre	eate Requisition							Home Add to Favorites
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ntel (te) (te) (term) Comp Name Castonica Comp Name Castonica Castonica Kerni Castonica		uisition, specifying the infor	mation necessary t	o procure each ite	m or service.					Total Lines: 1
Croup Name Description Type Description Vendor Status Price 0000 Operating Control Name If	earch:							Search		Total Amount (USD): 2,61
Type Description Category Find (A) (Find (C)										
Controls Names Controls Of Paris C and S Vire Description Vendor Status Price UOU Cuantify Image: Description Vendor Addrew 2514 25000 USD EA 1 0000 Image: Addrew Image: Description Vendor Addrew 2514 25000 USD EA 1 0000 Image: Addrew Image: Description Vendor Addrew 2514 25000 USD EA 1 0000 Image: Addrew Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description Image: Description			Description							
Type Description Vendor Status Price OUI Quantity If If CREAUTECH Adve 2514.2000 USD A. 10000 If Add Interact All Image: Add Image:										
Information OREANTECH Adve 251420000 USD EA 10000 Ig Add Add Information Information <thinformation< th=""> <thinformation< th=""></thinformation<></thinformation<>			Vendor	Statue	Price			1 💷 First 🖬 1 of 1 🖬 La	St.	
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Add Image: Add to Favorites Circup(s) Image: Add to Tampiate(s)	¥ #	Infocus DLP Projector	DREAMTECH	Active	2614.26000 USD	EA	1.0000	2% Add		
ex and Skihori	Select All / Des	elect All								
ex and Skihori	- 🐺 Add	Add to Favorit	tes Group(s)	Delete f	from Favorites		Add to Te	emplate(s)		
III										

Step	Action
10.	Click the 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



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

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



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

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



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

Step	Action
8.	Select the desired Category.
	+ Desktops
9.	Click the desired Item.
10.	Click the Add to Cart » button.
	Add to Cart »
11.	Enter the desired Quantity .
12.	Click the Add to Requisition » button.
	Add to Requisition »
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.)



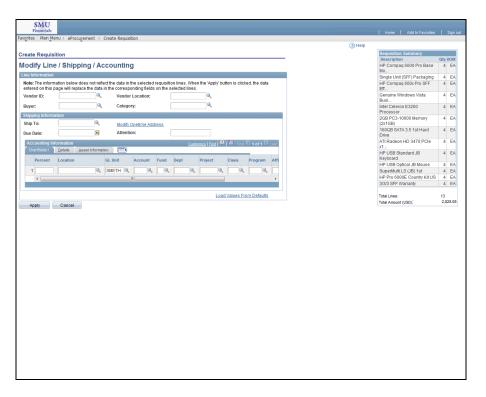
Favorite lisms Control	ato Dog									(2) Help		
1. Define Requisition 2. Add Items and Services 3. Roview and Submit nes to be requisition, specifying the information necessary to procure each item or service. 9. Roview and Submit net to the requisition, specifying the information necessary to procure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

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

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



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. Modify Line / Shipping / Accounting
18.	 You have two choices when entering the shipping address: 1. One time address change 2. Load shipping address from default values. 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. Proceed with entering Account, Fund and Dept codes.



Step	Action
19.	To load your default shipping address <u>and</u> use your default Fund and Dept, click the 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.

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

Step	Action
24.	Click the OK button.



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

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

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



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

Chartfields and Split Item Costs

Customizing Accounting Lines and Chartfields

Procedure

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

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

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



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

Step	Action
2.	Select the Column you want to hide. Program
3.	Then, click the 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.
8.	Click the OK button to save your changes.
9.	End of Procedure.



Split Item Costs: Individual Line Item

Procedure

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

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

Step	Action
1.	From the 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.



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

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



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

Step	Action
5.	Return to the 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. Submit
15.	End of Procedure.

Split Item Costs: Multiple Line Items

Procedure

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

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tows Vista Business E3200 Processor E3200 Memory (2x1GB) 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000	352.00	·	Home Add to Favorites	Sign o
tows Vista Business E3200 Processor E3200 Memory (2x1GB) 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000		Î	Requisition Summary	
tows Vista Business E3200 Processor E3200 Memory (2x1GB) 3.5 1st Hard Drive	HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	4.0000 Each	51.00000		^		
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00 Memory (2x1GB) 3.5 1st Hard Drive	COMPANY HEWLETT-PACKARD COMPANY			204.00 🖺 🖓			Qty UOM
3.5 1st Hard Drive	COMPANY	4.0000 Each	45,00000			HP Compaq 6000 Pro Base Mo	4 EA
	HEWLETT-PACKARD		43.00000	180.00 🎥 🖓		Single Unit (SFF) Packaging HP Compaq 600x Pro SFF Eff	4 EA 4 EA
	COMPANY	4.0000 Each	46.00000	184.00 🔀 💭		Genuine Windows Vista Busi	4 EA
D 3470 PCIe x16 1s	HEWLETT-PACKARD COMPANY	4.0000 Each	76.00000	304.00 陆 🖓		Intel Celeron E3200 Processor 2GB PC3-10600 Memory	4 EA
dard JB Keyboard	HEWLETT-PACKARD COMPANY	4.0000 Each	5.00000	20.00		(2x1GB) 160GB SATA 3.5 1st Hard	4 EA
al JB Mouse	HEWLETT-PACKARD COMPANY	4.0000 Each	3.00000	12.00 陆 💭		Drive ATI Radeon HD 3470 PCIe	4 EA
	HEWLETT-PACKARD COMPANY	4.0000 Each	25.00000	100.00 📳 🖓		HP USB Standard JB Keyboard	4 EA
Country Kit US	HEWLETT-PACKARD COMPANY	4.0000 Each	2.00000	8.00 陆 🖓		SuperMulti LS (JB) 1st	4 EA 4 EA 4 EA
rrantv	HEWLETT-PACKARD COMPANY	4.0000 Each	44.10000	176.40 🔜 📿	Ξ	3/3/3 SFF Warranty	4 EA
			Total Amount:	2,828.08 USD		Total Lines: Total Amount (USD).	13 2,828.08
ites 🔥 .	Add to Template(s)	Modify Line / Shipping / J	Accounting	Delete			
	(JB) 1st : Country Kit US ranty	COMPANY LIBITS COMPANY COMPANY Company Company HEWLETT-PACKARD COMPANY HEWLETT-PACKARD COMPANY	COMPANY COMPANY (JB) 1a) COMPANY COMPA	Columnity Set US Columnity Columnity <thcolumnity< th=""></thcolumnity<>	County Mit County	Colume/WY Colume/WY <t< th=""><th>Country Kit US Country Kit US Country</th></t<>	Country Kit US Country

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



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

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Create Requisitio	on									Requisition Summary		
Modify Line /	Shipping / Acc	ounting						-		Description HP Compaq 6000 Pro Base Mo	Qty U 4	EA
Line Information										Single Unit (SFF) Packaging	4	EA
Note: The information entered on this pag	on below does not reflect je will replace the data in	the data in the selecte the corresponding field	d requisition lin is on the selec	nes. When the 'Apply ted lines.	/ button is clic	ked, the data				HP Compag 600x Pro SFF Eff		EA
Vendor ID:	٩	Vendor Location:		٩						Genuine Windows Vista Busi	4	EA
Buyer:	٩	Category:		٩,						Intel Celeron E3200 Processor	4	EA
Shipping Information	on Q	Modify Onetime Ad	Idress							2GB PC3-10600 Memory (2x1GB)	4	EA
Due Date:	H	Attention:	<u>Mittaa</u>							160GB SATA 3.5 1st Hard Drive	4	EA
Accounting Inform	mation			Customize Find	🖉 🐂 First	KI 1 of 1 D	Last			ATI Radeon HD 3470 PCIe x1	4	EA
	etails Asset Information					-				HP USB Standard JB Keyboard	4	EA
Percent L	ocation G	L Unit Account	Fund De	pt Project	Class	Program	Affi			HP USB Optical JB Mouse	4	EA
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4		m								HP Pro 6000E Country Kit US 3/3/3 SFF Warranty		EA
											4	-
				L	oad Values F	rom Defaults				Total Lines:	13	28.08
Apply	Cancel									Total Amount (USD).		

Step	Action			
3.	Enter the desired 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.
	Replace Distribution Lines

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(3) Help			
	Requisition Summary		
	Description HP Compaq 6000 Pro Base	Qty L	EA
	Mo	-	EA
	Single Unit (SFF) Packaging		EA
	HP Compaq 600x Pro SFF Eff	4	EA
Apply changes to each existing distribution line by matching the distribution line numbers.	Genuine Windows Vista Busi	4	EA
	Intel Celeron E3200 Processor	4	EA
	2GB PC3-10600 Memory (2x1GB)	4	EA
OK Cancel	160GB SATA 3.5 1st Hard Drive	4	EA
	ATI Radeon HD 3470 PCIe x1		EA
	HP USB Standard JB Keyboard		EA
	HP USB Optical JB Mouse		EA
	SuperMulti LS (JB) 1st		EA
	HP Pro 6000E Country Kit US 3/3/3 SFF Warranty		EA
	Total Lines:	13	_
	Total Amount (USD).	2,82	8.08

Step	Action
14.	Click the 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. Main Menu
2.	Click the eProcurement menu.
3.	Click the Manage Requisitions link. <u>Manage Requisitions</u>
4.	Requesters and Approvers can view requisitions they have created or ones for which they have approval responsibility.
	You can utilize the Search Requisitions box to enter specific search criteria.
5.	Under the Status listing, you may find requisitions labeled with one of the following descriptions:
	•Open - Requisition created but not submitted.
	•Pending - Submitted but is waiting for some level of approval.
	•Approved - Approved and forwarded to Purchasing.
	 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.



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

Step	Action
6.	Editing a Requisition:
	You can edit a requisition by selecting Edit Requisition on the desired row.
7.	Click the Go button.
8.	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.
	Click the Cancel button to return to the requisition page.



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

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



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

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



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

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

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



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

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

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



Step	Action
16.	To return to the Manage Requisitions page, click the 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.

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

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



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

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



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

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

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



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

Change Shipping Address: Multiple Line Items

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

Step	Action				
1.	In order to complete this task you must first be on the 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.				



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



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

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



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

Step	Action
7.	Enter the State: .

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



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

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

Step	Action
10.	Click the Apply button.



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

Step	Action
11.	The radio button should have Replace Distribution Lines selected.
	ок
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

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



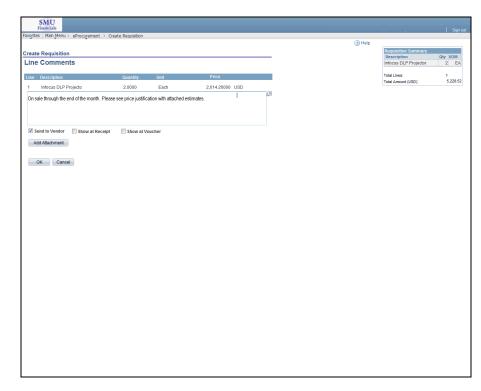
SMU Finacias		
Favorites Main Menu > eProcurement > Create Requisition		Sign out
serificant serificant series ender a serificant series ender ende	() Help	
Create Requisition		Requisition Summary Description Qty UOM
1. Define Requisition 2. Add Items and Services 3. Review and Submit		Infocus DLP Projector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

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

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



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



Step	Action
4.	Once you have edited your comment, click 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.

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

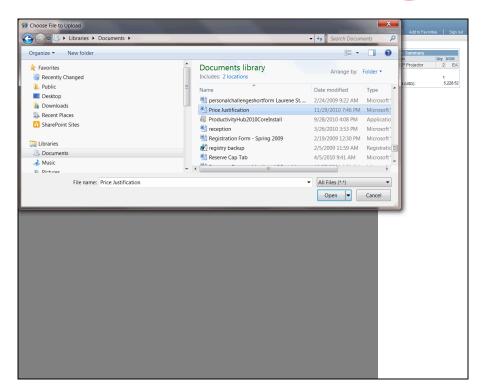
Step	Action
1.	From the Review and Submit page, click the Add/Edit Comments button.



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

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





Step	Action
5.	Click the Open button.
	Open 🔽
6.	Click the Upload button.
	Upload
7.	Your file has now been uploaded. Repeat this process to add additional attachments.
8.	Upon completion, click the 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. Main Menu
2.	Click the Vendors menu.
3.	Click the Vendor link. Vendor
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., " <i>begins with</i> " or " <i>contains</i> ".

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



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

SMU Financials					
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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.



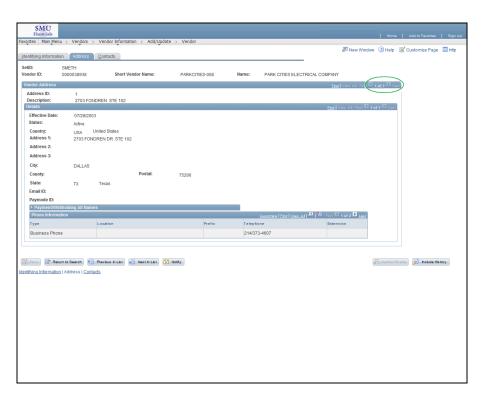
SMU							
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Identifying Information Address	Contacts						
SetID:	SMETH	Vendor Name 1:	PARK CITIES ELECTRICAL COMPANY				
Vendor ID:	0000038938	Vendor Name 2:					
Vendor Short Name:	PARKCITIES	PARKCITIES-008	Withholding				
Classification: HCM Class:	Outside Party		Open For Ordering VAT Registration				
Persistence:	Regular		VAT Registration				
Vendor Status:	Approved						
			Expand All	Collapse All			
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Corporate Vendor ID:	0000038938	PARK CITIES ELECTRICAL COMPANY					
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Identifying Information Address Cont	tacts						
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Step	Action
9.	The first tab, Identifying Information , displays Vendor ID, Short Name, and Vendor Status.

SMU Financials					Home	Add to Favorites	Sign out
Favorites Main Menu > Vendors >	Vendor Information > Ad	d/Update > Vendor					
				🖉 New Window	/ 🕐 Help	📝 Customize Page	📰 http
Identifying Information	Contacts						
SetID:	SMETH	Vendor Name 1:	PARK CITIES ELECTRICAL CO	MPANY			
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Classification:	Outside Party		Open For Ordering				
HCM Class:			VAT Registration				
Persistence:	Regular						
Vendor Status:	Approved						
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Duplicate Invoice Settings							
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Identifying Information Address Contact	ts						



Step	Action
10.	Click the Address tab.
	Address



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



Termidality Vendor 1/formation > Add/update > Vendor Setting: Control 1/formation > Add/update > Vendor SetD: Sulf:TH Vendor Address Control 1/formation > Add/update > Vendor Vendor Address 3: County: Usa Vendor Address > Vendor Normation > Vendor Address > Vendor County: Destate Vendor Address > Vendor Vendor Normation > Vendor Address > Vendor Ven	
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Step	Action
12.	Phone Information is displayed at the bottom of the page. You can toggle between numbers by using the arrow buttons on the right or by selecting to view all which will display a scroll area. Click the View All link.
13.	A scroll area is now available. Use the vertical scroll arrows to see the multiple phone types.
14.	Click the Contacts tab.



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Identifying Inform	mation I A	Address C	ontacts															

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

Suggest a New Vendor

Procedure

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



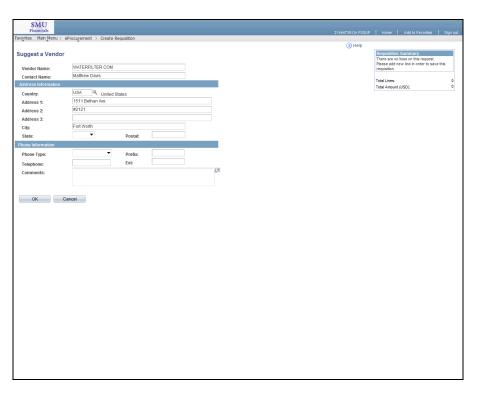
SMU Financials	21444739 On FSSUP Home Add to Favorites Sign out
Favorites Main Menu > eProcurement > Create Requisition	
Create Requisition	Help Requisition Summary There are no lines on this request. Please add new line in order to save this
1. Define Requisition 2. Add Items and Services 3. Review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

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



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



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



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

SMU							
Financials							
	eProcurement > Create Re	auisition			21444739 On FSSUP	Home A	dd to Favorites
					(?) Help		
uggest a Vendo	or				-	Requisition Sur	nmary
						There are no lines Please add new I	s on this request.
Vendor Name:	WATERFILTER.COM					requisition.	
Contact Name:	Matthew Davis			_		Total Lines:	
Address Information						Total Amount (USI	D).
Country:	USA 🔍 United St	ates					
Address 1:	1511 Bethan Ave						
Address 2:	#2121						
Address 3:							
City:	Fort Worth						
State:	TX 💌	Postal:	76082				
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Step	Action
11.	You can either click an entry in the Phone Type list or enter a valid value into the Phone Type: field. Press Enter to continue.



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

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



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

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		isition ID: 00000002 isition Name: 0	241	244										8
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Step	Action
1.	After the Requester completes and submits the requisition, an email will be sent to the First Approver notifying them they have a requisition to review.
	Click the Message link from the Approval Request notification email.
2.	Enter your Login ID and Password.
	Click the Sign In button.



SMU Financials							
avorites Main M	1enu						
Requisition A	Approval						
Business Unit:	SMETH						
Requisition ID:	000000230						
Requisition Nan		partmental use					
Requester:	Gary Wilson						
Entered on:	11/29/2010						
Status:	Pending		Total Amount:		2,614.26 USD		
Priority:	Medium						
Requester's Ju							
No justifica	tion entered by requester.						
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Step	Action
3.	To view requisition information, click the Select All/Deselect All option.
4.	Click the View Line Details button. View Line Details



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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.



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

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Requisition A	pproval							
Business Unit:	SMETH							
Requisition ID: Requisition Nam	000000230 Projector for dep	artmental use						
Requester:	Gary Wilson	aiunentai use						
Entered on:	11/29/2010							
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Step	Action
8.	Enter the desired information into the Enter Approver Comments field. Note: Comments are required when denying a request.

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Requisition Approval							<u>^</u>
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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

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	Requisition Name: 000000241 Date: 2010-11-30 Click the link below to logon to SMU Financials. After logon you will be t https://fsgal.smu.edu/psp/fssup/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV Action=U&BUSINESS_UNIT=SMETH&REQ_ID=0000000241			deny the requis	sition.			🛯 Quick Contacts			
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Step	Action
1.	After the First Approver approves a requisition, an e-mail will be sent to the Second Approver notifying them they have a requisition to review.
	Click the Message link from the Approval Request notification e-mail.



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



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



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



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



Second Approver: Pushback Requisitions

Procedure

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



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



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Line	Requisition: 000000241 Requested By: Gary Wilson Currency: USD			
	Requisition Name: 0000000241 Entered Date: 11/30/10 Requisition Total: 2,080.00 Line: 1 Item Description: Replace water coolers for division Quantity: 4,0000 UOM: EA Price: 520.00 Line Total: 2,080.00	-		
Select All / Des	Line Status: Pending			
view e	Ship Line: 1 Ship To: MSAJOURN-S Address: Shipping Quantity: 4,0000			=
Requisition A	Attention: Gary Wilson Due Date: FONDREN LIBRARY 1414 HILLTOP LANE Shipping Total: 2,080.00 DALLAS TX 75205 United States			
	Dist Status Location Qty PCT Amount GL Unit Account			
Supervisor A	1 Open MAIN 2.000 50.00 1,040.00 SMETH 6305			
Approved Khimiti	Dept Fund 22320 10			
SMU Re 12/01/10	Open QTY Open Amt	Ξ		
	2.000 0.000			
Enter Approver Co	GL Base Amount Currency Sequence			
	1,040.00 USD 0			
	Dist Status Location Qty PCT Amount GL Unit Account 2 Open MAIN 2.0000 50.00 1.040.00 SMETH 6335			
	Dept Fund			
Return to Worklist	220300 10			
	Open QTY Open Amt			
	2,000 0.000			
	GL Base Amount Currency Sequence Capitalize 1,040,000 USD 0 N			
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Step	Action
5.	After the review is complete, click the Close button.

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	Main Men	U					Home	Add to Pavorites	Sign out
Denui									
Requi	isition Ap	brovai							
Requis	d on:	SMETH 0000000241 <u>Gary Wilson</u> 11/30/2010 Pending	Total Amount:		2,080.00 US	D			
Priority	y:	Medium							
	ster's Justil								
N	o justificatio	entered by requester.							
					View printable version				
	Information								
Line I	nformation				Frat Cl 1 of 1 Cl Last				
	Line	Item Description	Vendor Name	Quantity UOM	Price				
		1 Replace water coolers for di		4.0000 EA	520.00000 USD				
¥ Se	elect All / Des	elect All							
L	View L	ine Details							
- Revie	ew/Edit App	rovers							=
	uisition A								
		sition 0000000241:Pending							
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Enter /	Approver Co	mments							
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Return	to Worklist								
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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. Main Menu
2.	Click the eProcurement menu.



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

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



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



SN Fina	1U ncials															
Favorites I	Main Me	nu > ePr	rocuremen	t > Manag	e Requisition	Approvals										
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Status:	0											12				
Priority: Request(1		View F	avorites	Tools Hel	p						X	🕏 SnagIt 🖻	E.		
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Line Info								:								
			it: SMETH 000000023				ester: 214447			Status: F Currency	Pending Approval					
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Sele	L	ine: 1	Item Des	cription: Inford	us DLP Projecto	r	٩	uantity: 1.0000	UOM	EA Price: 2,61				-		
_											Line Sta	tus: Pend	ing	-		=
Review Requise		hip Line: 1			Ship To	MSAJOURN-	s	Addres	s:		Shipping Q	uantity: 1	.0000			
Requi	A	ttention: G	oodson,Lisa		Due Da	te:		UMPH		3300 DYER ST	Shipping To	otal: 2,61	1.00			
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Step	Action
7.	Shipping information, GL distribution information, item description and cost will be displayed.
	After reviewing requisition information, click the Close button.



SMU Financials									
vorites Main Menu	> eProcurement > Manage	Requisition Approvals							
Requisition Appr	oval						_		
Business Unit:	SMETH								
Requisition ID:	000000234								
Requisition Name:	Departmental Projector								
Requester:	Goodson,Lisa								
Entered on:	12/08/2010								
Status:	Pending	Total Amou	nt:		2,614.00 US	3D			
Priority:	Medium								
Requester's Justifica	ation:								
No justification e	intered by requester.								
					View printable version	1			
 Line Information Line Information 					First KI 1 of 1 D Last				
Line Information	Item Description	Vendor Name	Quantity	UOM Price					
		vendor name							
	1 Inforcus DLP Projector	DREAMTECH-001	1.0000	EA	2,614.00000 USD				
Select All / Desel	loct All								
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Review/Edit Approv	vers								
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	Approve	Ø Deny							
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Return to Approve Rei	quisitions	Previous in List	Next in Lis						
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Step	Action
8.	Click the Approve or Deny button.
9.	
	End of Procedure.

Additional Resources

Combination Edit Rules Made Easy

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

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

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

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

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

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



Catalog and Sub Category Listings

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

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