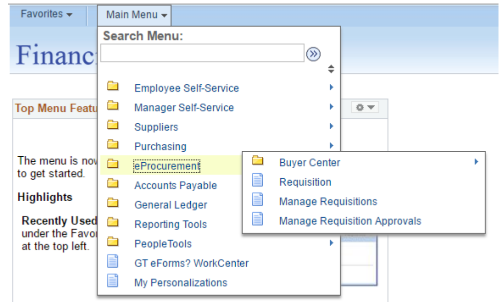
Creating a New Requisition

Accessing Requisition Section

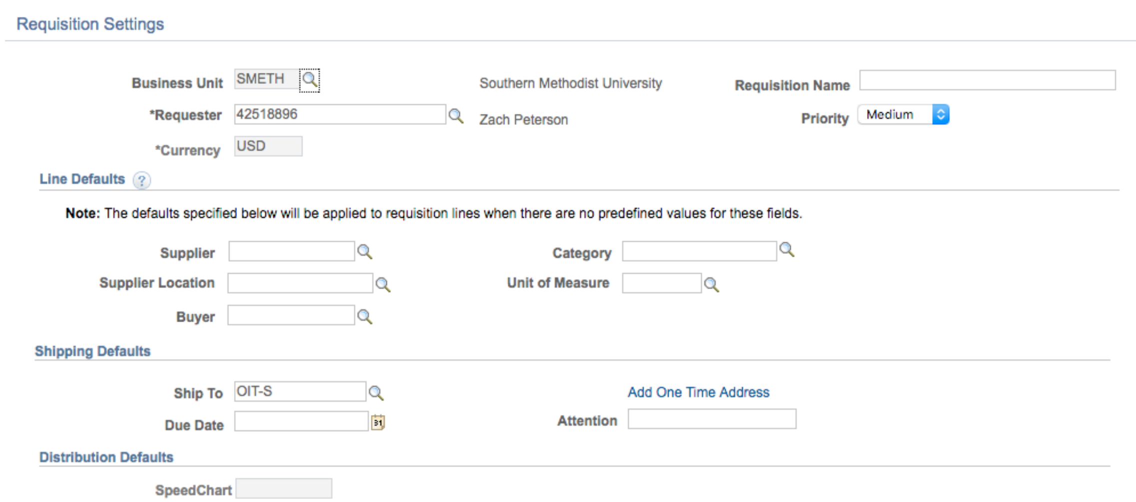
1. Go to financials.smu.edu
2. Log in with your SMU ID and password.
3. Click **Main Menu** button.
4. Click **eProcurement.**
5. Click **Requisition.**



Requisition Settings

For easier creation of new requisitions, you have the option to set default options by clicking on the **Requisition Settings** link at the top of the requisition page. The settings screen allows you to enter predefined values that will be used throughout the creation process.

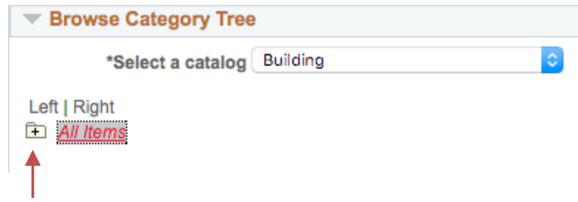
For best results, enter a **Requisition Name** in this settings screen to make searching for your requisition easier in the future.



New Requisition

1. Click **Special Requests**
2. Enter desired information in the **Item Description** field.
3. Enter desired information in the **Price** field.
4. Enter desired information in the **Quantity** field.
5. Click the **Look Up Unit of Measure** button.
6. Select the desired **Unit of Measure**.
7. Click the **Category Lookup** button.

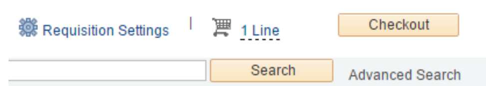
8. Click the **Expand** button located on the far left of the **Browse Category Tree** row.
9. Select an entry in the **Select a Catalog** drop-down menu.
10. Click the **Expand Folder** button. NOTE: Do not click the All Items link.
11. Select the appropriate category.



You will notice a **Due Date** field on the form. This is an optional field and <u>will not affect</u> expediting the requisition request.

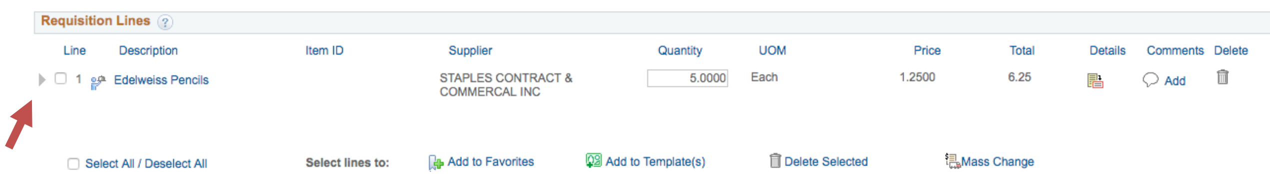
12. Click the **Supplier ID Lookup** button.
13. Enter supplier name in the **Name** field. You may use the wildcard identifier (%) if needed.
14. Select appropriate **Supplier ID.**
15. Click **Add to Cart.**
16. The item will now appear in your cart.

You may repeat this process for each item you wish to add to the requisition. When ready to proceed with submission, click on **Checkout**.

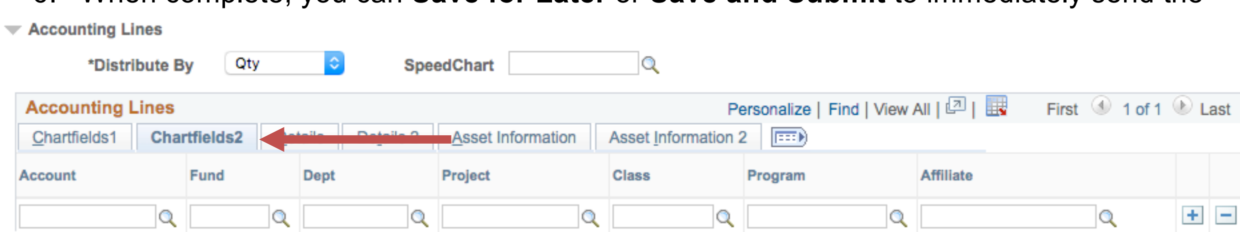


Checking Out

1. On the **Cart Summary** screen, click on the **Expand Section** button on the far left of the line item.



2. Click on the **Expand Section** button to the left of the **Accounting Lines** section of the line item.
3. Click on the **Chartfields2** tab.
4. Enter appropriate Account, Fund, and ORG codes.
5. If requisition costs are to be split between different ORGs, click the **Add Item** button at the right of the accounting line to add a new row. Add the Account, Fund, and ORG info for the additional ORG.
6. When complete, you can **Save for Later** or **Save and Submit** to immediately send the



request for approval.

Before submission, you can also click the **Preview Approvals** link to view the approval workflow that will be made for the requisition.

End of Procedure.