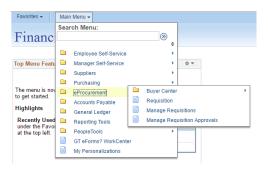
# **Creating a New Requisition**

### **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.

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00					
below will be applied to requ	isition lines when there are no prec	defined values for these fields.			
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Q	Unit of Measure	Q			
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DIT-S		Add One Time Address			
	् Q Q	Q Category   Q Unit of Measure	Q   Unit of Measure   Q		

#### **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**.

Requisition Settings	I	📜 <u>1 Line</u>	Checkout
		Search	Advanced Search

## Checking Out

Accounting Lines

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

Requ	uisition Lines 👔									
L	ine Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
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/ _	Select All / Deselect All	Select lines to:	Add to Favorites	2 Add to Template(s)	Delete Selected	\$=_ M	ass Change			
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- 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

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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.



