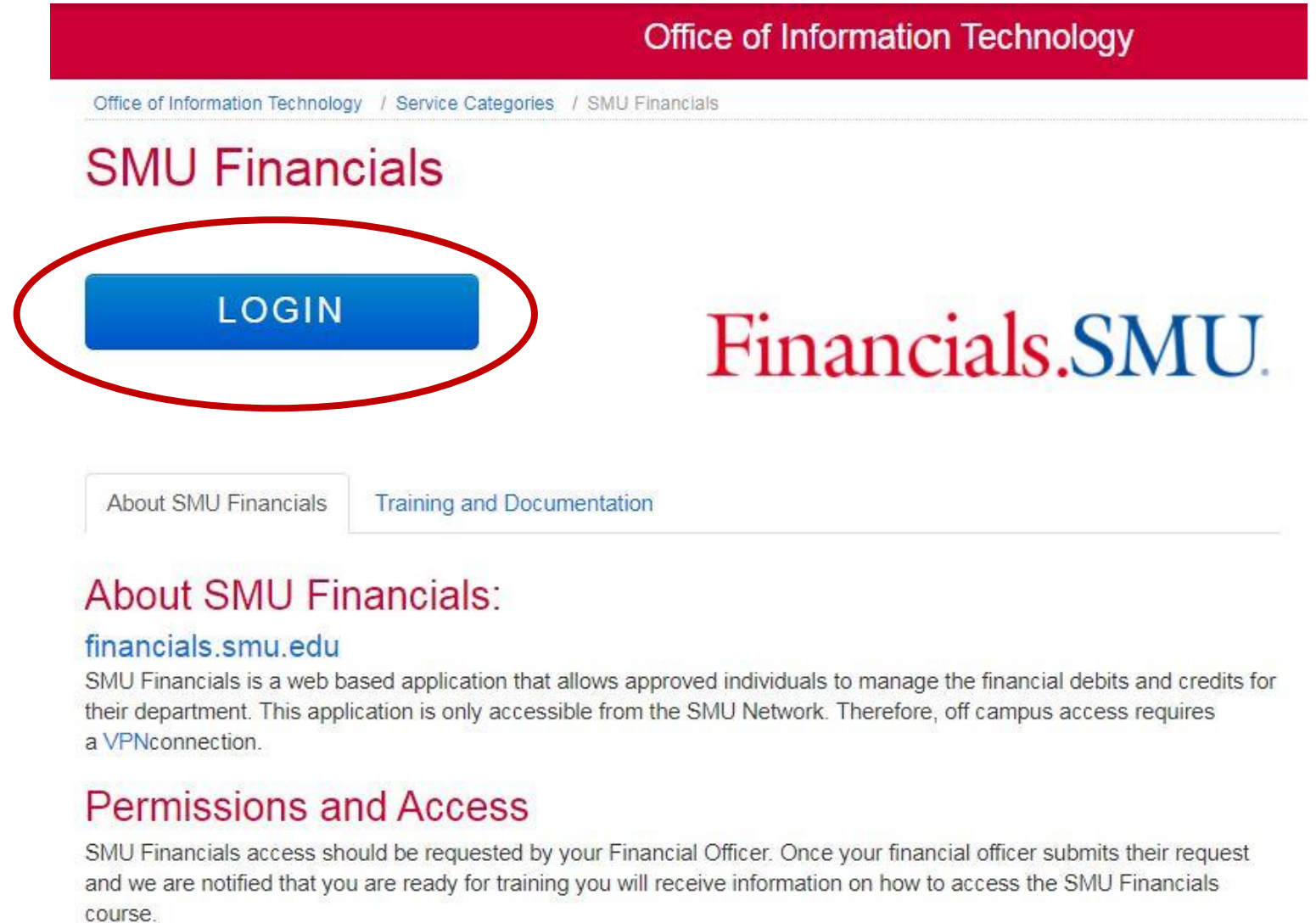


# **Entering eProcurement Requisitions**

*Last updated 7-21-17*

Go to SMU FINANCIALS <https://www.smu.edu/OIT/Services/SMUFinancials>

Click the blue LOGIN button



The screenshot shows the SMU Financials website interface. At the top, a red banner contains the text "Office of Information Technology". Below this, a breadcrumb trail reads "Office of Information Technology / Service Categories / SMU Financials". The main heading "SMU Financials" is displayed in a large, dark red font. A prominent blue button with the word "LOGIN" in white capital letters is circled in red. To the right of the button is the logo "Financials.SMU." in a serif font, with "Financials." in red and ".SMU." in blue. Below the button and logo, there are two navigation tabs: "About SMU Financials" (which is active) and "Training and Documentation". Under the "About SMU Financials" tab, the text reads "About SMU Financials:" followed by the URL "financials.smu.edu" in blue. A paragraph below explains that SMU Financials is a web-based application for managing departmental financial debits and credits, accessible only from the SMU Network and requiring a VPN connection. A second section titled "Permissions and Access" states that access should be requested from a Financial Officer and that training information will be provided upon notification.

Click **“Main Menu”**



**Top Menu Features Description**

**Our menu has changed!**


The menu is now located across the top of the page. Click on **Main Menu** to get started.

**Highlights**

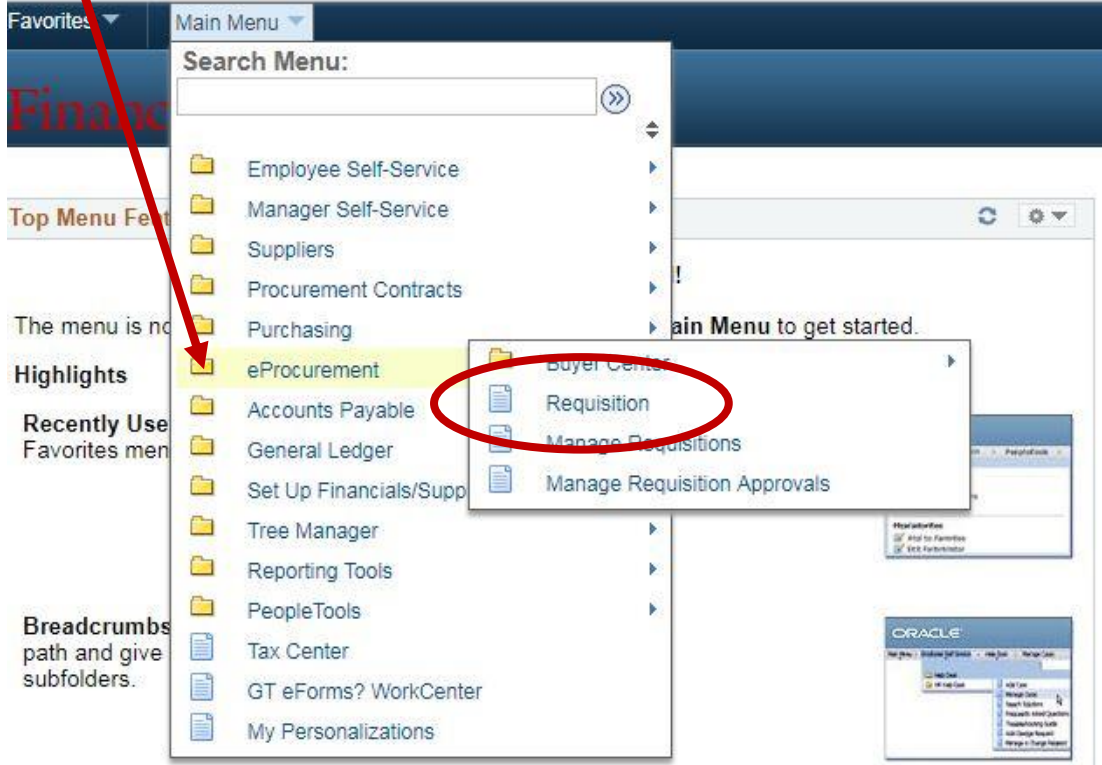
**Recently Used** pages now appear under the Favorites menu, located at the top left.

**Breadcrumbs** visually display your navigation path and give you access to the contents of subfolders.

**Menu Search**, located under the Main Menu, now supports type ahead which makes finding pages much faster.



Click **“eProcurement”** then **“Requisition”**



**Search Menu:**

- Employee Self-Service
- Manager Self-Service
- Suppliers
- Procurement Contracts
- Purchasing
- eProcurement**
- Accounts Payable
- General Ledger
- Set Up Financials/Supp
- Tree Manager
- Reporting Tools
- PeopleTools
- Tax Center
- GT eForms? WorkCenter
- My Personalizations

**Sub-menu for eProcurement:**

- Buyer Center
- Requisition**
- Manage Requisitions
- Manage Requisition Approvals

**Top Menu Features Description**


The menu is now located across the top of the page. Click on **Main Menu** to get started.

**Highlights**

**Recently Used** pages now appear under the Favorites menu, located at the top left.

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Click **“Special Requests”**

## Create Requisition

Welcome **Cathy Heckman**


 Home


 My Preferences

 Requisition Settings

 0 Lines

Checkout

Request Options 

Search All 

Search

Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.



### Web

Browse Supplier Websites

Dell

VWR International

Fisher Scientific



### Express Item Entry

Create an Express Requisition



### Special Requests

Create a non-catalog request



### Favorites

Browse Favorite Items and Services

Fixed Cost Service

Variable Cost Service

Time and Materials



### Recently Ordered

View recently ordered items and services

Household goods

Shipping one vehicle

Press check changes

SMU Magazine printing

Shipping charges

More...

# ENTER ITEM DETAILS

## 1. Item Description

## 2. Price

## 3. Quantity \*\*\* enter total qty being purchased. i.e. 500

## 4. Unit of Measure

## 5. Category

## 6. Due Date (optional)

## 7. Supplier Name

*Click magnifying glass to look up vendor by NAME or ID #. See vendor look-up on next page.*

## 8. "Additional Information"

*Information in this box applies only to this line item and aids in requisition review and approval.*

## 9. Click "ADD TO CART" for each item

## 10. REPEAT for additional items

Request Options Search All Search Advanced Search

All Request Options

Web  
Dell  
VWR International  
Fisher Scientific

Express Item Entry

Special Requests

Favorites  
Fixed Cost Service  
Variable Cost Service  
Time and Materials

Recently Ordered

### Special Requests ?

Enter information about the non-catalog item you would like to order:

**Item Details**

\*Item Description Airplane 4GB USB drive

\*Price 8.89

\*Quantity 500

\*Category A016

\*Currency USD

\*Unit of Measure EA

Due Date

**Supplier**

Supplier ID 0000004690

Supplier Name HALO BRANDED SOLUTIONS HALO BRANDED SOLUTIONS INC Suggest New Supplier

Supplier Item ID

**Manufacturer**

Mfg ID

Manufacturer

Mfg Item ID

**Additional Information**

Send to Supplier Show at Receipt Show at Voucher

### Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

Add to Cart



## VENDOR LOOK-UP by Vendor Name

1. Type part of vendor **"Name"**.
2. Click **"Find"**.
3. Click **"Supplier ID #"** to select correct vendor.

**NOTE: Vendor names do not appear in alpha order. They are listed in the in the order they were entered into the system. There can be multiple pages of vendors. Click "View All" or use the arrow buttons to scroll to more pages.**

Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country

State

Postal Code

Search Results Personalize | Find | **View All** | |  First  Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
21	0000073552	DEBRA ECHOLS	000001	Default	717 STAIN GLASS DRIVE	DESOTO	TX	
22	0000073794	ECHO360 INC	000001	Default	21000 ATLANTIC BOULEVARD	DULLES	VA	
23	0000078505	ROGER C ECHO-HAWK	000001	Default	1745 TULIP STREET	LONGMONT	CO	
24	0000078565	ECHO COMPANIES	000001	Default	5012 MOSSON ROAD	FORT WORTH	TX	
25	0000079773	ABBEY ECHOLS	000001	Default	715 N BRENTS AVENUE	SHERMAN	TX	
26	0000079874	ECHO DICKERSON	000001	Default	10951 STONE CANYON RD APT #327	DALLAS	TX	

Click **VIEW ALL** or click the arrows **< & >** to scroll to more pages

**AFTER all items have been entered**

**Click "CHECKOUT"**

**The shopping cart will show the # of items you have entered.**

## Create Requisition ?

Welcome Cathy Heckman

[Home](#)

[My Preferences](#)

[Requisition Settings](#)

[0 Lines](#)

[Checkout](#)

Request Options ▼

Search All ▼

Search

Advanced Search

All Request Options

Web

Dell

VWR International

Fisher Scientific

Express Item Entry

Special Requests

Favorites

Fixed Cost Service

Variable Cost Service

Time and Materials

Recently Ordered

### Special Requests ?

Enter information about the non-catalog item you would like to order:

#### Item Details

\*Item Description

\*Price

\*Currency

\*Quantity

\*Unit of Measure

\*Category

Due Date

#### Supplier

Supplier ID

Supplier Name

HALO BRANDED SOLUTIONS  
INC

[Suggest New Supplier](#)

Supplier Item ID

#### Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

#### Additional Information

Send to Supplier

Show at Receipt

Show at Voucher

#### Request New Item

Request New Item

A notification will be sent to a buyer regarding this new item request.

[Add to Cart](#)

## CHECKOUT – Review and Submit

After all items have been entered & you've clicked "CHECKOUT"

1. Enter a "Requisition Name"

2. Attach estimates, contract, diagrams, etc. by clicking "ADD" under line item "Comments"

3. "Shipping Summary" if necessary. *This applies to the entire requisition.*

4. Add "Requisition Comments" *Type details & specifications about the order.*

5. Add "Approval Justification" *Price justification required on all orders over \$5000 in*

### Checkout - Review and Submit

Review the item information and submit the req for approval.

#### Requisition Summary

Business Unit SMETH

Southern Methodist University

\*Requester 04185352

Gregory Heckman

My Preferences Requisition Settings

Requisition Name Law Review Air Law Symposium

Priority Medium

Cart Summary: Total Amount 4,950.00 USD

Expand lines to review shipping and accounting details

Add More Items

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Airplane 4GB USB drive		HALO BRANDED SOLUTIONS INC	500.0000	Each	8.890	4445.00		Edit	
2	Round metal gift box		HALO BRANDED SOLUTIONS INC	500.0000	Each	0.890	445.00		Add	
3	Pre-production Sample		HALO BRANDED SOLUTIONS INC	1.0000	Each	60.000	60.00		Add	

Select All / Deselect All    Select lines to:    Add to Favorites    Add to Template(s)    Delete Selected    Mass Change

Total Amount 4,950.00 USD

#### Shipping Summary

Edit for All Lines

Ship To Location LAWJALC-S  
Address UNDERWOOD LAW LIBRARY  
6550 HILLCREST AVE., STE 105  
Dallas, TX. 75205  
Attention To Lisa Browning

#### Requisition Comments

Enter requisition comments

Law Review, Air Law Symposium, 50th Annual Symposium special gift for attendees  
Airplane Shaped 4GB USB drives, metallic gold, engraved  
Silver metal round box with 1-color, PMS 186 red imprint  
Pre-production sample required for final approval. Job produced in China

Send to Supplier     Show at Receipt     Shown at Voucher

#### Approval Justification

Enter approval justification for this requisition

Preferred Provider vendor

**\*\*\*NOTE\*\*\***  
Requisition Comments  
helps speed up requisition  
review and approval.



## Checkout - Review and Submit

Review the item information and submit the req for approval.

 My Preferences

 Requisition Settings

### Requisition Summary

Business Unit  Southern Methodist University  
\*Requester  Cathy Heckman  
\*Currency




Requisition Name   
Priority

Cart Summary: Total Amount 4,950.00 USD

Expand lines to review shipping and accounting details



### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Airplane 4GB USB drive		HALO BRANDED SOLUTIONS INC	500.0000	Each	8.890	4445.00			
*Ship To <input type="text" value="LAWJALC-S"/>				Quantity	<input type="text" value="500.0000"/>					
Address UNDERWOOD LAW LIBRARY 6550 HILLCREST AVE., STE 105 Dallas, TX 75205				Add One Time Address	Price	8.8900		Price Adjustment Pegging Inquiry Pegging Workbench		
Attention To <input type="text" value="Lisa Browning"/>										
Due Date <input type="text"/>										

## ACCOUNTING LINES

1. Click "**Chartfield2**" to allocate to appropriate account, fund, org, project, class (subclass), & program (grant #).


2. Repeat for all line items.

3. Click "+" to 'split charges'  
4. to multiple org #s.

Accounting Lines

\*Distribute By  SpeedChart

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2					
Account	Fund	Dept	Project	Class	Program	Affiliate				
<input type="text" value="6735"/>	<input type="text" value="10"/>	<input type="text" value="225805"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



### Shipping Summary

 Edit for All Lines

**Ship To Location** LAWJALC-S  
**Address** UNDERWOOD LAW LIBRARY  
6550 HILLCREST AVE., STE 105  
Dallas, TX 75205  
**Attention To** Lisa Browning

### Requisition Comments

Enter requisition comments

Law Review, Air Law Symposium, 50th Annual Symposium special gift for attendees  
Airplane Shaped 4GB USB drives, metallic gold, engraved  
Silver metal round box with 1-color, PMS 186 red imprint  
Pre-production sample required for final approval. Job produced in China



Send to Supplier

Show at Receipt

Shown at Voucher

### Approval Justification

Enter approval justification for this requisition

Preferred Provider vendor

**SAVE & SUBMIT**

**Click "SAVE & SUBMIT"  
once all information has  
been entered**



Save & submit



Save for Later



Add More Items



Preview Approvals

# CONFIRMATION

1. Record **REQ NAME & REQ #**
2. Click **"View Printable Version"**  
*Save Printable Version to PDF for your records*
3. Click **"Edit This Requisition"** to make changes prior to approvals being made.
4. Changes can be made after approvals have been made but the approval process begins again.

## Confirmation

Your requisition has been submitted.

Requested For Cathy Heckman

Requisition Name Law Review Air Law Symposium

Requisition ID 0000007106

Business Unit SMETH

Status Pending

Priority Medium

Number of Lines 3

Total Amount 4,950.00 USD

Approval Justification  
Preferred Provider vendor

 View printable version


 Edit This Requisition

## Requisition Approval

▼ Law Review Air Law Symposium:Pending

Supervisor Req Approval

Pending

 Shannon Scott Brown  
SMU Requisition Approver

Apply Approval Changes

 Create New Requisition

 Manage Requisitions

