

Using one Speedtype for all line items


Information Technology Services Reference Sheet Using one Speedtype for all line items

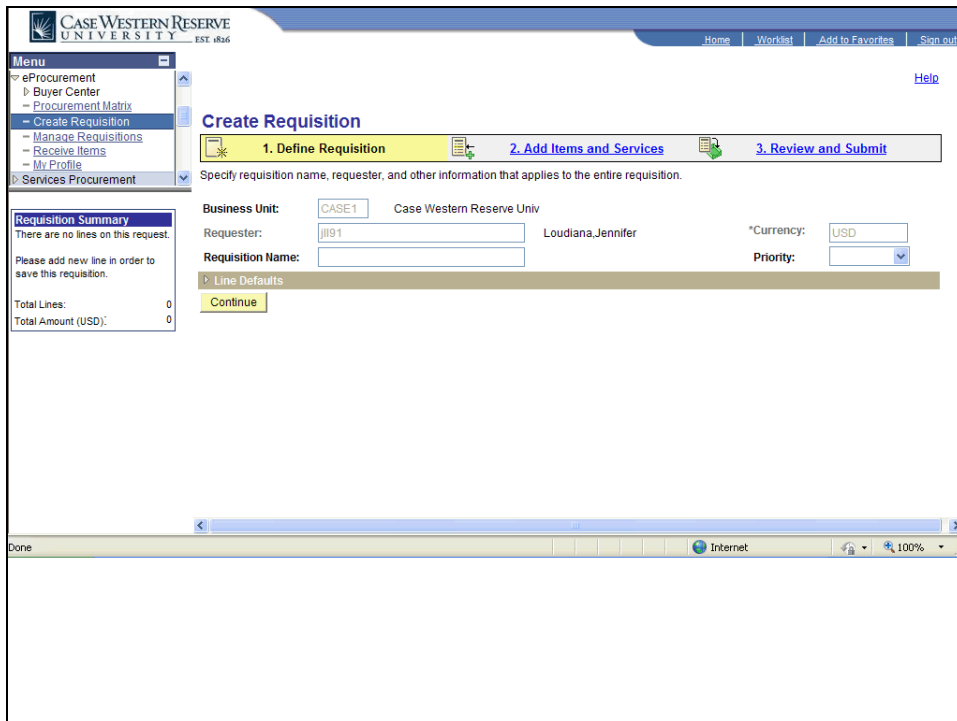
Procedure

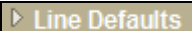
This guide explains how to designate one Speedtype for all line items on a requisition.

One Speedtype may be used for all lines on a Special Request or a SmartCART requisition.

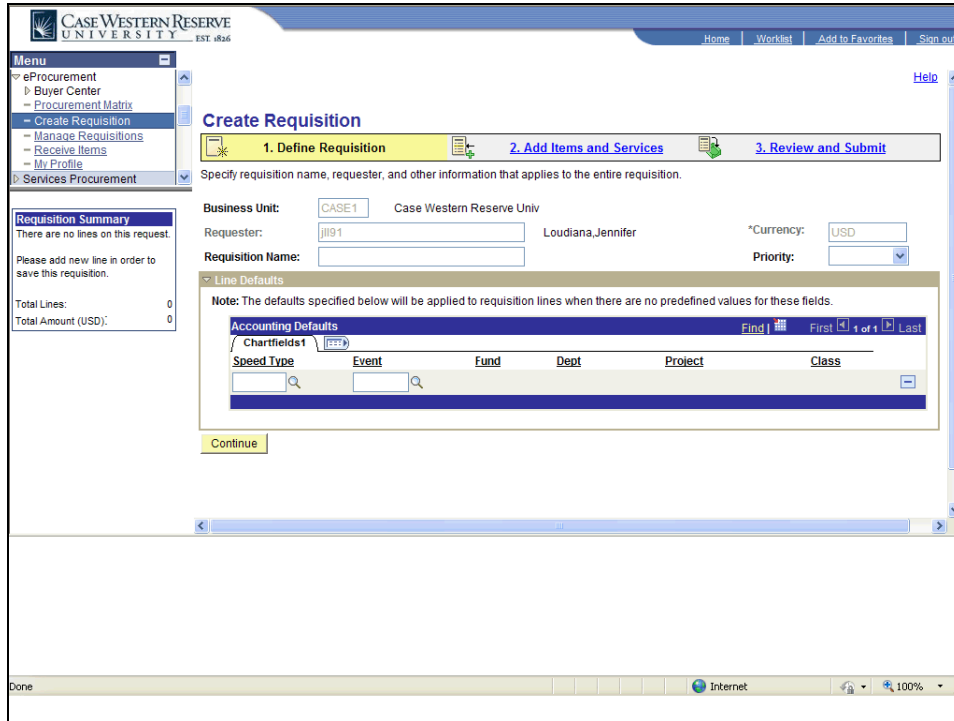
This process also applies to retrieving Window Shopper carts.

Step	Action
1.	Start with eProcurement. Then Create Requisition. 



Step	Action
2.	The Create Requisition page will appear. If preferred, enter a name for your requisition. Click the Expand section button next to the Line Defaults. 

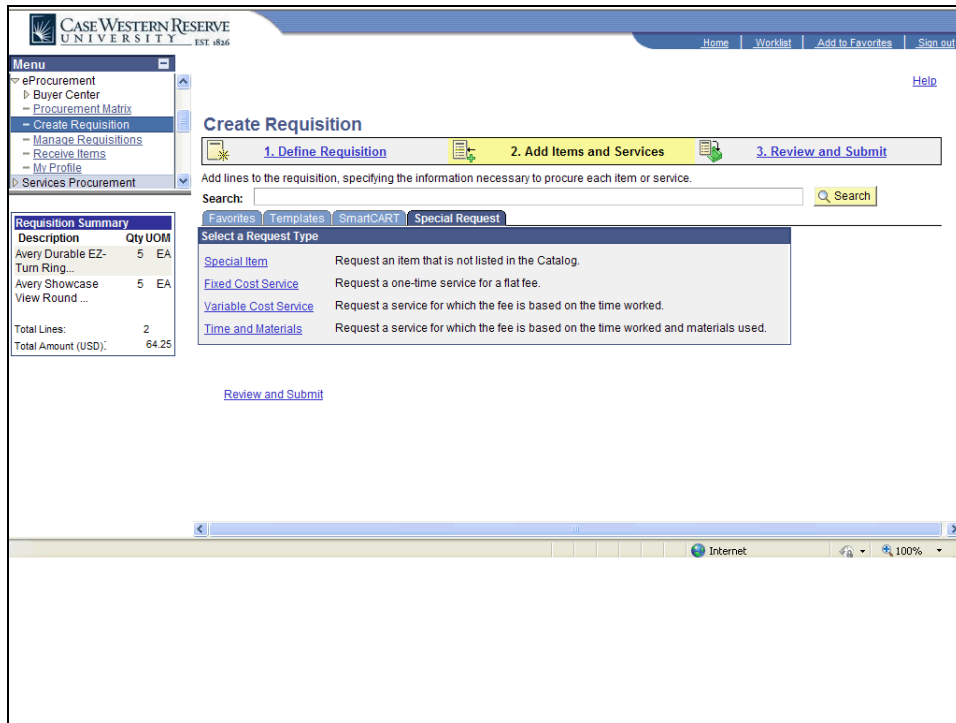
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Step	Action
3.	<p>Enter the Speedtype Defaults to charge all lines in the requisition into the Speed Type field. Enter the Event chartfield in the Event field, if applicable.</p> <p>WARNING! Changes are not allowed after this page has been completed. If you do not enter the default speedtype here you can not return to enter that information.</p> <p>WINDOW SHOPPER CARTS! This step must be completed first before retrieving Window Shopper carts from SmartCART. Check the email notification for the Speedtype information from the window shopper.</p>
4.	<p>Click the Continue button.</p> <p>Continue</p>
5.	<p>Proceed to SmartCART by clicking the SmartCART tab.</p> <p>SmartCART</p>
6.	<p>Or proceed to create a non-SmartCART requisition by clicking the Special Request tab.</p> <p>Special Request</p>

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Step	Action
7.	<p>Create a requisition, order from SmartCART or retrieve Window Shopper carts as usual.</p> <p>For SmartCART, when finished, click the Place Order button and the cart will pull into the PeopleSoft Financials system.</p>



The screenshot displays the 'Create Requisition' page in the eProcurement system. The page title is 'Create Requisition' and it features three main steps: 1. Define Requisition, 2. Add Items and Services, and 3. Review and Submit. A search bar is present for finding items or services. The 'Requisition Summary' table shows the following data:

Description	Qty	UOM
Avery Durable EZ-Turn Ring...	5	EA
Avery Showcase View Round ...	5	EA
Total Lines:	2	
Total Amount (USD):	64.25	

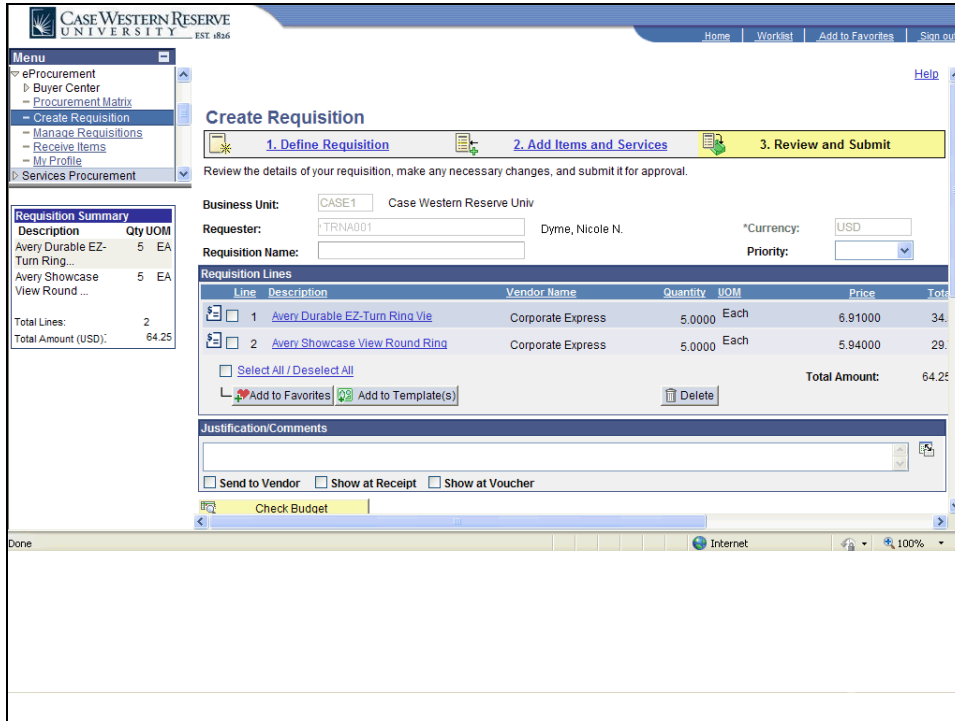
The 'Select a Request Type' dropdown menu is open, showing the following options:

- [Special Item](#): Request an item that is not listed in the Catalog.
- [Fixed Cost Service](#): Request a one-time service for a flat fee.
- [Variable Cost Service](#): Request a service for which the fee is based on the time worked.
- [Time and Materials](#): Request a service for which the fee is based on the time worked and materials used.

A 'Review and Submit' link is visible at the bottom of the page.

Step	Action
8.	<p>After adding items to the requisition, click the 3. Review and Submit link.</p> <p>3. Review and Submit</p>

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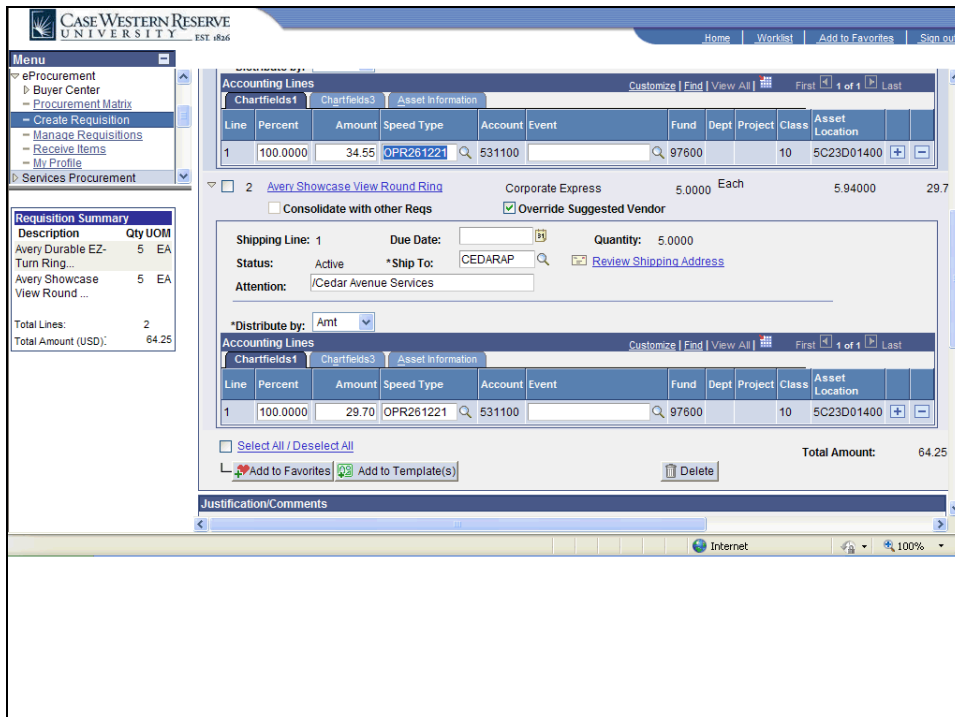
Requisition Summary

Description	Qty	UOM
Avery Durable EZ-Turn Ring...	5	EA
Avery Showcase View Round ...	5	EA
Total Lines:	2	
Total Amount (USD):	64.25	

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Avery Durable EZ-Turn Ring Vie	Corporate Express	5.0000	Each	6.91000	34.55
2	Avery Showcase View Round Ring	Corporate Express	5.0000	Each	5.94000	29.70
Total Amount:						64.25

Step	Action
9.	Click the Expand Section button on each item to view the Speedtype has populated correctly and to make any changes to Shipping or Attention Lines. 



Accounting Lines

Line	Percent	Amount	Speed Type	Account	Event	Fund	Dept	Project	Class	Asset Location
1	100.0000	34.55	OPR261221	531100		97600		10	5C23D01400	

Shipping Line: 1 Due Date: Quantity: 5.0000
 Status: Active *Ship To: CEDARAP Review Shipping Address
 Attention: /Cedar Avenue Services

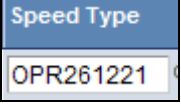
*Distribute by: Amt

Accounting Lines

Line	Percent	Amount	Speed Type	Account	Event	Fund	Dept	Project	Class	Asset Location
1	100.0000	29.70	OPR261221	531100		97600		10	5C23D01400	

Total Amount: 64.25

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Step	Action
10.	<p>The Speedtype and Event, if applicable, that were entered at the beginning of the requisition now appear in each line item field.</p> <p>At this time, changes to the Speedtype and Account fields may be done. For example, if a default Speedtype was entered for all of the items, except one item should be charged to a different Speedtype.</p> 
11.	<p>Proceed to Check Budget and Submit the requisition as usual.</p> <p>End of Procedure.</p>