

Log into PeopleSoft Financials at:

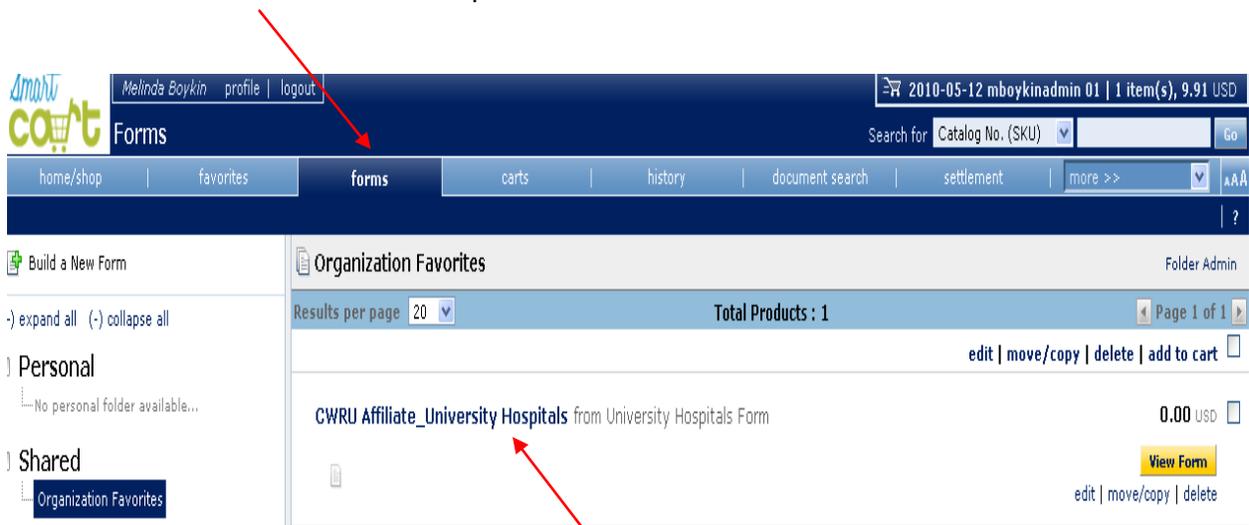
<https://fin.case.edu/psp/finprd/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&>

Click on eProcurement > Create Requisition on the left menu (same as creating a new SmartCART req)

Enter in your Req Name. Enter your Speedtype under Line Defaults if you wish to do so. Hit Continue on the bottom.

Click on the SmartCART tab then the SmartCART link under Merchant.

Click “forms” on the menu on the top of SmartCART.



The screenshot shows the SmartCART interface. At the top, there is a navigation bar with the 'forms' menu item highlighted. Below the navigation bar, there is a section for 'Organization Favorites' with a table of results. The table has one row with the following details:

Organization Favorites	Price
CWRU Affiliate_University Hospitals from University Hospitals Form	0.00 USD

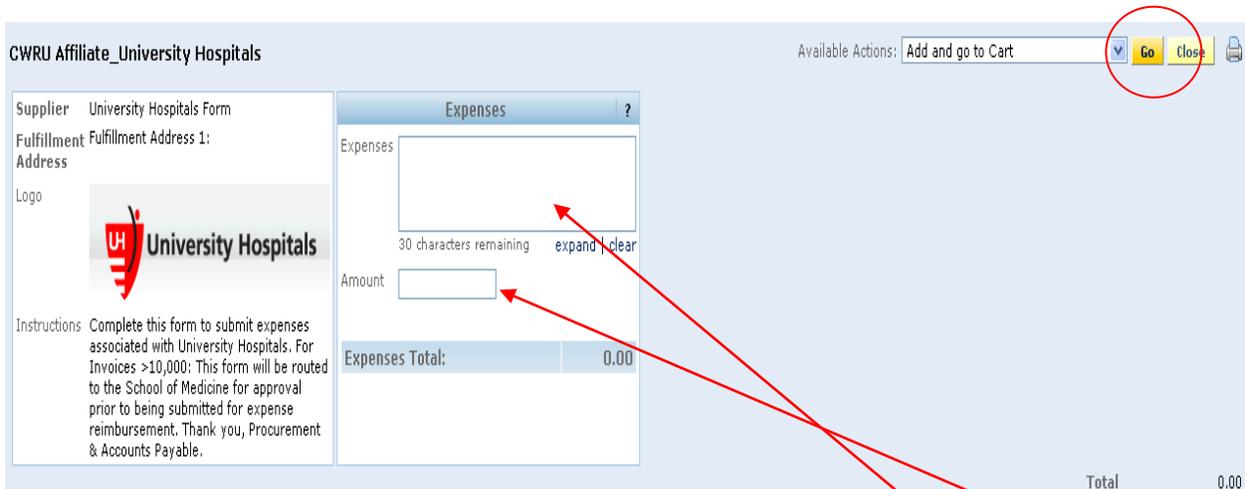
Click on link “CWRU Affilitate_University Hospitals” and the form will open in a new browser window.

If the “Shared” menu has a “+” sign then click on it and it will turn into a “-“. Click on “Organization Forms” and then you will be able to see the shared forms available to you on the right.



Type in the Description and Amount (**without the \$ sign**). Cents are not required if they are zero and a comma is not required for amounts 1000 and over, but does not hurt anything.

Once you are done entering all your information, click the yellow Go button next to “Available Actions” and the drop down box that says “Add and go to Cart”. Do not change the drop down box.



If you have an invoice that has one expense listed, type the expense description, amount and select “Add and go to Cart” - Go.

If you have an invoice with two or more lines, type the 1st expense and click the drop down arrow and select “Add to Cart and Return”, then click Go.



CWRU Affiliate_University Hospitals

Supplier: University Hospitals Form
 Fulfillment Address: University Hospitals Form
 Logo: University Hospitals
 Instructions: Complete this form to submit expenses associated with University Hospitals. For Invoices >10,000: This form will be routed to the School of Medicine for approval prior to being submitted for expense reimbursement. Thank you, Procurement & Accounts Payable.

Expenses: [Empty field]
 Amount: [Empty field]
 Expenses Total: 0.00

Available Actions: Add and go to Cart, Add and go to Cart, **Add to Cart and Return**, Add to Cart, Add to Draft Cart or Pending PR/PO, Add to PO Revision, Add To Favorites, Save

Total: 0.00

The 1st expense will be added and you will receive a clear box to type the next expense.



CWRU Affiliate_University Hospitals

Supplier: University Hospitals Form
 Fulfillment Address: University Hospitals Form
 Logo: University Hospitals
 Instructions: Complete this form to submit expenses associated with University Hospitals. For Invoices >10,000: This form will be routed to the School of Medicine for approval prior to being submitted for expense reimbursement. Thank you, Procurement & Accounts Payable.

Expenses: Salary for Carte July-Aug 11
 Amount: 500
 Expenses Total: 0.00

Available Action: Add to Cart and Return

Total: 0.00

After you enter the last expense from the invoice, click the drop down arrow and select “Add and go to Cart” and click Go to complete the process.



Form added to cart successfully
Each **Add to Cart** action adds the item to the cart. Use the **Save** option to update the item in the cart.

CWRU Affiliate_University Hospitals Available Actions: **Add and go to Cart** Go Close

Supplier: University Hospitals Form
Fulfillment Address 1:
Address:
Logo:

Instructions: Complete this form to submit expenses associated with University Hospitals. For Invoices >10,000: This form will be routed to the School of Medicine for approval prior to being submitted for expense reimbursement. Thank you, Procurement & Accounts Payable.

Expenses

Expenses: Salary Cowie July-Aug 11
6 characters remaining expand | clear

Amount: 500

Expenses Total:	0.00
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Total 0.00

Your lines will be populated in SmartCART:

active cart | draft carts | other draft carts | assigned carts | favorites | my recent carts | reminder settings

Shopping Cart for Melinda Boykin
Name this cart: 2010-05-12 mboykinadm01

2 Item(s) for a total of **1,000.00 USD**
subtotal: 1,000.00 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or Assign Cart to Approver

University Hospitals Form

Product Description	Unit Price	Quantity	Total
Salary for Carte July-Aug 11 Commodity Code: <input type="text"/>	500.00 USD	1	500.00 USD
Salary Cowie July-Aug 11 Commodity Code: <input type="text"/>	500.00 USD	1	500.00 USD

2 Item(s) for a total of **1,000.00 USD**
subtotal: 1,000.00 USD
estimated tax, shipping & handling: 0.00 USD

Click the magnifying glass to select the correct commodity code that describes the expense. All commodity codes that relate to Affiliate reimbursements begin with "Affiliate"

Commodity Code Search

Code starts with...

Description contains...

Search

Close

Type "aff" in the description field and click Search

Select the commodity code that describes the expense.

[Close](#)

[+ Click to filter search results](#) ?

Results per page **Results 10** Page 1 of 1 ?

Code	Description	
00324	Affiliate CCLCM Subcontract	select
00326	Affiliate Other Purchases	select
00328	Affiliate Parking	select
00329	Affiliate Parking	select
00322	Affiliate Patient Care	select
00327	Affiliate Research Supplies	select
00320	Affiliate Salaries Fringes	select
00325	Affiliate Scholarships	select
00323	Affiliate Stipends	select
00321	Affiliate Study Participants	select

Results per page Page 1 of 1

The commodity codes will load for each line or click update to recognize the commodity.

****Note, the commodity code name must appear on the line.**

Name this cart: subtotal: 1,000.00 USD
estimated tax, shipping & handling: 0.00 USD

[Proceed to Checkout](#) or [Assign Cart to Approver](#)

Have you made changes? [Update](#) [Help](#) [Empty Cart](#) Perform an action on (0 items selected)... [Select All](#)

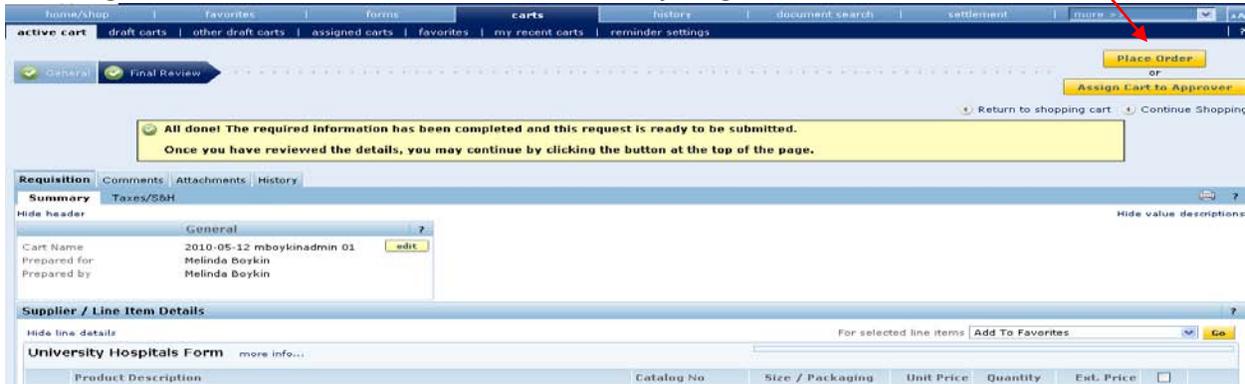
Product Description	Unit Price	Quantity	Total
Item added on Dec 4, 2011 Add to Favorites Remove More Actions Salary Carte July-Aug 11 open form... Commodity Code: <input type="text" value="00320"/> Affiliate Salaries Fringes	500.00 USD	1	500.00 USD
Item added on Dec 4, 2011 Add to Favorites Remove More Actions Salary Cowie July-Aug 11 open form... Commodity Code: <input type="text" value="00320"/>	500.00 USD	1	500.00 USD

Have you made changes? [Update](#) 2 Item(s) for a total of **1,000.00** USD
subtotal: 1,000.00 USD
estimated tax, shipping & handling: 0.00 USD

[Proceed to Checkout](#) or [Assign Cart to Approver](#)

When all expenses are entered, click Proceed to Checkout.

You will get a chance to have a “Final Review”. If everything is correct, click “Place Order”.



Double check the Account Codes to make sure they are not 531200, Lab Inst & Res Supplies, unless that is what you wanted it to be. 531200 is the default and if this is your account code you probably forgot to enter in the commodity code in SmartCART or did not hit the Update button if you are not purchasing lab or research supplies. Don't worry, you can change it in PeopleSoft Financials but it is a different # (see list on next page)

SmartCART Commodity Codes and Corresponding PeopleSoft Financials Account #'s

SmartCART Commodity Code	PeopleSoft Financials Account #
00325 – Affiliate Scholarships	572200 - Predoc Fellow - Tuition & Fees
00323 – Affiliate Stipends / Reimbursement Expenses	533400 - Stipends & Allow - Non-CWRU
00321 – Affiliate Study Participants	533770 - Study Participants
00327 – Affiliate Research Supplies	531200 - Lab Inst & Res Supplies
00322 – Affiliate Patient Care Expenses	533710 - Patient Care
00328 – Affiliate Parking Expenses	533700 - Other Parking Services
00329 – Affiliate Alcohol	531200 - Affiliated Alcohol
00320 – Affiliate Salaries / Fringe Benefits #1	533720 - Salaries Fringe Benefits
00326 – Affiliate Other Purchases	533730 - Other Purchases

Finish like you would any other PeopleSoft Financials requisition.