1. Assigning Budget Information

Before a cart can be submitted for approvals, the funding information (Speedtype and Accounting Code) needs to be assigned to it. The first step in the approval workflow, the department approval step, is based on whatever department information is assigned to the cart.

Beginning at the home/shop page,

1. Click the Action Items link (located on top right of screen)
2. Click the Carts Assinged To Me link. (Only applies if a cart has been assigned. Many Requisitioners will be creating their own.)
3. Click the Shopping Cart name you wish to work on.
4. Click the button.

The Draft Requisition detail screen displays. The red triangles on the workflow screen see example below, indicates that the Shipping and Accounting Codes required fields MUST be completed before the order can be Final Reviewed and submitted to the Approver.

5. To enter the required accounting information, click the link...

The Accounting detail screen appears with a message box letting you know which accounting fields need to be addressed.
### Assigning Budget Information — Continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td>6.</td>
<td>Click on the pencil icon next to each required field. The Accounting Codes detail screen appears as shown in the example below.</td>
</tr>
<tr>
<td>7.</td>
<td>Enter the <strong>Speedtype</strong> and <strong>Account</strong> values in the field text boxes if you know them. Otherwise you will have to perform a search described below.</td>
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<tr>
<td>8.</td>
<td>Click the links under each value and…</td>
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<tr>
<td>9.</td>
<td>Click the button.</td>
</tr>
<tr>
<td>10.</td>
<td>Scroll through the list until you find the Speedtype and Account values you need.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the [select] link.</td>
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<tr>
<td>12.</td>
<td>You can also select the values from the code favorites/profile values if they have been set up.</td>
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<tr>
<td>13.</td>
<td>Click the button. The message box at this step lets you know that you have successfully completed the request and provides further instructions.</td>
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<tr>
<td>14.</td>
<td>Click the link on the progress arrow to review a summary of the requisition. <strong>Final Review</strong> provides a summary of the completed requisition before submittal. You can also resolve many shopping cart issues from the <strong>Final Review</strong> step. Next, click the <strong>Submit Requisition</strong> button. An overlay screen providing a summary of the requisition appears letting you know that you have successfully submitted the cart to the Approver.</td>
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</tbody>
</table>
2. Split Funding a Requisition

The funding information that is assigned at the **Header Level** is inherited by all the items. If necessary, you can assign lines separately if they should be charged differently. You can also **Split Fund** the cart at the header level.

### Split Funding a Requisition At The Header Level

**Split Funding** at the **Header** level splits the entire Purchase Order.

Beginning at the home/shop level,

1. Navigate **Approvals** > **Carts Assigned To Me** > **Shopping Cart Name** > **Proceed to Checkout**. You can also,

2. Click the **Carts Tab** > **draft carts link** > **Carts Assigned To Me** > **Shopping Cart Name** > **Proceed to Checkout**

3. Click the **edit** link.

4. Click the **button in the Accounting Codes** section.

5. Select the **button.**
   
   You can split the charge by % of Price, % of Quantity, or Amount of Price.

6. Select the split type from the drop down menu.

7. Enter the information for each split by adding a new **speedtype/s** or **account code/s** to the new line/s.

8. Click the **recalculate / validate values** button to verify the split has been entered accurately.

9. Click the **Save** button when done.

### Split Funding a Requisition At Line Level

**Split Funding At The Line Level** only affects the line you want to split.

1. Follow steps 1 – 3 of the **Split Funding At The Header Level** procedure.

2. Open the **Accounting Codes** section of the requisition.

3. Hide the **Header** level or scroll down to the **Product Description and Line Items** section

4. Click the **edit** button to the right of the line item and,

5. Follow the **Split Funding at the Header level** steps 1 – 9 to complete the split funding at the line level.