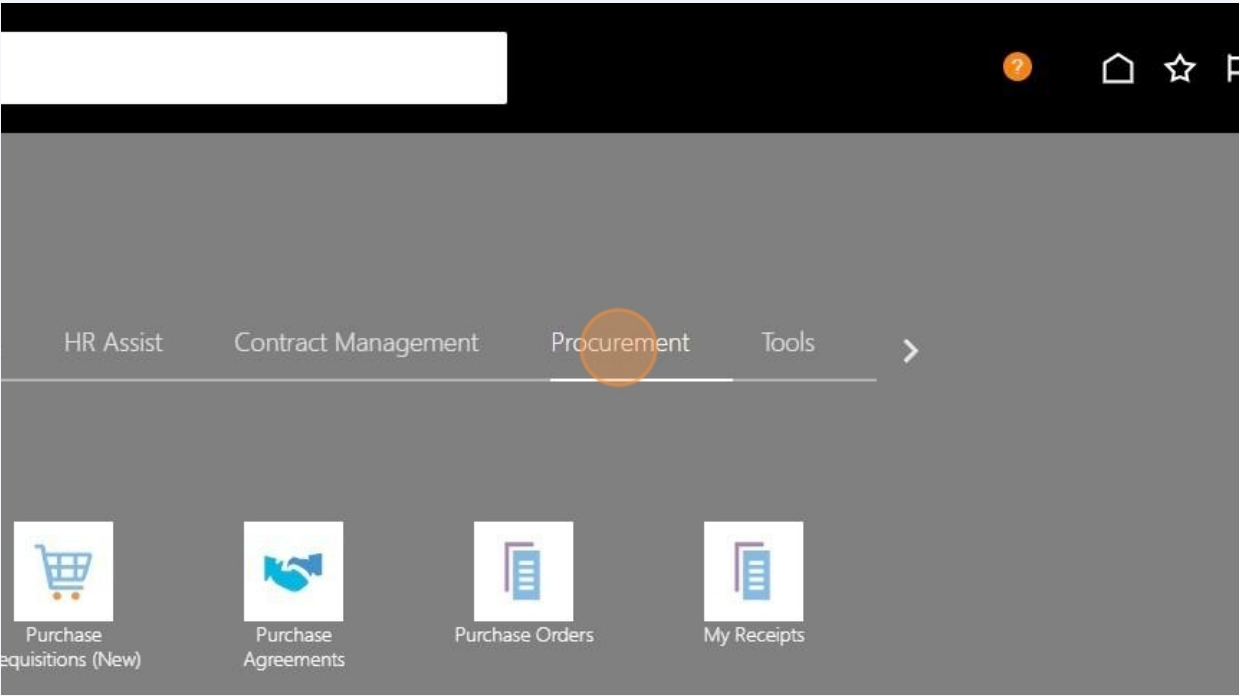
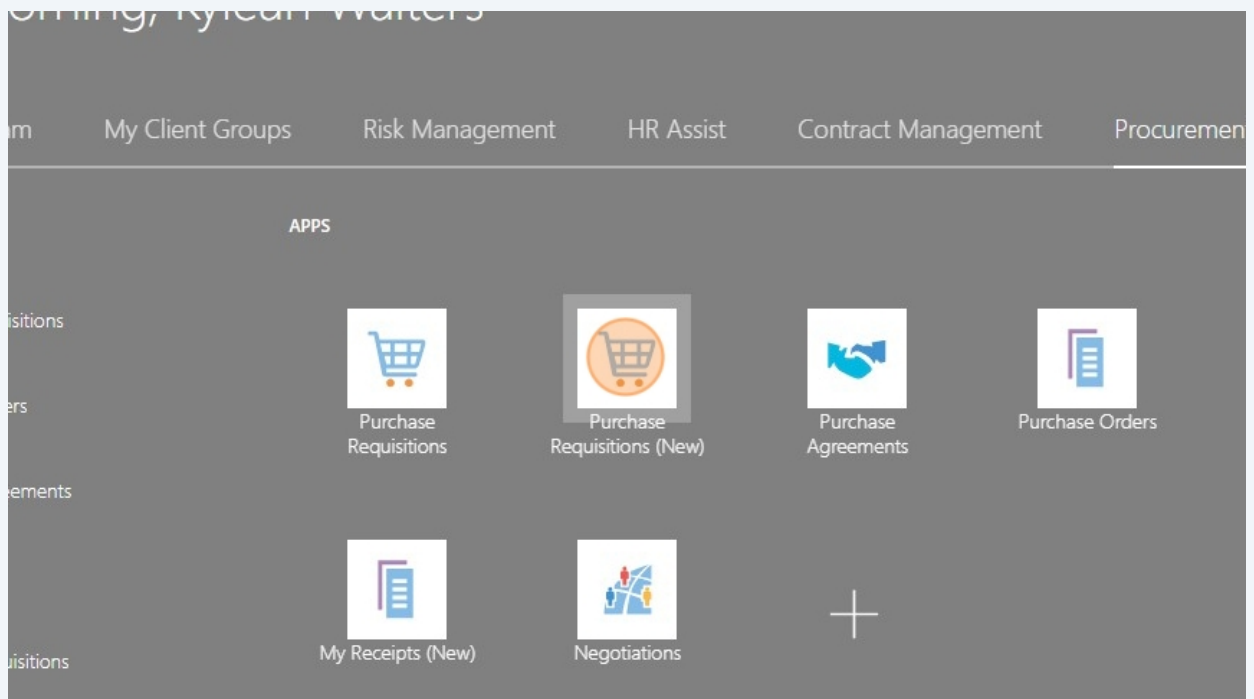


How to Set Up Procurement Preferences DASH (Deliver to Location & Charge Accounts)

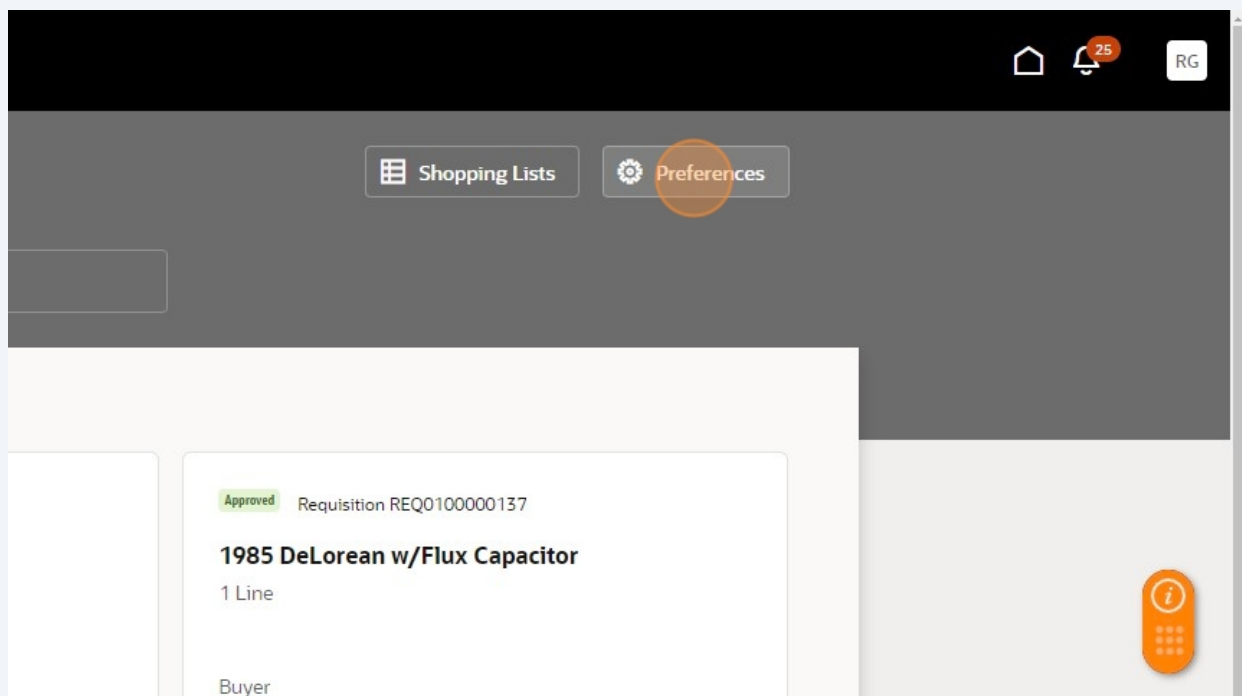
1 Click "Procurement"



2 Click "Purchase Requisitions (New)"



3 Click "Preferences"



4

The Requisitioning BU will default to end-user's Business Unit. If you have access to multiple BUs, you can use the drop-down to view options.

The screenshot shows a requisitioning interface. On the left, a requisition card is visible with the following details: **Approved** Requisition REQ0100000137, **1985 DeLorean w/Flux Capacito**, 1 Line, and Buyer **Kyleah Walters**. On the right, a **Preferences** sidebar is open. Under the **Requisitioning BU** section, a dropdown menu is set to **UT System BU**. Under the **Delivery** section, the **Requester** is **Kyleah Walters**, the **Deliver to Location** is **UT Tower_10_1049C**, and the **Destination Type** is **Expense**. An information icon is present next to the Destination Type field.

5

Requester will default to end-user

The screenshot shows a requisitioning interface. On the left, a requisition card is visible with the following details: **Approved** Requisition REQ0100000137, **1985 DeLorean w/Flux Capacito**, 1 Line, and Buyer **Kyleah Walters**. On the right, a **Preferences** sidebar is open. Under the **Requisitioning BU** section, a dropdown menu is set to **UT System BU**. Under the **Delivery** section, the **Requester** is **Kyleah Walters**, the **Deliver to Location** is **UT Tower_10_1049C**, and the **Destination Type** is **Expense**. An information icon is present next to the Destination Type field. Below the Delivery section, the **Project costing** section is partially visible.

6

Enter Deliver to Location by typing in the address. In this example, "UT_Tower_10_1049c"

The screenshot shows a requisition form with the following fields and values:

- Requisitioning BU: UT System BU
- Delivery:
 - Requester: Kyleah Walters
 - Deliver to Location: UT_Tower_10_1049c
 - Destination Type: Expense
- Project costing:
 - Project Number: (empty)

On the left side, a card displays requisition details: "Approved Requisition REQ0100000137", "1985 DeLorean w/Flux Capacito", "1 Line", and "Buyer Kyleah Walters".

7

Click the "Deliver to Location" field. To help search for your address, you can start typing the building name or name of the college.

The screenshot shows the same requisition form as in step 6, but with the "Deliver to Location" field open to show search results. The field contains the text "tickle". The search results are:

- John D Tickle Engineering Building_01_100
851 Neyland Drive, 100, Knoxville, TN 37996, Knox, United States
- John D Tickle Engineering Building_01_101
851 Neyland Drive, 101, Knoxville, TN 37996, Knox, United States
- John D Tickle Engineering Building_01_101A
851 Neyland Drive, 101A, Knoxville, TN 37996, Knox, United States

On the left side, a card displays requisition details: "Requisition REQ010000000130", "ware m16 R2", "Order PO0100000000056", and a Dell logo.

8 Here we are searching by the word nursing

The screenshot shows a requisition page on the left and a search dropdown menu on the right. The requisition card includes the text "Requisition REQ010000000130", "ware m16 R2", "der PO010000000056", and the Dell logo. The search dropdown menu is titled "Delivery" and has "Requester" set to "Abigail Shellist". The "Deliver to Location" dropdown is set to "nursing". The search results list four locations: "College of Nursing_01_101A", "College of Nursing_01_101B", "College of Nursing_01_103", and "College of Nursing_01_105". Each location entry includes the address "1200 Volunteer Boulevard, [number], Knoxville, TN 37996, Knox, United States". An orange circle highlights the "College of Nursing_01_103" entry in the search results.

9 Click here.

This screenshot is similar to the one above, showing the same requisition card and search dropdown menu. However, the search results list now includes five entries: "College of Nursing_01_101A", "College of Nursing_01_101B", "College of Nursing_01_103", "College of Nursing_01_105", and "College of Nursing_01_107". The "College of Nursing_01_103" entry is highlighted with an orange circle. The text "0000" is visible at the bottom of the search results area.

10 Select address from the drop-down

The screenshot shows a requisition form for '1985 DeLorean w/Flux Capacito' (1 Line) with an approved status and requisition number REQ0100000137. The buyer is Kyleah Walters. The 'Delivery' section includes a 'Requester' dropdown (Kyleah Walters) and a 'Deliver to Location' dropdown (UT_Tower_10_1049c). A search dropdown is open, showing 'UT Tower_10_1049C' highlighted. Below this is the 'Project costing' section with a 'Project Number' dropdown, and a 'Charge accounts' section with a plus sign.

11 Destination Type defaults to "Expense". Do not change unless you are in Facilities Services.

This screenshot is similar to the previous one, but the 'Destination Type' dropdown is now visible and set to 'Expense'. The 'Deliver to Location' dropdown is still set to 'UT Tower_10_1049c'. The rest of the form, including the 'Requester', 'Project costing', and 'Charge accounts' sections, remains the same.

12 Project Costing is only required for Capital Projects or Sponsored Projects

Approved Requisition REQ0100000137

1985 DeLorean w/Flux Capacito
1 Line

Buyer
Kyleah Walters

UT Local Catalog

Deliver to Location
UT Tower_10_1049C

Destination Type
Expense

Project costing

Project Number

Charge accounts +

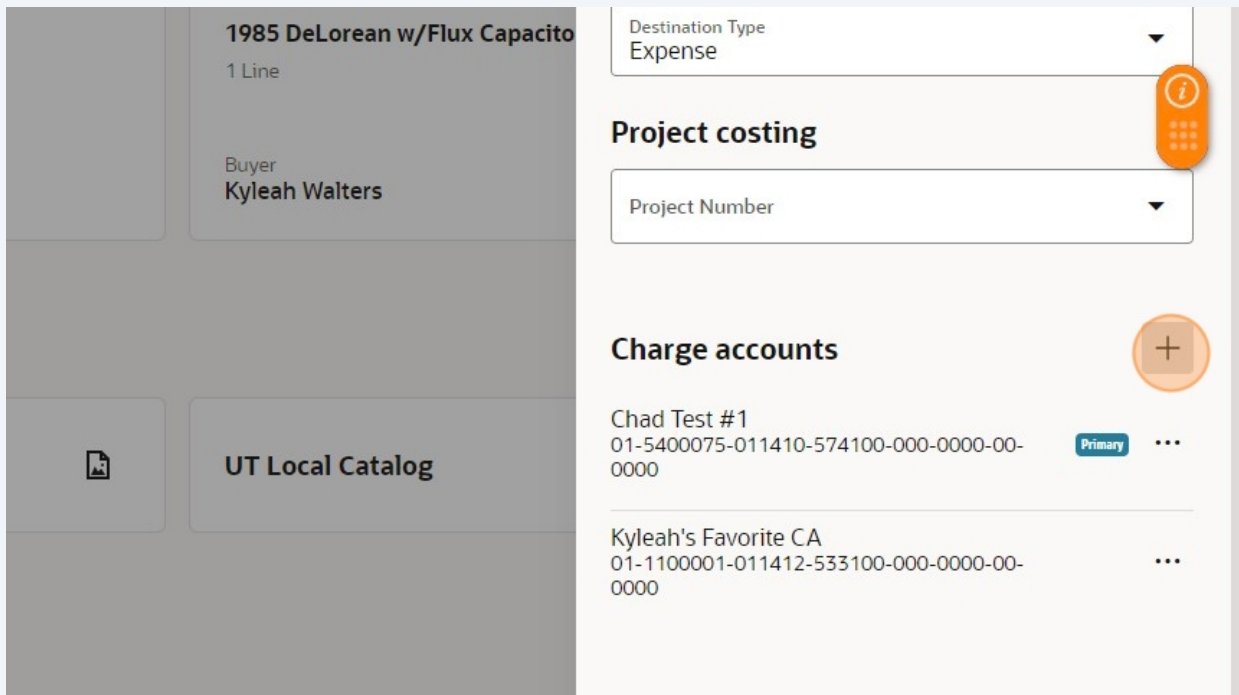
Chad Test #1
01-5400075-011410-574100-000-0000-00-0000 **Primary** ...

Kyleah's Favorite CA



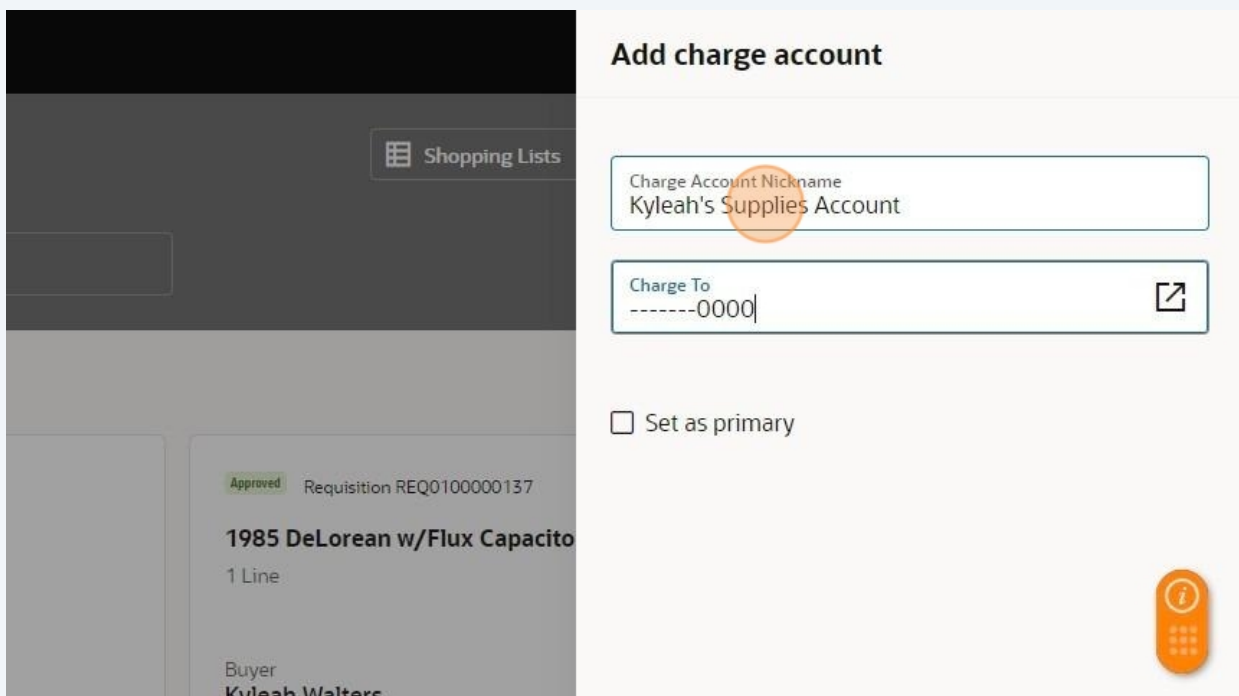
Tip! You have the option to add commonly used charge accounts to your Preferences.

13 To add a Charge Account, click the "+" symbol



The screenshot shows a procurement system interface. On the left, a line item is displayed with the following details: "1985 DeLorean w/Flux Capacito", "1 Line", and "Buyer Kyleah Walters". Below this, there is a "UT Local Catalog" button. On the right, a "Destination Type" dropdown menu is set to "Expense". Below that is a "Project costing" section with a "Project Number" dropdown. The "Charge accounts" section is highlighted with a red circle around a plus sign (+) button. It lists two accounts: "Chad Test #1" (01-5400075-011410-574100-000-0000-0000) with a "Primary" label and a three-dot menu, and "Kyleah's Favorite CA" (01-1100001-011412-533100-000-0000-0000) with a three-dot menu.

14 Enter a nickname for the charge account in the "Charge Account Nickname" field.



The screenshot shows the "Add charge account" form in a procurement system. The form has a "Charge Account Nickname" field containing "Kyleah's Supplies Account", which is highlighted with a red circle. Below it is a "Charge To" field containing "-----0000" and a search icon. There is a checkbox labeled "Set as primary" which is currently unchecked. The background shows a line item with the following details: "Approved Requisition REQ0100000137", "1985 DeLorean w/Flux Capacito", "1 Line", and "Buyer Kyleah Walters".



Tip! There are a couple of different ways to enter charge accounts. You can enter them directly into the "Charge To" field, or you can click on the "square-arrow symbol" to enter.

15

To enter a charge account, click in the "Charge To" field (click to the left of the dashes). A drop-down box will appear. Start by typing the Entity number or scroll down to select.

The screenshot shows a web application interface. On the left, a shopping list item is visible with the following details: "Approved Requisition REQ0100000137", "1985 DeLorean w/Flux Capacito", "1 Line", and "Buyer Kyleah Walters". On the right, a dialog box titled "Add charge account" is open. It contains a text field for "Charge Account Nickname" with the value "Kyleah's Supplies Account". Below it is a "Charge To" field containing "-----0000" and a square-arrow icon. A dropdown menu is open below the "Charge To" field, showing a list of entities with their descriptions:

Entity	Description
00	DEFAULT ENTITY
01	UT System
02	UNIVERSITY OF TENNESSEE ENTERPRISE
03	UT Institute For Public Service
04	IIT Municipal Technical Advisory Service

16 Next, select the Fund. Either type the Fund number or scroll down to select.

Charge To
01+-----0000

Fund	Description
1000000	CURRENT UNRESTRICTED
1100000	UNRESTRICTED EDUCATIONAL & GENERAL FUNE
1100001	EDUCATIONAL & GENERAL FUNDS ~ CURRENT U
1100002	EDUC&GEN FUND~CUR UNRESTRIC~ACCESS&DI
1100003	STATE OFFSET FUNDS

Approved Requisition REQ0100000142

Phone Services
1 Line

Buyer
Kyleah Walters

17 Next, select the Department. Either type the number/description or scroll to select.

Department	Description
010100	Board of Trustees Office
0101XX	Board of Trustees Level 3
0101XY	Board of Trustees Level 4
0101XZ	Board of Trustees Level 5
011410	Treasurer

Approved Requisition REQ0100000137

1985 DeLorean w/Flux Capacito
1 Line

Buyer
Kyleah Walters

UT Local Catalog

18 Next, select the Account. Type the number/description or scroll to select.

The screenshot shows a requisition form for '1985 DeLorean w/Flu' with a 'Buyer' of 'Kyleah Walters'. A dropdown menu is open, displaying a list of accounts. The account '539001 Supplies' is highlighted with an orange circle. The background form includes a 'Shopping Lists' button and a 'UT Local Catalog' button.

Account	Description
5020ZZ	SUB TTL Utilities supplies and other services
502ZZZ	SUB TTL Utilities supplies and other services
530ZZZ	Sub TTL Utilities Supplies And Other Services
539000	439000 Supplies
539001	Supplies

19 For Program, select "Default Program".

The screenshot shows the same requisition form as in step 18. A dropdown menu is open, displaying a list of programs. The program '000 DEFAULT PROGRAM' is highlighted with an orange circle. The background form includes a 'Shopping Lists' button and a 'Charge Account Nickname' field with the value 'Kyleah's Supplies Account'. The 'Charge To' field contains the value '01-1100001-011410-539001----0000'.

Program	Description
000	DEFAULT PROGRAM
210	INSTRUCTION
220	RESEARCH
230	PUBLIC SERVICE
240	ACADEMIC SUPPORT

20 For Activity, select "Default Activity"

Shopping Lists

Charge Account Nickname
Kyleah's Supplies Account

Charge To
01-1100001-011410-539001-000---0000

Activity	Description
0000	Default Activity
0001	Academic Success in Recovery
0003	Affordable Course Materials
0004	Alzheimers Disease
0005	Antimicrobial Fruit Coating

Approved Requisition REQ0100000137

1985 DeLorean w/Flux Capacito

1 Line

Buyer
Kyleah Walters

21 For InterCo, select "DEFAULT INTERCOMPANY"

Shopping Lists

Charge Account Nickname
Kyleah's Supplies Account

Charge To
01-1100001-011410-539001-000-0000--0000

InterCo	Description
00	DEFAULT INTERCOMPANY
01	UT SYSTEM
03	UT INSTITUTE FOR PUBLIC SERVICE
04	UT MUNICIPAL TECHNICAL ADVISORY SERVICE
05	UT COUNTY TECHNICAL ASSISTANCE SERVICE

142

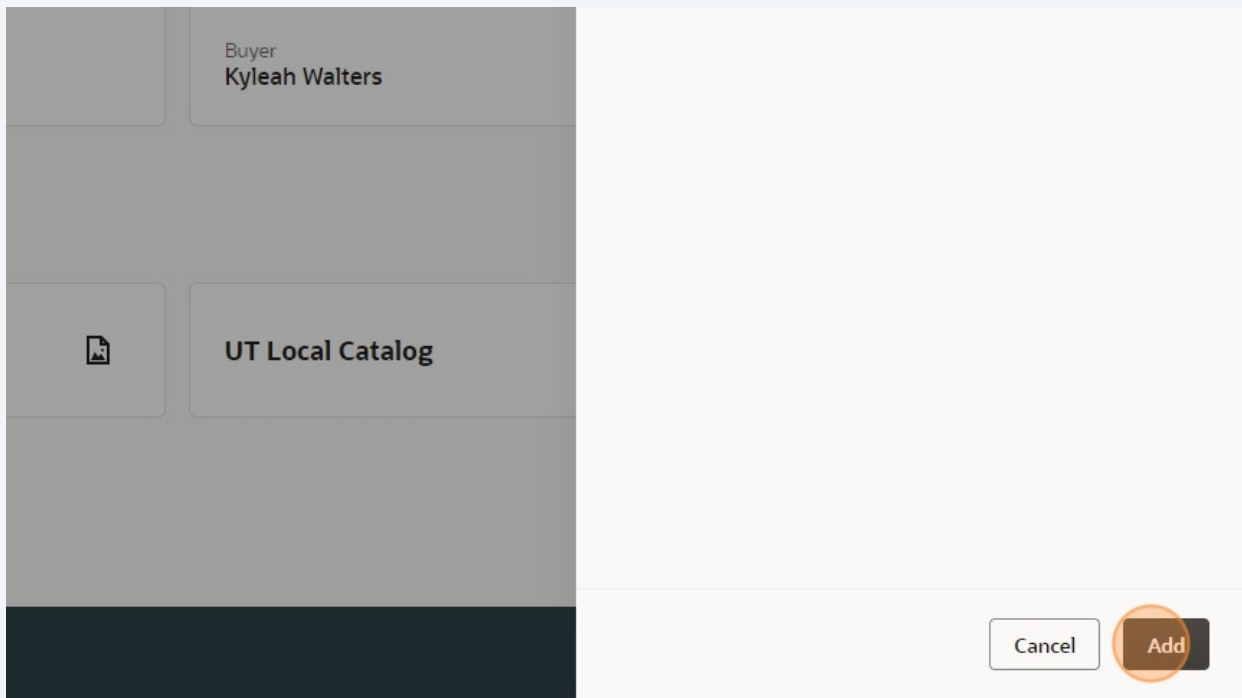
Approved Requisition REQ01

1985 DeLorean w/Fl

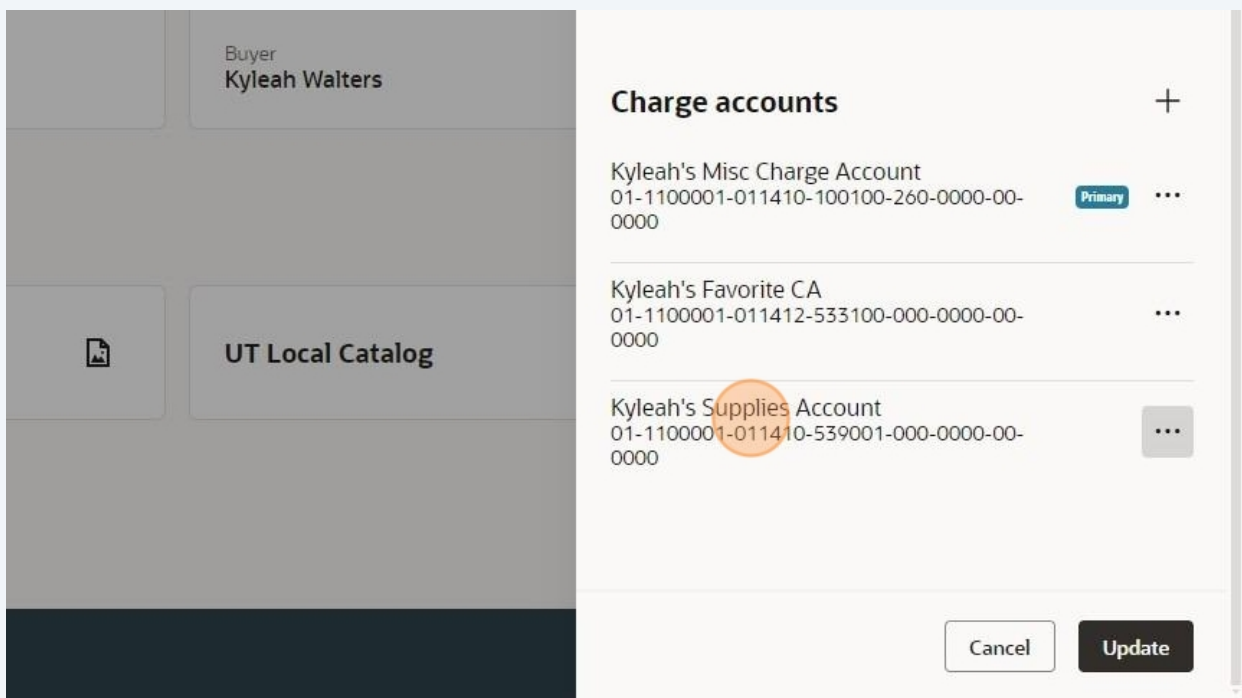
1 Line

Buyer
Kyleah Walters

22 Lastly, click "Add"



23 The Charge Account has now been added to your Preferences.



24

To set the new Charge Account as the primary account, click the 3 dots and click "Set as Primary".

Buyer
Kyleah Walters

UT Local Catalog

Charge accounts

Kyleah's Misc Charge Account
01-1100001-011410-100100-260-0000-00-0000 Primary ...

Kyleah's Favorite CA
01-1100001-011412-533100-000-0000-00-0000 ...

Kyleah's Supplies Account
01-1100001-011410-539001-000-0000-00-0000 ...

- ✓ Set as Primary
- Edit
- Delete

25

Click "Update", to save changes.

Buyer
Kyleah Walters

UT Local Catalog

Charge accounts

Kyleah's Misc Charge Account
01-1100001-011410-100100-260-0000-00-0000 ...

Kyleah's Favorite CA
01-1100001-011412-533100-000-0000-00-0000 ...

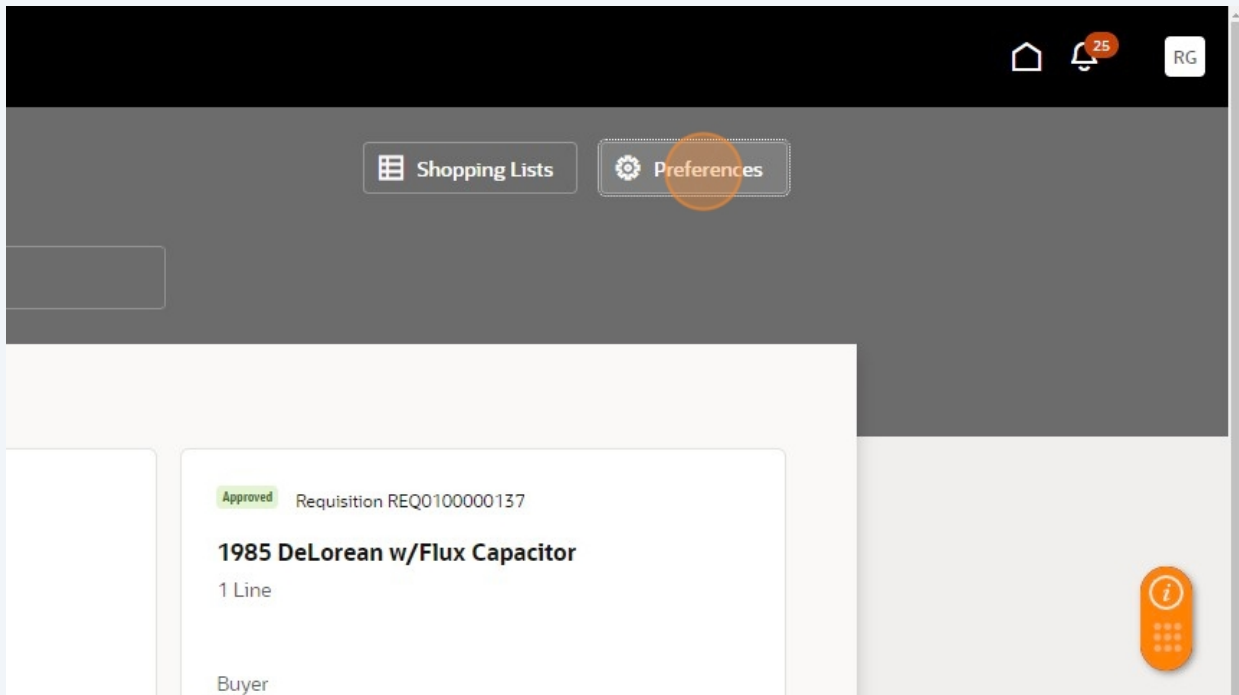
Kyleah's Supplies Account
01-1100001-011410-539001-000-0000-00-0000 Primary ...

Cancel Update



Alert! The following steps show an alternative method to enter the Charge Account. If you used the previous steps to enter the Charge Account, you can stop. The Preferences training is complete.

26 Click "Preferences"



27 Alternative way to enter a new Charge Account.

28 Click the "+" sign.

The screenshot shows a requisition line item for "1985 DeLorean w/Flux Capacito" with a "Buyer" of "Kyleah Walters". On the right side, there is a "Project costing" section with a "Project Number" field and an information icon. Below that is a "Charge accounts" section with a "+" button circled in orange. The list of charge accounts includes "Kyleah's Supplies Account", "Chad Test #1", and "Kyleah's Favorite CA".

Destination Type
Expense

Project costing

Project Number

Charge accounts

Kyleah's Supplies Account
01-1100001-011410-100100-260-0000-00-0000

Chad Test #1
01-5400075-011410-574100-000-0000-00-0000

Kyleah's Favorite CA
01-1100001-011412-533100-000-0000-00-0000

Approved Requisition REQ0100000137

1985 DeLorean w/Flux Capacito
1 Line

Buyer
Kyleah Walters

UT Local Catalog

29 Enter a nickname for the charge account in the "Charge Account Nickname" field.

The screenshot shows the "Add charge account" form. The "Charge Account Nickname" field is highlighted with an orange circle. Below it is the "Charge To" field with a dropdown arrow. There is also a checkbox for "Set as primary".

Add charge account

Charge Account Nickname

Required

Charge To
-----0000

Set as primary

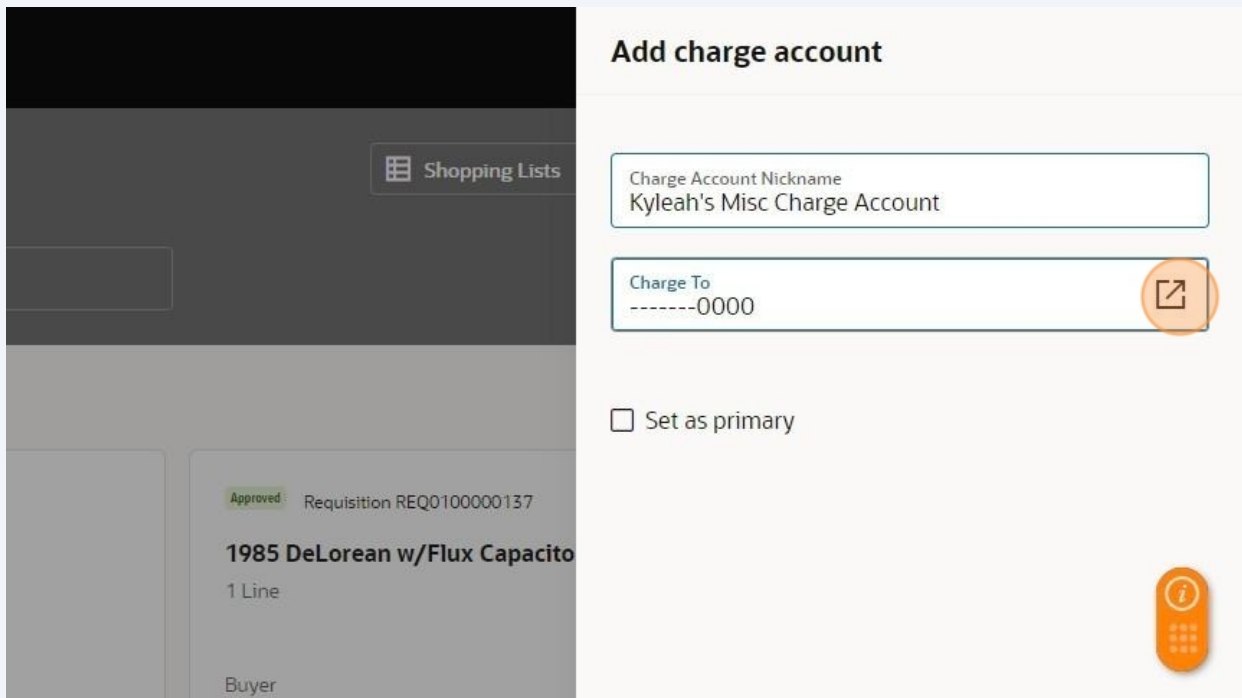
Approved Requisition REQ0100000137

1985 DeLorean w/Flux Capacito
1 Line

Buyer

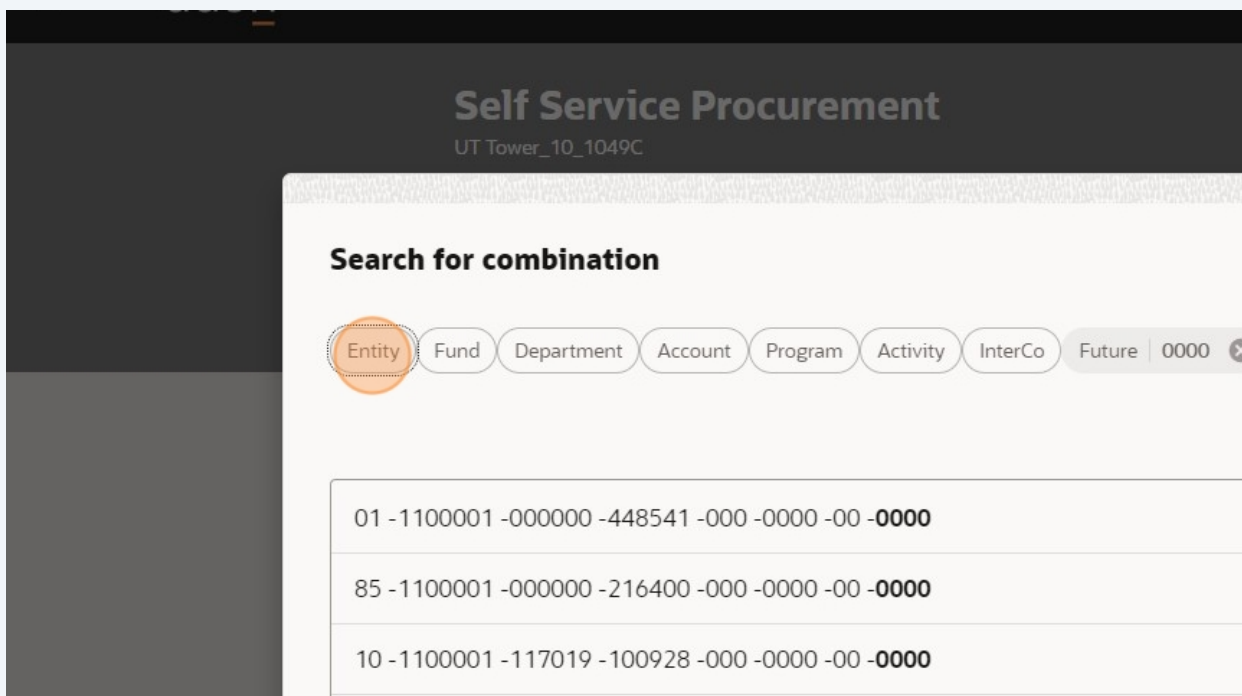
30

Click the "square-arrow" symbol. This will open a new screen to enter charge account information.



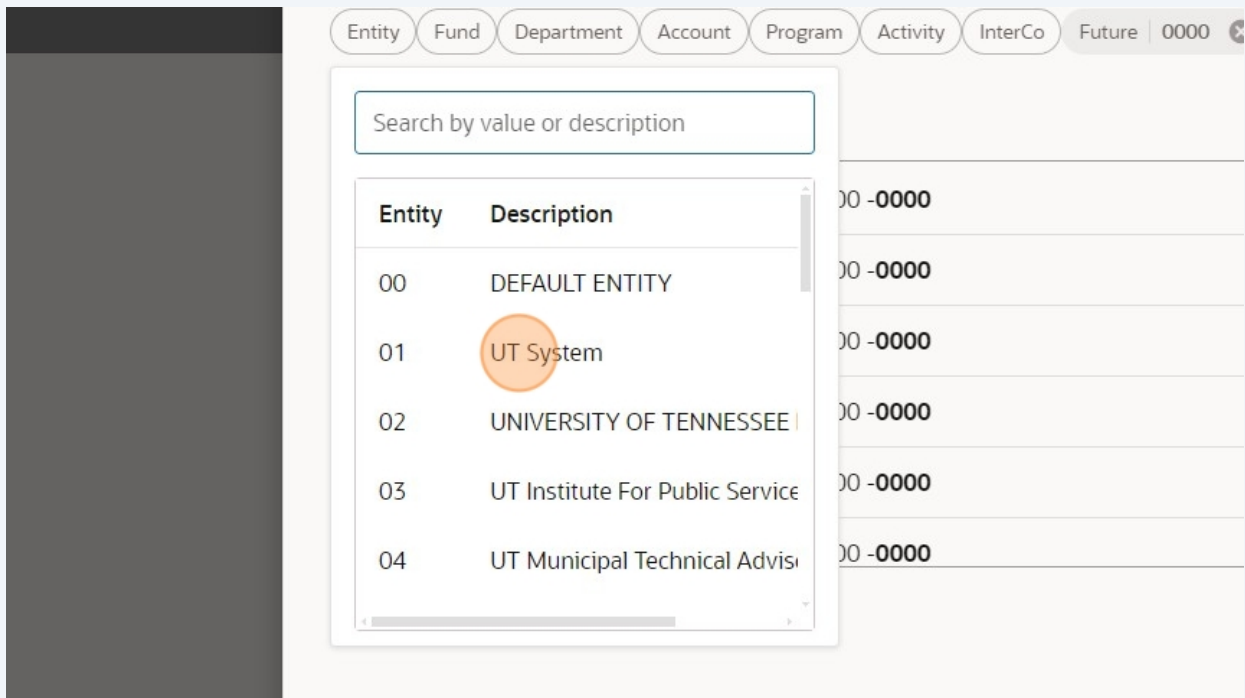
31

From this screen, you can click on each individual portion of the Charge Account.



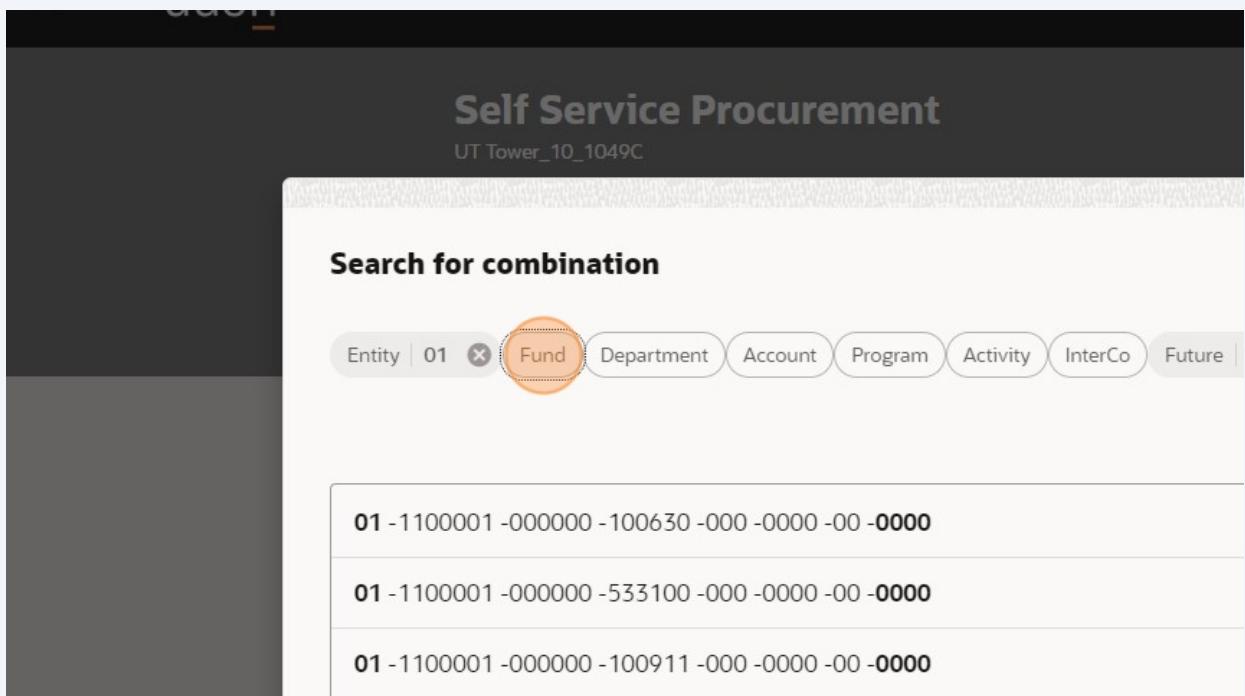
32

For example, when you click Entity, you can either search by value, description or scroll to make a selection.



33

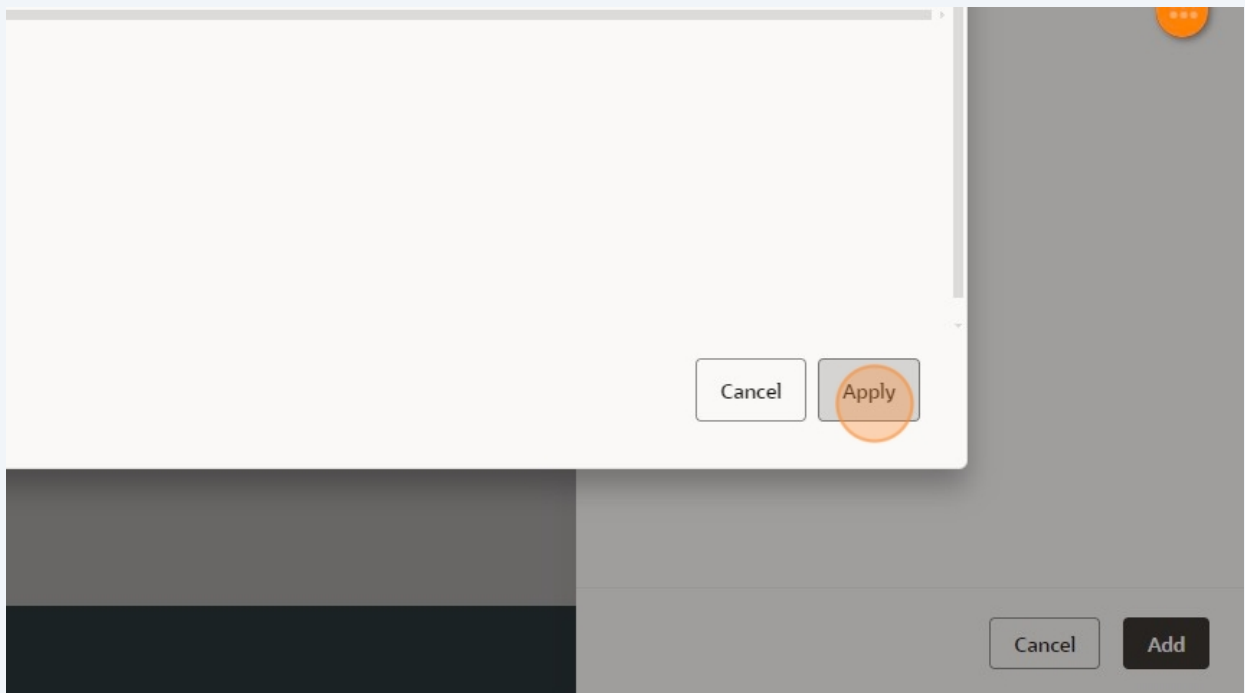
You will repeat this process for each step of the charge account.



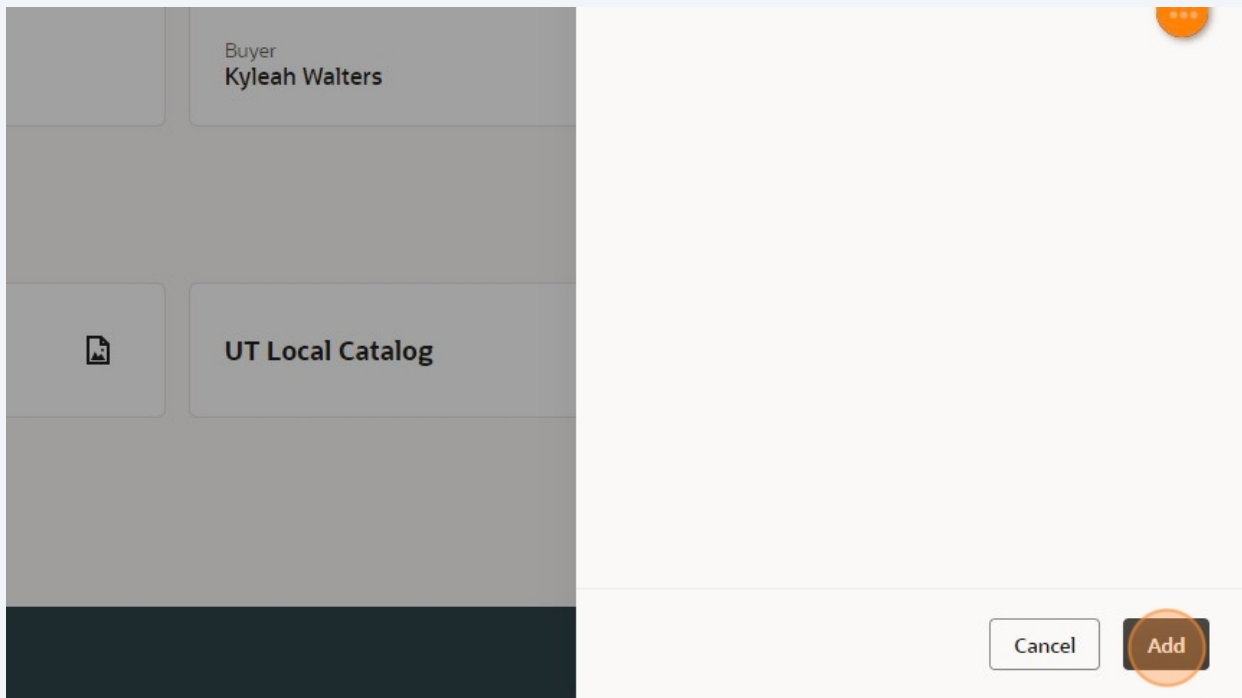
34 Once you have entered the Charge Account, click on the charge account string.



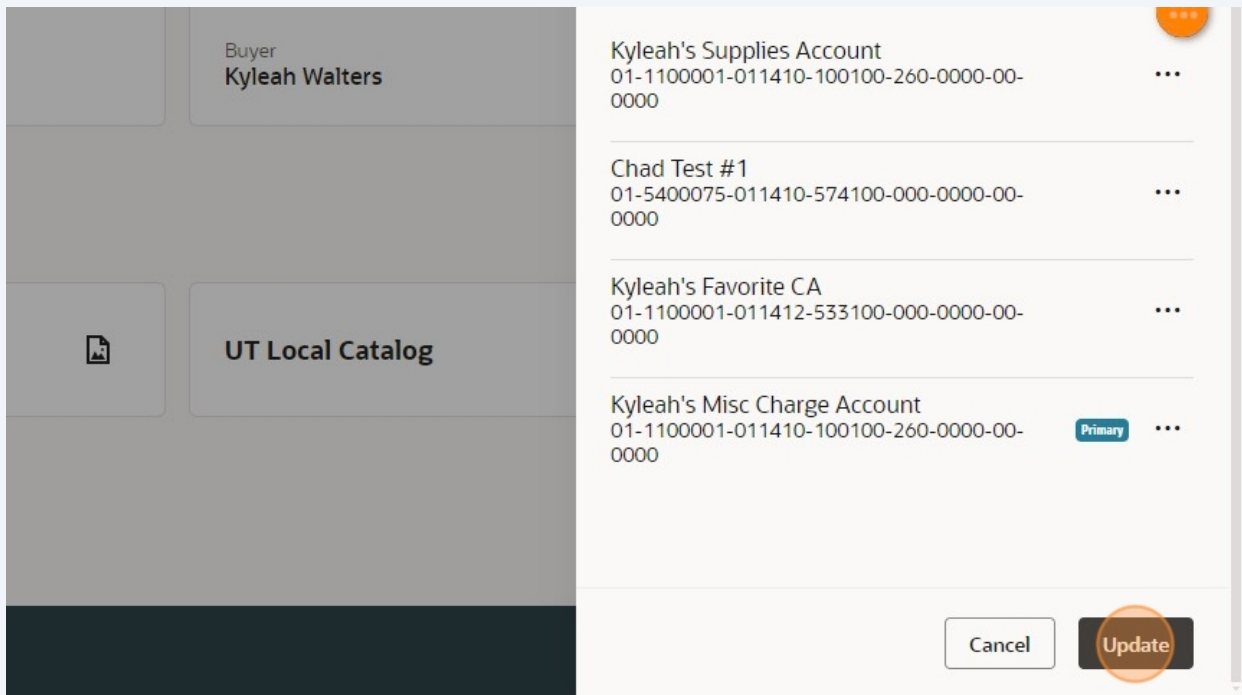
35 Then, click Apply.



36 Click "Add"



37 Click "Update"



38

Congratulations! You have now setup your Preferences!