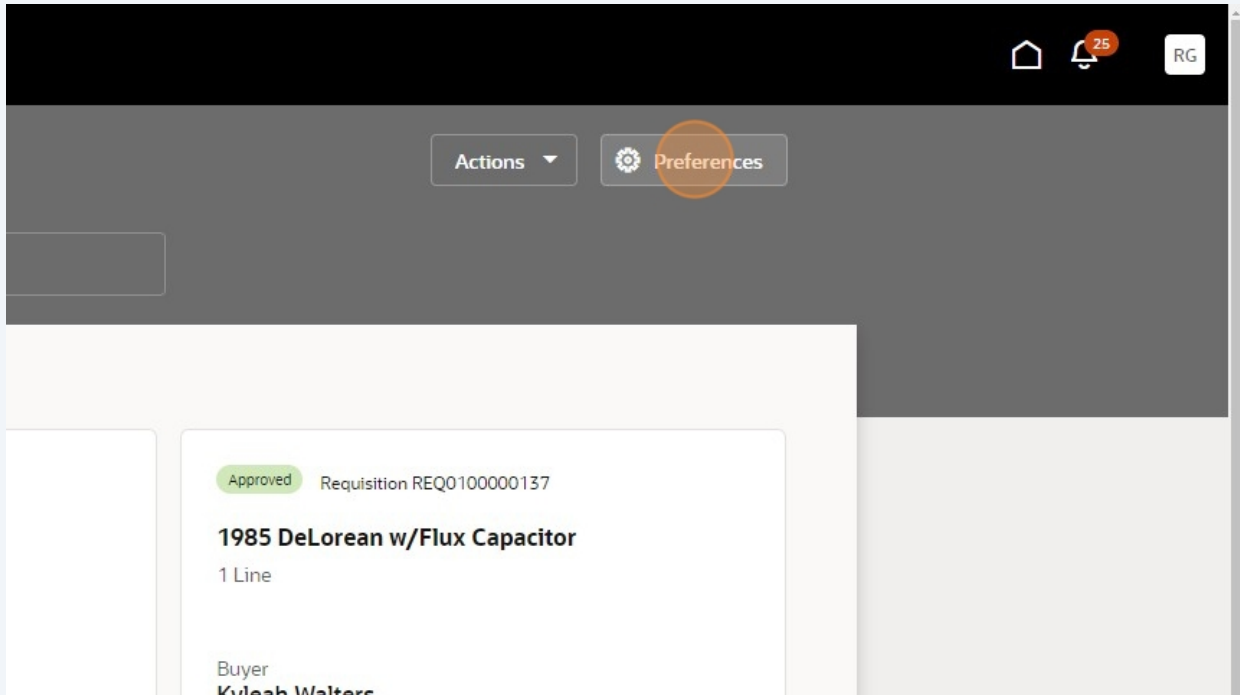


How to Set Up Procurement Preferences for Project Costing (Capital Projects/Sponsored Projects) in DASH

1 Click "Preferences"



2 Click, "Project Number"

The screenshot shows a requisition form for an approved requisition (REQ0100000137) for a 1985 DeLorean w/Flux Capacitor. The buyer is Kyleah Walters. The form includes fields for Deliver to Location (UT Tower_10_1049C) and Destination Type (Expense). Under the 'Project costing' section, the 'Project Number' field is highlighted with an orange circle. Below this is the 'Charge accounts' section, which lists 'Kyleah's Supplies Account' as the primary account and 'Kyleah's Favorite CA' as another account.

3 Type "SPN109705"

4

Type or Scroll to the Capital or Sponsored Project Number and select. For example, "SPN109705"

1 Line
Buyer
Kyleah

Destination Type
Expense

Project costing

Project Number
SPN109705

SPN109705 MC Project 2200

Charge accounts

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

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

5

Click "Task Number", type or scroll to select the task number

Expense

Project costing

Project Number
SPN109705

Task Number
1.0 Task 1.0

Required

Expenditure Organization
Required

Cancel Update

6 Click "Expenditure Type", type or scroll to select the expenditure type

The screenshot shows a mobile application interface. On the left, there is a sidebar with buttons labeled 'ers', 'orms', and 'UT L'. The main area displays a form with a dropdown menu for 'Expenditure Type' which is highlighted with an orange circle. The dropdown menu is open, showing a list of options: Binding, Casual Labor, Cellular Telephones, and Coal. Below the dropdown, there is a 'Required' label. Further down, there is another dropdown menu for 'Expenditure Organization' with a 'Required' label. At the bottom right, there are two buttons: 'Cancel' and 'Update'.

7 Click, "Expenditure Organization", type or scroll to select expenditure organization

The screenshot shows the same mobile application interface as in step 6. The 'Expenditure Organization' dropdown menu is highlighted with an orange circle and is open, displaying a list of options: 011500-System Communications & Marketing, 181016-Houston County, 110811-Stadium Drive Garage, 110311-Lock & Key Services, 110320-Facilities Svc Procuremnt Card, and 011413-Treasury Operations. Below the dropdown, there is a 'Required' label. Further down, there is a dropdown menu for 'Contract Number' with a 'Required' label. At the bottom right, there are two buttons: 'Cancel' and 'Update'.

8 Click "Contract Number", type or scroll to select the contract number

The screenshot shows a form with several dropdown menus. The 'Contract Number' dropdown is highlighted with an orange circle and has a list of options open, with '2003601 MC Award 2200' selected. Other dropdowns include 'Task Number' (1.0), 'Expenditure Type' (Awards Faculty and Other), and 'Expenditure Organization' (110811-Stadium Drive Garage). Below the dropdowns is a section for 'Charge accounts' with a plus sign and the text 'Kyleah's Supplies Account'.

9 Click "Funding Source", type or scroll to funding source

The screenshot shows the same form as in step 8, but now the 'Funding Source' dropdown is highlighted with an orange circle and has a list of options open, with 'UT-Battelle, LLC 101295' selected. The 'Contract Number' dropdown now shows '2003601'. At the bottom of the form, there are 'Cancel' and 'Update' buttons.

10

After entering "Funding Source", you can click "Update" to save your project selection

The screenshot shows a mobile application interface with a form. The form has three dropdown menus: "Expenditure Organization" with the value "110811-Stadium Drive Garage", "Contract Number" with the value "2003601", and "Funding Source" with the value "UT-Battelle, LLC". Below these fields is a section titled "Charge accounts" with a plus sign icon. There are two entries in this section: "Kyleah's Supplies Account" with a "Primary" button and "Kyleah's Favorite CA". At the bottom right of the form, there are two buttons: "Cancel" and "Update". The "Update" button is highlighted with an orange circle.



Tip! Congratulations! You have successfully entered a Project Number!