

Helpful Hints, Resources, and Checklist for Requesters

The Procurement Services team has developed this document as a resource guide to aid Requesters entering requisitions into UTShare. This is an important process as it initiates a procurement activity and is critical to ensuring an error-free and timely purchase. In addition to the information in this document, we have also included a “checklist” to use as you enter a requisition. We believe this will be a very helpful tool for you.

It is recommended that all Requesters complete training on requisitions and the related functionalities of receiving and voucher processing in UTShare. UTShare can be a very challenging tool and errors during the requisition creation phase may cause issues and delay the procurement. You can find information and training schedules on the [Knowledge Services webpage](#), or by contacting them directly at knowledgeservices@uta.edu or 817-272-2155.

THE BASICS

1. Make sure you assign your requisition to your departmental Buyer. If you don't know who your Buyer is, you can find them at [FIND A BUYER](#). If you do not assign a Buyer, your requisition will go into a general queue and may be delayed. Assigning it to your department's Buyer assures it will arrive in their queue promptly.
2. Attach a current valid quote/estimate/proposal in a comment field. Quotes are typically valid for 30 days, so be sure you have a valid quote from the vendor to ensure prompt processing. If the quote has expired, please obtain a new/valid quote prior to submission.
3. “Negative” or “discount” lines can cause problems in your commitment control/budget (KK) because UTShare does not encumber/dis-encumber negative lines correctly. It is preferred that the vendor provide a quote with the discount applied to the line-item pricing. If a requisition (and subsequent PO) is created with a negative/discount line, the line will be closed and the discount should be applied at the voucher level as a non-PO line entry.
4. It saves a lot of time if the vendor will accept our PO Terms and Conditions. If their quote references their company terms and conditions or includes additional documents that must be signed, then these will be subject to review by Procurement and/or Legal Affairs and will slow the procurement process down significantly.
5. Any document that requires review/approval by Procurement and subsequent signature can only be signed by an authorized University signer with delegated authority to obligate the University financially. Specific information can be found at [Delegations of Authority for The University of Texas Arlington](#).
All other signatures are not legally binding and could make the individual who signed the document financially responsible for the transaction.
6. Please use a common unit of measure whenever possible. Some examples are below:
 - a. EA
 - b. LOT
 - c. HR
 - d. YR
7. Please select an accurate *Category Code* in the appropriate field that best describes the goods or services purchased. You can use the magnifying glass next to the field to search for codes by description in UTShare. Category Codes that begin with a “7”, “8”, or “9” are typically for services. All others are typically for goods/materials. Selecting an accurate Category Code is critical as it also initiates any required workflow for approvals in UTShare for certain types of goods (e.g., hazardous materials or chemicals, computers, vehicles, etc.). This ensures that when the requisition arrives to your Buyer, it is ready to process. If the proper approvals have not been obtained, the process will stop, and the requisition will be returned to you for correction and re-submission.
8. *Account Codes* default from the Category Code. However, not all codes default correctly based on the way UTA handles certain assets and controlled items. There is a helpful presentation on the [Procurement homepage](#) titled “[Account Codes](#).” You are strongly encouraged to download this presentation and keep it handy as it contains the most commonly used category and account codes, including those that must be corrected.
9. If your requisition includes capital assets or controlled items, you will also need to include a Profile ID under the Asset Information tab. If the funding is on a grant/project, please coordinate with Accounting Services and/or Grants Accounting prior to creating your requisition to ensure a proper account code is set up on the project.

10. Grouping items into LOTS (similar items with the same category and account codes) can be a way to simplify your requisition and subsequent PO in some cases. This **can't** be done with assets or controlled items. Those must always be on individual lines by quantity and unit price for Asset Management and Inventory purposes. However, if you group items together and use LOT as your unit of measure, a complete list of all items in the group and their associated prices must be included in the description so that they can be verified against the invoice when it is received.

As an example:

Line	Item	Description	PO Qty	UOM	Price	Merchandise Amount
1		Landscaping Services as needed: Mowing @ \$25/hour Edging @ \$20/hour Trimming @ \$30/hour	1	LOT	\$50,000.00	\$50,000.00

If you are using "LOT" **and expect to make multiple payments against the line**, please notify your Buyer to ensure the Line(s) get set up correctly to allow for multiple payments. Otherwise, the first time you make a payment against the line, the system will consider the line complete, and you will not be able to make future payments against it. Contact Knowledge Services for instructions on how to do this on the Requisition if you are unsure.

11. There must be a direct correlation from Requisition → Purchase Order → Invoice. Ensure you enter your requisition in the manner that the vendor will ultimately invoice us (e.g., the requisition/PO should match the quote and should match how the vendor will invoice UTA).

INQUIRY EMAIL TO YOUR BUYER – REQUISITION/PO

To ensure a prompt response from your Buyer, please use the Requisition/PO number and vendor name in the subject line of your email. This will provide the needed information so the Buyer can quickly address your email. A good example of a subject line would be:

Subject: REQ 52611 / PO 54679 for Ace Door and Supply

REQUIRED HEADER COMMENTS

1. Enter complete contact information for the vendor and the primary departmental point-of-contact using this format:

VENDOR CONTACT

John Doe ###-###-#### ext. ####

John.doe@xxxxxx.com

UTA CONTACT

For questions regarding delivery or scheduling, please contact:

John Doe ###-###-####

John.doe@uta.edu

You must also check the "send to vendor" and "show at receipt" boxes so this information is visible to all parties.

2. For items delivered to Central Receiving (CENT110), you must enter the final delivery location and contact information so that Central Receiving knows where to deliver the items:

FINAL DELIVERY LOCATION

Building Name and Office #

University Point-of-contact

###-###-####

Jane.doe@uta.edu

You must check the “show at receipt” box so that the information is visible to Central Receiving personnel, and they know where to deliver the item(s). Doing this will ensure a prompt delivery of your order.

ATTACHMENTS REQUIRED FOR CERTAIN PURCHASES

1. **Software/Cloud-Based Applications or Services/Online Database Subscriptions**

Purchase for these types of products or services, or any equipment or service that has a user computer interface/display, must be reviewed and approved by the Office of Information Technology’s (OIT) Electronic Information Resource (EIR) and Accessibility Coordinator, as well as the Information Security Office (ISO) prior to purchase. Complete instructions on how the process works is available at [Technology Approval Process Request \(TAPREQ\) in ServiceNow](#). If the request is approved, the submitter will receive a notification email from ServiceNow. Attach this email showing it is fully approved to your requisition in UTShare. Without a fully approved TAPREQ, your Buyer cannot proceed with the purchase.

2. **Exceptions For an After-The-Fact PO**

If a purchase was made without an approved purchase order being issued first, your department must submit an “exception” using the [BA Exception Tracker Request located in UTA SharePoint](#) requesting permission for a PO to be created so the vendor can be paid. Purchases of this type are a violation of [Procedure BF-PGS-PR-01 Best Value](#) and could result in the person who authorized the purchase without proper authority assuming a personal obligation to the supplier unless an exception is granted.

3. **Exclusive Acquisitions (Sole Source and Emergency Purchases)**

A completed and signed Exclusive Acquisition Justification form ([Form BF-PGS-F1](#)) is required for any purchase when competition is not available (e.g., only a single source can provide the product or service) and is \$15,000 or greater, or for any true “emergency” purchase. Emergencies are defined as unforeseeable purchases required to prevent the threat of damage to property or health of UTA students, faculty, or staff. Contact your Buyer if you have any questions about how to handle either of these situations or how to complete the form.

4. **Relocation Service POs**

If you are creating a requisition to cover relocation services for new faculty or staff, you must attach a copy of the official offer letter showing the amount that has been approved. Additionally, the person being relocated needs to be made aware that any amount paid is reported as taxable income per IRS rules, effective January 1, 2018. The University has preferred vendors for relocation services available from [Campus Wide Contracts > Preferred Supplier Agreements > Relocation Services](#).

Relocation Allowances are also being paid in lump sums through Payroll Services. If the new employee receives this allowance, departments cannot submit a PO for these relocation services. Please see [Procedure HR-E-PR-20 Relocation Allowance](#) for complete information.

BUDGET CHECKING AND SUBMITTING YOUR REQUISITION

If you get a budget check error when budget checking your requisition:

1. Verify that ALL of your chartfield information is correct (“No Budget Exists” error);
2. Verify that there are sufficient funds available in the cost center or project being used (“Exceeds Budget Tolerance” error);
3. Contact your Budget Analyst if you cannot resolve the issue. Budgets contact information can be found at [Contact Budgets, Planning and Analysis - Business Affairs and Controller - UT Arlington](#)

MAV eSHOP REQUISITIONS

Mav eShop automates much of the shopping, ordering, and payment processes, resulting in improved productivity and overall cost savings to the University. Below are a few issues that we've seen occur that can delay your order. By following the tips provided, you will ensure that your order processes promptly.

1. Shipping and Delivery

Only one "ship-to" address is allowed per PO.

When you import your Mav eShop cart into UTShare and are selecting your specific delivery location, please double-check to ensure that all lines on your Requisition have the correct and same ship-to address. If they do not, the order will not dispatch in the system. The PO will have to be manually corrected and dispatched, which will delay your order.

Here is an incorrect example:

The screenshot displays a 'Requisition Lines' table with three entries. Each entry has a 'Shipping Line' section with a '*Ship To:' field. Line 1 and Line 2 have 'CENT110' selected, while Line 3 has 'D-246' selected. A red arrow points to the 'D-246' selection. A text box on the right says 'Ship To address should be the same on every requisition line'.

Line	Description	Vendor Name	Quantity	Unit	Price	Total
1	Shurco Fine Point Permanent M	Summus Industries Inc. - Staples	3.0000	DZ <SQ>	5.83000	17.49
2	Scotch Box Sealing Tape 311	Summus Industries Inc. - Staples	1.0000	carton	65.79000	65.79
3	uni-ball Vision Water-Proof R	Summus Industries Inc. - Staples	4.0000	DZ <SQ>	21.99000	87.96

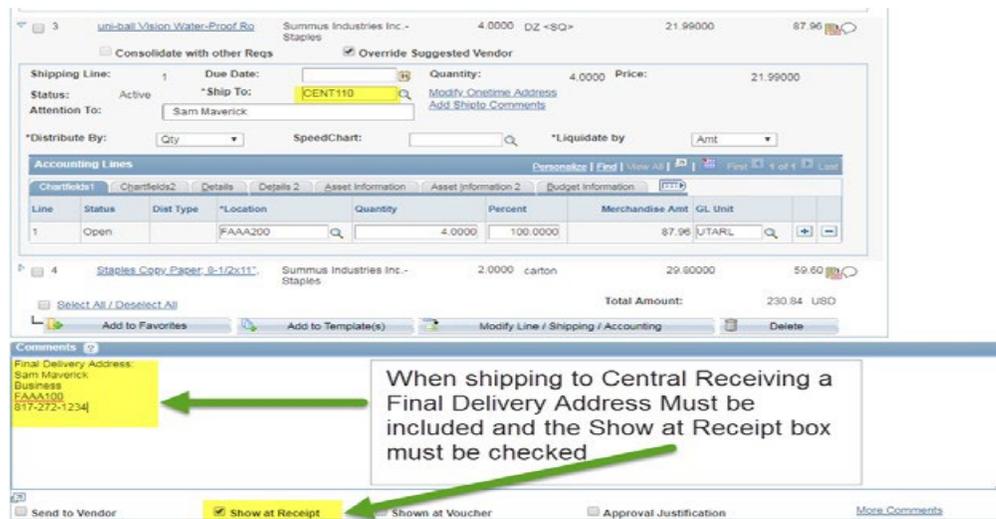
Here is a correct example:

The screenshot displays a 'Requisition Lines' table with three entries. Each entry has a 'Shipping Line' section with a '*Ship To:' field. All three entries (Line 1, Line 2, and Line 3) have 'FAAA100' selected. A text box on the right says 'All Ship To lines are set to the same address'.

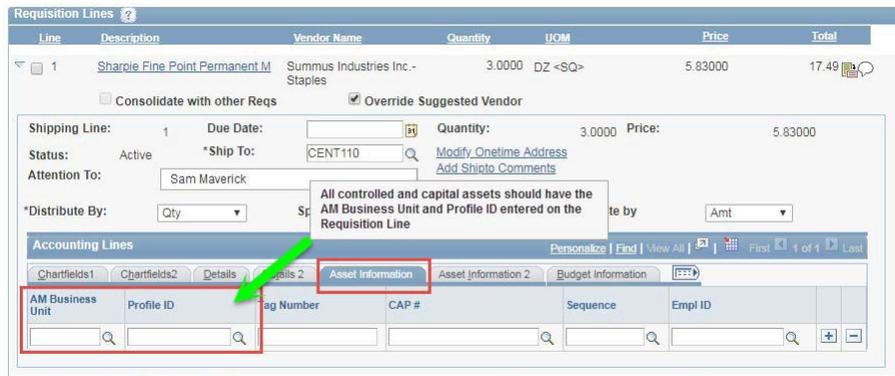
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2. Assets and controlled items (including all laptops and computers) must be shipped to Central Receiving (CENT110 in UTShare) for tagging and/or encryption.
 - a. Per University policy, any asset or controlled item must be delivered to Central Receiving. If your Requisition contains assets or controlled items, please ensure that all lines are set to ship to CENT110. In the event an asset or controlled item is delivered directly to your department, you must contact the Property Management Office immediately at 817-272-2191.

- b. Please enter your final destination information (building, contact information, and phone number) in a header comment field on your requisition and select the box “Show at Receipt.” This informs Central Receiving where to deliver the items after tagging and/or encryption. Otherwise, delivery is delayed while Central Receiving locates the correct department.



- c. When entering a requisition for controlled items or capital assets, please use the correct Account Code and include a Profile ID. A helpful presentation is included on the [Procurement homepage](#) titled “[Account Codes](#),” or you may contact your Buyer if you have any questions prior to submitting the Requisition in UTShare.



3. “Searching” for Items

The “Search” bar at the top of the MAVESHOP home page can be confusing. The search functionality only works for what is called “hosted” catalogs. Currently, Mav eShop does not have any hosted catalogs. Even though the blue ribbon at the top of the page explains this, it is easy to overlook. If you want to search the punchout catalogs for items, you must go into the vendor-specific catalog and search. This is due to how the catalogs are housed within the system, and this configuration is vendor controlled and cannot be changed by UTA.

For example, if you were to enter “Stanley” (as in the tool manufacturer) into the search bar and hit search, you will get “no results” because the system is only searching hosted catalogs (which do not currently exist). However, if you go into the Burgoon/Grainger catalog and search for Stanley, you will find many results.

4. Items Cancelled on a PO

In the event that you have a PO with multiple items, and one or more of the item(s) / line(s) will not be delivered against the PO, please notify your Buyer so the item(s) / line(s) can be cancelled, and the PO closed out in UTShare. Otherwise, the PO remains open, and the funds remain encumbered against the PO.

Also, do not request (nor accept if the vendor offers) to ship a similar product against the same PO. The system will not recognize the new item and will stop the transaction. If you need a similar or replacement item, process a new cart/requisition/PO.

If you are having technical problems with Mav eShop, or need training on how to effectively use the tool, please contact Knowledge Services at

knowledgeservices@uta.edu or 817-272-2155.

ADDITIONAL RESOURCES

- Procurement Services Webpage (contains many links to other resources and tools):
<https://www.uta.edu/business-affairs/procurement/>
- UTA Policies and Procedures:
<https://policy.uta.edu/doctract/documentportal>
- Business Affairs Forms
<https://resources.uta.edu/business-affairs/forms/index.php>
- Issues related to vendor setup, payment vouchers, or payment status should be directed to Accounts Payable at:
Accounts_payable@uta.edu