Create Requisition MAV eShop for Requesters
Training Topics

- Mav eShop Overview
- Shopping Cart Process
- Requesters Role in Mav eShop
- Process an Assigned Cart
- Desktop Receiving
- Manage Requisition
- Purchase Order Voucher
AFTER THIS CLASS YOU WILL:

- Be able to navigate to MAV eShop
- Be able to review information on Manage Requisitions page
- Be able to create a MAV eShop requisition
Mav eShop Overview
What is MAV eShop?

A web-based purchasing system that allows UTA employees to buy goods more efficiently and economically.

• Connects directly to UTShare’s create requisition page.
• Offers end-users a shopping cart experience designed to make day-to-day purchases easier.
• Shop online from a variety of contracted and approved vendors.
• Ensures the best overall value and streamlines the buying process.
• Retains purchase history.
**Methods for Requesting Goods or Services**

**MAV eSHOP (SciQuest)**
- Shopping marketplace that contains links to online shopping sites for vetted suppliers with whom UT System or UTA has negotiated items and prices.

**ProCard**
- The ProCard is used to purchase goods or services for low-cost items ($4,000 or less) that do not exist in MAV eSHOP.

**Non-PO Voucher**
- Some purchases of goods and services may not require a purchase order. See the BF-PGS-PR-01 Best Value Purchasing Procedures (Section IV “Procedure”, Article H “Purchase of Goods/Services Not Requiring a Purchase Order”) for the list of goods and services that do not require a purchase order.

**Special Request (Non-Catalog Items)**
- The Special Request form in UTShare is used to request goods or services that do not exist in MAV eSHOP and are not eligible to purchase with a ProCard.
Things to know...

• Since contracted suppliers are being used, support (pricing) documentation is not required.

• Buyers in Procurement will not see Purchase Orders (POs) less than $100K. After the approvals are received, Requisitions less than $100K are automatically sourced into a PO and dispatched to the vendor to be fulfilled.

**Note:** POs are sourced and dispatched every 2 hours (odd hours 7, 9, 11, etc.)

• PO Vouchers are automatically created, matched, budget-checked, and approved for MAV eShop purchases.
Shopping Cart Process
The Shopping process differs depending on the employee’s role.

- **Shopper** – The primary role all UTA employees have
- **Requester** – Requires level II or III access in UTShare

The Shopping cart contains the items selected for Purchase and the details such as:

- Description
- Quantity
- Price
Shopping Cart Process

**Shopper**
- Any employee can be a Shopper
- Cannot create a Requisition in UT Share
- Must log directly into MAV eSHOP to shop for items from an online catalog
- Assigns shopping cart to Requester

**Requester**
- Can create a Requisition in UTShare
- Can also be a Shopper
- Must log into UTShare and access MAV eSHOP from within the Create Requisition page
- Assigns Shipping, Profile Asset ID and Accounting Information to Requisition
- Submit Requisition for Approval

**Approver**
- Cannot be a Requester
- Can be a Shopper and assign a shopping cart to a Requester
- Reviews Requisition in UTShare for accuracy
- Can approve or deny a Requisition in UT Share
Shopping as a Requester
Mav eShop
Shopping as a Requester

The Requester is responsible for the following:

• Creating the Requisition in UTShare
• Shopping from an online catalog
• Finalize a cart assigned by a Shopper and returning it to UTShare

• Finalizing the Requisition
• Assign Accounting and Delivery information
• Check Budget
• Submit for Workflow approval
Shopping as a Requester

To shop as a Requester

First Log into UTShare and navigate to the create requisition page.

**NavBar > Menu > Financials > eProcurement > Create Requisition.**

Then, Select the **SciQuest eShop Portal** link
Shopping as a Requester

Next, select the vendor’s Punchout Catalog to begin shopping
Shopping as a Requester

Search or add desired items to the shopping cart and click the Submit Order button to return to Mav eShop.

**Note:** The language for the button to return the cart to Mav eShop will vary between catalogs.
Shopping as a Requester

Return Cart to PeopleSoft

Purchases from multiple suppliers in Mav eShop cannot be returned to UTShare.
Shopping as a Requester

Return Cart to PeopleSoft (UTShare)

• Review and/or update the cart items before returning the cart to UTShare.

It is recommended that you update the Cart Name and Description.
Shopping as a Requester

Finalize the Requisition with the required information
Shopping as a Requester

Once all requisition lines have been entered and a valid budget check obtained, click the **Save & Submit** button to submit the requisition for Workflow approvals.

**Shipping Summary**

- **Ship To Location**: CENT110
- **Address**: 1225 W. Mitchell St.
  Room 110
  Arlington, TX 76019
- **Attention To**: Multiple

**Requisition Comments and Attachments**

Enter requisition comments:

- Attention To
- Comments
- After asset processing final delivery to UAB 203

- Send to Supplier
- Show at Receipt
- Shown at Voucher

**Approval Justification**

Enter approval justification for this requisition

**Budget Checked Status**: Valid
The Requisition ID that is displayed in Mav eShop is not equivalent to that of UTShare.

- The Requisition ID in Mav eShop is exclusive to Mav eShop.
- The Requisition ID in UTShare is the official Document ID

**Note:** When reaching out for support with your requisition refer to the UTShare Requisition ID.
Finalize Requisition by entering the following:

- Requisition Name
- Ship To Location
  - This must be the same for all line items
  - Capital and Controlled assets must be delivered to Central Receiving (CENT110)
- If applicable, add Asset Profile ID and AM Business Unit
  - For Capital and Controlled Assets
  - On the Asset Information tab
- Accounting Information
  - Using SpeedChart field or entering values on Chartfields2 tab.
- Final Delivery Instructions
  - Enter as Requisition Comment
  - Include name of party to receive item and building name and room number
- Check Budget
- Save and Submit document for approval
Requesters Process Flow

Requester Process Flowchart

- Log into UT Share
- Create Requisition
- Punch-Out to MAV eSHOP
- Finalize Requisition, Budget check and Submit for Approval
- Workflow Approval
- PO Sourced and Dispatched
- Goods Rec’d

UT Share

- Requester

MAV eSHOP

- Shop from online catalog or pick up assigned cart
- Return cart to UT Share Requisition Page
Class Activity

- Finalize Requisition after shopping
Process Assigned Cart
Once a cart is assigned by a Shopper:

The Requester receives an email notification:

```
From: noreply@sciquest.com <noreply@sciquest.com>
Sent: Monday, July 24, 2023 9:03 AM
To: r@uta.edu
Subject: A shopping cart has been assigned to you

[External]

Re: A shopping cart has been assigned to you
Cart Name: August 23
Prepared for: [Redacted] (Business Unit: UT Arlington)
Prepared by: [Redacted]

Dear [Redacted],

A shopping cart has been assigned to you by [Redacted] ([Redacted]@uta.edu). The shopping cart can be accessed for review in "Draft Carts".

If applicable, the user has submitted the following additional comments:

If you have any questions with regard to this shopping cart, please contact your Support Team.

Support Team Contact Information:
+1 817-272-2155 knowledgeservices@uta.edu

Thank you,
University of Texas System
```
Process Assigned Cart

Once in eShop select the **Alert** icon in the top banner and click the link displayed.

Click the **Carts Assigned to Me** to view carts that are ready for processing.
Process Assigned Cart

**Return Cart to Peoplesoft (UTShare)**

Before returning the cart to UTShare, review the cart items and edit if needed.

Once you return the cart to PeopleSoft you cannot go back to Mav eShop
Finalize the Requisition by entering the following:

- Requisition Name
- Ship To Location
  - This must be the same for all line items
  - Capital and Controlled assets must be delivered to Central Receiving (CENT110)
- If applicable, add Asset Profile ID and AM Business Unit
  - For Capital and Controlled Assets
  - On the Asset Information tab
- Accounting Information
  - Using SpeedChart field or entering values on Chartfields2 tab.
- Final Delivery Instructions
  - Enter as Requisition Comment
  - Include name of party to receive item and building name and room number
- Check Budget
- Save and Submit the document for approval
### Requisition Summary

**Business Unit**: UTARL  
**Requester**: 1000123456 Sam Maverick  
**Currency**: USD

**Requisition Name**:  
**Requisition ID**: 0000052339  
**Priority**: Medium

### Cart Summary: Total Amount 1,377.31 USD

Expand lines to review shipping and accounting details

#### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>915 Waterproof Hard-Shell Case</td>
<td></td>
<td>B&amp;H PHOTO AND ELECTRONICS CORP</td>
<td>1.0000</td>
<td>Each</td>
<td>83.2500</td>
<td>83.25</td>
</tr>
</tbody>
</table>

- **Ship To**: CENT110
- **Address**: 1225 W. Mitchell St.  
  Room 110  
  Arlington, TX  76019
- **Attention To**: Jane Dolan  
- **Due Date**: 07/31/2023

#### Accounting Lines

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Status</td>
<td>Dist Type</td>
<td>*Location</td>
<td>Quantity</td>
</tr>
<tr>
<td>1</td>
<td>Open</td>
<td>842-203</td>
<td></td>
<td>1.0000</td>
</tr>
</tbody>
</table>

**Price Adjustment**  
- Pegging Inquiry  
- Pegging Workbench  
- Custom Fields
Process Assigned Cart

Shipping Summary

Edit for All Lines

Ship To Location: CENT110
Address: 1225 W. Mitchell St.
Room 110
Arlington, TX 76019

Attention To: Multiple
Comments: 

Requisition Comments and Attachments

Enter requisition comments:

Attention To
Comments
After asset processing final delivery to UAB 203

Send to Supplier: x
Show at Receipt: x
Shown at Voucher: x

Edit more Comments and Attachments

Approval Justification

Enter approval justification for this requisition:

Budget Checked Status: Valid

Check Budget
Pre-Check Budget
Save & submit
Save for Later
Add More Items
Preview Approvals
Demonstration

Class Activity
• Process Requisition for Assigned Cart
Mav eShop Tools
To view past orders you created, from the Mav eShop home page click on the shopping cart icon, choose My Carts and Orders, and select View My Orders.

**Note:** *If you choose the Last 90 Days option, you can change the date range.*
To change the date range and view orders more than 90 days old, click on the **Submitted Date: Last 90 days**, you can choose **All** orders or input a date range.
To view All Orders, click on the page icon with the clock, on the **Search tab**, you’ll click on **All Orders**.
To view Purchase Orders in Mav eShop, from the homepage, click on the page icon with the clock, from the **My Orders** tab, choose **My Purchase Orders**.
Managing Requisitions
Manage Requisitions

General Information

- The Manage Requisition page is used to search for an existing Requisition or Purchase Order (PO). Also, it displays the different stages of the Requisition.
- Search by Requisition ID, Requester ID, Date Range, Status or Purchase Order ID.
Manage Requisitions

General Information

• The different stages of the Requisition that are complete or in progress are highlighted with an active link.

• The Manage Requisition page allows users to: view Approvals, Copy the requisition, Edit the requisition, View Print the requisition and more.
Manage Requisitions

General Information

- Requesters can edit or cancel a requisition if the document status is Open, Pending, or Approved.
- If changes or corrections are required and the Requisition State is one of the following, contact your Buyer in Procurement Services:
  - PO(s) Created
  - PO(s) Dispatched
  - Received
  - Partially Received
Cancel a Requisition
Cancelling a Requisition

When a requisition is canceled, the budget check must be performed to release the pre-encumbrance.

1. Select “Cancel” from the dropdown menu on the Manage Requisitions page, then click the “Go” button.
Cancelling a Requisition

On the Requisition Details page, click on the Cancel Requisition button.

After cancellation, the Total dollar amount of the requisition will be 0.00.
Cancelling a Requisition

To complete the cancellation, select **Check Budget** from the dropdown menu and then click the Go Button.
When the cancellation is complete, the Requisition State will be **Canceled**, the Budget **Valid** and the Total dollar amount will be 0.00. The pre-encumbrance should now be released.
Desktop Receiving
Desktop Receiving - A formal method for documenting acceptance of goods received from a vendor.

- Desktop Receiving will be required for MAV eSHOP POs greater than $5000 and any Controlled Assets (regardless of the dollar amount).

**Note:** *Central Receiving will perform desktop receiving for Capital and Controlled Asset.*

The Receive Items page is used to perform Desktop Receiving. You can access this page using the following navigation:

- Receive Items (Menu > e-procurement > Receive Items)
  - View receivable items for all Requisitions created by the Requester.
Receiving Items

1. Select the requisition/PO line(s) to receive.
2. Click the **Receive Selected** button.
3. If necessary, adjust the Received Date.
4. Enter the quantity received.
5. Attach the packing slip in the Receipt Comments.
6. Click the **Save Receipt** button.
Desktop Receiving Tips:

- Only receive in UTShare the items and quantities **physically** received.
- Capital and Controlled Assets delivered to Property Management will be received in UTShare by Property Management.
- Users can only receive in UTShare the items they requested. (The person who entered the requisition must receive it.)

![Receipt Saved Successfully](image)
Mav eShop - PO Vouchers
Things to Consider:

- There are two types of Matching Processes in UT Share:
  - PO Vouchers less than $5000 will invoke 2-way matching. It verifies that the purchase order and the invoice information matches.
  - PO Vouchers greater than or equal to $5000 invokes 3-way matching. It verifies that the items are received, and the invoice information matches the purchase order.
- If a match is found, the PO Voucher is automatically made ready for payment processing. If matching fails, the PO Voucher is placed on hold and the invoice will not be paid until the issue is cleared.
PO Voucher Process Flow

1. Goods received from Vendor
2. Desktop Receiving (if necessary)
3. E-invoice is submitted by Vendor
4. PO Voucher automatically Created, Matched, Budget Checked, and Approved
5. Payment voucher is processed
Resource Information
For more information about MAV eSHOP:
• www.uta.edu/mav-eshop

Support & Help:
• ServiceNow
• 817-272-2155
• Online Chat

Training Resources:
• https://www.uta.edu/business-affairs/training/
  • Register for Classes
  • Join Business Affairs Listserv
  • View and/or Print Training Materials
    • PowerPoint Slides
    • Training Guides
    • Job Aids