



Office of Information
Technology

KNOWLEDGE SERVICES

Requisitions

Training Agenda



Methods for Requesting Goods
and Services

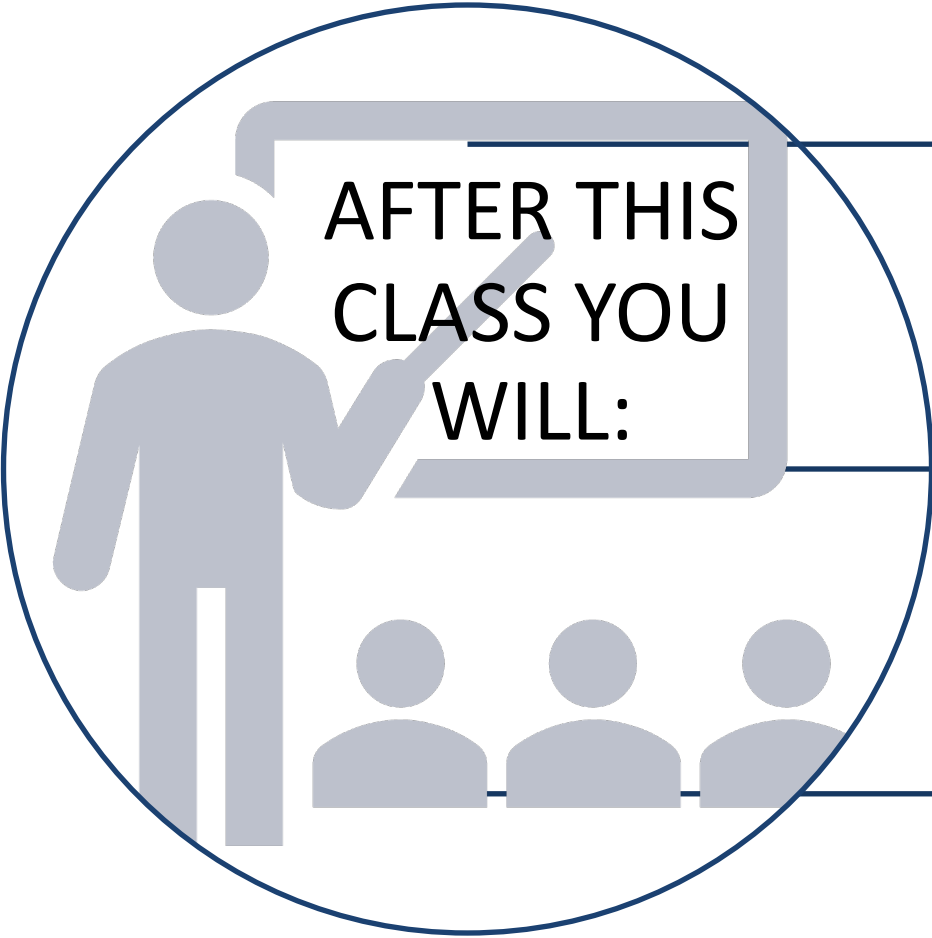
Mav eShop Requisitions

Manage Suppliers

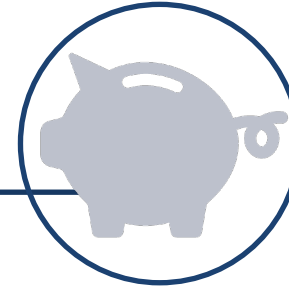
Special Item Requisitions

Desktop Receiving

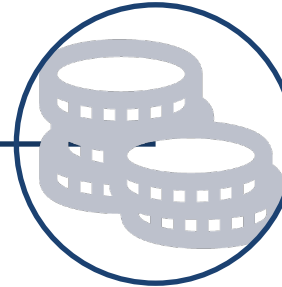
Learning Objectives



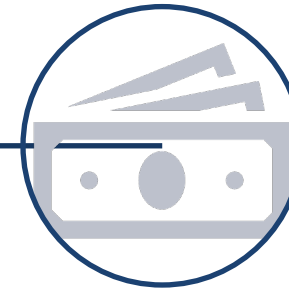
AFTER THIS
CLASS YOU
WILL:



BE ABLE
TO
SEARCH
FOR
SUPPLIERS



BE ABLE TO
CREATE MAV
ESHOP
REQUISITIONS



BE ABLE
CREATE
SPECIAL ITEM
REQUISITIONS

Methods for Requesting Goods or Services

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.

Mav eShop

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.

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

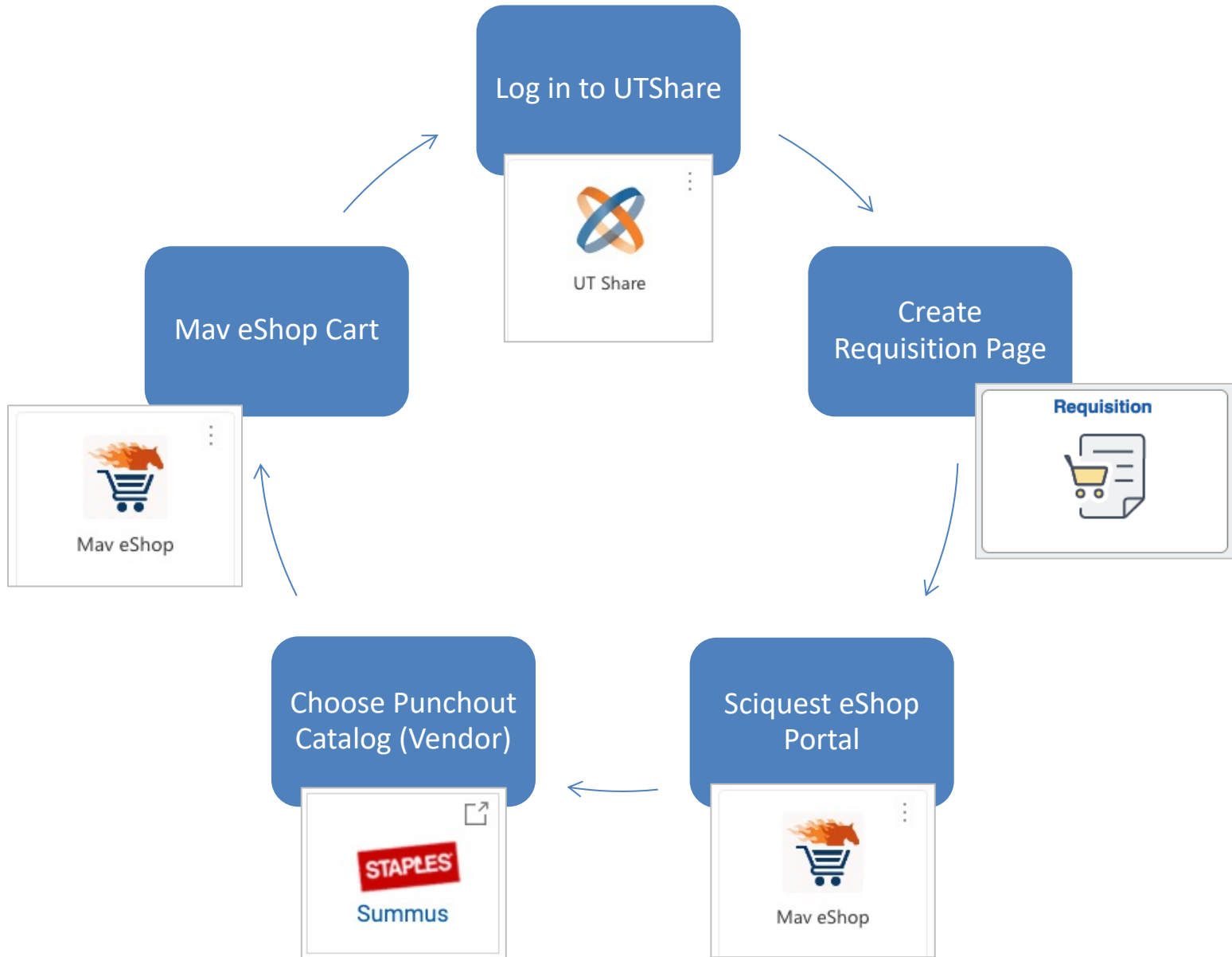
- Cannot be a Requester
- Can be a Shopper and assign a shopping cart to a Requester
- Reviews Requisition in UTShare for accuracy
- Can approve or deny a Requisition in UT Share



Shopping as a Requester

Mav eShop

Shopping as a Requester



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

Create Requisition

Create Requisition ?

Welcome Jane Dolan

Home My Preferences Requisition Settings | 0 Lines Checkout

Request Options Search All Search Advanced Search

All Request Options

Web
SciQuest eShop Portal

Special Requests

Favorites

Templates

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency USD

*Unit of Measure

Due Date

Supplier

Address Sequence Number

Shopping as a Requester

Next, select the vendor's Punchout Catalog to begin shopping

The screenshot displays the Mav eShop interface. At the top, there is a navigation bar with the Mav eShop logo, a dropdown menu set to 'All', a search bar with the text 'Search (Alt+Q)', a currency indicator '0.00 USD', and icons for a shopping cart, a heart, a flag, and a notification bell with a '1' badge. Below the navigation bar, the breadcrumb 'Shop • Mav eShop' is visible. The main content area is divided into two columns. The left column has a dark header 'Organization Message' and contains a 'Welcome to Mav eShop' message, a description of the eProcurement system, a list of suppliers, and details for Staples Office Supply, Office Depot, Dell, and Apple. The right column has a dark header 'Showcases' and contains a 'Punchout Catalogs' section. This section is highlighted with a red border and contains a grid of vendor logos and their corresponding HUB names: Apple (UT Arlington Only), B&H (UTA), BURGOON GRAINGER (HUB), fisherscientific (Possible Missions-HUB), shi (HUB), DELL (Summus-UT Arlington), VWR INTERNATIONAL (VWR - Summus), STAPLES (Summus), and TODAY'S BUSINESS SOLUTIONS (HUB). A hand cursor is shown pointing at the TODAY'S BUSINESS SOLUTIONS logo.

Mav eShop

All Search (Alt+Q) 0.00 USD

Shop • Mav eShop

Organization Message

Welcome to Mav eShop

An eProcurement system for the University of Texas at Arlington

Mav eShop eProcurement system provides a familiar online shopping experience and negotiated pricing from the University of Texas at Arlington's most preferred suppliers.

Please review the supplier list to find the right supplier for your purchases:

Staples Office Supply (via HUB partner Summus Industries)
Office Depot (via HUB partner Today's Business Solutions)

These are mandatory use contracts without a prior exception approval from Procurement and Payment Services. Both vendors offer a wide variety of office supplies and related products for everyday use. Staples has a \$50/order minimum requirement. Procurement suggests pooling orders on a weekly basis, or some other pre-determined time frame, into a single order to reduce the need to track multiple small dollar orders.

Dell (via HUB partner Summus Industries)

Dell is a recognized global leader in computer technology and related supplies. The Dell/Summus punchout includes the University's pre-approved standard configuration towers, laptops and related items.

Apple

Apple is a leader in technology products and solutions including a variety of devices and related tools and solutions. All items available in the Apple portfolio are approved for use by the University's Office of Information Technology.

Showcases

Punchout Catalogs

 UT Arlington Only	 UTA	 HUB	 Possible Missions-HUB
 HUB	 Summus-UT Arlington	 VWR - Summus	 Summus
 HUB			

Shopping as a Requester

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

The screenshot shows a 'Review & Checkout' page. At the top left is the 'Summus Industries' logo. A search bar is located at the top right. The main heading is 'Review & Checkout' with a 'Print to pdf' icon on the right. Below this is an 'Order Summary' table. The table has two columns: 'Items (4)' and '\$63.08'. The 'Total' row shows '\$63.08'. To the right of the table, it says 'Delivery to: Arlington, TX 76019' and a red 'Submit Order' button. Below the summary, it says '4 items in cart' and 'Delivery'. One item is shown: 'BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, Black Ink, 60/Pack (GSM609-BLK)'. It has a '29% off' badge, a 'BEST VALUE' badge, and a 'Remove' button. The quantity is '1', with a price of '\$5.65 60/PK' (original price '\$7.99' is crossed out). Delivery is 'by Thursday, Jul 06, 2023'.

Items (4)	\$63.08
Total	\$63.08

Delivery to: Arlington, TX 76019

Submit Order

4 items in cart
Delivery

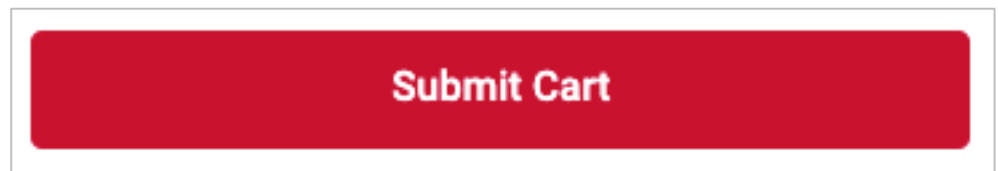
BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, Black Ink, 60/Pack (GSM609-BLK)
Item #: 442901 | MFR #: GSM609BLK | CIN #: 442901
Delivery by Thursday, Jul 06, 2023

1 \$5.65 60/PK ~~\$7.99~~ **\$5.65**

Remove



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 (UTShare)

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

Mav eShop All Search (Alt+Q) 174.15 USD

Shopping Cart • Shopping Cart Assign Cart **Return Cart To PeopleSoft**

Simple Advanced Summary

Search for products, suppliers, forms, part number, etc.

Cart Name: July Office Supplies

Description:

Prepared for: Jane Dolan

9 Items

Summus Staples • 9 Items • 174.15 USD

SUPPLIER DETAILS

Contract	no value	PO Number	To Be Assigned
----------	----------	-----------	----------------

Need to make changes? **MODIFY ITEMS** **VIEW ITEMS** Item(s) was retrieved on: 6/26/2023 4:43:04 PM

- Staples 8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)
- Sharpie Permanent Marker, Fine Tip, Black, Dozen (30001)
- BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

It is recommended that you update the Cart Name and Description.

One Vendor One Cart

Return Cart to PeopleSoft

Purchases from multiple suppliers in Mav eShop cannot be returned to UTShare.

The screenshot displays the Mav eShop Shopping Cart interface. At the top, the header includes the Mav eShop logo, navigation options (All, Search), and cart details (254.47 USD). The main content area is titled 'Shopping Cart' and shows 11 items from the supplier 'Summus Staples' for a total of 212.19 USD. A dropdown menu is open for the first item, listing actions: 'Add to Favorites', 'Remove Selected Items', 'Remove All Items' (highlighted with a red box and arrow), 'Move to Another Cart', 'Add to Draft Cart or Pending PR/PO', and 'Remove Contract from Selected Lines'. On the right, a 'Summary' section contains an error message: 'Correct these issues. You are unable to proceed until addressed. Requisition can only contain one supplier. Remove or Move the items to another draft cart.' Below this, the 'Details' section shows the user 'CAM Cook' and a 'Total (254.47 USD)' section with a 'Subtotal' of 254.47. A table at the bottom lists the items, including 'TRU RED 8.5" x 11" Copy Paper, 20 lbs., 135848 CT' with a quantity of 3.

11 Items 9 ✓

Summus Staples · 10 Items · 212.19 USD

SUPPLIER DETAILS

Contract *no value* PO Number

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#)

- TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 10 Reams/Carton (TR56958)
- TRU RED Durable Dry Erase Eraser, Black (13612)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 12/13/2023 2:50:13 PM

- TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 10 Reams/Carton (TR56958)
- TRU RED Durable Dry Erase Eraser, Black (13612)
- Expo Block Eraser (81505)
- Expo Whiteboard Care Cleaner, Blue (1752229)
- Expo White Board Care Cleaner, 12/Carton (81803FC)
- Expo Whiteboard Care Dry Erase Wipes, 5.5" x 10", White, 50/Container (81850)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 TRU RED 8.5" x 11" Copy Paper, 20 lbs.,	135848	CT	40.72	3 CT	122.16	✓

Summary →

Correct these issues. You are unable to proceed until addressed.

Requisition can only contain one supplier. Remove or Move the items to another draft cart.

Details ↓

For
CAM Cook

Total (254.47 USD) ↓

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.


Subtotal ★ **254.47**

Powered by JAGGAER | [Privacy Policy](#)

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

 [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 Show at Receipt Shown at Voucher

[Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

 **Check Budget**  Pre-Check Budget Budget Checked Status **Valid**

 **Save & submit**  Save for Later  Add More Items  Preview Approvals

Process Assigned Cart

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: I [REDACTED]@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](mailto:[REDACTED]@uta.edu)). The shopping cart can be accessed for review in "Draft Carts".

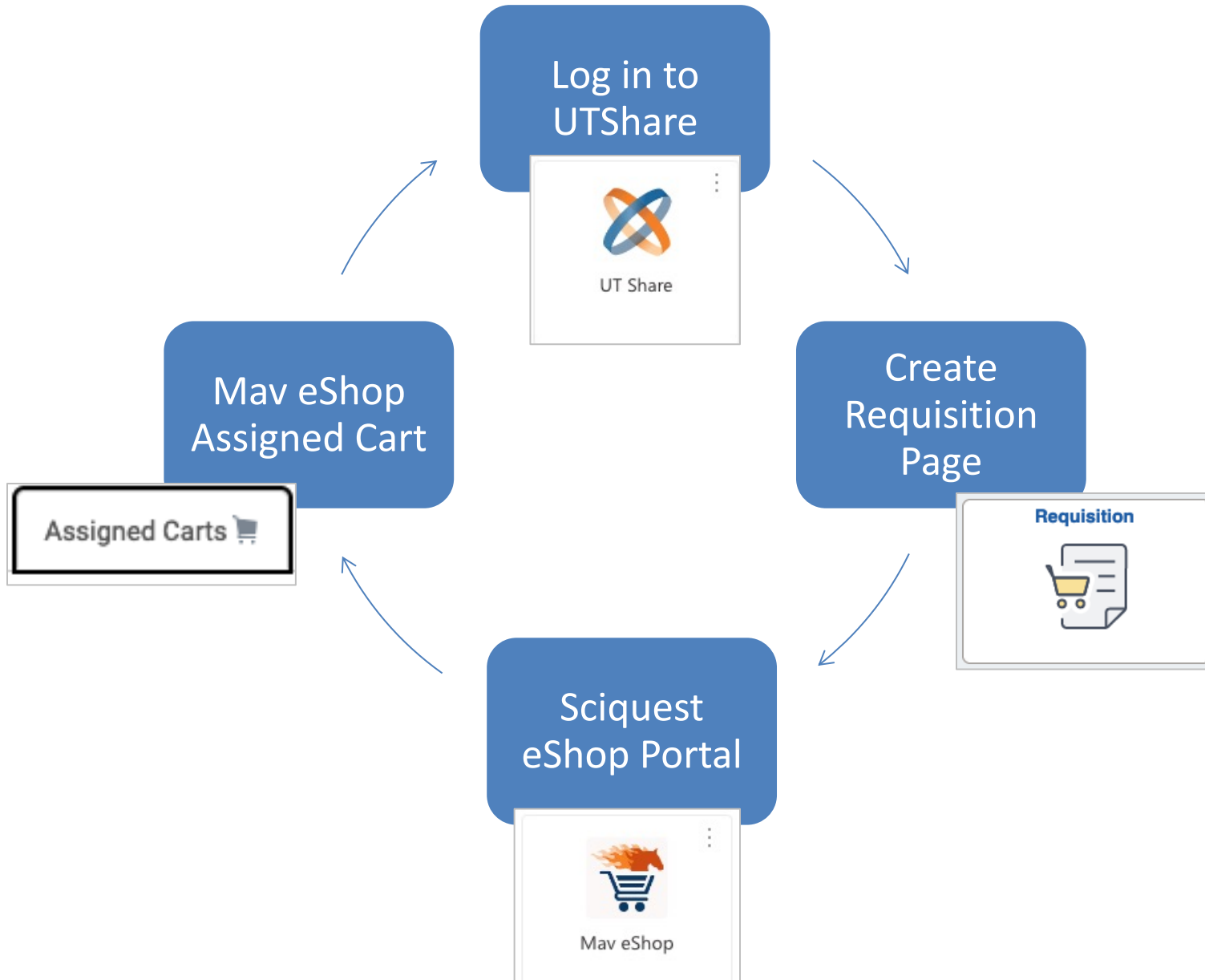
If applicable, the user has submitted the following additional comments:

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

Support Team Contact Information:
[+1 817-272-2155](tel:+18172722155) knowledgeservices@uta.edu

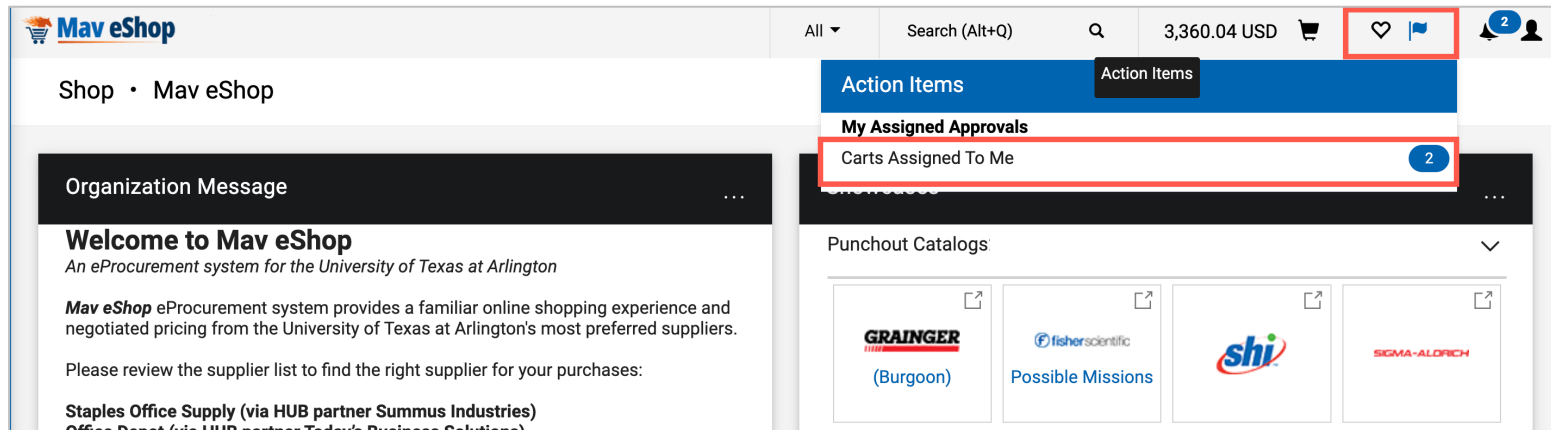
Thank you,
University of Texas System

Process Assigned Cart

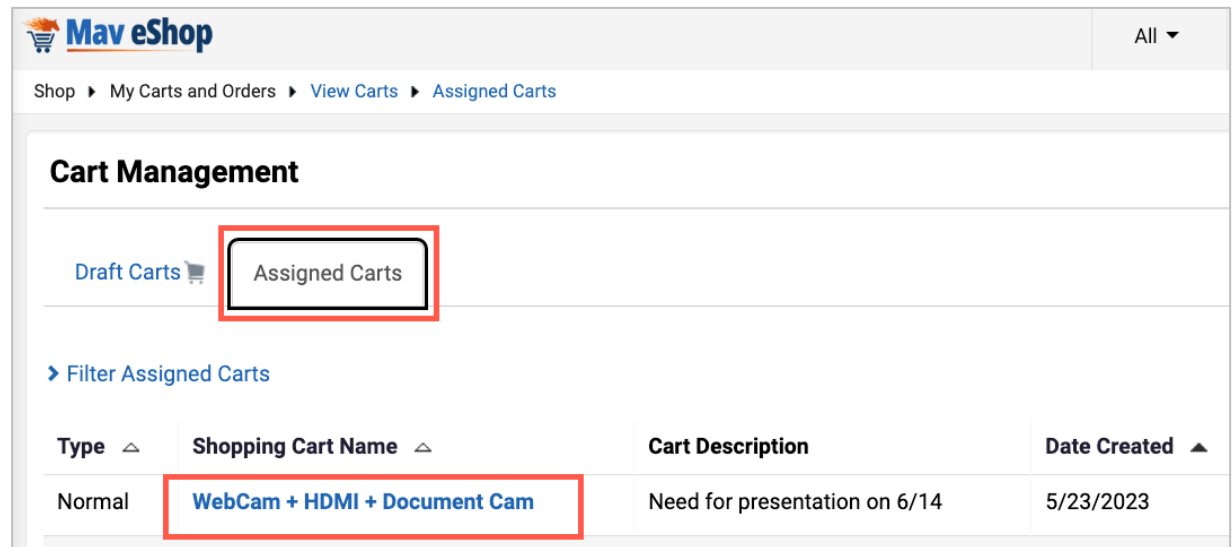


Process Assigned Cart

Once in Mav eShop select the **Flag** 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.

The screenshot shows the Mav eShop interface for a shopping cart. The top navigation bar includes the Mav eShop logo, a search bar, and a total amount of 136.95 USD. The main header shows 'Shopping Cart • Shopping Cart' and three buttons: 'Return Cart', 'Assign Cart', and 'Return Cart To Peoplesoft' (highlighted with a red box). Below the header, there are tabs for 'Simple' and 'Advanced'. A search bar is present with the text 'Search for products, suppliers, forms, part number, etc.'. The cart details section shows 'Cart Name' as 'Breakroom items' (highlighted with a red box), 'Description' as 'Pls charge to cc 123456', and 'Prepared for' as 'Jane Dolar'. The 'Summary' section on the right shows 'Details' for 'Sara Barton' and a 'Total (136.95 USD)' section with a subtotal and total of 136.95.

Item	Quantity	Price	Total
Subtotal *			136.95
Total *			136.95

Once you return the cart to PeopleSoft you cannot go back to Mav eShop

Requesters Role

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

Demonstration



Special Request

Special Request

The Special Request form is used to request goods or services. This form captures the details of the purchase, such as:

- Item Information
- Quantity
- Shipping Terms
- Other Purchase Obligations or Conditions



Special Request

The Difference Between a Requisition and Purchase Order:

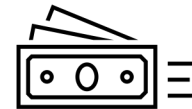
Requisition

- Internal document
- Used to communicate purchasing needs to Buyers
- Provides approvals for the purchase



Purchase Order

- External Document
- Provides the Supplier with the information needed to complete the order.



Special Request



General Information

1. Get pricing information (such as a quote, catalog, website copy, or fax).
2. Complete the Requisition, attach support documentation, budget check, and then submit the form for approval.

Identify Need

Create
Requisition

PO is dispatched
and sent to the
supplier

Receipt of
Goods/Services

Receipt of
Invoice - Create
Voucher

Pay Supplier

Special Request

Purchases
Less than \$15K
(Small Dollar)

- No competitive bids required
- Departments can purchase goods or services from any available source

Purchases
\$15K to \$50K
(Informal Bids)

- Competitive bids required
- Departments can solicit bids from 3 or more potential suppliers (2/3 of which must be *HUB Suppliers) or allow Procurement Services to conduct the bidding

Purchases
Greater than \$50K
(Formal Bids)

- Competitive bids required
- Procurement Services will obtain bids from 3 or more potential suppliers (2/3 of which must be *HUB Suppliers)

Special Request

Discount lines are NOT added to a requisition.

Request a new source of pricing with the discount applied to the unit price.



OR



Enter requisition with regular pricing and apply the discount on the payment voucher.

Managing Suppliers

Managing Suppliers

General Information

1. Suppliers Overview

- Suppliers provide goods/services to the university.

2. Supplier Activation Process

- Suppliers must be active and approved in UTShare.
- PaymentWorks is UT Arlington's supplier management tool.

3. Avoiding Duplications

- Thoroughly search UTShare and PaymentWorks before adding a new Supplier.

4. Verification Process

- Search UTShare to confirm the supplier's status.
- If in PaymentWorks but not UTShare, wait for processing completion.
- If not found in either, send a PaymentWorks invite.

Managing Suppliers

The Supplier Information page is used to search for an existing Supplier (Find an Existing Value).

- Search by Supplier ID or Name.
- Narrow your search by using search operators such as, *begins with*, *Contains*, *Equal to*, *Not Equal to*, etc.

Supplier Information

Find an Existing Value

▼ **Search Criteria**

Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches

SetID = 🔍

Supplier ID = 🔍

Persistence =

Short Supplier Name = 🔍

Our Customer Number = 🔍

Supplier Name = 🔍

Financial Sanctions Status =

^ Show fewer options

Case Sensitive Include History

▼ **Search Results**

5 rows - SetID "UTARL" Short Supplier Name "SPENCER"

SetID	Supplier ID	Persistence	Short Supplier Name	Our Customer Number	Supplier Name	
UTARL	0000106027	Regular	SPENCER BY-001	(blank)	SPENCER PERRY	>
UTARL	0000105619	Regular	SPENCER CH-001	(blank)	SPENCER WILSON	>

Supplier Search

Search for an existing Supplier in UTShare using one of the following pages:

Supplier Information Search Page

- NavBar > Menu > Financials > Suppliers > Supplier Information > Add/Update > Add/Update Supplier

Review Suppliers Search Page

- NavBar > Menu > Financials > Suppliers > Supplier Information > Add/Update > Review Suppliers

Note: *The Review Suppliers option lets you search by address.*

Supplier Search

The Review Suppliers page is used to search for an existing Supplier.

- Search by Name, supplier ID, or supplier Address
- Narrow your search by using search operators such as, Contains, Equal to, Not Equal to, etc.

Review Suppliers

Search Criteria

*SetID	UTARL	<input type="text"/>	<input type="text"/>	Supplier ID	<input type="text"/>	<input type="text"/>
Name	Contains	<input type="text"/>	<input type="text"/>	Short Name	Equal to	<input type="text"/>
Withholding Name	Contains	<input type="text"/>	<input type="text"/>	Classification	<input type="text"/>	<input type="text"/>
Supplier Status	<input type="text"/>	<input type="text"/>	<input type="text"/>	Type	<input type="text"/>	<input type="text"/>
Sanctions Status	<input type="text"/>	<input type="text"/>	<input type="text"/>	Persistence	<input type="text"/>	<input type="text"/>
Address	Contains	<input type="text"/>	<input type="text"/>	City	<input type="text"/>	<input type="text"/>
Customer Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	Country	<input type="text"/>	<input type="text"/>
ID Type	(Invalid Value)	<input type="text"/>	<input type="text"/>	State	<input type="text"/>	<input type="text"/>
VAT Registration ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	Postal	<input type="text"/>	<input type="text"/>
Withholding Tax ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	Bank Account #	<input type="text"/>	<input type="text"/>

Max Rows

Supplier Search

- This page displays detailed information for multiple Suppliers. On the Additional Supplier Info tab, the **Status** of the Supplier is provided
 - Denied
 - Unapproved
 - Inactive

Address City

Customer Number

ID Type

VAT Registration ID

Withholding Tax ID

Country

State

Postal

Bank Account #

Max Rows

Search Results Personalize | Find | View All | First 1-10 of 15

Search Results

Main Information				Additional Supplier Info		Audit Information				Last	
Status	Classification	Persistence	AR Number	Withholding	Withd Name	VAT Supplier	Open For Ordering	Sanctions Status			
Inactive	Outside Party	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Valid			
Approved	Outside Party	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Valid			
Inactive	Outside Party	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Valid			
Actions	UTARL	0000024914	AMERICAN ENGINEERS	SPENCER CO-001	150 TURTLE CREEK BLVD STE 205	DALLAS TX	USA	Active			
Actions	UTARL	0000039547	MARY SPENCER COMPANY								

Supplier Search

Click on the Supplier ID or name to open their Supplier Information / Status.

[New Window](#) | [Help](#) | [Personalize Page](#)

Summary | Identifying Information | Address | Contacts | Location | Custom

SetID UTARL

Supplier ID 0000039547

Supplier Short Name SPENCER CO SPENCER CO-001

Supplier Name MARY SPENCER COMPANY

Order SPENCER CO-001

2121 N AKARD ST STE 100

DALLAS, TX 752012296

Remit To SPENCER CO-001

150 TURTLE CREEK BLVD STE 205

DALLAS, TX 75207-6825

Status Approved

Persistence Regular

Classification Outside Party

HCM Class

Open for Ordering Yes

Withholding No

VAT No

Last Modified By UTZBATCH-UTZ

Last modified date 02/05/2021 8:10AM

Created By UTZ_FI_CNV1

Created Date/time 04/04/2014 12:00AM

Last Activity Date 07/21/2023

Save Return to Search Previous in List Next in List Notify

Update/Display Include History

[Summary](#) | [Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Custom](#)

**Special Request
Steps for Requesting
Goods/Services**

Special Request

Create Requisition ?

Welcome Sam Maverick

[Home](#)

[My Preferences](#)

[Requisition Settings](#)

[0 Lines](#)

[Checkout](#)

Request Options

Search All

Search

Advanced Search

All Request Options

Web

SciQuest eShop Portal

Special Requests

Favorites

Templates

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Address Sequence Number

Supplier

Supplier ID

Supplier Name

Supplier Item ID

[Suggest New Supplier](#)

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

Send to Supplier

Show at Receipt

Show at Voucher

Request New Item

Request New Item

A notification will be sent to a buyer regarding this new item request.

[Add to Cart](#)

Special Request

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 Show at Receipt Shown at Voucher

[Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

 [Check Budget](#)

 [Pre-Check Budget](#)

Budget Checked Status **Valid**

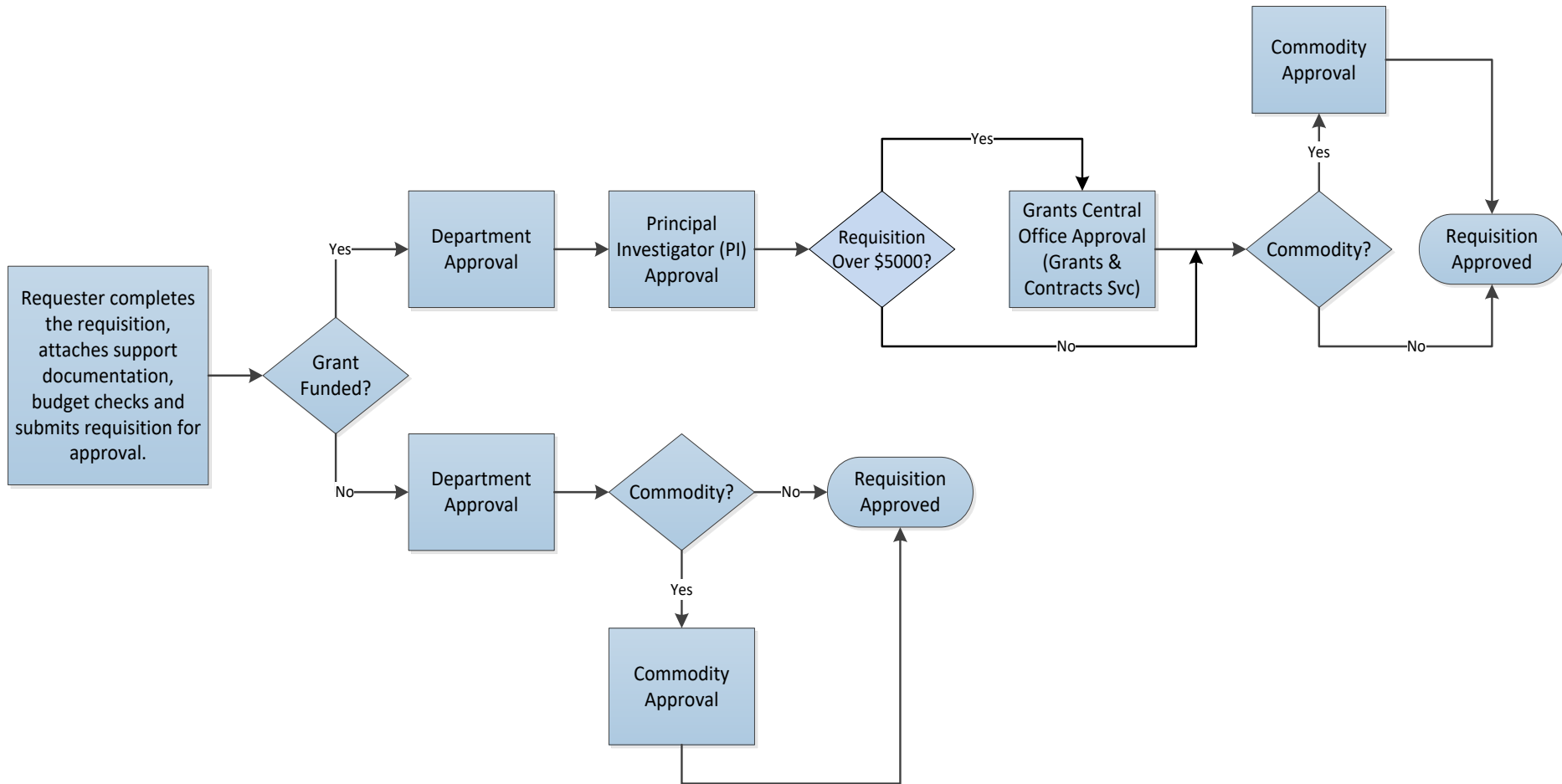
 [Save & submit](#)

 [Save for Later](#)

 [Add More Items](#)

 [Preview Approvals](#)

Requisition Workflow Process



Special Request

Once the Requisition is approved it is sourced into a PO, a Purchase Order ID number is assigned, and the status of the Requisition changes to PO(s) Dispatched.

The POs Dispatched status indicates that the funds are encumbered, and the goods or services can now be purchased from the Supplier.

The PO status can be viewed from the Manage Requisitions page in UTShare.

Manage Requisitions

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
▶ 0000020895	0000020895	UTARL	04/23/2019	PO(s) Dispatched	Valid	900.00 USD [Select Action] Go
▼ 0000020894	S. Davis_Power Supply	UTARL	04/23/2019	PO(s) Dispatched	Valid	5,483.00 USD [Select Action] Go

Requester Sam Maverick
Pre-Encumbrance Balance 0.00 USD
Entered By Sam Maverick
Priority Medium

Requisition → Approvals → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Request Lifespan:

Line Information Personalize | Find | First 1-2 of 2 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	OPS-A1000 450-1000 W DC Arc ...	PO Dispatched	5733.0000	USD	1.0000	EA	NEWPORT CORPORATION
2	Discount	PO Dispatched	-250.0000	USD	1.0000	EA	NEWPORT CORPORATION

Special Request

The PO will be emailed to the Requester. To begin the purchasing process:

- The Requester must provide the PO information to the Supplier and purchase small dollar POs (**less than \$15,000**).
- Procurement Services will provide the PO information to the Supplier and purchase large dollar POs (**\$15,000 or greater**).

Goods or services are received & Desktop Receiving has been performed, a PO Voucher should be processed to generate a payment to the Supplier.

- PO Vouchers **less than \$15,000** are processed by the Department.
- PO Vouchers **\$15,000 or greater** are processed by the Office of Disbursements.

Demonstration



Manage 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

Requisition Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text" value="UTARL"/>	Requisition Name	<input type="text"/>
Requisition ID	<input type="text"/>	Request State	<input type="text" value="All but Complete"/>
Date From	<input type="text" value="05/08/2020"/>	Date To	<input type="text" value="05/15/2020"/>
Requester	<input type="text"/>	Entered By	<input type="text"/>
		Budget Status	<input type="text"/>
		PO ID	<input type="text"/>

[Show Advanced Search](#)

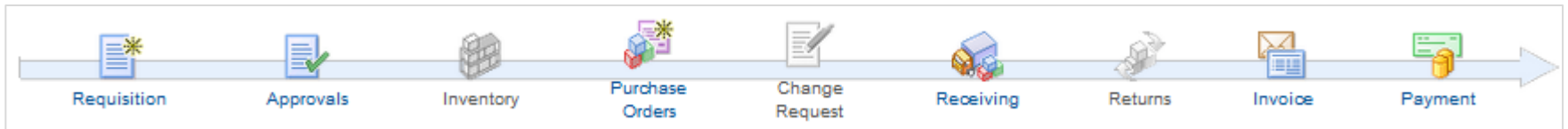
! The Requester specified has no Requisitions.

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

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, *Receive* items, *View Print* the requisition.

Manage Requisitions

Requisition Search | Keyword Search

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: UTARL | Requisition Name: | Requestion ID: | Request State: All but Complete | Budget Status: | Date From: 06/16/2023 | Date To: 06/23/2023 | Requester: | Entered By: | PO ID: |

Search | Clear | Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD	[Select Action] Go
▶ 0000052327	TEST	UTARL	06/20/2023	Pending	Valid	400.00 USD	[Select Action] Go

[Select Action] dropdown menu: Approvals, Cancel, Copy, Edit, View Print, [Selected] [Select Action]

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

Manage Requisitions

Canceling a Requisition

When a requisition is cancelled, 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.

Manage Requisitions

Requisition Search | Keyword Search

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request State: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000052329	Housing- Door	UTARL	06/26/2023	Pending	Valid	415.80 USD	<input type="button" value="Go"/>
▶ 0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD	<input type="button" value="Go"/>
▶ 0000052327	TEST	UTARL	06/20/2023	Pending	Valid	400.00 USD	<input type="text" value="[Select Action]"/> <input type="button" value="Go"/>
▶ 0000052326	CAM test Mav eSHOP	UTARL	06/15/2023	Pending	Valid	256.04 USD	<input type="text" value="[Select Action]"/> <input type="button" value="Go"/>

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

Manage Requisitions

Canceling a Requisition

- On the Requisition Details page, click the **Cancel Requisition** button.

Sam Maverick

Requisition Details for:

Business Unit UTARL Date 06/20/2023
Requisition ID 0000052328 Status Pending
Requisition Name Organizer doors APT Life Total 1,889.80 USD

Line Details

Line	Item Description	Status	Price	Qty	Total
1	HIGHBACK ORGANIZER,HINGED DOORS	Pending Approval	815.40000 Each	1.0000	815.40
2	OVERHEAD CABINET,WALL MOUNT	Pending Approval	389.70000 Each	2.0000	779.40
3	METROPLEX FACILITY SERVICES LABOR	Pending Approval	295.00000 Batch Lot	1.0000	295.00

[Cancel Requisition](#)

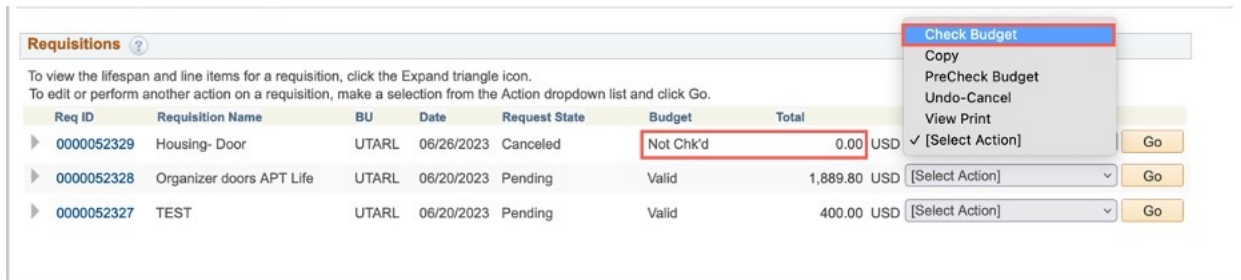
[Return to Manage Requisitions](#)

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

Manage Requisitions

Cancelling a Requisition

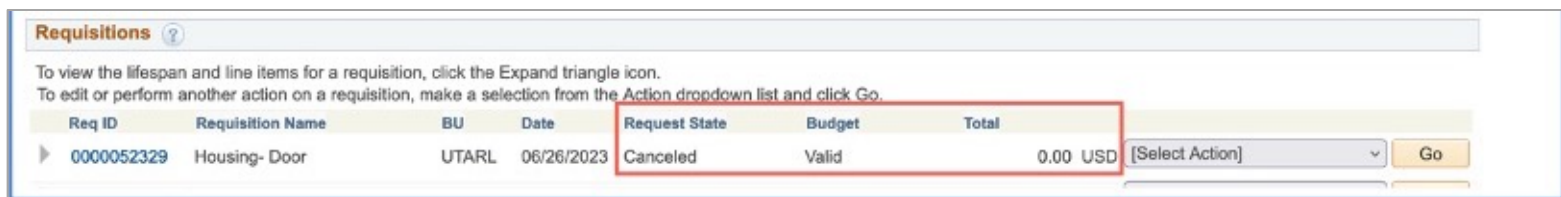
- To complete the process, select Check Budget from the dropdown menu and then click the Go button.



The screenshot shows a table of requisitions with a dropdown menu open over the 'Check Budget' option. The table has columns for Req ID, Requisition Name, BU, Date, Request State, Budget, and Total. The first row is highlighted with a red box around the 'Not Chk'd' budget value.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000052329	Housing- Door	UTARL	06/26/2023	Canceled	Not Chk'd	0.00 USD
0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD
0000052327	TEST	UTARL	06/20/2023	Pending	Valid	400.00 USD

When the process 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.



The screenshot shows the same table as above, but the 'Request State' is now 'Canceled' and the 'Budget' is 'Valid'. The 'Total' column shows '0.00 USD'. A red box highlights the 'Request State' and 'Budget' columns for the first row.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000052329	Housing- Door	UTARL	06/26/2023	Canceled	Valid	0.00 USD

Desktop Receiving

Desktop Receiving

General Information

- Desktop Receiving is a formal method for documenting acceptance of goods received from a Supplier.

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

- The Receive Items page is used to perform Desktop Receiving. You can access this page using one of the following navigations:
 - **Receive Items** (NavBar > Menu > Financials > eProcurement > Receive Items)
 - View receivable items for all Requisitions created by the Requester.

Desktop Receiving

Receiving Items

1. Select the Requisition/PO line(s) to receive.
2. Click the **Receive Selected** button.

Casual Receiving Main Page

Receive Items

You have 19 lines open for receiving

Receive Selected

Requisition Lines to Receive

Requisition Lines to Receive | Purchase Order Details

	Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM
<input type="checkbox"/>	UTARL	NGans/EngravingConcepts/Epilog	EL48ProOne		1	0	EA
<input type="checkbox"/>	UTARL	NGans/EngravingConcepts/Epilog	ERGAFFM		1	0	EA

Desktop Receiving

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.

Receive Items

New Receipt

*Business Unit

Receipt Status

*Received Date

Header Comments/Attachments Header Custom Fields Reject Shipmen

Receipt Lines

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Qty
1		4/24/23 Celebration of Researc	<input type="text" value="35.00"/>	HR	60.0000				N		

Desktop Receiving





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

New Window | Help | Personalize Page

You have saved receipt # 0000029736 containing the following items:

Receipt Lines Personalize | Find |   First  1 of 1  Last

Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity
1	4/24/23 Celebration of Research & Innovation Planning/Consultation Services(Estimate #1003)	35.0000		35.0000

[Return to Manage Requisitions](#) [Return to Receiving](#)

UTA Policies and Procedures



BF-PGS-PR-11

- New Supplier Registration and Maintenance Procedure



BF-PGS-PR-01

- Best Value Purchasing Procedures

More Information for Requisitions

Procurement Webpage:

- Find Your Buyer
- View updated Procurement Information and Deadlines
- Campus-Wide Procurement Agreements
- <https://www.uta.edu/business-affairs/faculty-staff/purchasing-goods-and-services>

Historically Underutilized Business (HUB) Vendor:

- Bids Terms & Conditions
- PO Terms & Conditions
- Information for Suppliers

Resource Information

For more information about MAV eSHOP:

- <https://resources.uta.edu/business-affairs/procurement/mav-eshop.php>

Support & Help:

- ServiceNow
- 817-272-2155
- Online Chat

Training Resources:

- Register for Classes
 - Join Business Affairs Listserv
 - View and/or Print Training Materials
 - PowerPoint Slides
 - Training Guides
 - Job Aids
 - <https://resources.uta.edu/business-affairs/training/index.php>