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 to 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
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

1. Log in to UTShare
2. Create Requisition Page
3. Mav eShop Cart
4. Choose Punchout Catalog (Vendor)
5. Sciquest eShop Portal
6. 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.

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.
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 (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.
One Vendor One Cart

Return Cart to PeopleSoft

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

Finalize the Requisition with the required information

Checkout - Review and Submit

Business Unit: UTARL

*Requester: 6001234567

Currency: USD

Requisition Name

Priority: Medium

Custom Fields

Cart Summary: Total Amount $1.44 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total |
--- | --- | --- | --- | --- | --- | --- | --- |
1 | TRU RED 8.5" x 11" Copy Paper | | Summus Industries Inc.-Staples | 2.0000 | carton | 40.7200 | 81.44 |

*Ship To: CENT110

Address: 1225 W. Mitchell St.

Room 110

Arlington, TX 76019

Attention To:

Due Date:

Accounting Lines

*Distribute By: Qty

SpeedChart

*Liquidate By: Amt

Accounting Lines

Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information
--- | --- | --- | --- | --- | --- | ---

Account | Fund | Dept | Cost Center | Function | Program | PC Bus Unit | Project | Activity
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.
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: [email]
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: [name] (Business Unit: UT Arlington)
Prepared by: [name]

Dear [name],

A shopping cart has been assigned to you by [name] ([name]@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

1. Log in to UTShare
2. Create Requisition Page
3. Mav eShop Assigned Cart
4. Sciquest eShop Portal

Assigned Carts
Requisition
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.

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

- Finalize Mav eShop Requisition after shopping
- Process Assigned Cart
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
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.
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.
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

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

- Denied
- Unapproved
- Inactive

```
<table>
<thead>
<tr>
<th>Max Rows</th>
<th>300</th>
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</thead>
</table>
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<table>
<thead>
<tr>
<th>Address</th>
<th>Contains</th>
<th>turtle creek</th>
</tr>
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<td>Customer Number</td>
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<td></td>
</tr>
<tr>
<td>ID Type</td>
<td>(Invalid Value)</td>
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</tr>
<tr>
<td>VAT Registration ID</td>
<td></td>
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</tr>
<tr>
<td>Withholding Tax ID</td>
<td></td>
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<tr>
<td>City</td>
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</tr>
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<tr>
<td>Bank Account #</td>
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<table>
<thead>
<tr>
<th>Search Results</th>
<th>Additional Supplier Info</th>
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<tbody>
<tr>
<td>Status</td>
<td>Classification</td>
</tr>
<tr>
<td>Inactive</td>
<td>Outside Party</td>
</tr>
<tr>
<td>Approved</td>
<td>Outside Party</td>
</tr>
<tr>
<td>Inactive</td>
<td>Outside Party</td>
</tr>
<tr>
<td>Actions</td>
<td>UTARL</td>
</tr>
<tr>
<td>Actions</td>
<td>UTARL</td>
</tr>
<tr>
<td>Actions</td>
<td></td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>150 TURTLE CREEK BLVD STE 205</th>
<th>DALLAS</th>
<th>TX</th>
<th>USA</th>
<th>Active</th>
</tr>
</thead>
</table>
```
**Supplier Search**

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

<table>
<thead>
<tr>
<th>Summary</th>
<th>Identifying Information</th>
<th>Address</th>
<th>Contacts</th>
<th>Location</th>
<th>Custom</th>
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<tbody>
<tr>
<td><strong>SetID</strong></td>
<td>UTARL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supplier ID</strong></td>
<td>0000039547</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supplier Short Name</strong></td>
<td>SPENCER CO, SPENCER CO-001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supplier Name</strong></td>
<td>MARY SPENCER COMPANY</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Order</strong></td>
<td>SPENCER CO-001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2121 N AKARD ST STE 100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DALLAS, TX 752012296</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Remit To</strong></td>
<td>SPENCER CO-001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>150 TURTLE CREEK BLVD STE 205</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>DALLAS, TX 75207-6825</td>
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</tr>
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<td><strong>Status</strong></td>
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<td></td>
<td></td>
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<tr>
<td><strong>Persistence</strong></td>
<td>Regular</td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Classification</strong></td>
<td>Outside Party</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HCM Class</strong></td>
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<td></td>
</tr>
<tr>
<td><strong>Open for Ordering</strong></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Withholding</strong></td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>VAT</strong></td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Create Requisition

Welcome  Sam Maverick

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

Supplier ID  Supplier Name  Supplier Item ID

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

Checkout
**Special Request**

**Checkout - Review and Submit**

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>UTARL</th>
<th>UT Arlington</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Requester</td>
<td>6001234567</td>
<td>Sam Maverick</td>
</tr>
<tr>
<td>*Currency</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>

**Requisition Name**

**Priority**

**Cart Summary: Total Amount 81.44 USD**

<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>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TRU RED 8.5” x 11” Copy Paper</td>
<td></td>
<td>Summus Industries Inc.- Staples</td>
<td>2.0000</td>
<td>carton</td>
<td>40.720</td>
<td>81.44</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Shipping Line**

<table>
<thead>
<tr>
<th>*Ship To</th>
<th>CENT110</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>1225 W. Mitchell St. Room 110 Arlington, TX 76019</td>
</tr>
</tbody>
</table>

**Accounting Lines**

<table>
<thead>
<tr>
<th>*Distribute By</th>
<th>Qty</th>
<th>SpeedChart</th>
<th>*Liquidate By</th>
<th>Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfields1</td>
<td></td>
<td></td>
<td>Chartfields2</td>
<td></td>
</tr>
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</table>

**Account Information**

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Cost Center</th>
<th>Function</th>
<th>Program</th>
<th>PC Bus Unit</th>
<th>Project</th>
<th>Activity</th>
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<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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
Requester completes the requisition, attaches support documentation, budget checks and submits requisition for approval.

Do Requisition Workflow Process

Requester completes the requisition, attaches support documentation, budget checks and submits requisition for approval.

Grant Funded?

Yes → Department Approval → Principal Investigator (PI) Approval

No → Department Approval → Commodity Approval

Requisition Over $5000?

Yes → Grants Central Office Approval (Grants & Contracts Svc)

No → Commodity Approval

Commodity Approval

Yes → Requisition Approved

No → Commodity?

Yes → Requisition Approved

No → Commodity Approval
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.
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).

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

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

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.
Class Activity

- Create and Finalize Special Item Requisition
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, Receive items, View Print the requisition.
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
Cancelling 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.
2. On the Requisition Details page, click the **Cancel Requisition** button.

After cancellation, the Total dollar amount of the requisition will be 0.00.
3. To complete the process, select Check Budget from the dropdown menu and then click the Go button.

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.
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.
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

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.)

<table>
<thead>
<tr>
<th>Receipt Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Item Description</td>
<td>Received Quantity</td>
<td>Reject Quantity</td>
<td>Accept Quantity</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>4/24/23 Celebration of Research &amp; Innovation Planning/Consultation Services (Estimate #1003)</td>
<td>35.0000</td>
<td></td>
<td>35.0000</td>
<td></td>
</tr>
</tbody>
</table>

You have saved receipt # 0000029736 containing the following items:
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
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
    o PowerPoint Slides
    o Training Guides
    o Job Aids
    o https://resources.uta.edu/business-affairs/training/index.php