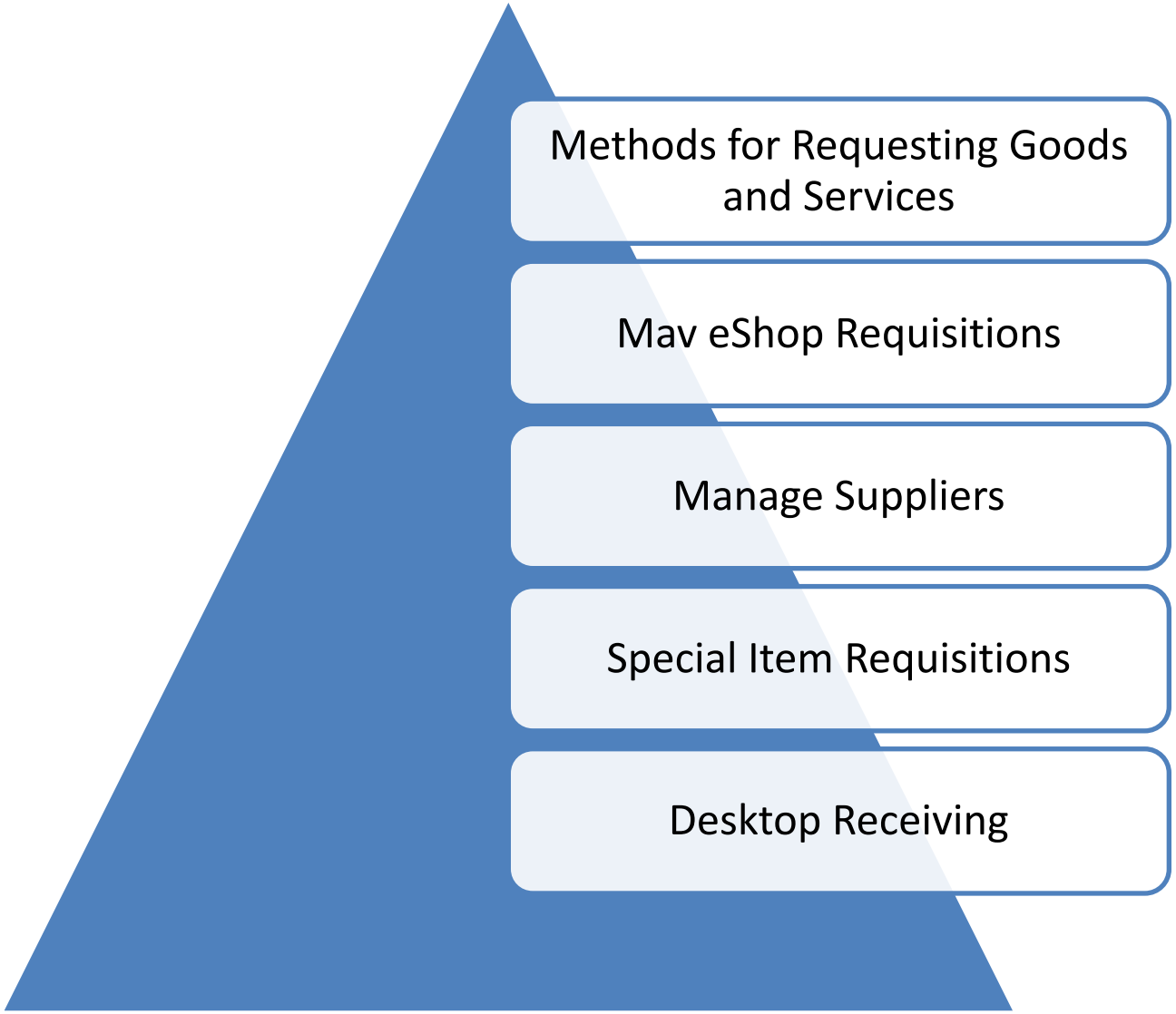
Office of Information Technology

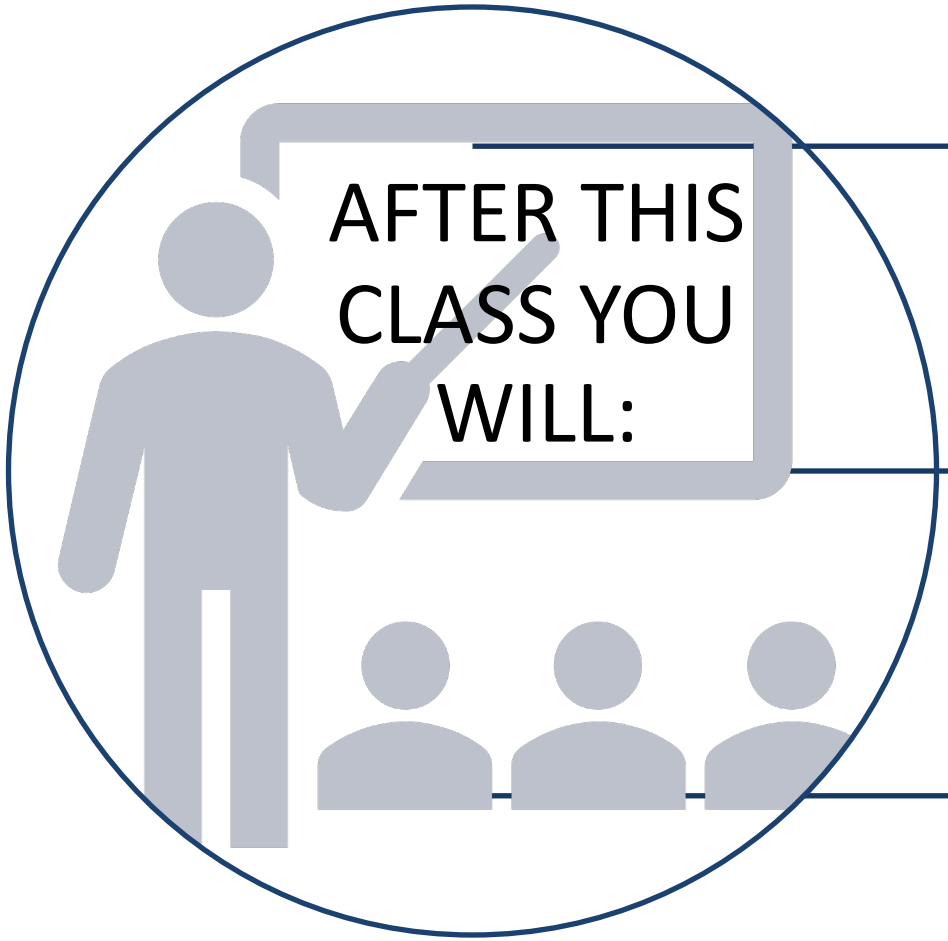
KNOWLEDGE SERVICES

Requisitions

Training Agenda



Learning Objectives



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.

Mav eShop

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

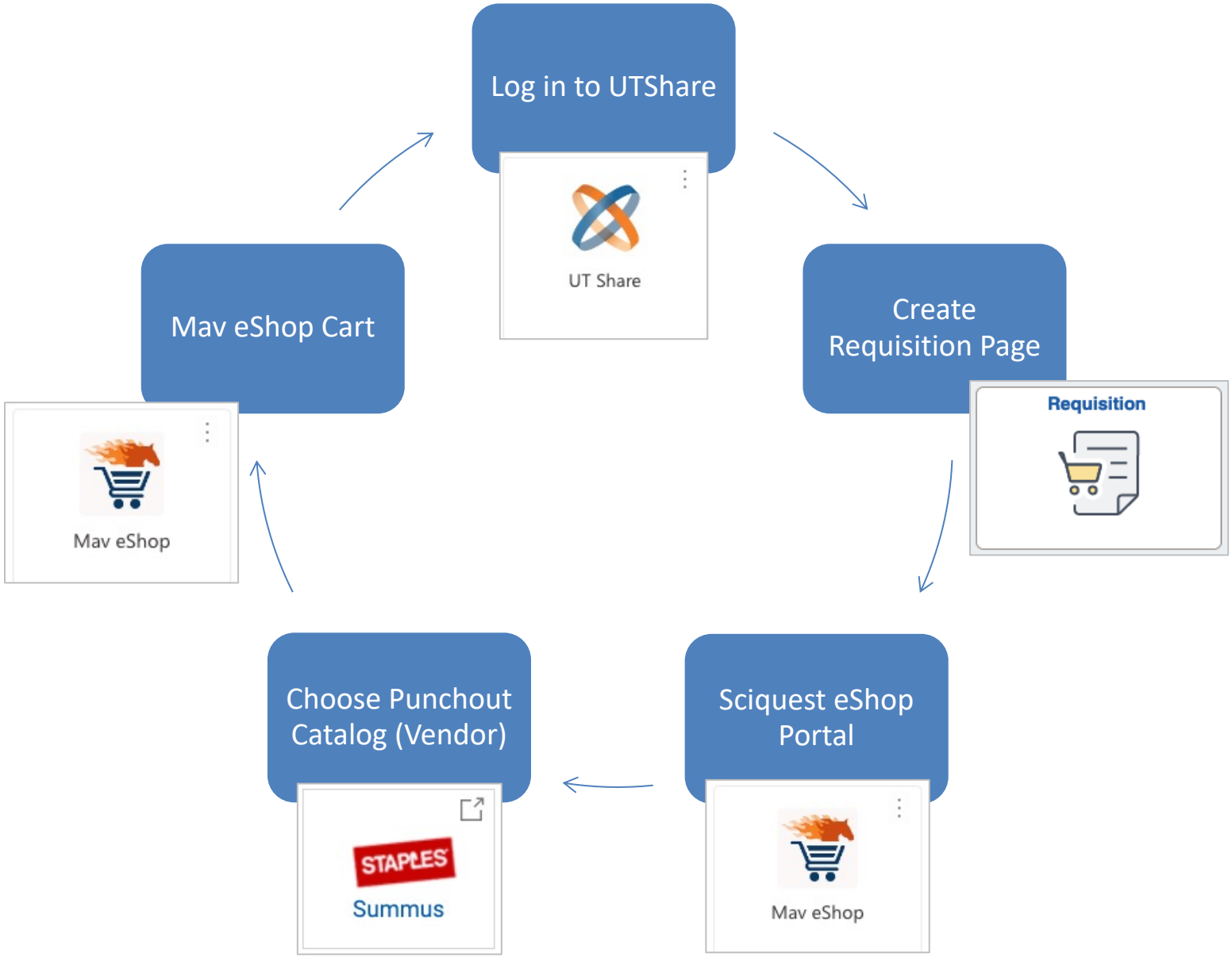
- Can create a Requisition in UTShare
- Can also be a Shopper
- Must log into UTShare and access MAV eSHOP from within the Create Requisition page
- Assigns Shipping, Profile Asset ID and Accounting Information to Requisition
- Submit Requisition for Approval

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



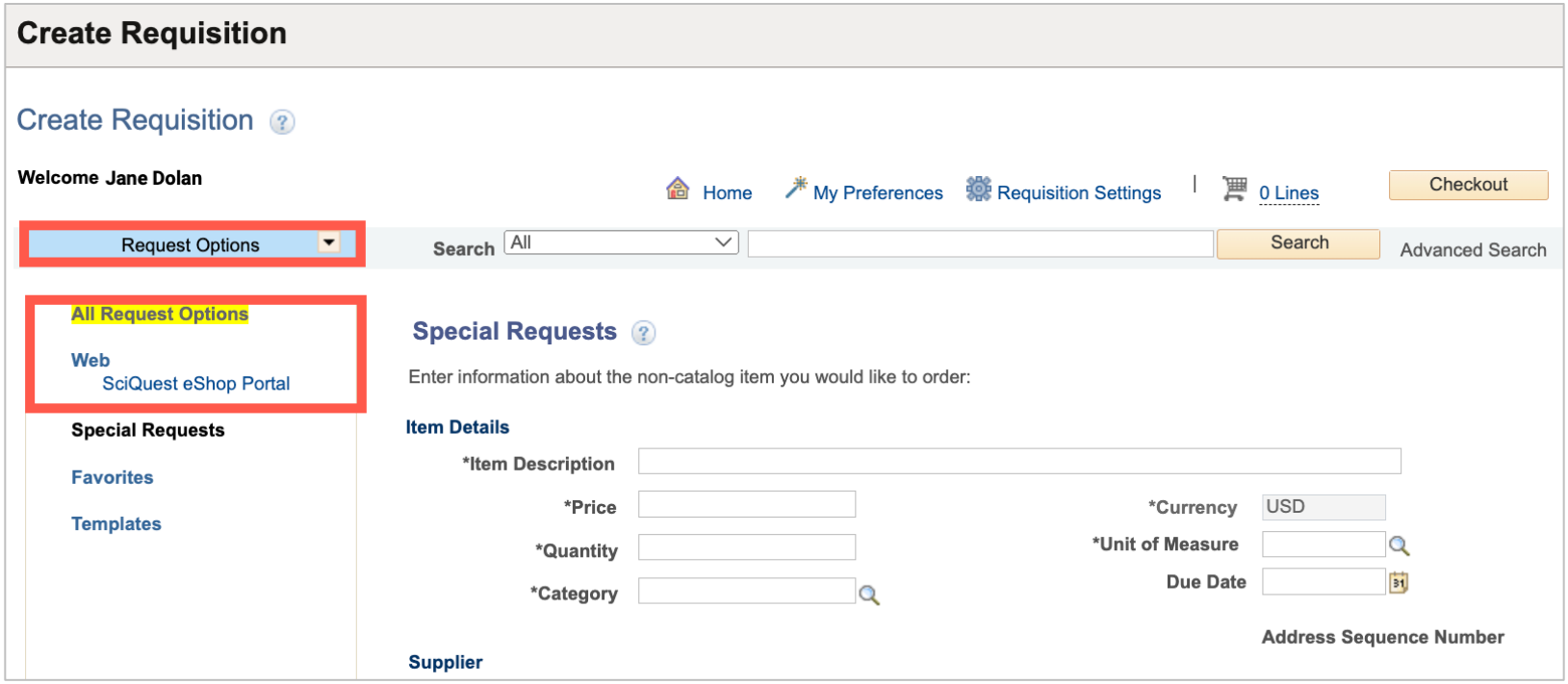
Shopping as a Requester

To shop as a Requester

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

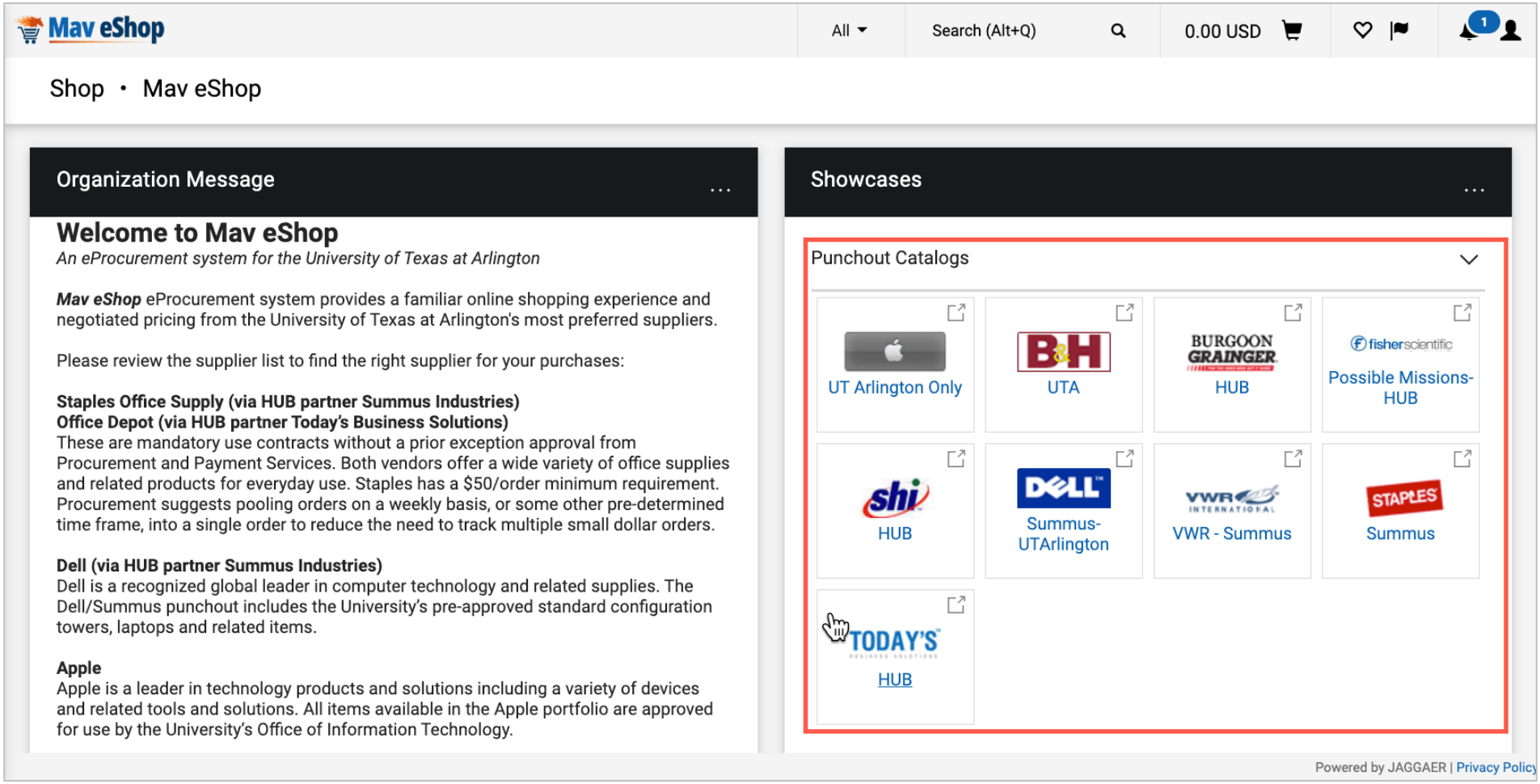
NavBar > Menu > Financials > eProcurement > Create Requisition.

Then, Select the **SciQuest eShop Portal** link



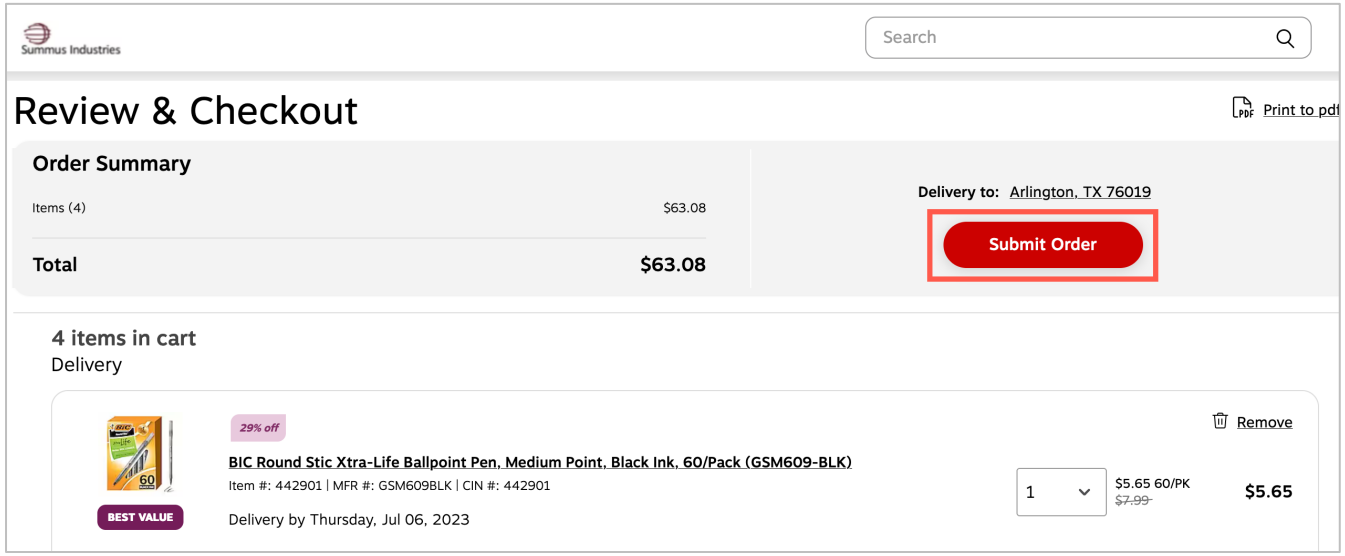
Shopping as a Requester

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

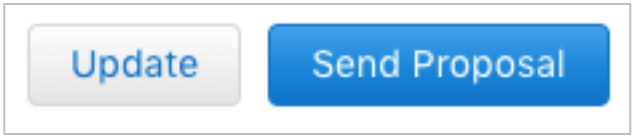


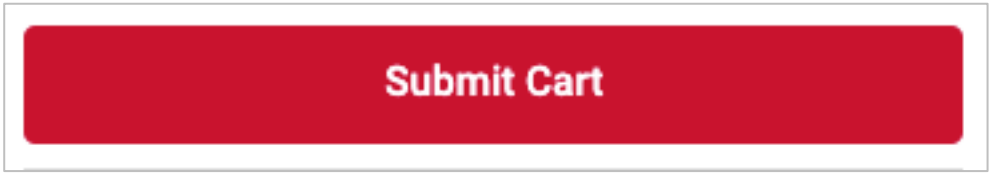
Shopping as a Requester

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.*

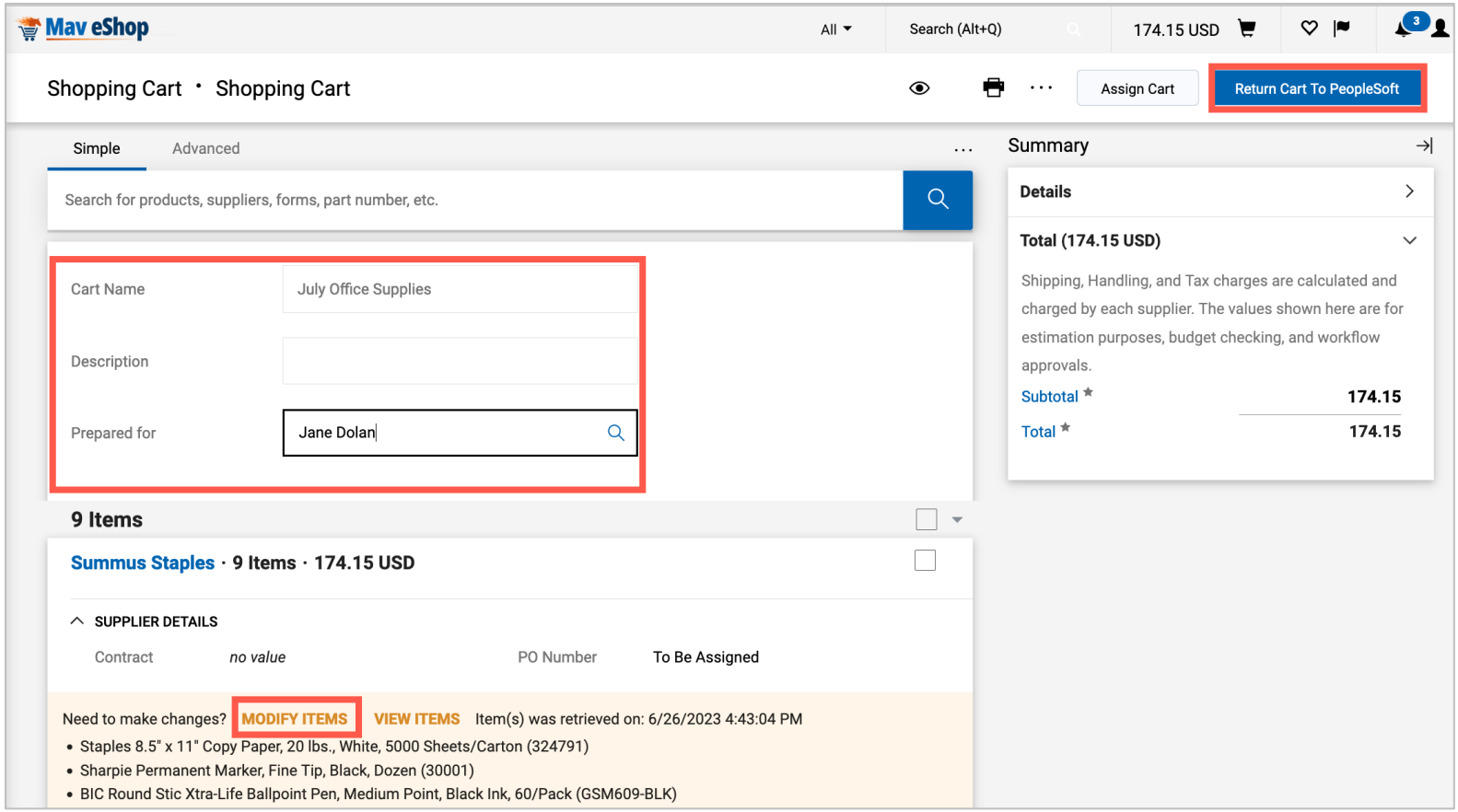




Shopping as a Requester

Return Cart to PeopleSoft (UTShare)

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

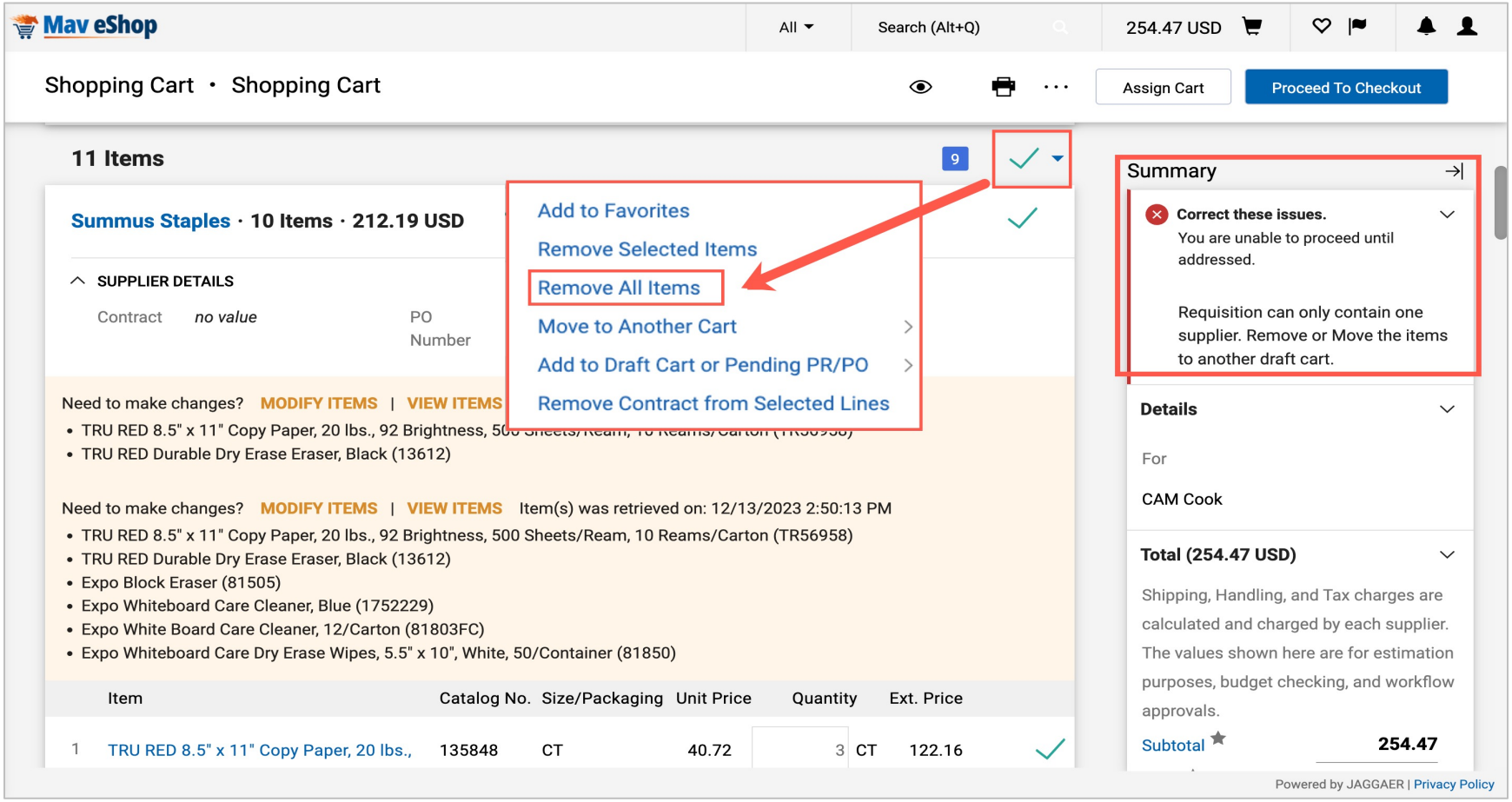


It is recommended that you update the Cart Name and Description.

One Vendor One Cart

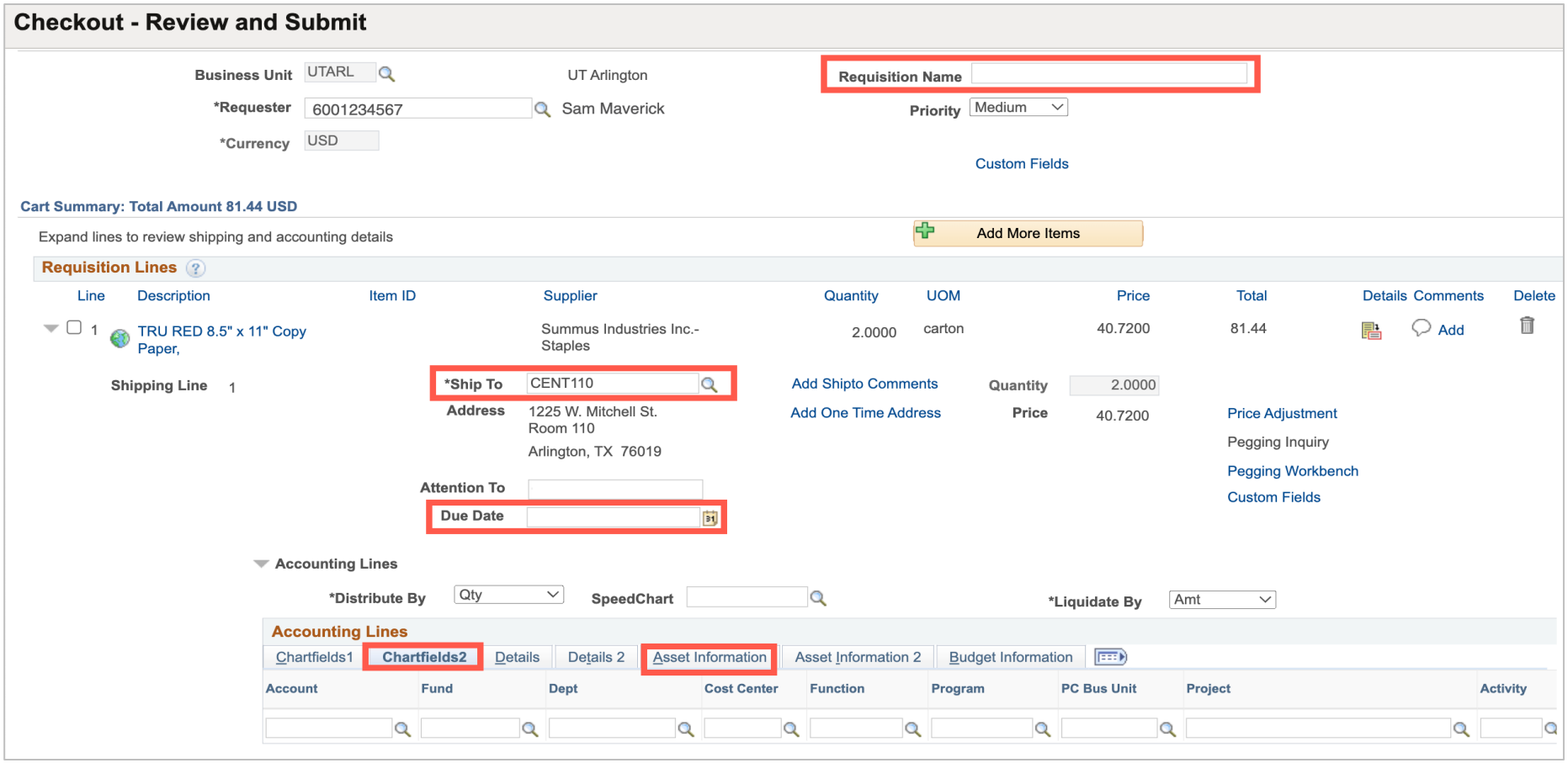
Return Cart to PeopleSoft

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



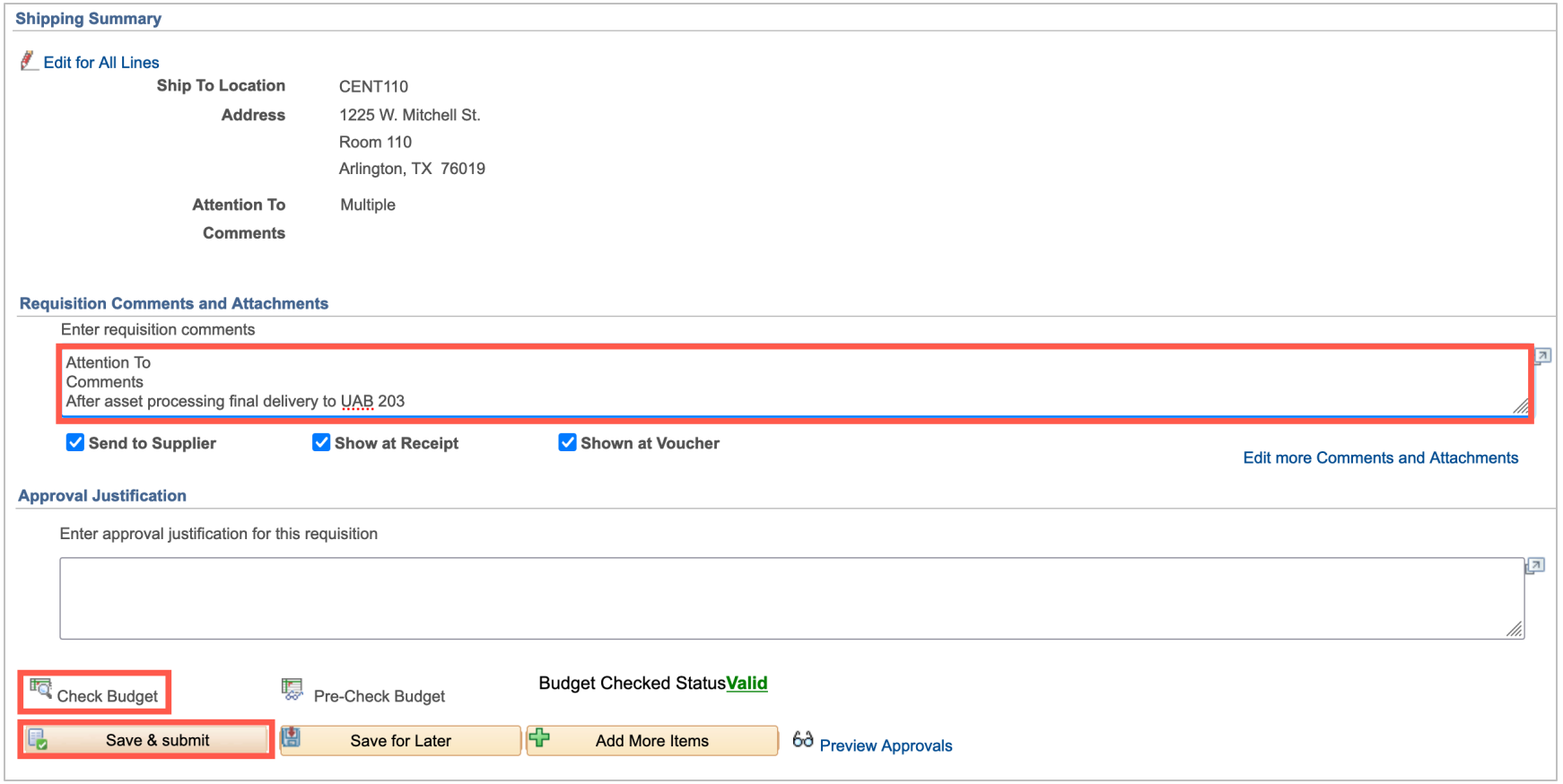
Shopping as a Requester

Finalize the Requisition with the required information



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

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: [redacted]@uta.edu>
Subject: A shopping cart has been assigned to you

[External]

Mav eShop

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".

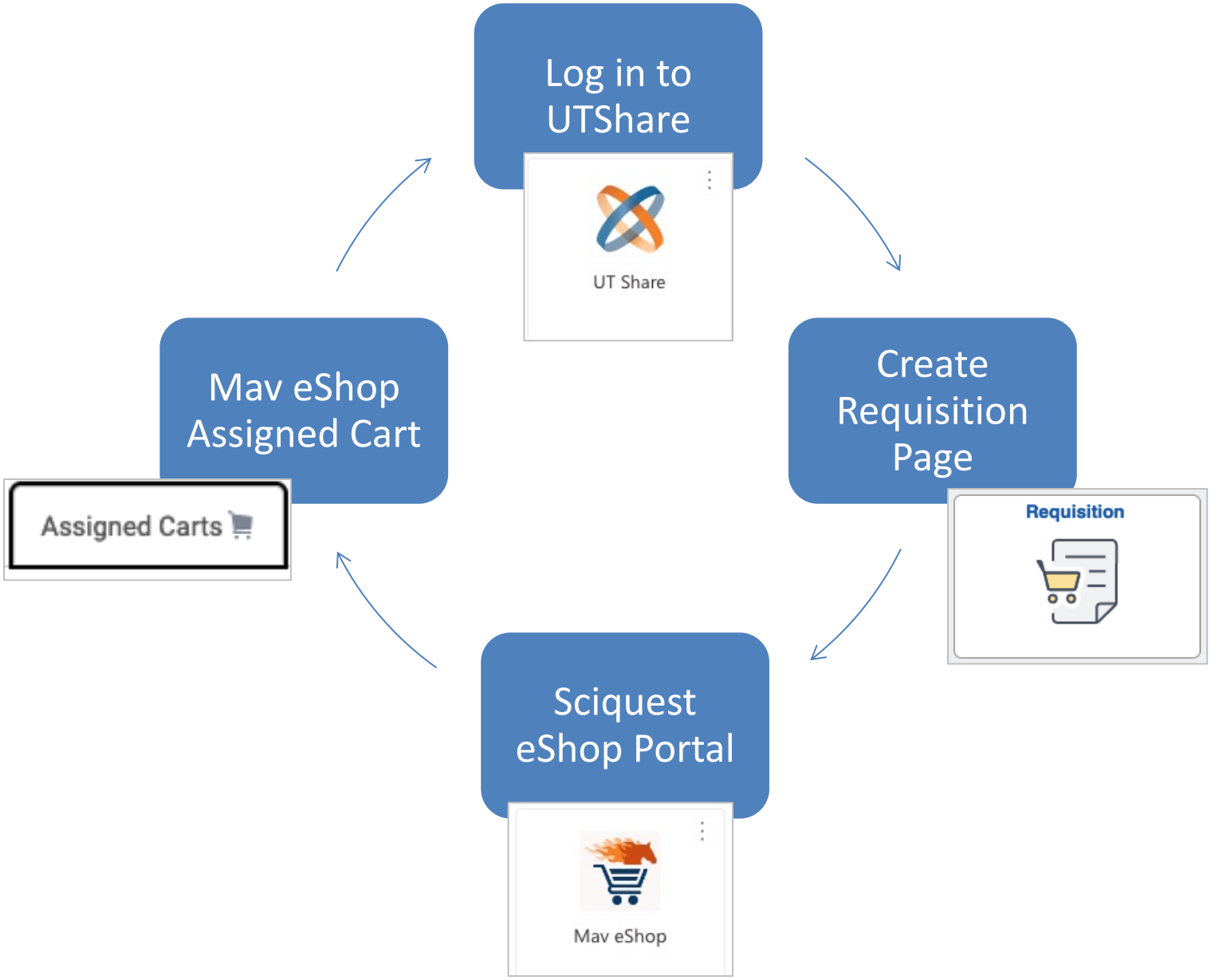
If applicable, the user has submitted the following additional comments:

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

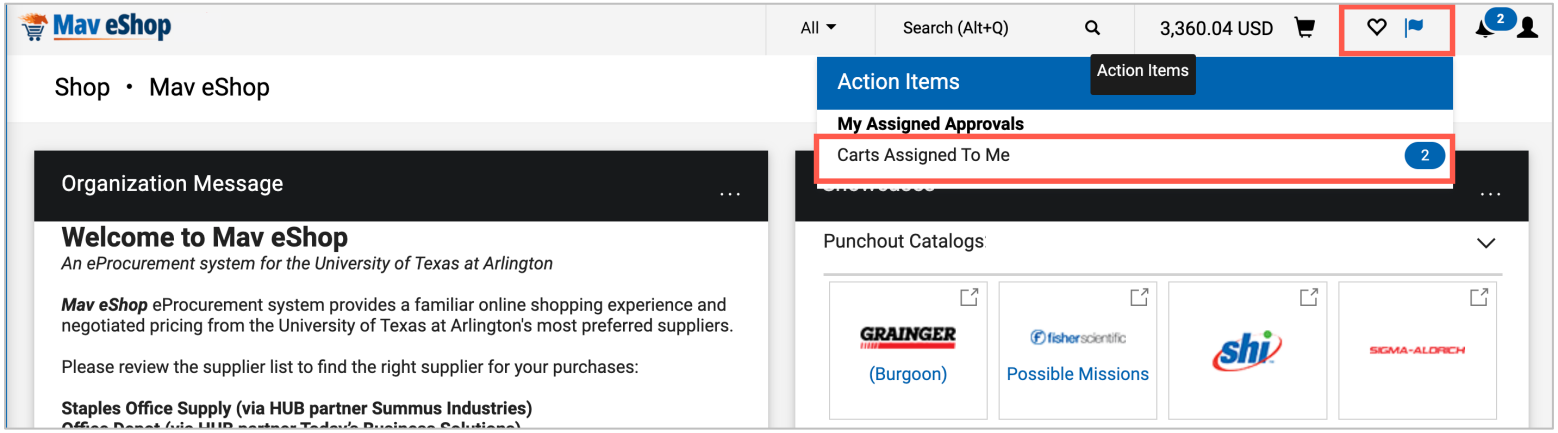
Thank you,
University of Texas System

Process Assigned Cart

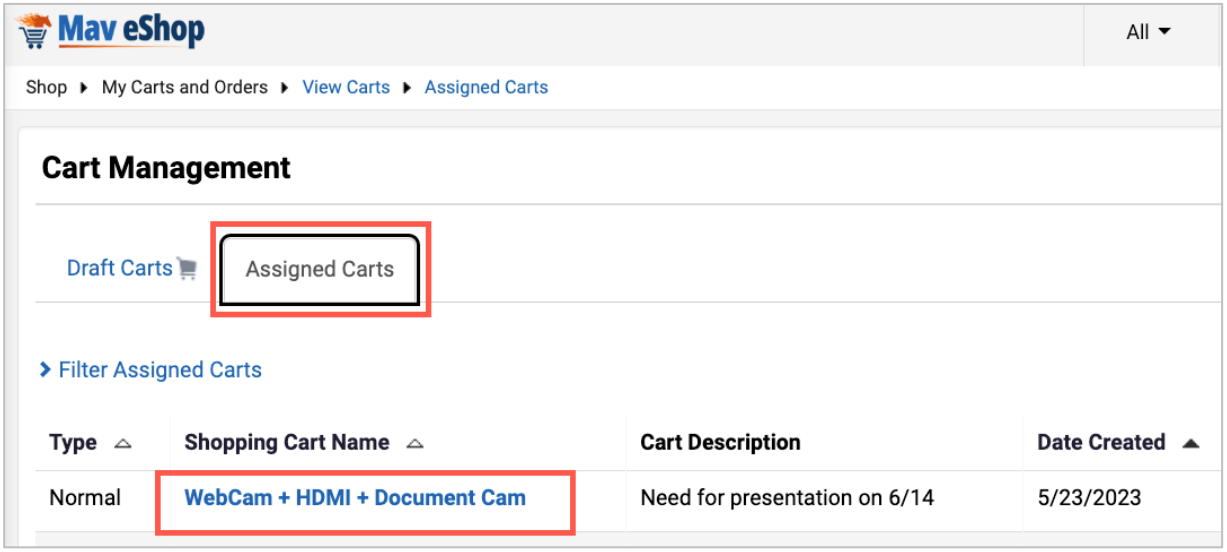


Process Assigned Cart

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



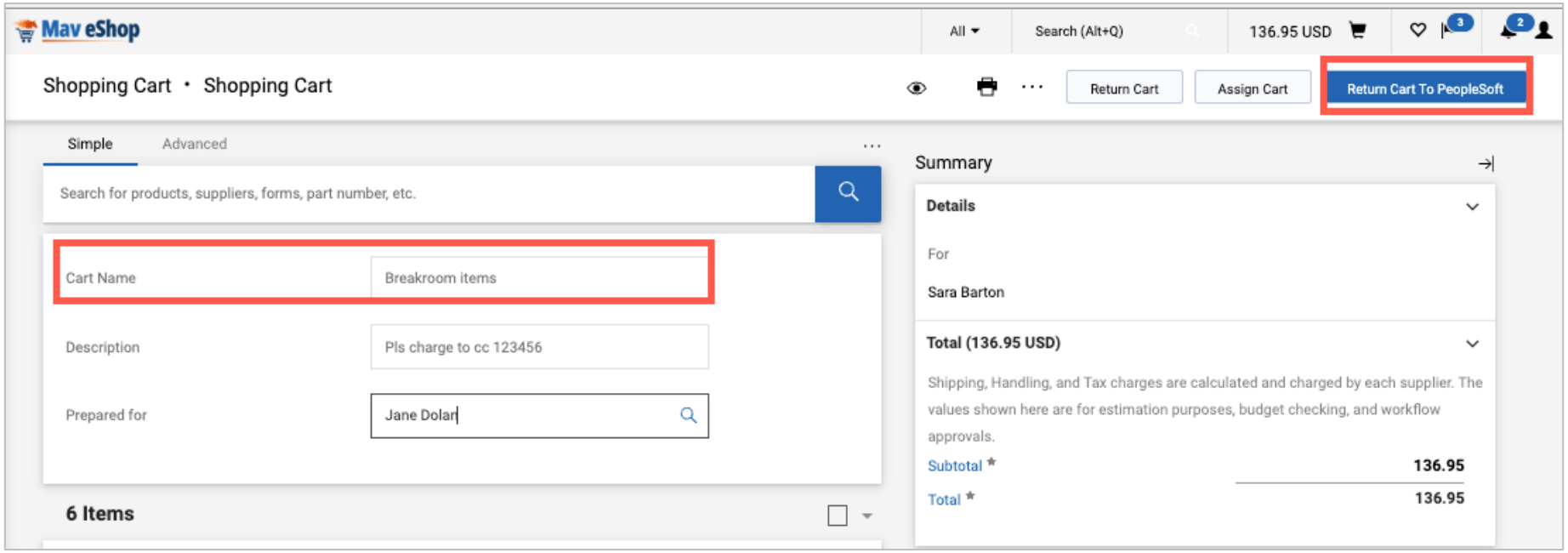
Click the **Carts Assigned to Me** to view carts that are ready for processing.



Process Assigned Cart

Return Cart to Peoplesoft (UTShare)

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



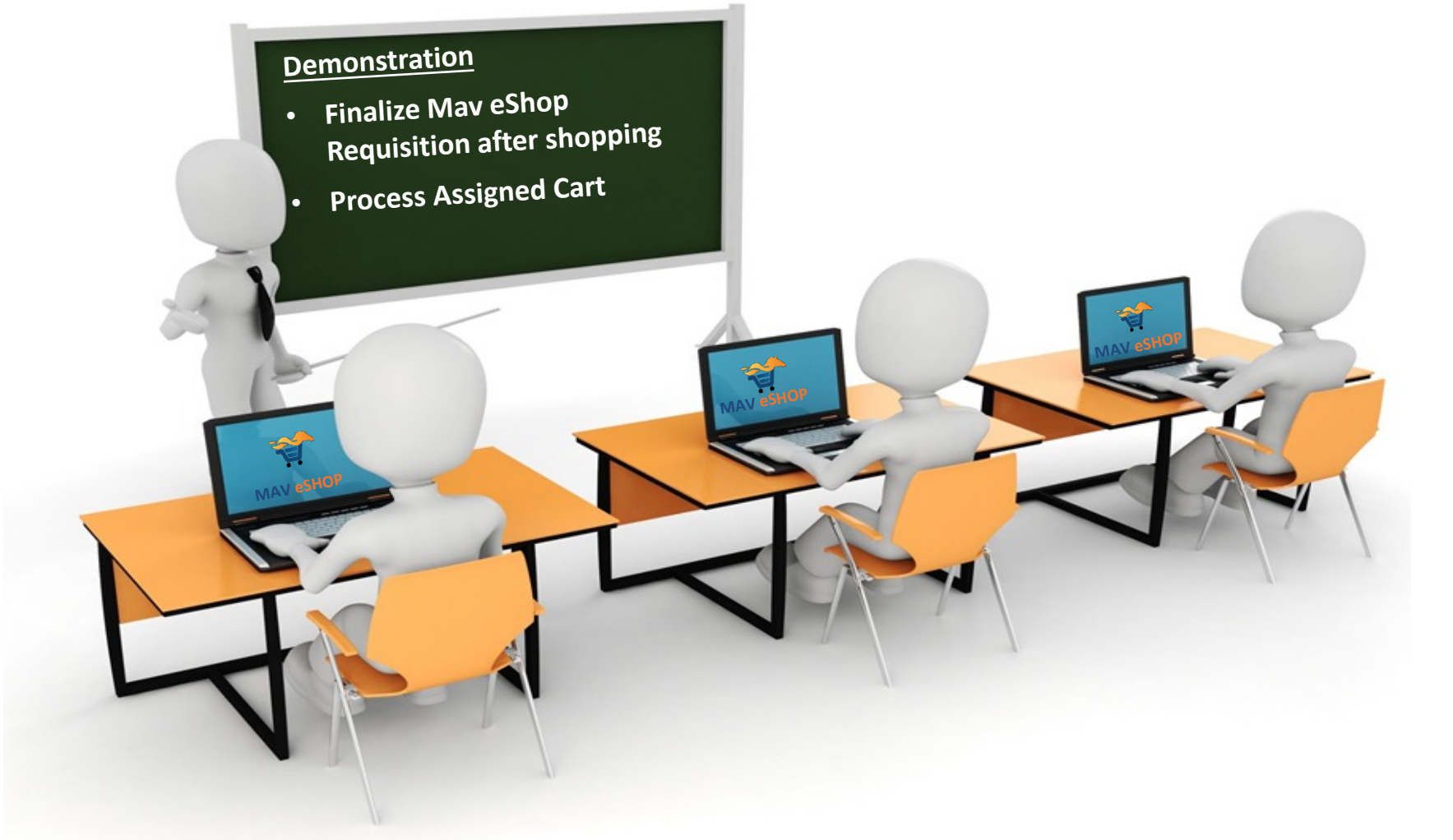
Once you return the cart to PeopleSoft you cannot go back to Mav eShop

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



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.

Special Request

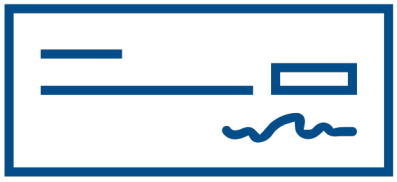
Purchases Less than $15K (Small Dollar)	• No competitive bids required • Departments can purchase goods or services from any available source
Purchases $15K to $50K (Informal Bids)	• Competitive bids required • Departments can solicit bids from 3 or more potential suppliers (2/3 of which must be *HUB 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.

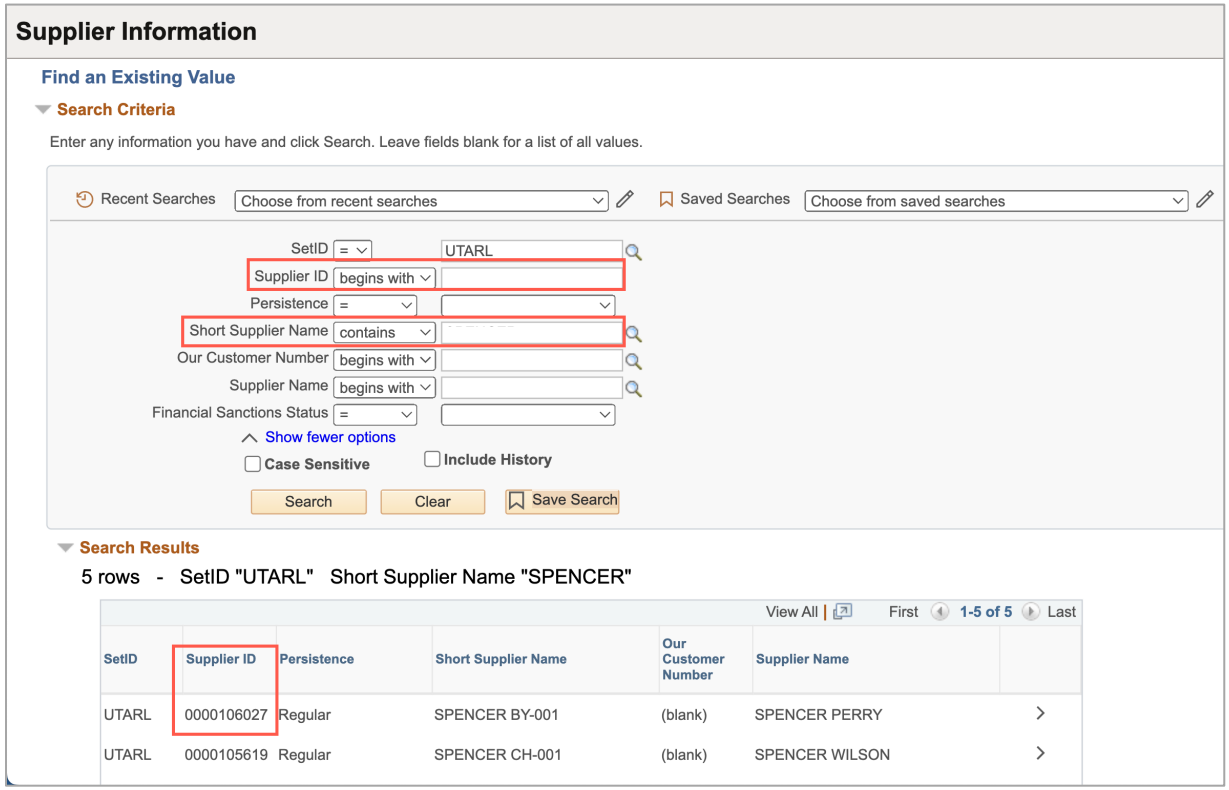
4. Verification Process

- 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 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

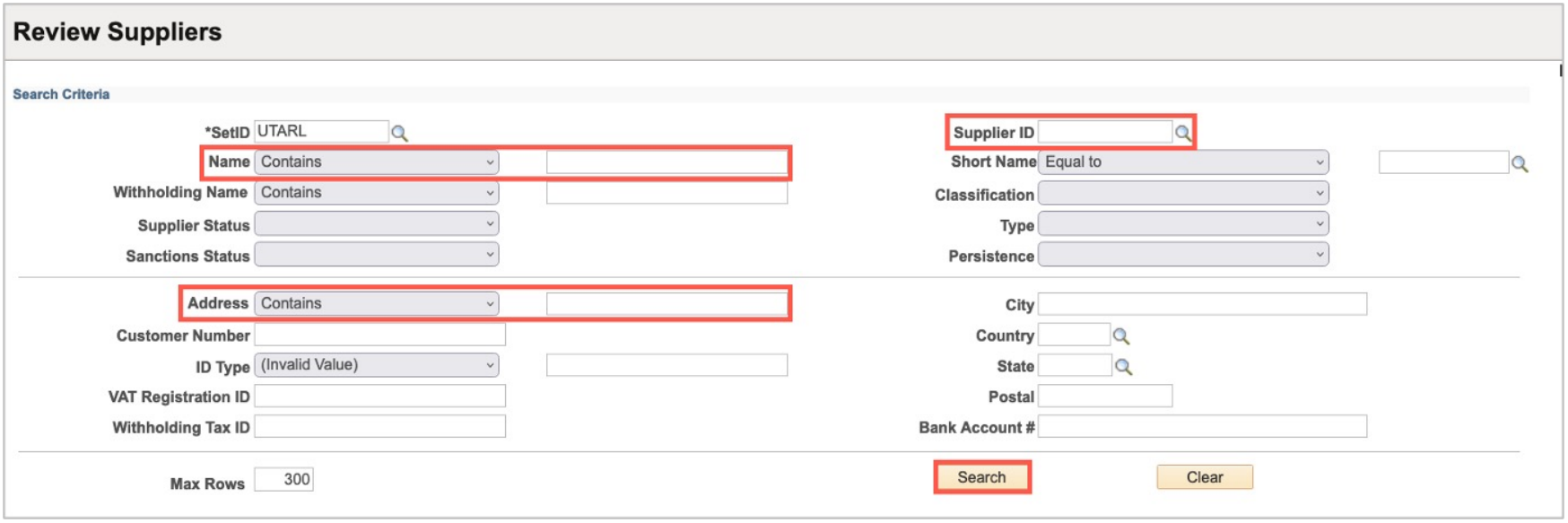
- NavBar > Menu> Financials > Suppliers > Supplier Information > Add/Update > Review Suppliers

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

Supplier Search

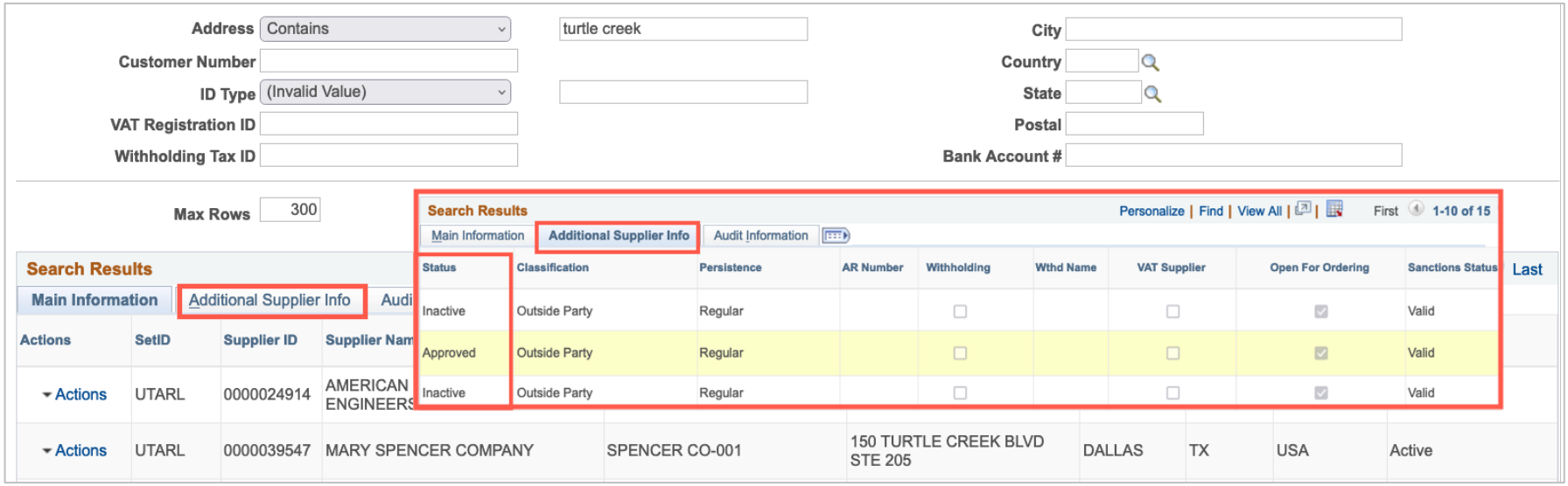
The Review Suppliers page is used to search for an existing Supplier.

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



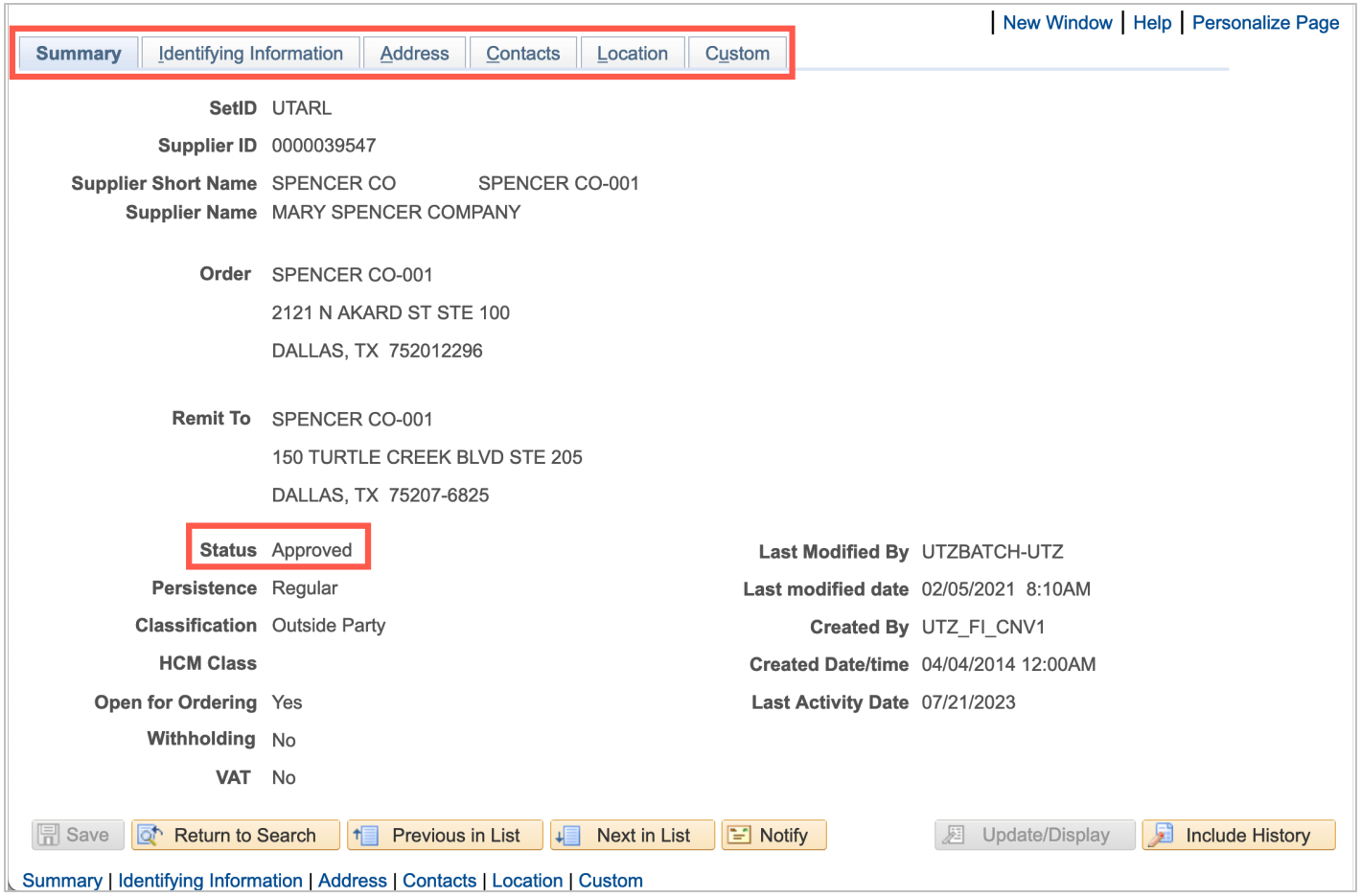
Supplier Search

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



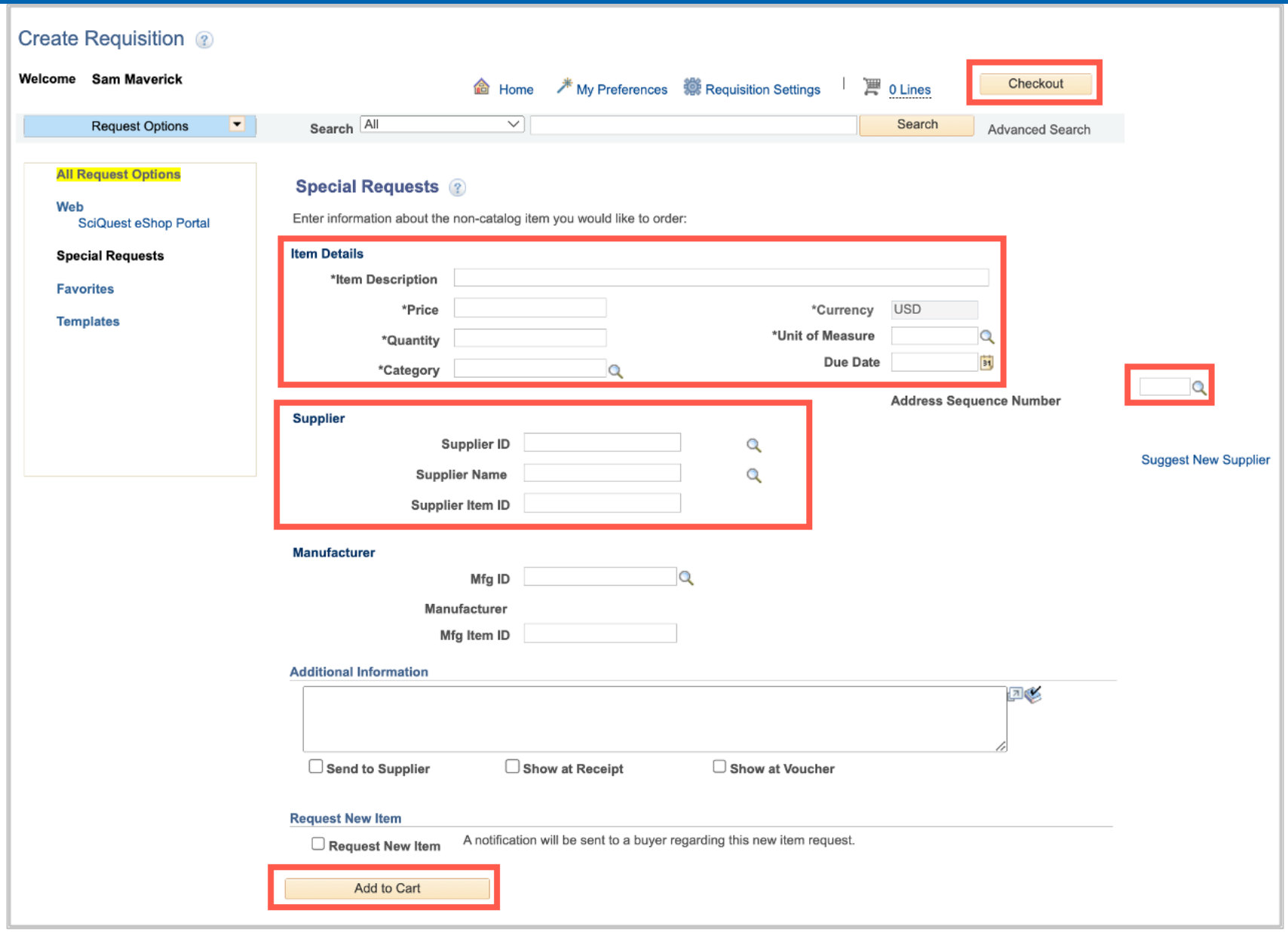
Supplier Search

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

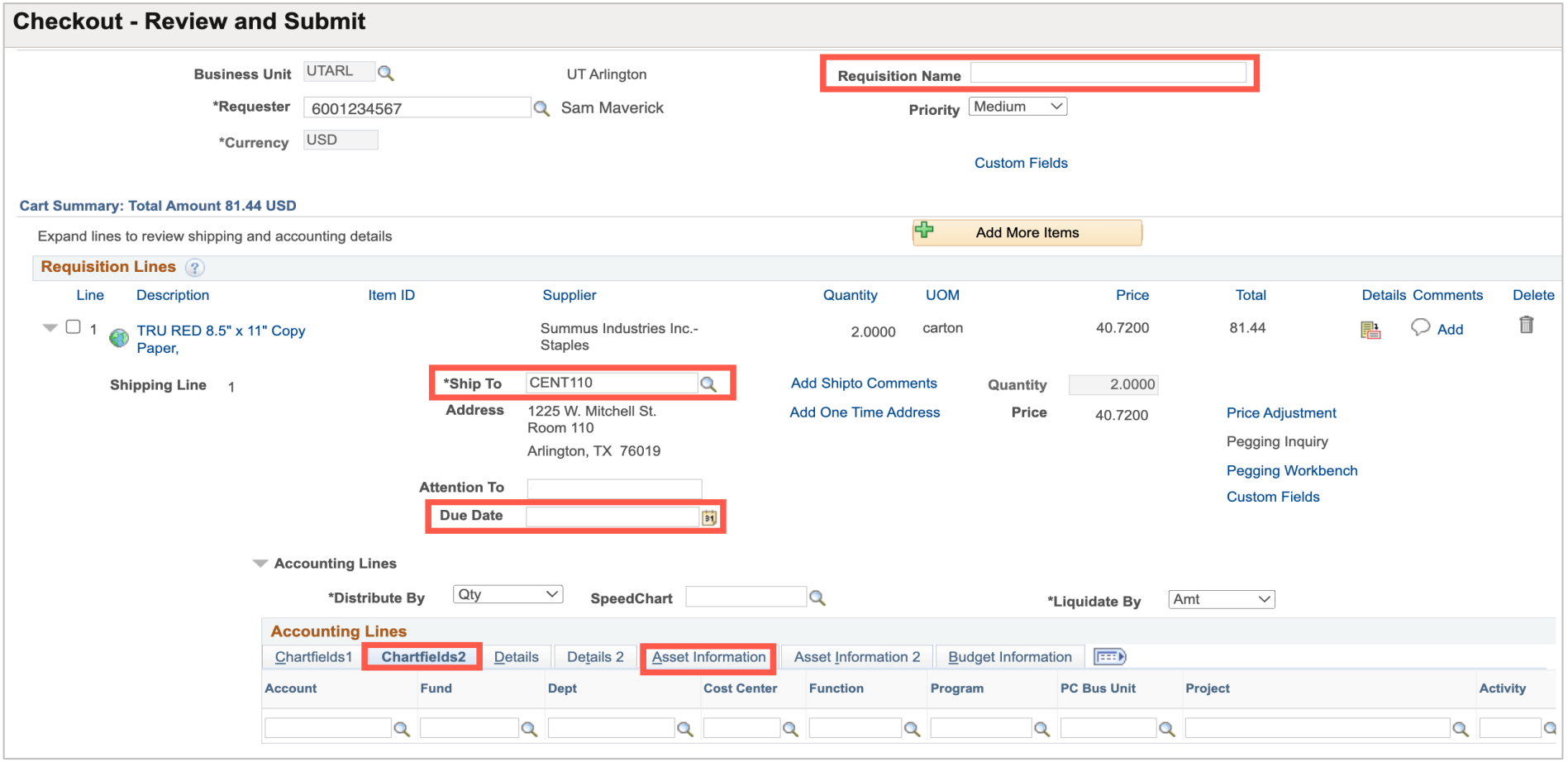


Special Request
Steps for Requesting Goods/Services

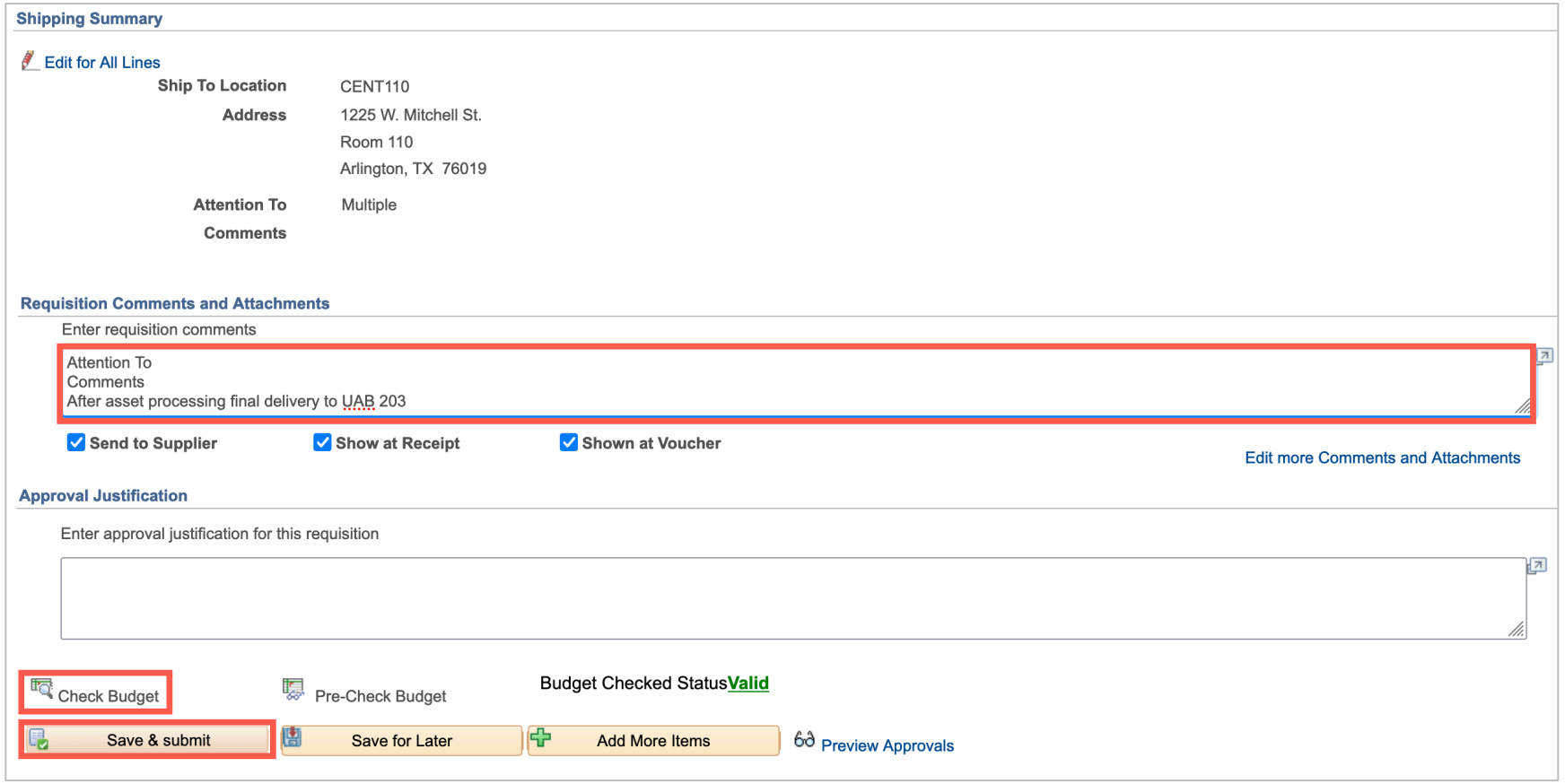
Special Request



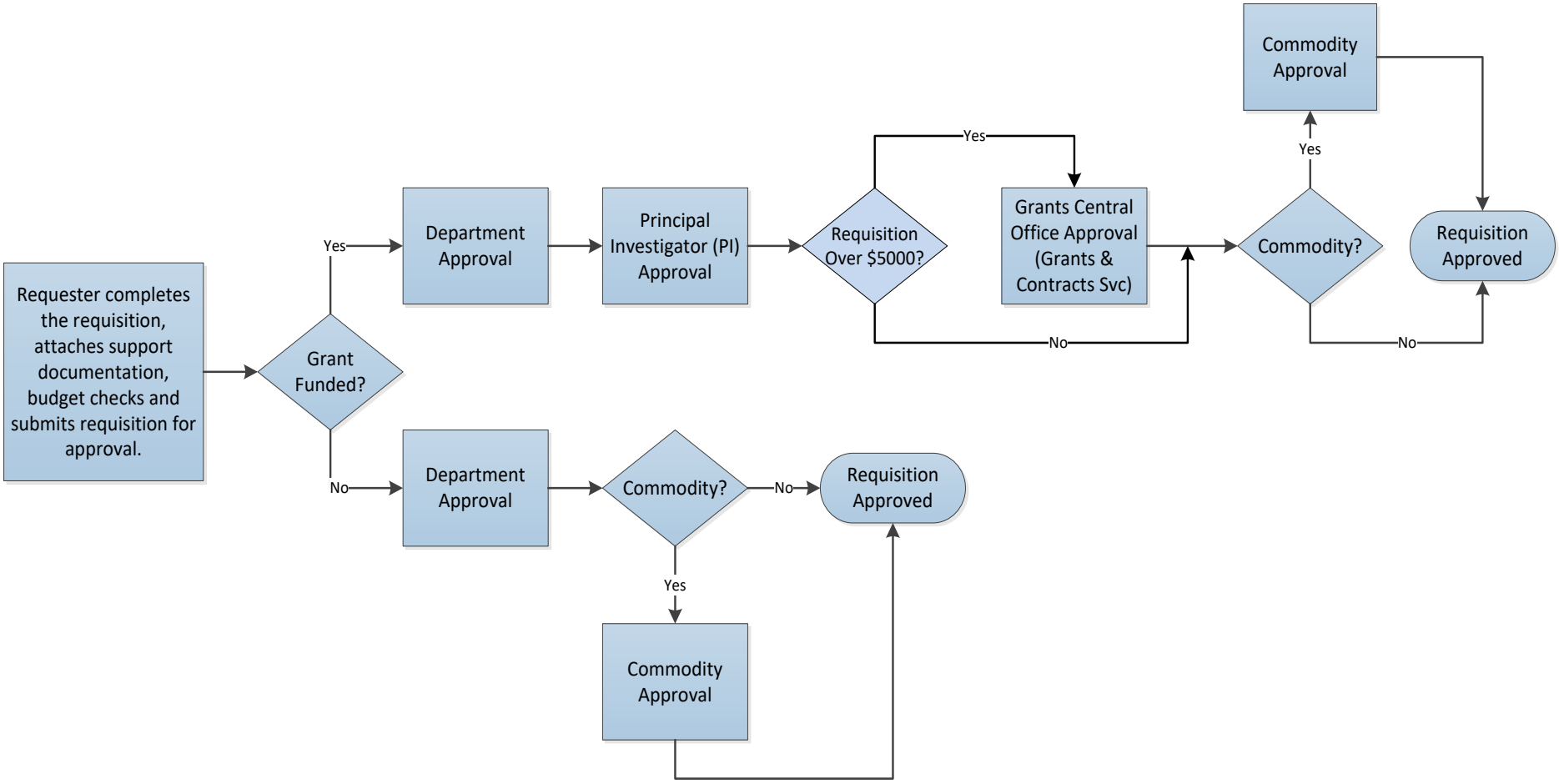
Special Request



Special Request



Requisition Workflow Process

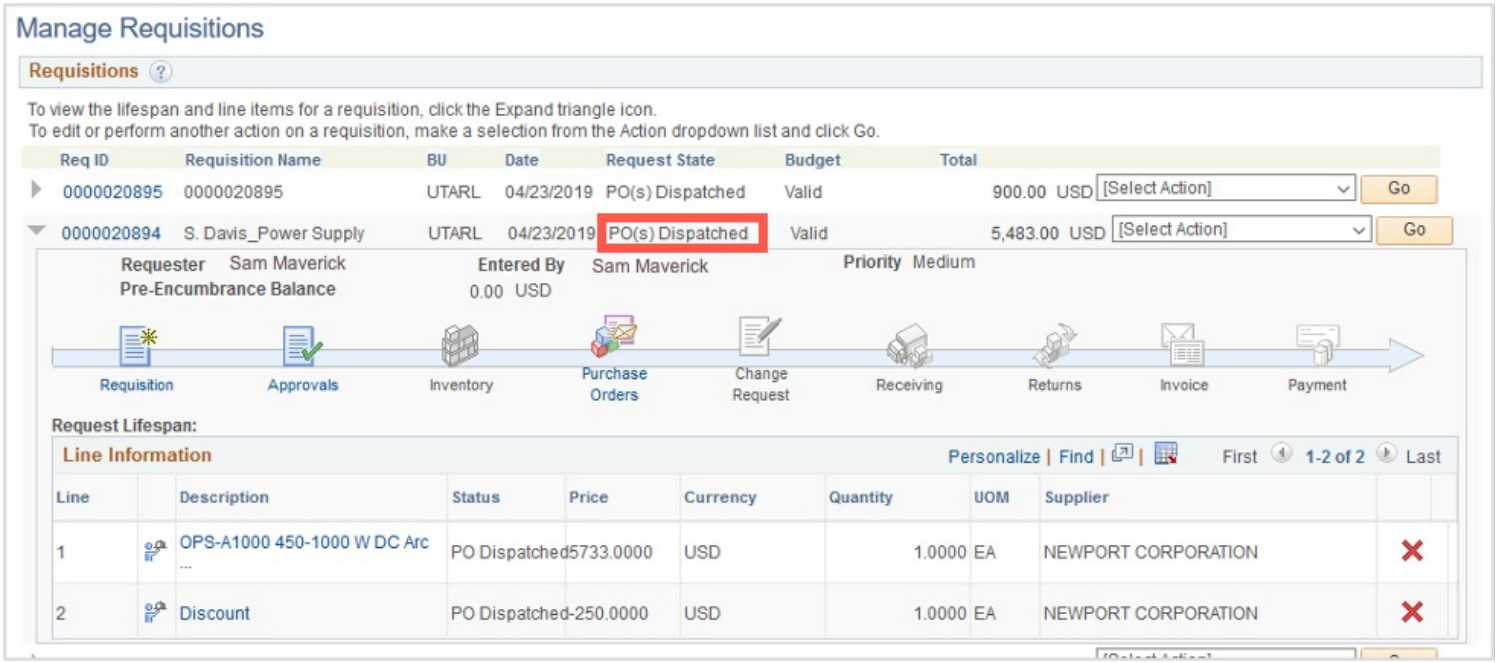


Special Request

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.



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.

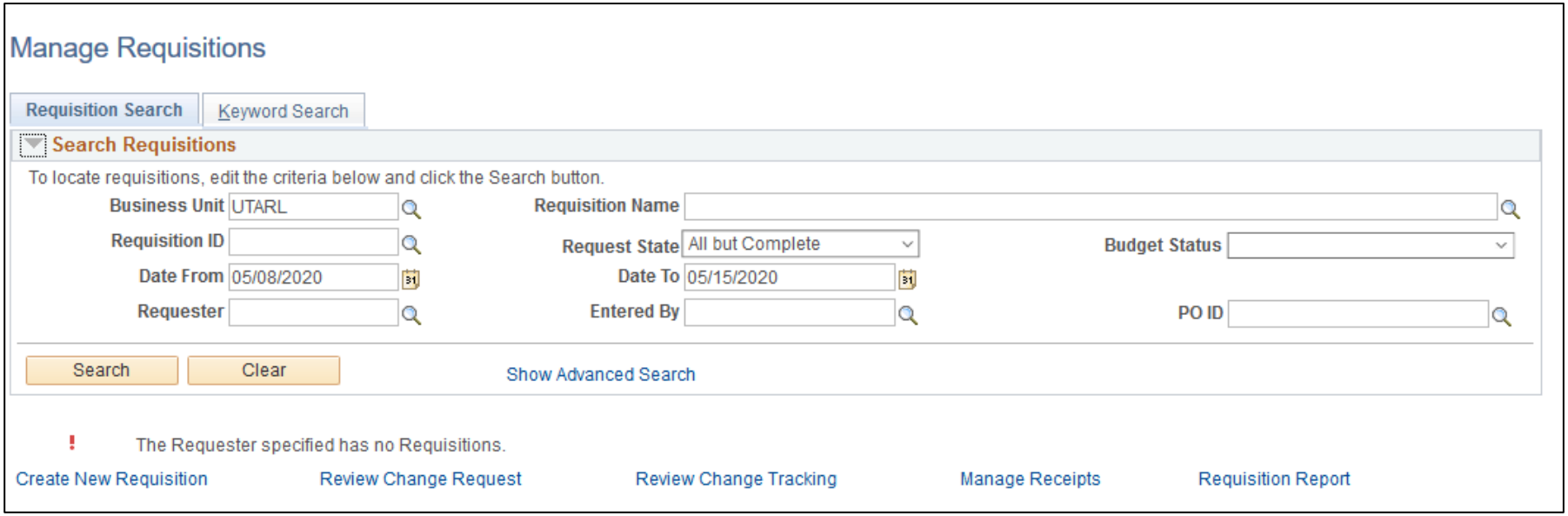
Demonstration

Manage Requisitions

Manage Requisitions

General Information

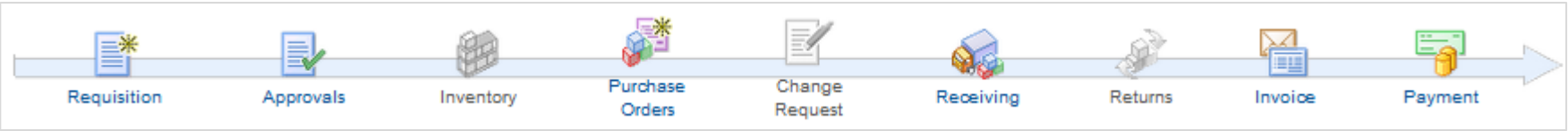
- The Manage Requisition page is used to search for an existing Requisition or Purchase Order (PO). Also, it displays the different stages of the Requisition.
- Search by Requisition ID, Requester ID, Date Range, Status or Purchase Order ID.



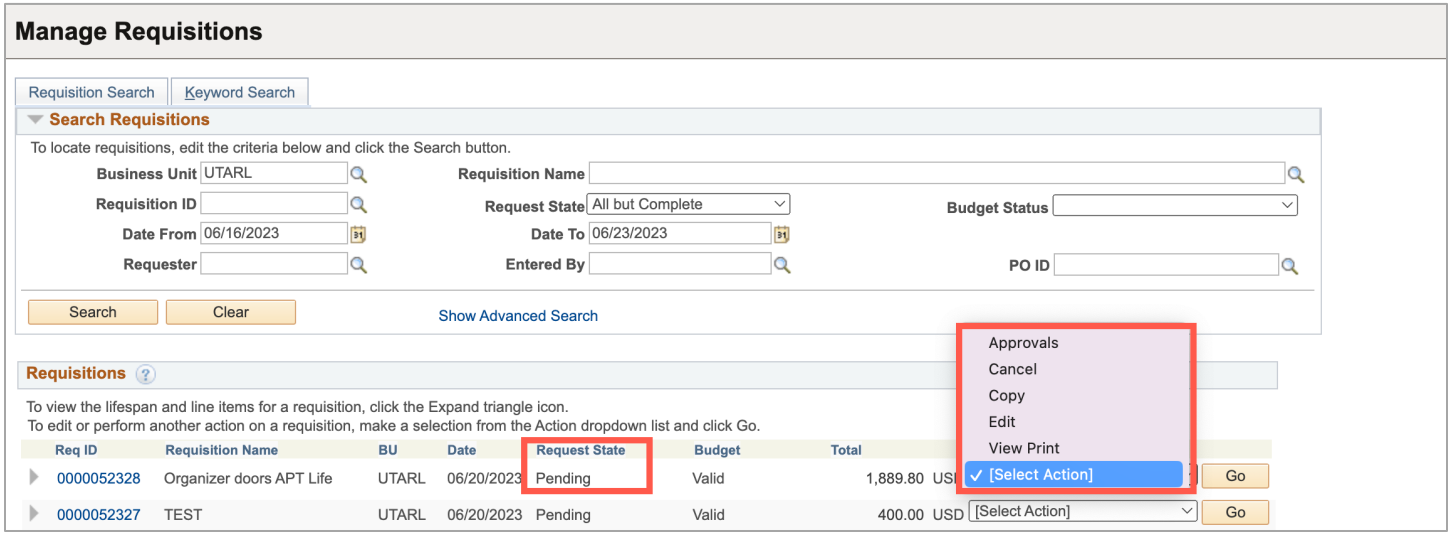
Manage Requisitions

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

General Information

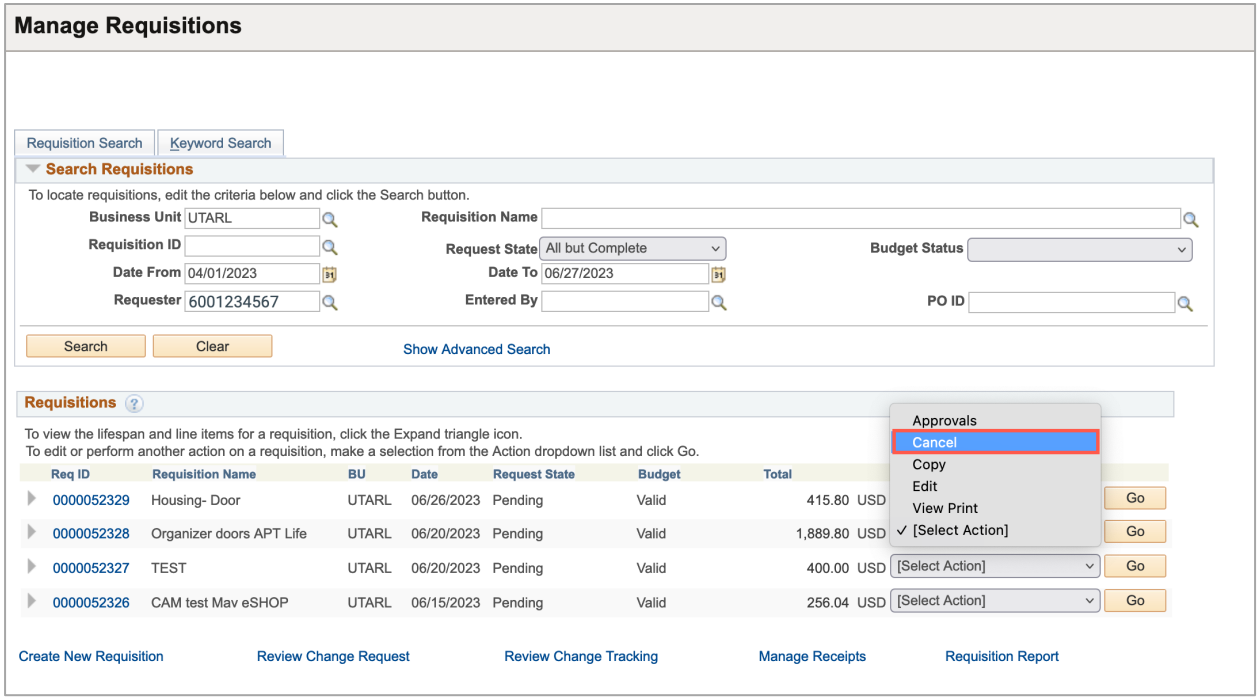
- Requesters can edit or cancel a requisition if the document status is Open, Pending, or Approved.
- If changes or corrections are required and the Requisition State is one of the following, contact your Buyer in Procurement Services:
  - PO(s) Created
  - PO(s) Dispatched
  - Received
  - Partially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

Manage Requisitions

Cancelling a Requisition

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

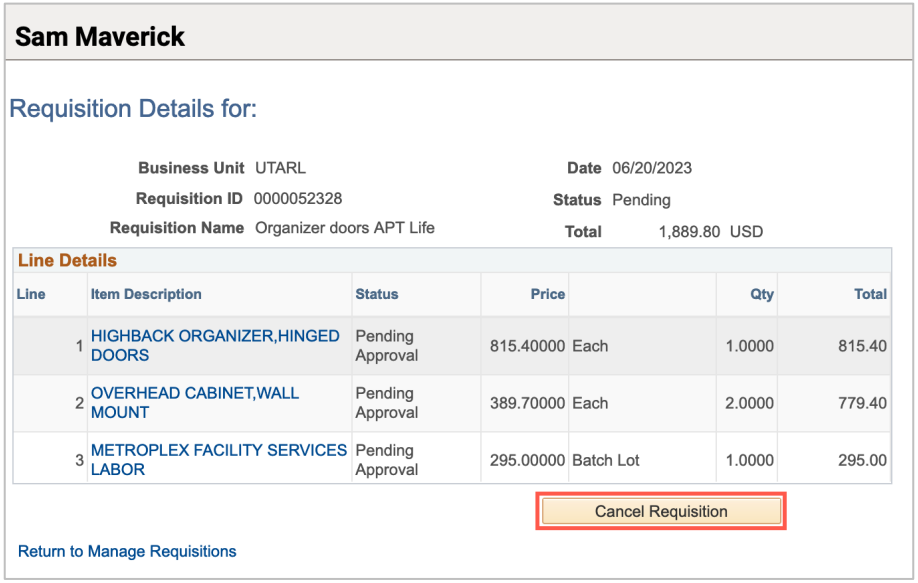
1. Select **Cancel** from the dropdown menu on the Manage Requisitions page, then click the **Go** button.



Manage Requisitions

Cancelling a Requisition

2. 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

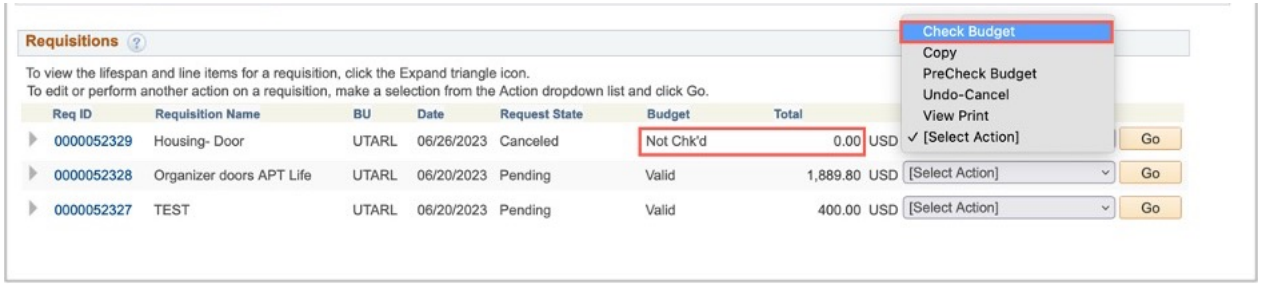
Return to Manage Requisitions

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

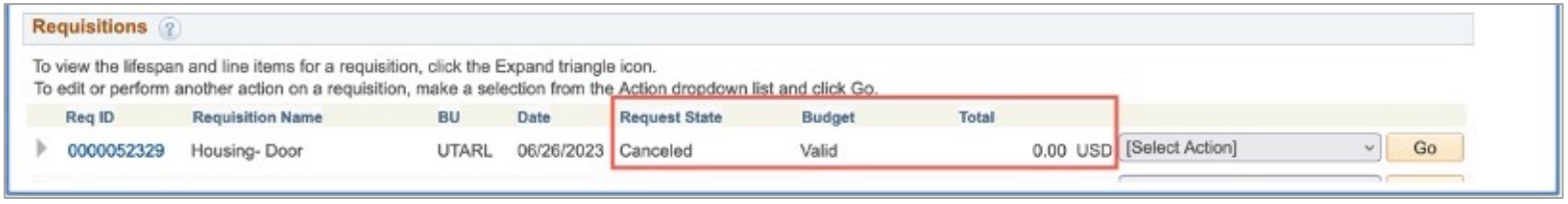
Manage Requisitions

Cancelling a Requisition

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.

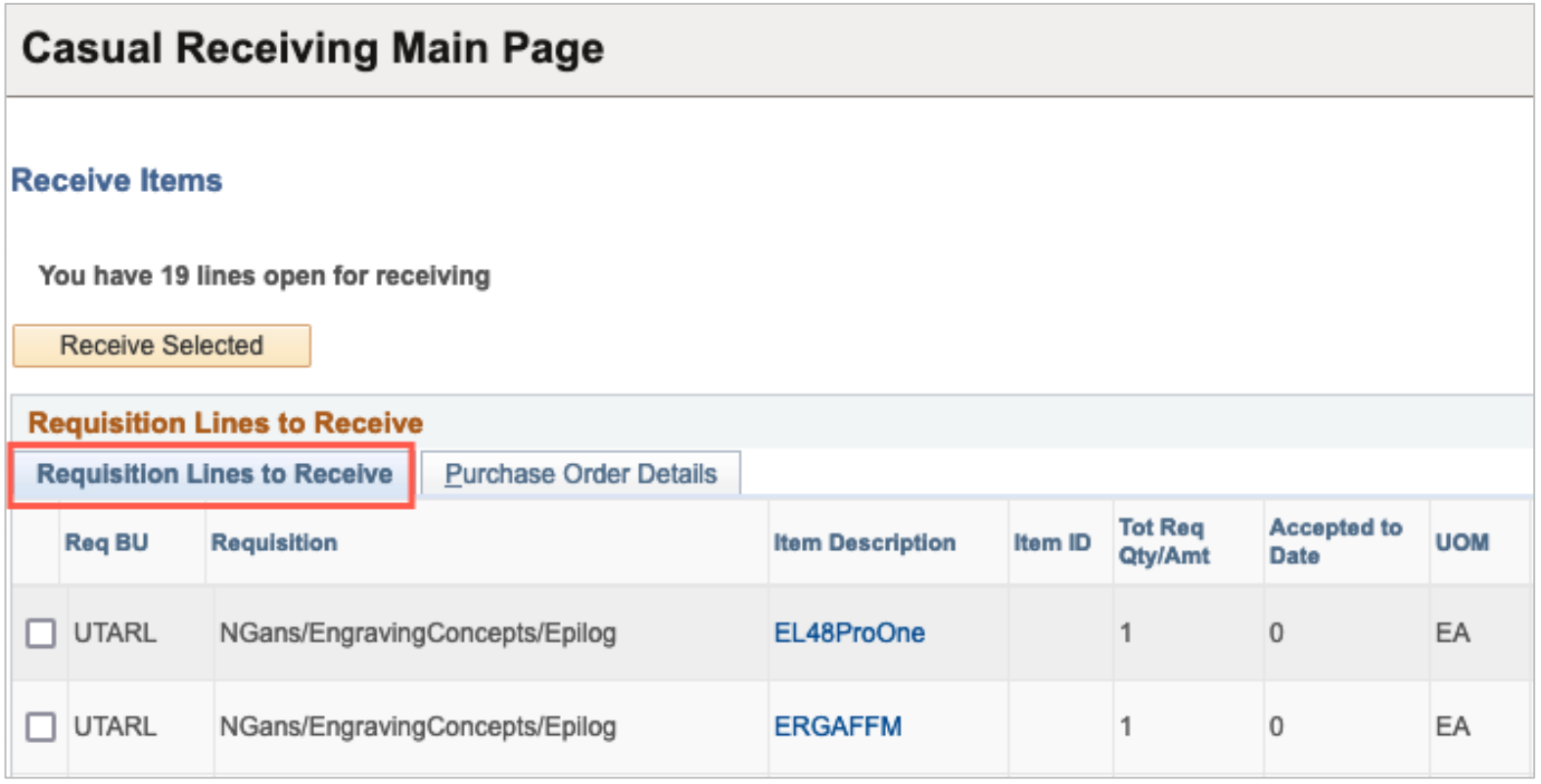
  Note: *Central Receiving will perform desktop receiving for Capital and Controlled Assets.*

- 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.

Desktop Receiving

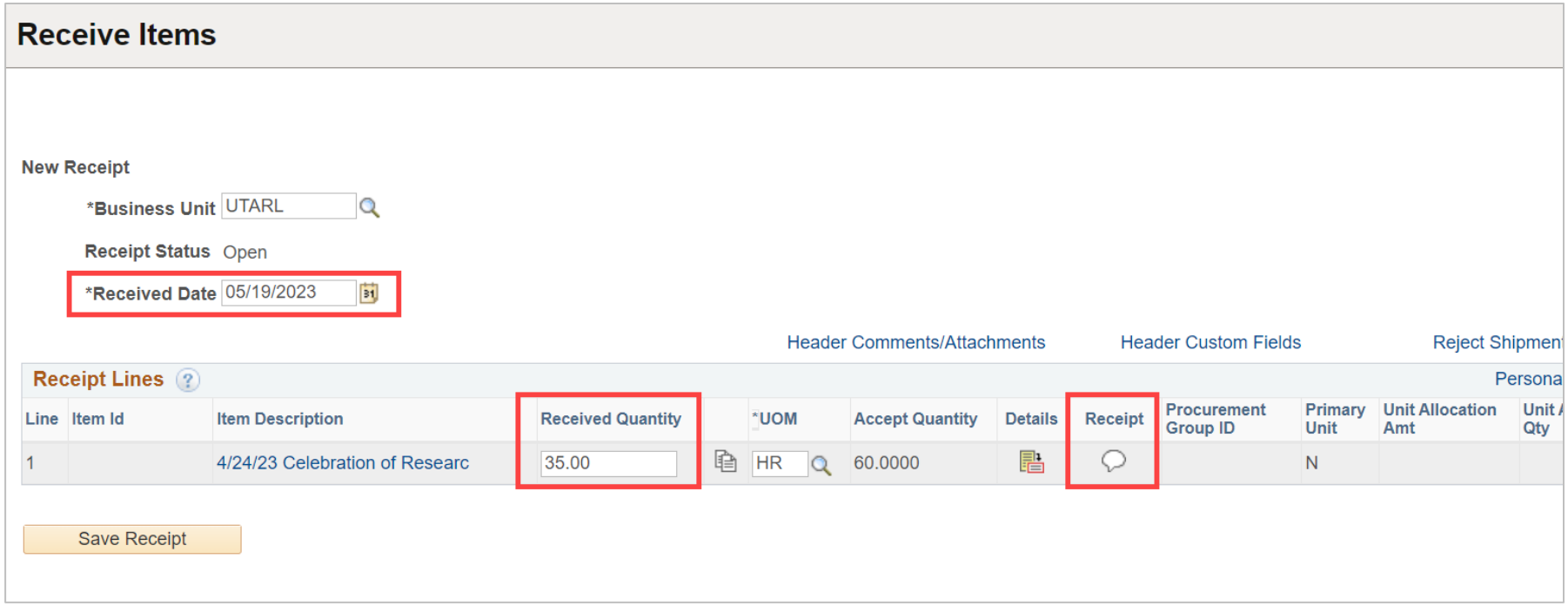
Receiving Items

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



Desktop Receiving

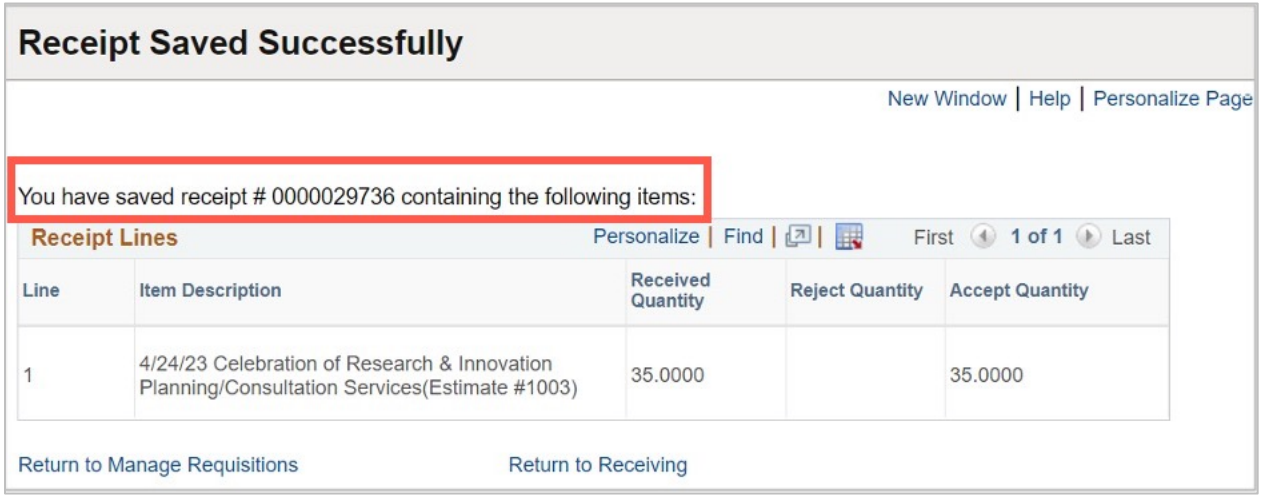
3. If necessary, adjust the Received Date.
4. Enter the quantity received.
5. Attach the packing slip in the Receipt Comments.
6. Click the **Save Receipt** button.



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