Create Requisition
Special Request
Training Topics

- Methods for Requesting Goods and Services
- Manage Suppliers
- Special Request
- Manage Requisitions
- Desktop Receiving
Learning Objectives

AFTER THIS CLASS YOU WILL:

- BE ABLE TO SEARCH FOR SUPPLIERS
- BE ABLE TO REVIEW INFORMATION ON MANAGE REQUISITIONS PAGE
- BE ABLE TO CREATE A SPECIAL ITEM REQUISITION
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.
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.
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

Do not add discount lines 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
Suppliers (vendors) are individuals or companies that provide goods or services to the university. The supplier must be active and approved in UTShare before a Requisition can be created. PaymentWorks is the supplier management tool used at The University of Texas at Arlington.

- Before adding a new Supplier, perform a thorough search in UTShare and PaymentWorks to avoid duplications.
  - Search UTShare and ensure the supplier is active and approved.
  - If a supplier is in PaymentWorks but not UTShare, the supplier cannot be used until the processing is complete.
  - If the supplier is NOT found in UTShare or PaymentWorks, a PaymentWorks invite can be sent.
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 Page](image)
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
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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</thead>
<tbody>
<tr>
<td>SetID</td>
<td>UTARL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier ID</td>
<td>0000039547</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Short Name</td>
<td>SPENCER CO, SPENCER CO-001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Name</td>
<td>MARY SPENCER COMPANY</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Order</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>
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<td></td>
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<tr>
<td></td>
<td>DALLAS, TX 752012296</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Remit To</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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<td></td>
<td>DALLAS, TX 75207-6825</td>
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<td><strong>Status</strong></td>
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<td>Persistence</td>
<td>Regular</td>
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<td>Classification</td>
<td>Outside Party</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HCM Class</td>
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<td>Open for Ordering</td>
<td>Yes</td>
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<td>Withholding</td>
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<td>VAT</td>
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<td>Last Modified By</td>
<td>UTZBATCH-UTZ</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last modified date</td>
<td>02/05/2021 8:10AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created By</td>
<td>UTZ_FI_CNV1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Created Date/time</td>
<td>04/04/2014 12:00AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Activity Date</td>
<td>07/21/2023</td>
<td></td>
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</tr>
</tbody>
</table>
Managing Suppliers
PaymentWorks
PaymentWorks interfaces with UTShare keeping the supplier information up-to-date.

- Suppliers will be invited to create their own user profiles in PaymentWorks
- PaymentWorks can be used by suppliers to view payment and invoice information.

UTA employees can access PaymentWorks through the UTA Apps page at myapps.uta.edu
Search for a Supplier

Search for Supplier

• Once logged into PaymentWorks.
• Click on **Setup and Manage Supplier Portal**.

• Click on the **Suppliers** tab.
Search for a Supplier

Search for Supplier

The Supplier list is displayed.

• Suppliers with a green dot in the connected column should be in UTShare.
• Suppliers without a green dot are still in the new vendor registration process.
Adding Suppliers
Departments are responsible for inviting new U.S. Suppliers using PaymentWorks.

1. Access PaymentWorks through the UTA Apps page at myapps.uta.edu
2. Sign in using single-sign-on.
3. Navigate to Vendor Master Updates.
Adding Suppliers

4. Click The New Vendors Tab
5. Select **Onboarding Tracker** from the SHOW menu
6. Click on the **Send Invitation** button
7. Complete the Information
8. Click Send.
General Information

• Suppliers are responsible for updating their company, banking, and or legal information in PaymentWorks once their account is established.

• The supplier inviter will receive notifications when the supplier connection and approval are complete.
Special Request
Steps for Requesting
Goods/Services
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

Checkout - Review and Submit

<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 Comments</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TRU RED 8.5&quot; x 11&quot; Copy Paper, Shipping Line</td>
<td>1</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>
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</table>

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

Attention To: 
Due Date: 

**Accounting Lines**

<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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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Special Request*
**Shipping Summary**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ship To Location</td>
<td>CENT110</td>
</tr>
<tr>
<td>Address</td>
<td>1225 W. Mitchell St.</td>
</tr>
<tr>
<td></td>
<td>Room 110</td>
</tr>
<tr>
<td></td>
<td>Arlington, TX 76019</td>
</tr>
<tr>
<td>Attention To</td>
<td>Multiple</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
</tbody>
</table>

**Requisition Comments and Attachments**

Enter requisition comments

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

- [ ] Send to Supplier
- [x] Show at Receipt
- [x] Shown at Voucher

**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]
Special Request

3. Once the Requisition is sourced into a PO and approved, a Purchase Order ID number is assigned and the status of the PO changes to POs 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 make the purchase for small dollar POs (less than $15,000).

Procurement Services will provide the PO information to the Supplier and make the purchase for large dollar POs ($15,000 or greater).

The details of 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.

When the goods or services are received and Desktop Receiving has been performed (if necessary), a PO Voucher should be processed to generate a payment to the Supplier.
Items to Enter to Complete the Requisition

- Requisition Name
- Buyer
- 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
Class Activity

Create Requisition -
Using the Special
Request form
Requisition Workflow Process
Requisition Workflow Process

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

Grant Funded?

- Yes: Department Approval
  - Yes: Principal Investigator (PI) Approval
    - Yes: Commodity Approval
      - Yes: Requisition Approved
  - No: Commodity Approval
  - No: Requisition Approved

- No: Department Approval
  - Yes: Commodity Approval
  - No: Requisition Approved

Requisition Over $5000?

- Yes: Grants Central Office Approval (Grants & Contracts Svc)
  - Yes: Commodity Approval
  - No: Requisition Approved
- No: Commodity Approval

Requisition Approved
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
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.
Cancelling a Requisition

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.

---

<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amt</th>
<th>Accepted to Date</th>
<th>UOM</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTARL</td>
<td>NGans/EngravingConcepts/Epilog</td>
<td>EL48ProOne</td>
<td>1</td>
<td>0</td>
<td></td>
<td>EA</td>
</tr>
<tr>
<td>UTARL</td>
<td>NGans/EngravingConcepts/Epilog</td>
<td>ERGAEFFM</td>
<td>1</td>
<td>0</td>
<td></td>
<td>EA</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Id</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>UOM</th>
<th>Accept Quantity</th>
<th>Details</th>
<th>Receipt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4/24/23</td>
<td>Celebration of Research</td>
<td>35.00</td>
<td>HR</td>
<td>60.0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Image of the Desktop Receiving interface]
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.)

You have saved receipt # 0000029736 containing the following items:

<table>
<thead>
<tr>
<th>Receipt Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>First</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>
</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>
</tr>
</tbody>
</table>
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/procurement/index.php

Historically Underutilized Business (HUB) Vendor:
• Bids Terms & Conditions
• PO Terms & Conditions
• Information for Suppliers
• https://www.uta.edu/business-affairs/hub/index.php
UT Share Support:
• ServiceNow
• 817-272-2155
• Online Chat

Training Resources:
• Visit Business Affairs Training and Development web page: https://www.uta.edu/business-affairs/training/
  • Register for UT Share Classes
  • Join Business Affairs Listserv
  • View and/or Print UTShare Training Materials
    • Training Guides
    • Job Aid