Create Requisition
Special Request
Training Agenda

Methods for Requesting Goods and Services

Manage Suppliers

Special Request

Manage Requisitions

Desktop Receiving
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

<table>
<thead>
<tr>
<th>Purchases</th>
<th>Less than $15K (Small Dollar)</th>
<th>$15K to $50K (Informal Bids)</th>
<th>Greater than $50K (Formal Bids)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• No competitive bids required</td>
<td>• Competitive bids required</td>
<td>• Competitive bids required</td>
<td></td>
</tr>
<tr>
<td>• Departments can purchase goods or services from any available source</td>
<td>• 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</td>
<td>• Procurement Services will obtain bids from 3 or more potential suppliers (2/3 of which must be *HUB Suppliers)</td>
<td></td>
</tr>
</tbody>
</table>
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
Managing Suppliers

General Information

 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 PaymentsWorks, a PaymentWorks invite can be sent.
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.

**Search Results**

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

<table>
<thead>
<tr>
<th>Supplier ID</th>
<th>0000039547</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Name</td>
<td>MARY SPENCER COMPANY</td>
</tr>
<tr>
<td>Order</td>
<td>SPENCER CO-001</td>
</tr>
<tr>
<td>Remit To</td>
<td>SPENCER CO-001</td>
</tr>
<tr>
<td></td>
<td>150 TURTLE CREEK BLVD STE 205</td>
</tr>
<tr>
<td></td>
<td>DALLAS, TX 75207-6825</td>
</tr>
<tr>
<td>Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Persistence</td>
<td>Regular</td>
</tr>
<tr>
<td>Classification</td>
<td>Outside Party</td>
</tr>
<tr>
<td>HCM Class</td>
<td></td>
</tr>
<tr>
<td>Open for Ordering</td>
<td>Yes</td>
</tr>
<tr>
<td>Withholding</td>
<td>No</td>
</tr>
<tr>
<td>VAT</td>
<td>No</td>
</tr>
<tr>
<td>Last Modified By</td>
<td>UTZBATCH-UTZ</td>
</tr>
<tr>
<td>Last modified date</td>
<td>02/05/2021 8:10AM</td>
</tr>
<tr>
<td>Created By</td>
<td>UTZ_FI_CNV1</td>
</tr>
<tr>
<td>Created Date/time</td>
<td>04/04/2014 12:00AM</td>
</tr>
<tr>
<td>Last Activity Date</td>
<td>07/21/2023</td>
</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**.

![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
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
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

Create Requisition

Welcome Sam Maverick

Request Options

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

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 - Review and Submit

**Business Unit**: UTARL

**Requester**: 6001234567, Sam Maverick

**Currency**: USD

#### Cart Summary: Total Amount 81.44 USD

**Requisition Name**

**Priority**: Medium

#### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TRU RED 8.5&quot; x 11&quot; 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>
</tr>
</tbody>
</table>

**Shipping Line**: 1

**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**

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Details</th>
<th>Details2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Information</th>
<th>[ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Fund</td>
<td>Dept</td>
<td>Cost Center</td>
<td>Function</td>
<td>Program</td>
<td>PC Bus Unit</td>
<td>Project</td>
</tr>
</tbody>
</table>

### Custom Fields

- Price Adjustment
- Pegging Inquiry
- Pegging Workbench
- Custom Fields
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
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

No → Commodity Approval

Department Approval

Yes → Principal Investigator (PI) Approval

No → Commodity Approval

Commodity Approval

Requisition Over $5000?

Yes → Commodity Approval

No → Commodity Approval

Commodity Approval

Grants Central Office Approval (Grants & Contracts Svc)

Yes → Requisition Over $5000?

No → Commodity Approval

Requisition Over $5000?

Yes → Commodity Approval

No → Commodity Approval

Commodity Approval

Requisition Approved

Commodity Approval

Requisition Approved

Yes → Requisition Approved

No → Requisition Approved

Yes → Requisition Approved

No → 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.
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 **CancelButton Requisition** button.

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

• Only receive in UTShare the items and quantities **physically** received.

• Capital and Controlled Assets delivered to Property Management will be received in UTShare by Property Management.

• Users can only receive in UTShare the items they requested. (The person who entered the requisition must receive it.)
UTA Policies and Procedures

BF-PGS-PR-11
• New Supplier Registration and Maintenance Procedure

BF-PGS-PR-01
• Best Value Purchasing Procedures
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
More Information

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