

# Requisitions and Purchase Orders Training Guide

# Table of Contents

- Requisitions .....1**
- Create a Requisition using the Special Item Request Form .....1
- Create a Requisition using Requisition Settings .....11
- Find a Category Code .....22**
- Add Attachments and Comments to a Requisition .....26**
- Create a Requisition using MAV eSHOP .....29**
- Process an Assigned Cart.....35**
- Manage Requisition Overview.....42**
- View the Life Cycle of an Existing Requisition.....45**
- Copy a Requisition .....51**
- Edit a Requisition .....53**
- Cancel a Requisition .....58**
- Re-Open a Requisition.....61**
- View Printable Version of a Requisition .....63**
- Purchase Orders.....66**
- PO Inquiry .....66
- Print PO.....72
- PO Activity Summary .....75

# Requisitions

The Procure-to-Pay process begins when a Requester creates a requisition. The Procurement module provides a complete and robust mechanism for managing the entire procurement process. Requisitions are the records of requests for items. When the Requisition has been approved and successfully budget checked, the requisition is sourced, a purchase order is generated and then it is dispatched to the supplier. After the merchandise/service has been received and inspected, the supplier’s invoice can be vouchered and paid.

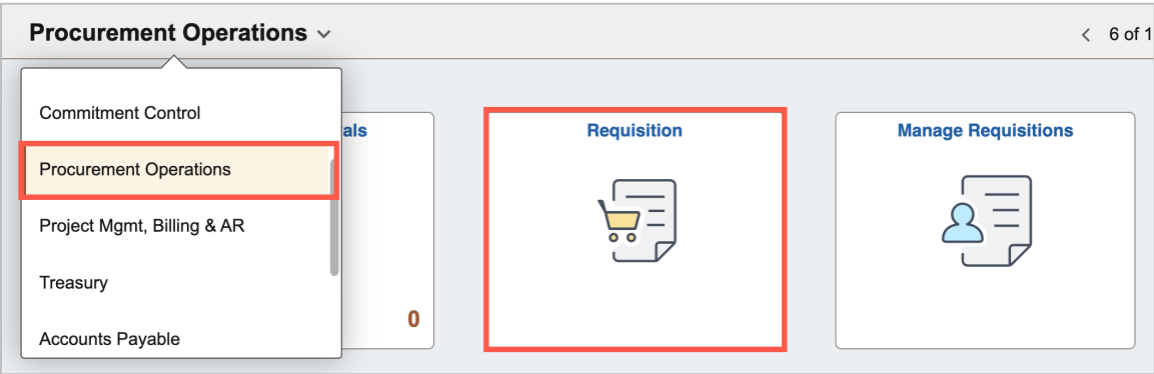
There are two different methods to create a requisition. The first is the Special Item requisition for items not found in Mav eSHOP and not eligible for purchase using a ProCard. The second requisition method uses Mav eSHOP, a shopping marketplace containing catalogs for vetted suppliers with negotiated prices.

The requisition is the first step in the purchasing cycle. It is used to specify products or services needed and delivery requirements. It is the source document from which the purchase order is prepared. The school/department desiring to purchase goods or services should complete the requisition form. The requisition indicates quantities, description, delivery requirements, etc.

## Create a Requisition using the Special Item Request Form

The Special Item Request page is used to request the purchase of goods and/or services that are not available through the online catalog. This process involves manually entering line-item information directly into the form fields. The information used for this form will be obtained from a quote, catalog, or other source of pricing. All line items on the source of pricing should be reflected on the Requisition, except for discounts. If you receive a discount from a supplier, one of two things needs to happen, you can 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.

1. To navigate to the Create Requisition page select the **Procurement Operations Homepage** and click on the **Requisition** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Create Requisition.**

- The Special Request Page is displayed. The Special Request page is used to capture details for the goods or services to be purchased. This includes item description, pricing, quantity, and supplier information.

The screenshot shows the 'Create Requisition' page. The main heading is 'Special Requests' with a help icon. Below the heading is the instruction: 'Enter information about the non-catalog item you would like to order:'. The form is divided into two main sections: 'Item Details' and 'Supplier'. In the 'Item Details' section, there are fields for '\*Item Description' (callout 3), '\*Price' (callout 4), '\*Quantity' (callout 5), '\*Category' (callout 6), '\*Currency' (set to USD), '\*Unit of Measure' (callout 7), and 'Due Date' (callout 8). In the 'Supplier' section, there are fields for 'Supplier ID', 'Supplier Name', and 'Supplier Item ID', each with a magnifying glass icon. There is also an 'Address Sequence Number' field with a magnifying glass icon.

- In the **Item Description** field provide a brief description of the good or service that you want to purchase.
- In the **Price** field enter the dollar amount of the good or service being purchased. This is the per-unit price.
- In the **Quantity** field enter the number of units being purchased.
- Enter or look up the **Category** code. This code is used to identify the item you are purchasing.
- The **Due Date** field is used to indicate the date you need to receive the item. If left blank, this field will default to the current date.
- Enter or look up the **Supplier** identification number. If the Supplier has multiple locations, make sure to select or enter the correct **Supplier Location**.
  - If the supplier address populated does not match the source pricing, click on magnifying glass to the right of the **Address Sequence** field to choose the correct address.

Special Requests ?

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

**Item Details**

\*Item Description

\*Price  \*Currency USD

\*Quantity  \*Unit of Measure

\*Category  Due Date

**Supplier**

8 Supplier ID

Supplier Name

Supplier Item ID

Address Sequence Number

Suggest New Supplier

b. Select the correct Supplier address starting with PW-REMT.

Look Up Address Sequence Number

SetID UTARL

Supplier ID 0000012345

Address Sequence Number =

Look Up Clear Cancel Basic Lookup

Search Results

Address Sequence Number	Description	Address Line 1	Address Line 2	City	State	Postal Code
1	Converted - 00001	2121 N AKARD ST STE 100	(blank)	DALLAS TX		75201-2296
2	PW-REMT-ATX-DALLAS-2	150 TURTLE CREEK BLVD STE 205	(blank)	DALLAS TX		75207-6825
3	PW-CORP-ATX-DALLAS-3	150 TURTLE CREEK BLVD STE 205	(blank)	DALLAS TX		75207-6825
4	PW-INVO-ATX-DALLAS-4	150 TURTLE CREEK BLVD STE 205	(blank)	DALLAS TX		75207-6825

- 9. The **Additional Information** text box is used to enter comments or remarks that relate to the item or service (e.g., item specification).
- 10. If comments are entered, select the appropriate check box to make the remarks available for others to view:
  - a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier to view.

- b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
- c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable to view.

11. Once the information has been entered, click the **Add to Cart** button.

The screenshot shows a form with the following elements:

- Additional Information** (Section 9): A large text area for entering comments.
- Send to Supplier** (checkbox)
- Show at Receipt** (checkbox)
- Show at Voucher** (checkbox) (Section 10)
- Request New Item** (Section): A checkbox and the text "A notification will be sent to a buyer regarding this new item request."
- Add to Cart** (button) (Section 11)

12. A blank **Special Item** request page is displayed. If necessary, enter the next line item for the requisition.

**Note:** *The cost of Shipping and Handling should be added as a separate line item on the requisition. You should use category code 78121603 for freight fees and use Lot for the Unit of Measure.*

- 13. Once you have entered all the line items, to proceed to the next section, click the **Checkout** button.
- 14. The Checkout - Review and Submit page provides a summary of the line-item information that was entered on the requisition. This page allows you to review the details of your requisition, make any necessary changes and submit it for approval.
- 15. Click in the **Requisition Name** field and enter a name for the requisition.
- 16. If more requisition lines need to be entered, use the **Add More Lines** button to return to the Special Request page.
- 17. The **Requisition Lines** section provides specific details for each line such as the item description, quantity, and price. If necessary, you can make changes to a line item from this section. In addition, this section is used to add or update chartfield information for each line.
- 18. Click the **Expand Section** button to add chartfield information for **Line Item 1**.

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

My Preferences Requisition Settings

**Requisition Summary**

Business Unit: UTARL UT Arlington **15** Requisition Name: \_\_\_\_\_  
 \*Requester: 1000123456 Sam Maverick Priority: Medium  
 \*Currency: USD Custom Fields

Cart Summary: Total Amount 815.40 USD

Expand lines to review shipping and accounting details **16** Add More Items

**Requisition Lines** **17**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<b>18</b>	Highback organizer door		MARY SPENCER COMPANY	1.0000	Each	815.4000	815.40		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 815.40 USD

19. The **Ship To** field defaults with Central Receiving ship to code. Update if necessary.

Cart Summary: Total Amount 815.40 USD

Expand lines to review shipping and accounting details Add More Items

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Highback organizer door		MARY SPENCER COMPANY	1.0000	Each	815.4000	815.40		Add	

Shipping Line 1

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

Add Shipto Comments Quantity: 1.0000  
 Add One Time Address Price: 815.4000

Price Adjustment  
 Pegging Inquiry  
 Pegging Workbench  
 Custom Fields

Attention To: Sam Maverick  
 Due Date: 08/01/2023

Accounting Lines

\*Distribute By: Qty SpeedChart \*Liquidate By: Amt

Accounting Lines Personalize Find View All First 1 of 1 Last

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		696-200	1.0000	100.0000	815.40	UTARL	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 815.40 USD

20. If there is an expectation that a specific line item will involve multiple invoices/payments with different dollar amounts and the Quantity is 1 the line should be set up as **Amount Only**. This option is intended for requisition lines involving services that you want to base on the dollar value, rather than the quantity when making a payment. Line items with a unit of **LOT** should use this option.

- a. To flag an item as **Amount Only**, click on the **Line Details** icon, and click the box for **Amount Only**.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	915 Waterproof Hard Case		B&H PHOTO AND ELECTRONICS CORP	1,0000	Each	83.2500	83.25		Add	

- b. Enter or look up the **Buyer** ID number for the Procurement buyer for your department. You can also input the Buyer on the Mass Change screen.
  - i. Your Buyer can be found on the [Procurement Specialist \(Buyer\) Page](#) from the Procurement website.

Line Details

---

**Line Details** Line Status: Open

No Image    Line 1    Higback Organizer hinged door

---

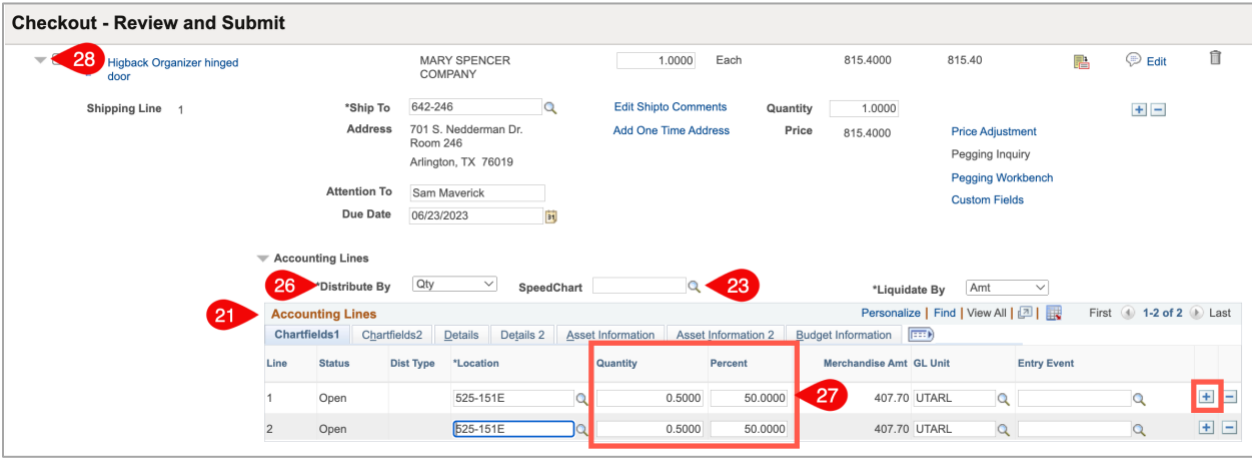
**Item Details**

Merchandise Amount	815.40 USD	<input type="checkbox"/> RFQ Required
Item ID		<input type="checkbox"/> Device Tracking
Category	56000000	<input type="checkbox"/> Zero Price Indicator
Original Substituted Item Description		<input checked="" type="checkbox"/> Amount Only
Physical Nature	Goods	<input type="checkbox"/> Inspection Required
Buyer	1001234567	

[Buyer Information](#)  
[Configuration Info](#)

21. Click **OK** to return to the Checkout – Review and Submit page.
22. The **Accounting Lines** section is used to enter or update chartfield information. It may be necessary to use the expansion arrow to open the Accounting Line section.
23. Enter the remaining chartfield values for the requisition line. You can manually enter the values into the appropriate fields (e.g., Fund, Dept, Cost Center, Function) or use the **SpeedChart** field to quickly populate the accounting lines.
24. Click in the **SpeedChart** field. Enter the **SpeedChart** you want to use for the expense line. SpeedChart values are either the 6-digit cost center number, 10-digit project ID, or 10-digit cost share ID.
25. Press **[Tab]** on your keyboard to populate the chartfields with the appropriate values.
26. If the line item is to be charged to multiple funding sources, use the **Distribute By** field to indicate if the split will be made by Quantity or by Amount.
27. Enter on the Chartfields1 tab the quantity, percentage, or amount that is to be paid by the first fund. Use the **+** button to add another chartfield line and enter the quantity, percentage, or amount appropriately. Add as many lines as necessary. Then enter the chartfield values on the Chartfields2 tabs.
28. Click the **Collapse Section** button to close the requisition line.





29. The **Mass Change** option can be used to enter the same information on multiple lines at once. To use this function, select the requisition line items on which the information should be entered, then click **Mass Change**. You can enter:
- a. Enter or look up the **Buyer** ID number for the Procurement buyer for your department.
    - i. Your Buyer can be found on the [Procurement Specialist \(Buyer\) Page](#) from the Procurement website.
  - b. Ship To Location
  - c. SpeedChart
  - d. Once you have entered all the desired information, click **OK**.

**Line Information**

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID  Supplier Location   
Buyer  Category

**Shipping Information**

Ship To Location  Add One Time Address  
Due Date  Attention   
Comments

**Accounting Lines**

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

**Accounting Information** Personalize | Find | First 1 of 1 Last

Chartfields1	Details	Asset Information					
Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Load Values From Defaults

OK Cancel

- 30. Complete the line information for all requisition lines.
- 31. The **Shipping Summary** will display the Ship To Address information. There should only be one shipping address used on all requisition lines.

3 Labor MARY SPENCER COMPANY 1.0000 Batch Lot 295.00000 295.00 Edit

Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change 29

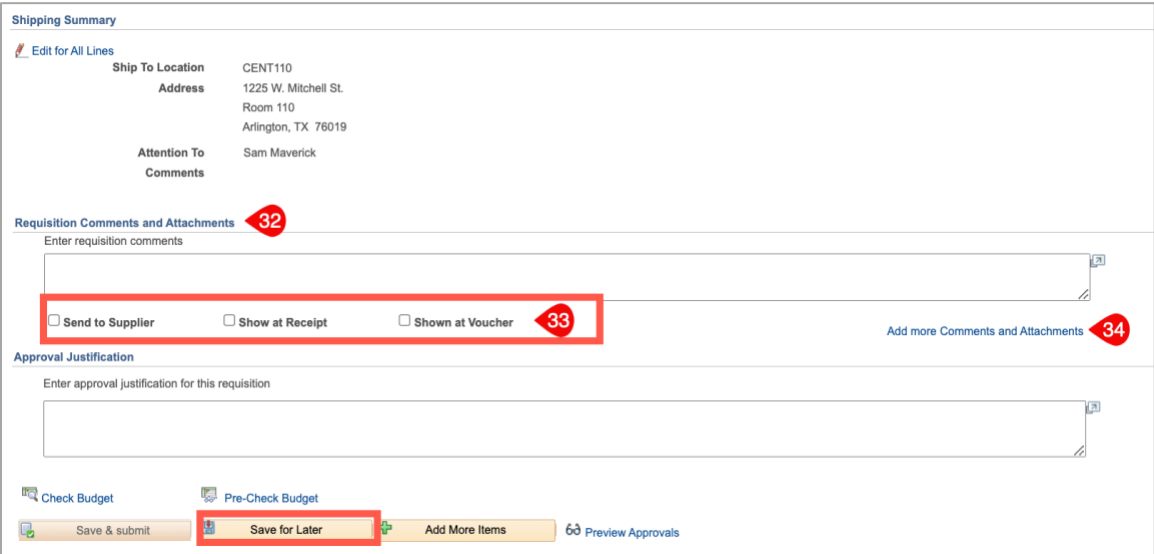
Total Amount 1,889.80 USD

**Shipping Summary** 31 Edit for All Lines

Ship To Location 642-246  
Address 701 S. Nedderman Dr.  
Room 246  
Arlington, TX 76019  
Attention To Multiple  
Comments

- a. If the Shipping Summary section states that **Multiple values exist**, use the **Edit for All Lines** link to update the Ship To Address for all lines.

- 32. The **Requisition Comments and Attachments** section is used to enter Comments that apply to the entire purchase. In this section, enter UTA and supplier contact information, and final delivery information such as: who should receive the item(s), the building, and the room where they are located.
- 33. If comments are entered, select the appropriate check box to make the remarks available for others to view (if desired):
  - a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier to view.
  - b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
  - c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable to view.
- 34. The Requisition must be accompanied by the appropriate support documentation. The **Add More Comments and Attachments** link is used to add attachments and/or comments to the requisition. The source pricing can be a quote, a screenshot of the catalog, a copy of the item on the supplier website, an email, or fax from the Supplier.
- 35. Click the **Save for Later** button.



**Checkout - Review and Submit**

Requisition Summary

Business Unit: UTARL UT Arlington  
\*Requester: 6001123456 Sam Maverick  
\*Currency: USD  
Requisition Name: 0000052330  
**Requisition ID: 0000052330**  
Priority: Medium  
Custom Fields

Cart Summary: Total Amount 249.50 USD  
Expand lines to review shipping and accounting details  
Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Highback Hinged Door		MARY SPENCER COMPANY	1.0000	Each	249.5000	249.50		Add	

Shipping Line 1

\*Ship To: CENT110  
Address: 1225 W. Mitchell St. Room 110, Arlington, TX 76019  
Attention To: Sam Maverick  
Due Date: 07/10/2023

Add Shipto Comments  
Add One Time Address  
Price Adjustment  
Pegging Inquiry  
Pegging Workbench  
Custom Fields

**Note:** the requisition now has a Requisition ID.

- 36. Click the **Check Budget** link. This will verify if the funding sources entered on the Accounting lines have the funds to pay for the purchase.
  - a. If the Budget Checking Status returns as **Error**, click the word **Error** to investigate and resolve the error. Once the necessary changes are made, again click the Check Budget link. A requisition must be in a **Valid** budget check status to be submitted.

Approval Justification

Enter approval justification for this requisition

**Check Budget** Pre-Check Budget **Budget Checked Status Error**


Save & submit Save for Later Add More Items Preview Approvals


**Note:** The Save & Submit button is grayed out because the budget check is not Valid.

- b. If the Budget Checking Status returns as **Valid**. The dollar amount of the requisition has been successfully **Budget Checked** and **Pre-Encumbered**.


**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

37. 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.


**Confirmation**

Your requisition has been submitted.

Requested For	Sam Maverick	Number of Lines	1
Requisition Name	0000052331	Total Amount	815.40 USD
Requisition ID	0000052331	Pre-Encumbrance Balance	815.40 USD
Business Unit	UTARL		
Status	Pending		
Priority	Medium		
Budget Status	Valid		

 View printable version Edit this Requisition Check Budget Pre-Check Budget


**Department Approval**

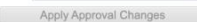
Requisition 0000052331: Pending 



Department Approval

Pending

Multiple Approvers

Manager 

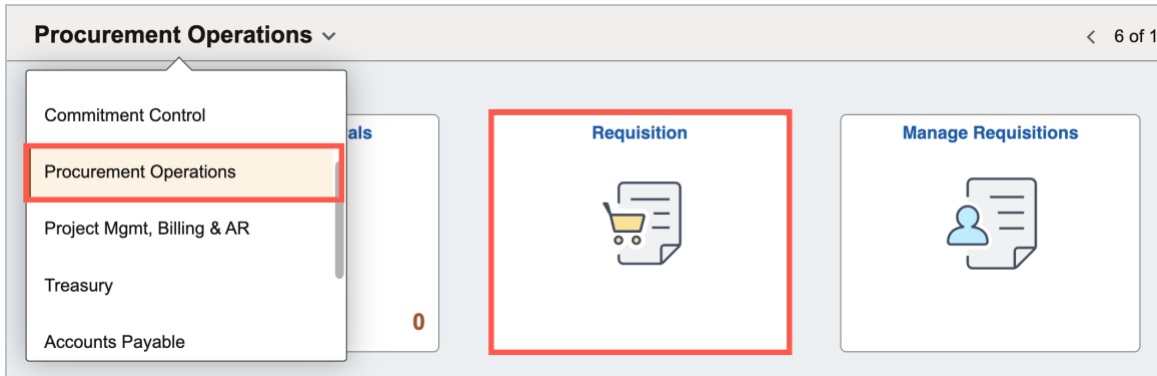
 Apply Approval Changes

 Create New Requisition Manage Requisitions

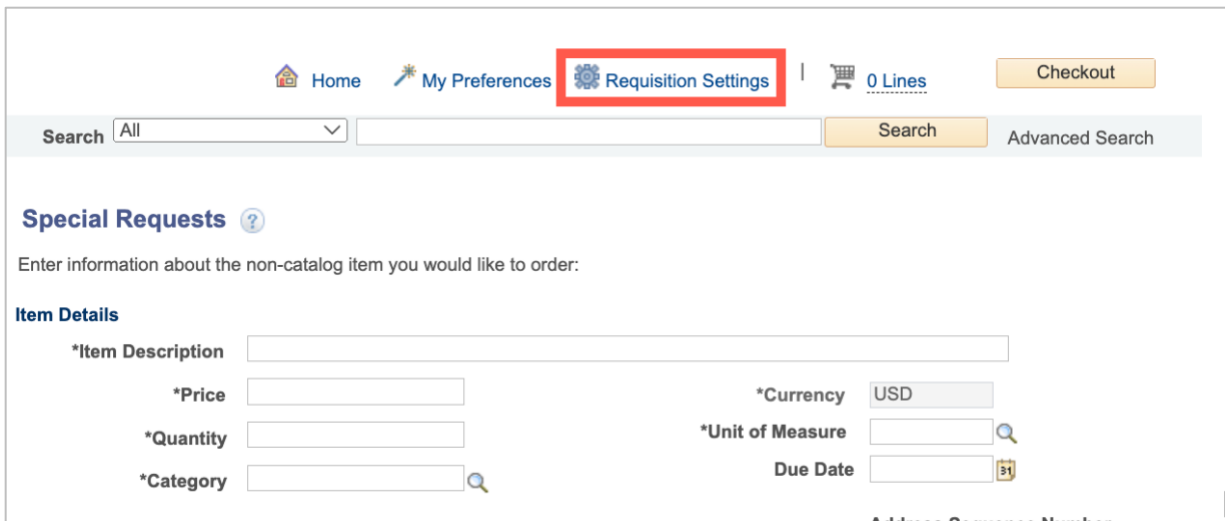
### Create a Requisition using Requisition Settings

The Special Item Request page is used to request the purchase of goods and/or services that are not available through the online catalog. This process involves manually entering line-item information directly into the form fields. The information used for this form will be obtained from a quote, catalog, or other source of pricing. All line items on the source of pricing should be reflected on the Requisition, except for discounts. If you receive a discount from a supplier, one of two things needs to happen, you can request a new source of pricing with the discount applied to the unit price(s) or you can enter requisition with regular pricing and apply the discount on the payment voucher.

1. To navigate to the Create Requisition page select the **Procurement Operations Homepage** and click on the **Requisition** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Create Requisition.**



2. The Special Request Page is displayed. The Special Request page is used to capture details for the goods or services to be purchased. This includes item description, pricing, quantity, and supplier information.
3. To access the Requisition Defaults, click the **Requisition Settings** link at the top of the page. Information entered in this section will help you avoid repetitive entries. However, data can be changed on individual lines as needed.
4. The **Defaults** sections are used to enter values that will be repeated on every line added to the requisition such as:

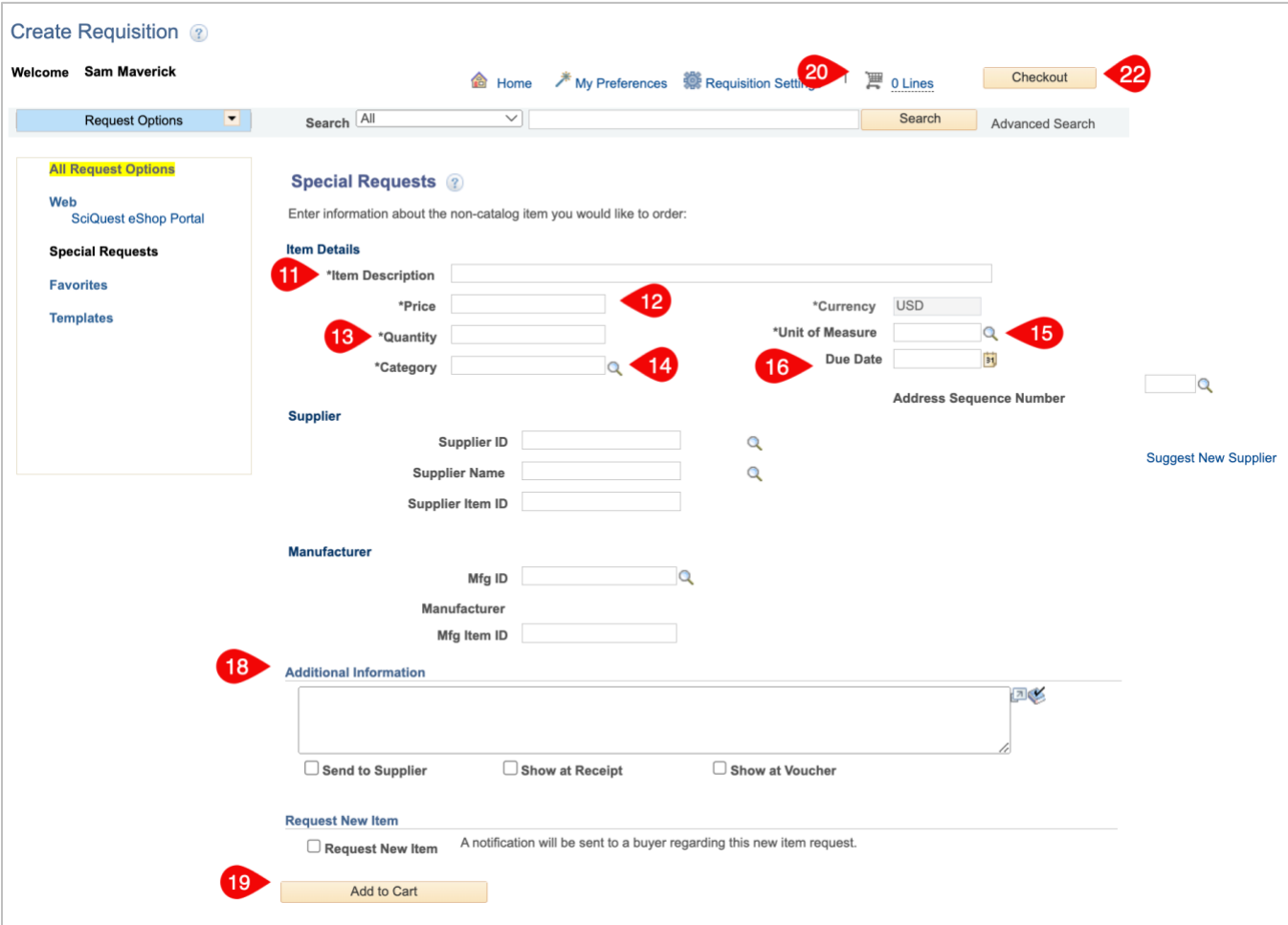
- a. Requisition Name
- b. The Supplier
- c. Buyer
- d. Unit of measure
- e. Ship To Address
- f. Chartfield values

**Note:** Do not use Requisition Settings for Mav eSHOP requisitions.

The screenshot shows the 'Requisition Settings' form. At the top, there are fields for Business Unit (UTARL), Requisition Name, \*Requester (1001234567), Priority (Medium), and \*Currency (USD). Below this is a 'Default Options' section with 'Default' selected. The 'Line Defaults' section contains fields for Supplier, Supplier Location, Buyer, Category, and Unit of Measure. The 'Shipping Defaults' section includes Ship To (CENT110), Due Date, and Attention. The 'Distribution Defaults' section features a 'SpeedChart' and an 'Accounting Defaults' table. The table has columns for Dist, Percent, Location, GL Unit, Account, Fund, Dept, Cost Center, Function, and Program. A red callout 'f' points to the first row of the table. Other callouts 'a' through 'e' point to various input fields throughout the form.

- 5. Enter or look up the **Supplier** identification number. If the Supplier has multiple locations, make sure to select or enter the correct **Supplier Location**.
  - a. If the correct supplier address does not populate it can be changed using the **Address Sequence** lookup on the Special Item Request page.
- 6. Enter or look up the **Buyer** ID number for the Procurement buyer assigned to your department.

- a. Your Buyer can be found on the [Procurement Specialist \(Buyer\) Page](#) from the Procurement website.
- 7. Enter all desired information on the Defaults page.
- 8. Click the **OK** button to enter line-item information.
- 9. Notice, the supplier's information is already populated. This information defaulted from the **Line Defaults** section that was completed on the **Requisitions Settings** page.
  - a. A requisition may include many line items, but **ONLY ONE SUPPLIER** can be used.
- 10. Next, complete the remaining required fields for the line item.



11. In the **Item Description** field provide a brief description of the good or service that you want to purchase.



12. In the **Price** field enter the dollar amount of the good or service being purchased. This is the per-unit price.
13. In the **Quantity** field, enter the number of units being purchased.
14. In the **Unit of Measure**, field enter the unit of measure for each unit (e.g., ea, lot, hr, dz), if it is not already pre-populated from the Defaults section.
15. Enter or look up the **Category** code. This code is used to identify the item you are purchasing.
16. The **Due Date** field is used to indicate the date you need to receive the item. If left blank, this field will default to the current date.
17. Ensure the Supplier Address matches the Source Pricing. If it does not, correct it using the Address Sequence lookup.
18. The **Additional Information** text box is used to enter comments or remarks that relate to the item or service (e.g., discount, item specification).
  - a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier to view.
  - b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
  - c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable to view.
19. Once the information has been entered, click the **Add to Cart** button.
20. The **Shopping Cart** at the top right side of the page displays the items that you have added to the requisition like item description, quantity ordered, unit of measure, plus the number of line items on the order and the total amount of the request.
21. A blank **Special Item** request page is displayed. If necessary, enter the next line item for the requisition.

**Note:** *The cost of Shipping and Handling should be added as a separate line item on the requisition. You should use category code 78121603 for freight fees.*
22. To proceed to the next section, click the **Checkout** button.
23. The Checkout - Review and Submit page provides a summary of the line-item information that was entered on the requisition. This page allows you to review the details of your requisition, make any necessary changes and submit it for approval.

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

My Preferences Requisition Settings

**Requisition Summary**

Business Unit: UTARL UT Arlington  
 \*Requester: 1000123456 Sam Maverick  
 \*Currency: USD  
 Requisition Name:   
 Priority: Medium

Custom Fields

**Cart Summary: Total Amount 815.40 USD**

Expand lines to review shipping and accounting details **Add More Items**

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	highback organizer door		MARY SPENCER COMPANY	1.0000	Each	815.4000	815.40		Add	

Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 815.40 USD

Shipping Summary

24. Click in the **Requisition Name** field and enter a name for the requisition if it is not already pre-populated from the Defaults section.
25. If more requisition lines need to be entered, use the **Add More Lines** button to return to the Special Request page.
26. The **Requisition Lines** section provides specific details for each line such as the item description, quantity, and price. If necessary, you can make changes to a line item from this section.
  - a. In addition, this section is used to add or update chartfield information for each line.
27. Click the **Expand Section** button to add chartfield information for **Line Item 1** if it is not already pre-populated from the Defaults section.
28. The **Ship To** field defaults with Central Receiving ship to code if it is not already pre-populated from the Defaults section.
  - a. Update if necessary.

Cart Summary: Total Amount 815.40 USD

Expand lines to review shipping and accounting details + Add More Items

**Requisition Lines** ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Highback organizer door		MARY SPENCER COMPANY	1.0000	Each	815.4000	815.40		Add	

Shipping Line 1

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

Attention To Sam Maverick  
Due Date 08/01/2023

Add Shipto Comments    Quantity 1.0000  
Add One Time Address    Price 815.4000

Price Adjustment  
Pegging Inquiry  
Pegging Workbench  
Custom Fields

Accounting Lines

\*Distribute By Qty    SpeedChart    \*Liquidate By Amt

**Accounting Lines**    Personalize | Find | View All | First 1 of 1 Last

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		696-200	1.0000	100.0000	815.40	UTARL	

Select All / Deselect All    Select lines to:    Add to Favorites    Add to Template(s)    Delete Selected    Mass Change

Total Amount 815.40 USD

29. If there is an expectation that a specific line item will involve multiple invoices/payments with different dollar amounts and the Quantity is 1 the line should be set up as **Amount Only**. This option is intended for requisition lines involving services that you want to base on the dollar value, rather than the quantity when making a payment. Line items with a unit of **LOT** should use this option.

- a. To flag an item as **Amount Only**, click on the **Line Details** icon, and click the box for **Amount Only**. Click **OK** to return to the Checkout page.

**Requisition Lines** ?

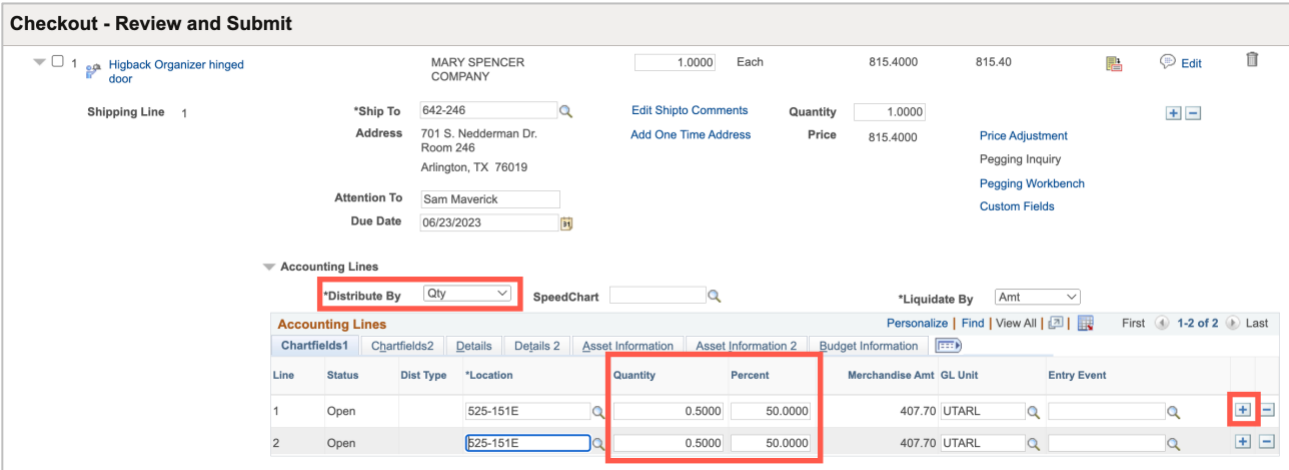
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	915 Waterproof Hard Case		B&H PHOTO AND ELECTRONICS CORP	1.0000	Each	83.2500	83.25		Add	

- b. Click the box for **Amount Only**.

The screenshot displays the 'Line Details' page for a requisition line. At the top, it shows 'Line 1' for the item 'Higback Organizer hinged door' with a status of 'Open'. Below this, the 'Item Details' section includes fields for 'Merchandise Amount' (815.40 USD), 'Item ID', 'Category' (56000000), 'Original Substituted Item Description', 'Physical Nature' (Goods), and 'Buyer' (1001234567). On the right side of the form, there are five checkboxes: 'RFQ Required', 'Device Tracking', 'Zero Price Indicator', 'Amount Only', and 'Inspection Required'. The 'Amount Only' checkbox is highlighted with a red box.

c. Click **OK** to return to the Checkout – Review and Submit page.

30. Click **OK** to return to the Checkout – Review and Submit page.
31. The **Accounting Lines** section is used to enter or update chartfield information. It may be necessary to use the expansion arrow to open the Accounting Line section.
32. Click the **Chartfield2** tab to enter chartfield information if it is not already pre-populated from the Defaults section.
33. The **Account** field defaults with the appropriate value based on the **Category** code that you selected in the line-item section. Verify the account number that is populated is appropriate.
34. Enter the remaining chartfield values for the requisition line. You can manually enter the values into the appropriate fields (e.g. Fund, Dept, Cost Center, Function) or use the SpeedChart field to quickly populate the accounting lines.
35. Click in the **SpeedChart** field. Enter the **SpeedChart** you want to use for the expense line if it is not already pre-populated from the Defaults section. SpeedChart values are either the 6-digit cost center number, 10-digit project ID, or 10-digit cost share ID.
36. Press the **[Tab]** key on your keyboard to populate the chartfields with the appropriate values.
37. If the line item is to be charged to multiple funding sources, use the **Distribute By** field to indicate if the split will be made by **Quantity** or by **Amount**.
38. Enter on the Chartfields1 tab the quantity, percentage, or amount that is to be paid by the first fund. Use the **+** button to add another chartfield line and enter the quantity, percentage, or amount appropriately. Add as many lines as you need. Then enter the chartfield values on Chartfields2.



- 39. Click the **Collapse Section** button to close the requisition line.
- 40. Complete the line information for all requisition lines.
  - a. The **Mass Change** option can be used to enter information on multiple lines at once. To use this function, select the requisition line items on which the information should be entered, then click **Mass Change**. Enter the appropriate information and click OK.
- 41. The **Shipping Summary** will display the Ship To Address information. There should only be one shipping address used on all requisition lines. If the Shipping Summary section states that multiple values exist, use the **Edit for All Lines** link to update the Ship To Address for all lines.



44. The Requisition must be accompanied by the appropriate support documentation. The **Add More Comments and Attachments** link is used to add attachments and/or comments to the requisition.

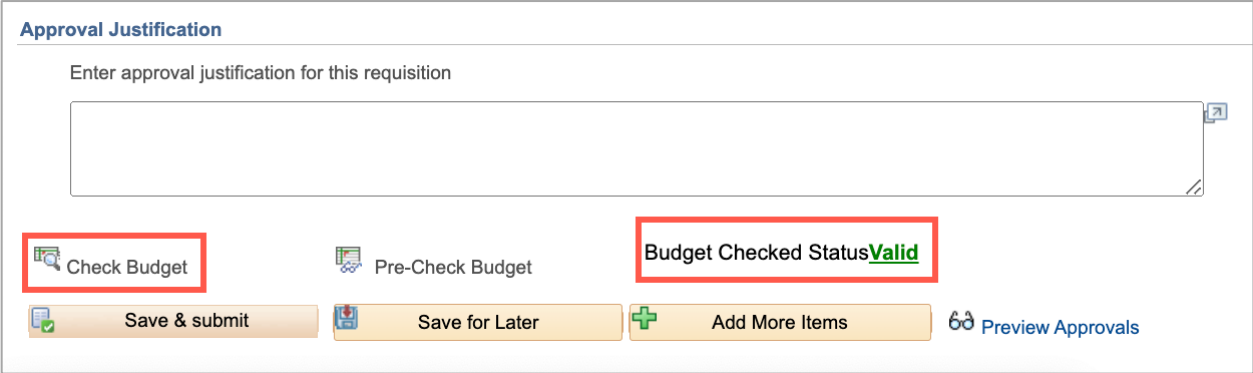
The screenshot shows the 'Shipping Summary' section with fields for 'Ship To Location', 'Address', and 'Attention To'. Below this is the 'Requisition Comments and Attachments' section, which includes a text area for comments and a row of checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Shown at Voucher'. A red box highlights these checkboxes, with a red diamond containing the number 43. To the right of these checkboxes is a link 'Add more Comments and Attachments' with a red diamond containing the number 44. Below the comments section is the 'Approval Justification' section with a text area. At the bottom of the page are several buttons: 'Check Budget', 'Pre-Check Budget', 'Save & submit', 'Save for Later' (highlighted with a red box), 'Add More Items', and 'Preview Approvals'.

- 45. Click the **Save for Later** button. Notice that the requisition now has a requisition ID.
- 46. Click the **Check Budget** link. This will check the budget for available funds.
- 47. If the Budget Checking Status returns as **Error**, click the word **Error** to investigate and resolve the error. Once the necessary changes are made, again click the **Check Budget** link. A requisition must be in a **Valid** budget check status to be submitted.

This screenshot shows the 'Approval Justification' section with a text area. Below it, the 'Check Budget' link is highlighted with a red box. To its right, the 'Pre-Check Budget' link is visible. Further right, a red box highlights the text 'Budget Checked Status Error'. Below these links are the buttons: 'Save & submit', 'Save for Later', 'Add More Items', and 'Preview Approvals'. The 'Save & submit' button is grayed out.

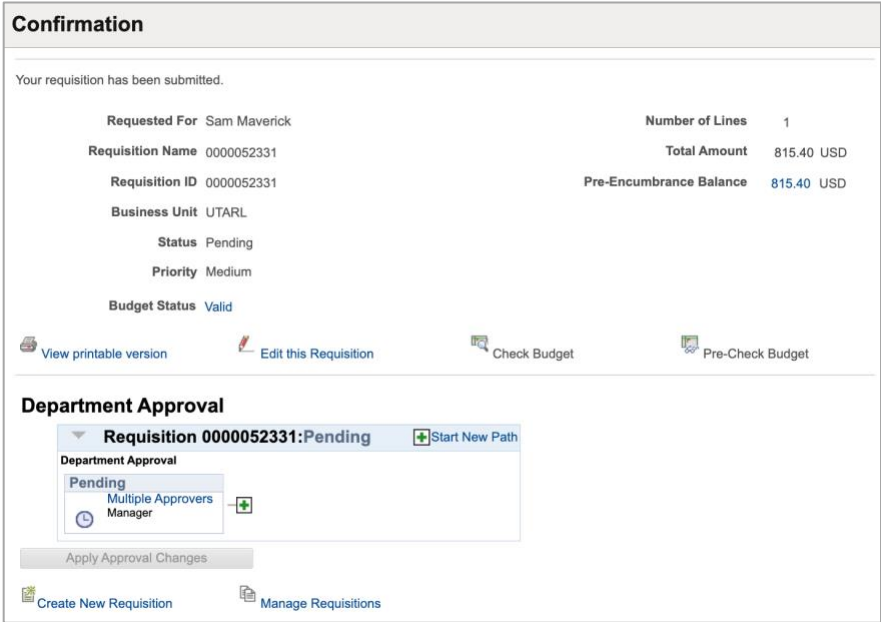
**Note:** The Save & Submit button is grayed out because the budget check is not Valid.

48. If the Budget Checking Status returns as **Valid**. The dollar amount of the requisition has been successfully **Budget Checked** and **Pre-Encumbered**.



49. 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.

50. You will receive a confirmation page with the option to view the Approval path.



## Find a Category Code

A Category code is used to classify goods and services for reporting purposes. It is an eight-digit code based on a four-level hierarchical structure.

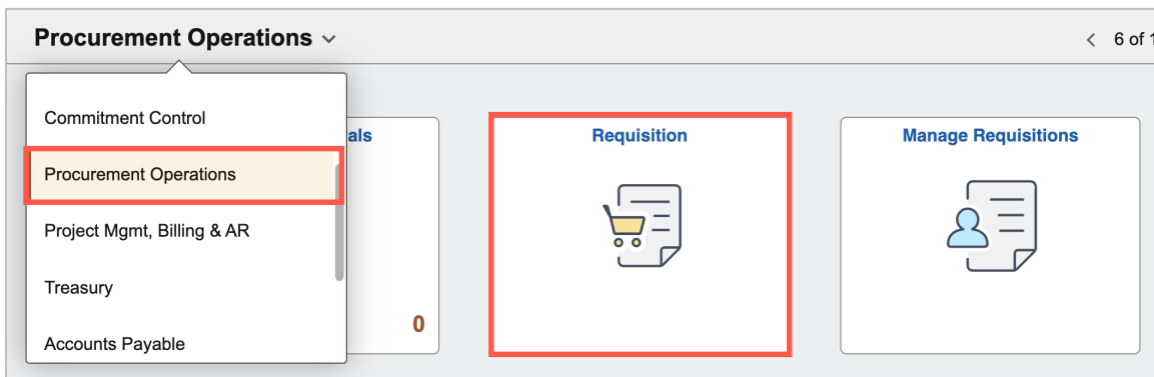


The table below explains the hierarchy for a Category code. In this example, Furniture is assigned to Category 56101500. Each subsequent level describes a subset of the code and is preceded by a description of each level in the hierarchy.

Level	Classification Code	Description
Segment	<b>56</b>	Furnishing and Equipment
Family	56 - <b>10</b>	Accommodation, Commercial, Classroom, Merchandising, Home
Class	56 - 10 - <b>15</b>	Furniture, Office Furniture, Outdoor, General Furniture Parts
Commodity	56 - 10 - 15 - <b>00</b>	When a Category is not specified down to the Commodity level, the last two digits of the code will be zeroes.

When using the Special Item Request option to purchase goods or services it is very important that you select the appropriate Category. Each Category code is connected to a General Ledger Account (e.g. 63103 - Furnishing and Equipment). When a Category is indicated for a particular good or service the appropriate GL Account is automatically populated into the **Account** chartfield. This business process demonstrates the different methods used to find a Category in UT Share

1. To navigate to the Create Requisition page select the **Procurement Operations Homepage** and click on the **Requisition** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Create Requisition.**

2. The Special Request Page is displayed. The **Special Request** page is used to capture details for the goods or services to be purchased. This includes item description, pricing, quantity, and supplier information.
3. To search for the Category, **click the magnifying glass** to the right of the **Category** field.

**Item Details**

*Item Description	<input type="text"/>		
*Price	<input type="text"/>	*Currency	USD
*Quantity	<input type="text"/>	*Unit of Measure	<input type="text"/>
*Category	<input type="text"/>	Due Date	<input type="text"/>

- 4. From the Look Up Category page. You can search for a **Category** by:
  - a. Browsing the Category Tree
  - b. Using a Category Number
  - c. Providing a Category Description

Look Up Category Help

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ **Search Categories**

Search By

▼ **Browse Category Tree**

\*Select a catalog

Left | Right

- ALL\_ITEMS
- Live Plant and Animal Material
- Mineral and Textile and Inedib
- Chemicals including Bio Chemic
- Resin & Rosin & Rubber & Foam
- Paper Materials and Products
- Fuels & Fuel Additives & Lubes

- 5. Click the **expand arrow** next to Browse Category Tree.
  - a. To find the appropriate Category click the **Vertical** scrollbar to scroll down the list.
  - b. Select the **Expand Section Folder** next to the **Category** that you want to view. The first level in the outline is the broadest term for the item you want to find.

- c. Continue drilling down until you find the category that you want to use. Click the Description of the category code to select it.
- 6. Click the **Expand Section** folder to the left of **All Items**.
  - a. To find the appropriate Category click the **Vertical** scrollbar to scroll down the list.
  - b. Select the **Expand Section Folder** next to the **Category** that you want to view. The first level in the outline is the broadest term for the item you want to find.
  - c. Continue drilling down until you find the category that you want to use. Click the Description of the category code to select it.

**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

- 7. The **Category** field is now populated with the appropriate code.
  - a. Once a **Category** is selected, the system will assign the appropriate General Ledger Account (e.g. 63103 - Furnishing and Equipment). You can view the GL Account from the Review and Submit page in the Accounting Lines section.
- 8. Alternatively, the category code can be selected using the **Search Categories** search feature.
- 9. Once in the Look Up Category page, select **Description** from the **Search By** drop-down list. (**Category** is the defaulting value.)
- 10. Click in the **Find** text box field. Enter a brief description in the text box.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

**Search Categories**

Search By

**Browse Category Tree**

**Note:** Notice, categories containing the word(s) entered are displayed.

The screenshot shows a web interface titled "Look Up Category". At the top, there is a note: "Note: You may either Search or Browse to look up the appropriate category for your special request." Below this is a search section with a dropdown menu set to "Description", a text input field containing "Office Furniture", and a "Find" button. The search results are displayed in a table with the following data:

Categories	Personalize	Find	View All	First	1-3 of 3	Last
Catalog	Category	Description	Find in Tree			
1 Non Catalog	72153606	Office furniture installation service				
2 Non Catalog	72153613	Office furniture lease and maintenance service				
3 ALL_ITEMS	56101700	Office furniture				

The third row of the table is highlighted with a red border. Below the table is a "Browse Category Tree" section with a "Return" button.

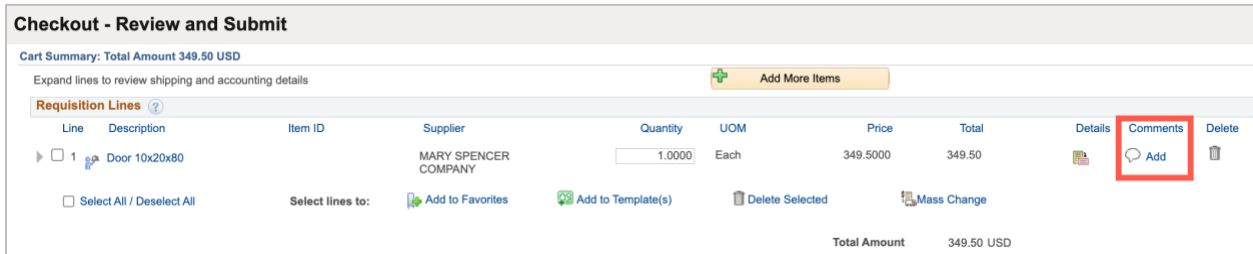
11. To locate the code you want to use, click the **Vertical** scrollbar to scroll down the list.
12. Once you have located the appropriate code, you can click the **Category** or **Description** link to select the item.
13. To help you decide the appropriate Category to use:
  - a. Work with your supervisor and/or Procurement Services to determine the types of goods and services your department purchases on a regular basis.
  - b. Agree on the appropriate Category code to use, so that the data is consistent.
  - c. Your department will then be able to run more accurate reports to assess the types of goods and services purchased on a periodic basis.

## Add Attachments and Comments to a Requisition

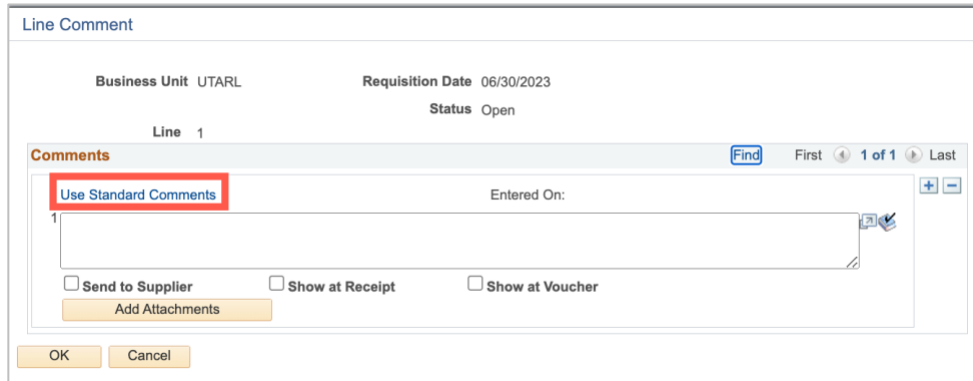
A Requisition form is created based on the pricing information obtained from the supplier. This information, also known as the source of pricing (i.e. email from the supplier, copy of the website, catalog page, etc.), is used to support audit requirements. The requisition component allows you to upload supporting documentation, as well as add comments to the online requisition. The support documentation can be scanned and electronically attached to the requisition. Make sure that the scanned document is legible.

1. Starting from the Checkout - Review and Submit page, you can add comments or an attachment to a specific line item or to the entire requisition.

2. The **Comment Bubble** is used to add an attachment and/or comment that applies to a single line item.
  - a. Click the **Add button**, near the comment bubble icon.

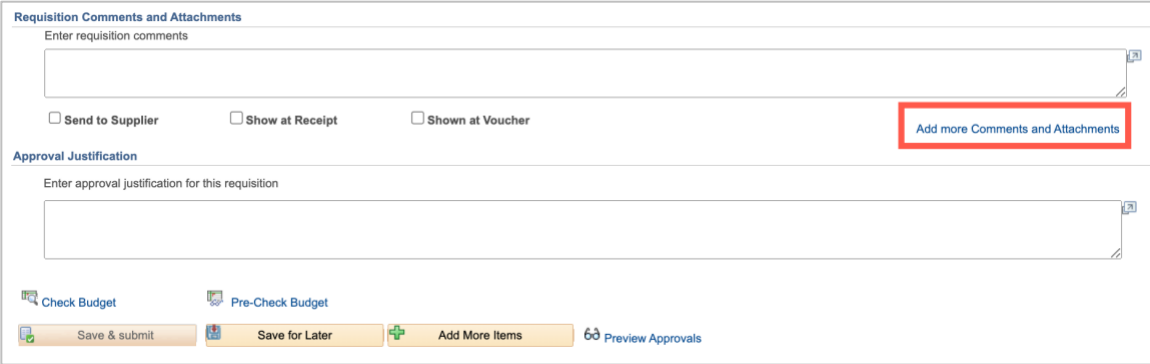


3. From the Line Comments page, click in the **Comments** field to add comments for this line item.
4. Enter the desired information into the **Use Standard Comments** field.

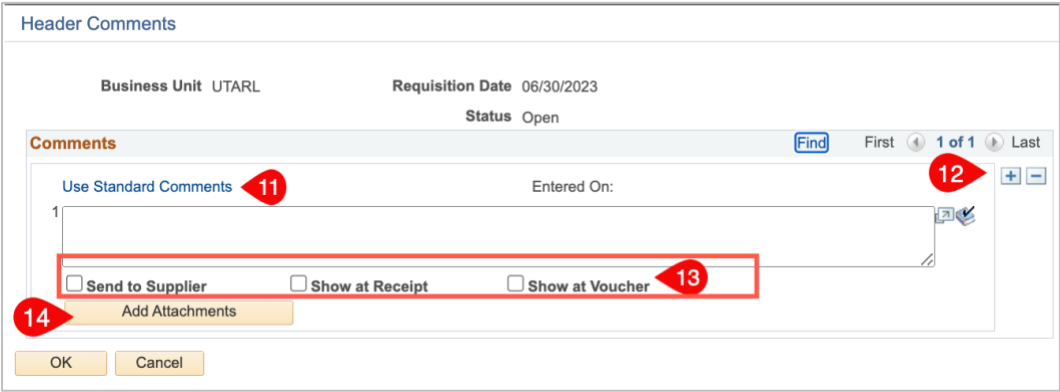


5. Select the appropriate check box to make the remarks available for others to view:
  - a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier.
  - b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
  - c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable
6. The **Add Attachments** button on the Line Comments page is used to add a document to this specific line item.
7. The **Comment Bubble** will have lines indicating a comment has been added. This indicates that comments and/or an attachment have been added to **Line Item 1**.

- 8. The **Requisition Comments and Attachments** box is used to add comments and/or an attachment that applies to the entire requisition.
- 9. Add comments in the Comments box.
- 10. To add additional comments, click the **Add more Comments and Attachments** link.



- 11. Enter the desired information into the **Use Standard Comments** field.
- 12. To add additional comments, use the + button.
- 13. If comments are entered, select the appropriate check box to make the remarks available for others to view (if desired):
  - a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier.
  - b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
  - c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable.
- 14. To add documentation that applies to the entire order, click the **Add Attachments** button.

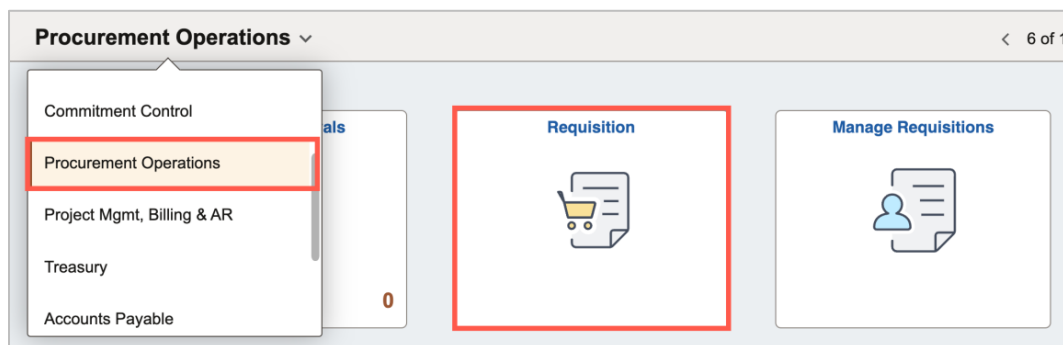


15. Click the **Choose File** button and navigate to the file you want to upload.
  - a. You can only select one file at a time.
  - b. Locate the file on your computer and then select the file to attach. Click the **Upload** button.
  - c. To insert a new comment line, click the **Add a new row** button.
16. To view the attached document, click the **View** button.
17. At least one comment line must be added to the requisition providing contact information for the person who can answer questions regarding the order. Make sure to select the **Send to Supplier** checkbox to make the remarks available for the supplier/vendor to view.
18. To insert a new comment line, click the **Add a new row** button.
19. Click in the **Comments** box and enter the name and contact information for the UTA employee who should be contacted.
20. Click the **Send to Supplier** checkbox.
21. Once all comments have been entered and documents attached click the **OK** button to return to the Review and Submit page.
22. Notice, the header comments added to the requisition are displayed in the **Comments** box.
23. Click the **Save for Later** button.

## Create a Requisition using MAV eShop

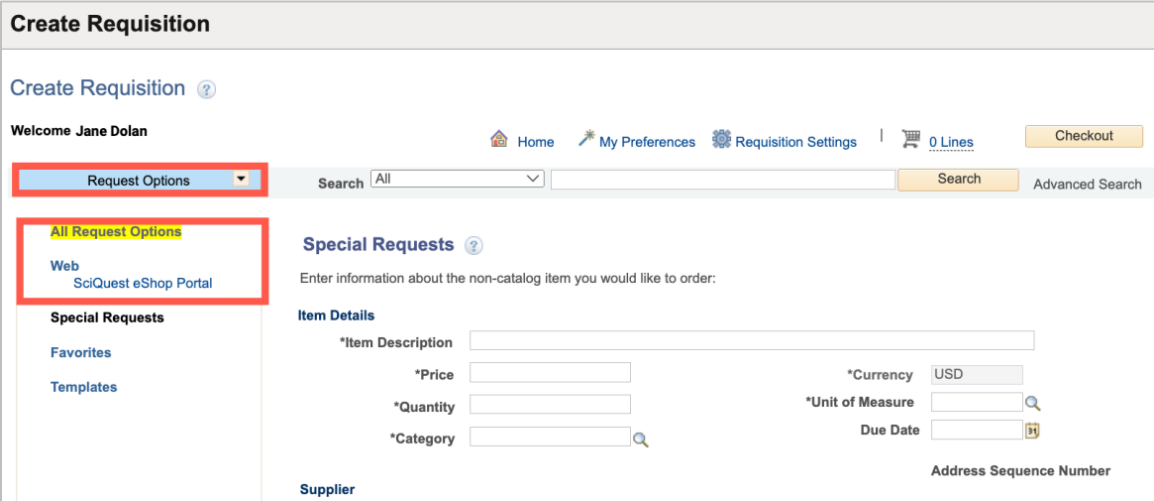
Mav eSHOP is an online ordering and requisition-generating system that provides an efficient and interactive way for shoppers and end-users to search and initiate requisitions. The tool interfaces with UTShare and enhances the ordering and payment processes, helping to reduce overall costs and improve productivity. Creating a requisition using Mav eSHOP is like shopping on any online website.

1. To navigate to the Create Requisition page select the **Procurement Operations Homepage** and click on the **Requisition** tile.

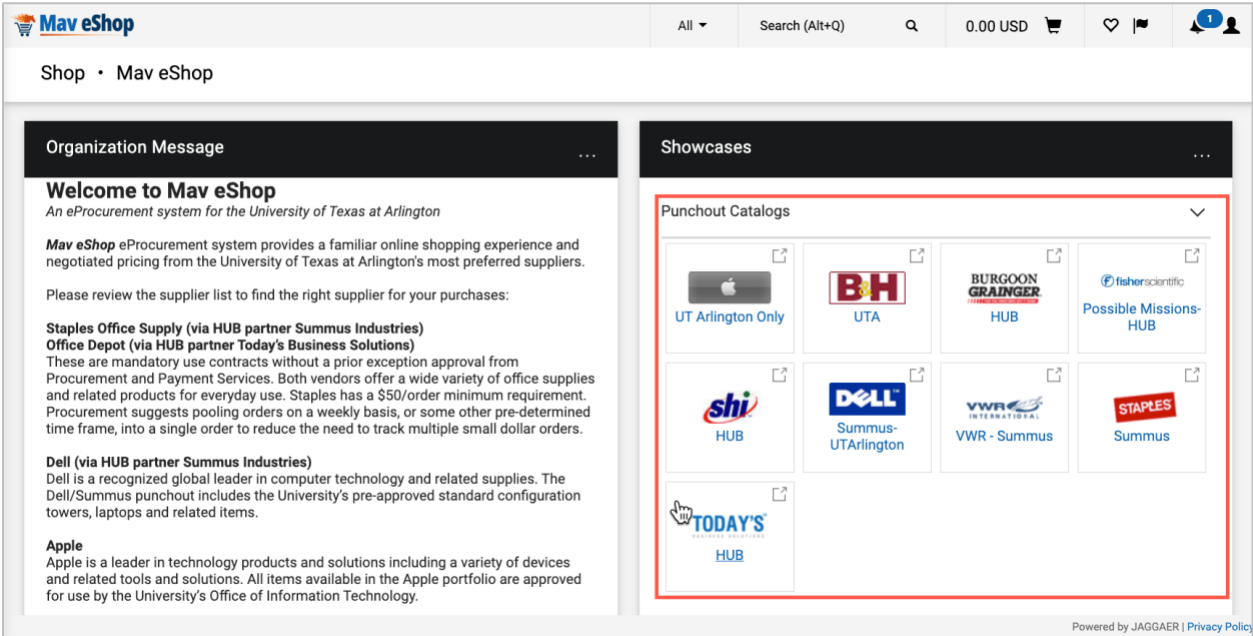


Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Create Requisition.**

- 2. The Create Requisition page is displayed.
- 3. Click the **Request Options** drop-down arrow on the left side of the screen.
- 4. Click on the **SciQuest eShop Portal** link.

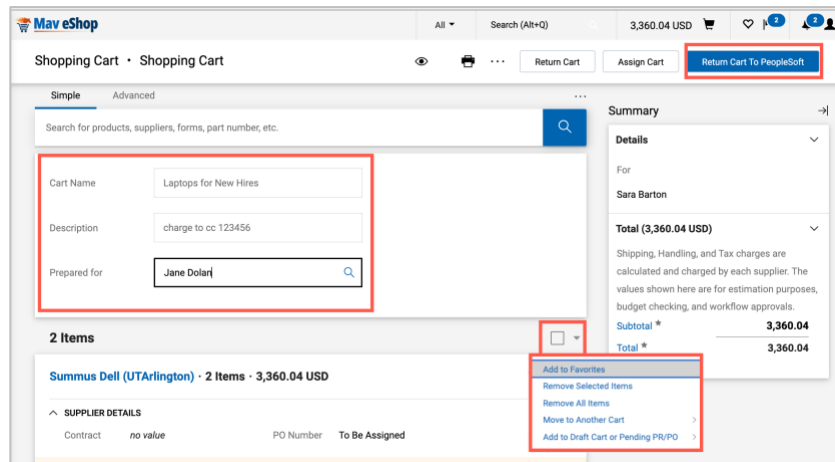


- 5. The MAV eSHOP screen will populate.



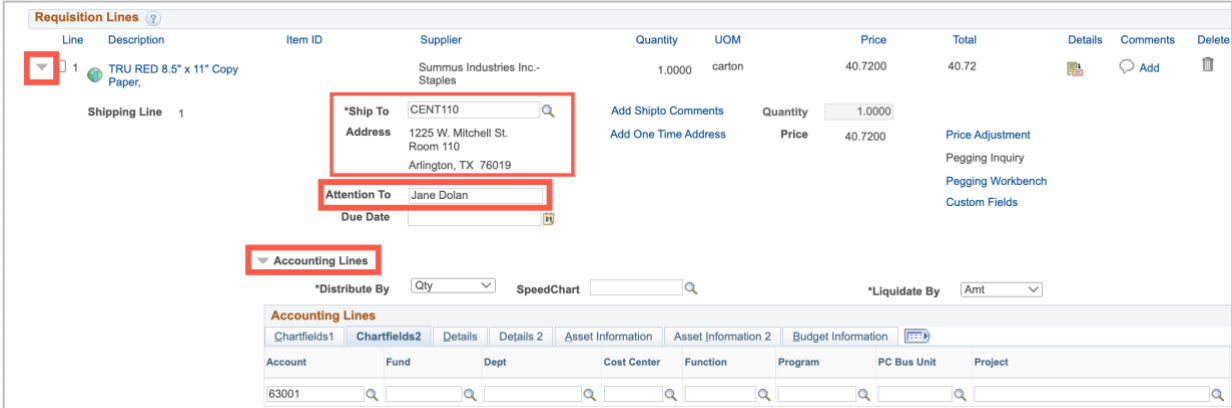


6. Select the desired Supplier's **Punchout Catalog**, clicking on the supplier tile will open the supplier's online catalog (often in a new browser window).
  - a. Be sure to allow pop-ups on your browser to allow the Punchout Catalog to launch.
  - b. If you would like to exit the Suppliers catalog without making a purchase, click the Cancel Punchout button, located in the top right corner of the page, to return to the MAV eSHOP.
7. Shop for the desired items on the supplier's catalog.
8. Once the desired items are in the cart, return the cart to MAV eSHOP.
  - a. Wording within suppliers' websites may be slightly different. All suppliers will have a cart feature where you can review the items selected and **Checkout** or **Submit Order** or similar wording which will return the cart to MAV eSHOP.



9. Update the **Cart Name**.
10. Add a **Description**.
11. Add the name for whom the requisition is **Prepared For**.
12. If you **check the box** to the right of the Supplier there are actions available in the drop-down box, including the Remove Selected Items option that can be used to remove items from the cart.
13. Review the cart for accuracy.
  - a. A MAV eSHOP cart can only have one supplier. If purchases from multiple suppliers are needed, a separate requisition and cart must be created for each supplier.
  - b. To move items from a supplier to a new cart check the box and choose **Move to Another Cart**.

- c. Then select **Move to a New Cart**.
- 14. Once the cart is verified for purchase, click **Return Cart to PeopleSoft** to return the cart to UTShare.  
**Note:** *Once an MAV eSHOP cart has been returned to PeopleSoft (UTShare), it is no longer available to edit or use in MAV eSHOP. Additionally, once the MAV eSHOP cart has been returned, the UTShare requisition must be saved. If not saved, the cart will not be available in MAV eSHOP to be pulled into a requisition – the requester must start over with shopping.*
- 15. The **Checkout – Review and Submit** page provides a summary of the line items that were downloaded from the MAV eSHOP cart. This page allows you to add accounting information and submit the requisition for approval.
- 16. Click the **expansion arrow** for the line item.
  - a. Enter or look up the **Ship To** location. Controlled assets should be shipped to Central Receiving (Ship To code **CENT110**).
  - b. A requisition should only have one Ship To address listed for all items.
- 17. Enter or look up the **Attention To** party.
- 18. To enter accounting information for the line items, if necessary, click the expansion arrow for Accounting Lines.
  - a. The **Accounting Lines** section is used to enter or update chartfield information. It may be necessary to use the expansion arrow to open the Accounting Line section.
  - b. Click the **Chartfield2** tabs to enter chartfield information.



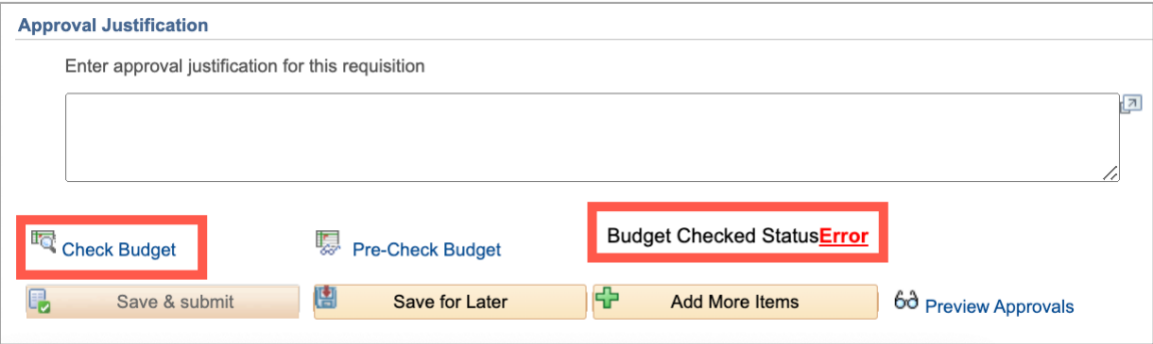
- 19. The **Account** field defaults with the appropriate value based on the **Category** code that you selected in the line-item section. Verify the account number that is populated is appropriate.

- a. The GL account code mapping for computers is known to default with an incorrect code. Please ensure computers (including desktop computers, servers, tablets, or workstations) are coded with the appropriate GL account number (63163).
20. Enter the remaining chartfield values for the requisition line. You can manually enter the values into the appropriate fields (e.g. Fund, Dept, Cost Center, Function) or use the **SpeedChart** field to populate the accounting lines quickly.
21. Click in the **SpeedChart** field. Enter the **SpeedChart** you want to use for the expense line. SpeedChart values are either the 6-digit cost center number, 10-digit project ID, or 10-digit cost share ID.
- a. Enter **UTARL** in the AM Business Unit field.
  - b. Enter or look up the **Profile ID** for the asset.
  - c. For assistance with Profile IDs, contact the Office of Distribution Services.
22. Enter comments that relate to the entire purchase, such as Final Delivery instructions and contact information in the **Requisition Comments and Attachments** box. To enter more than one comment, use the **Add More Comments and Attachments** link.

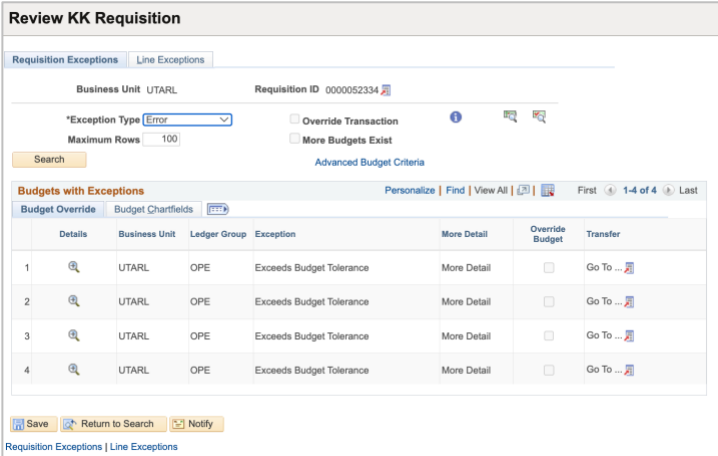
23. If comments are entered, select the appropriate check box to make the remarks available for others to view.
- a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier.
  - b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
  - c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable.
24. Click the **Check Budget** link. This will verify if the funding sources entered on the Accounting

lines have the funds to pay for the purchase.

- 25. If the Budget Checking Status returns as **Error**, click the word **Error** to investigate and resolve the error. This will open a new window.



- 26. The Review KK Requisition Page will come up and give insight into the budget error. In this case, it displays Exceeds Budget Tolerance. To Return to the Review and Checkout page close the tab.



- 27. Once the necessary changes are made, again click the **Check Budget** link. A requisition must be in a **Valid** budget check status to be submitted.
- 28. If the Budget Checking Status returns as **Valid**. The dollar amount of the requisition has been successfully **Budget Checked** and **Pre-Encumbered**.

**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

29. 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.

**Confirmation**

Your requisition has been submitted.

Requested For Sam Maverick	Number of Lines 1
Requisition Name 0000052331	Total Amount 815.40 USD
Requisition ID 0000052331	Pre-Encumbrance Balance 815.40 USD
Business Unit UTARL	
Status Pending	
Priority Medium	
Budget Status Valid	

View printable version Edit this Requisition Check Budget Pre-Check Budget

**Department Approval**

Requisition 0000052331: Pending  Start New Path

Department Approval

Pending

Multiple Approvers

Manager

Apply Approval Changes

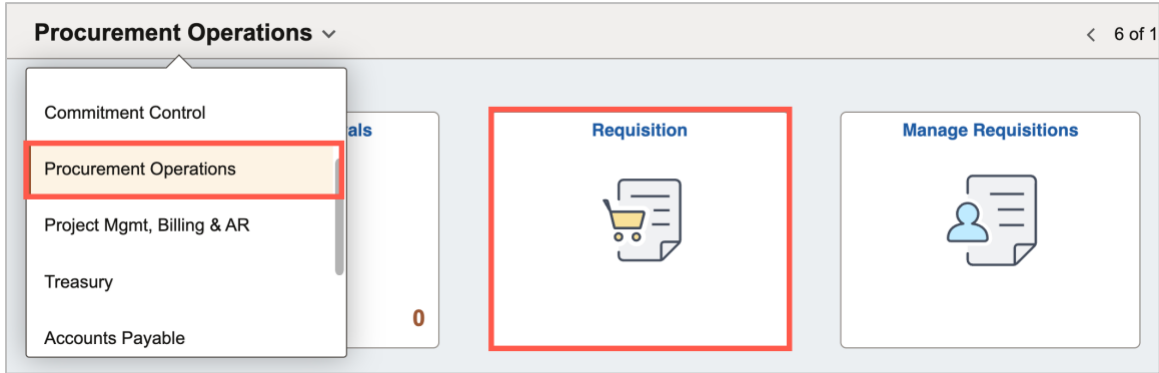
Create New Requisition Manage Requisitions

**Note:** The Requisition ID in Mav eShop is not the same as the Requisition ID from UTShare. The UTShare Requisition ID is the official document ID number.

## Process an Assigned Cart

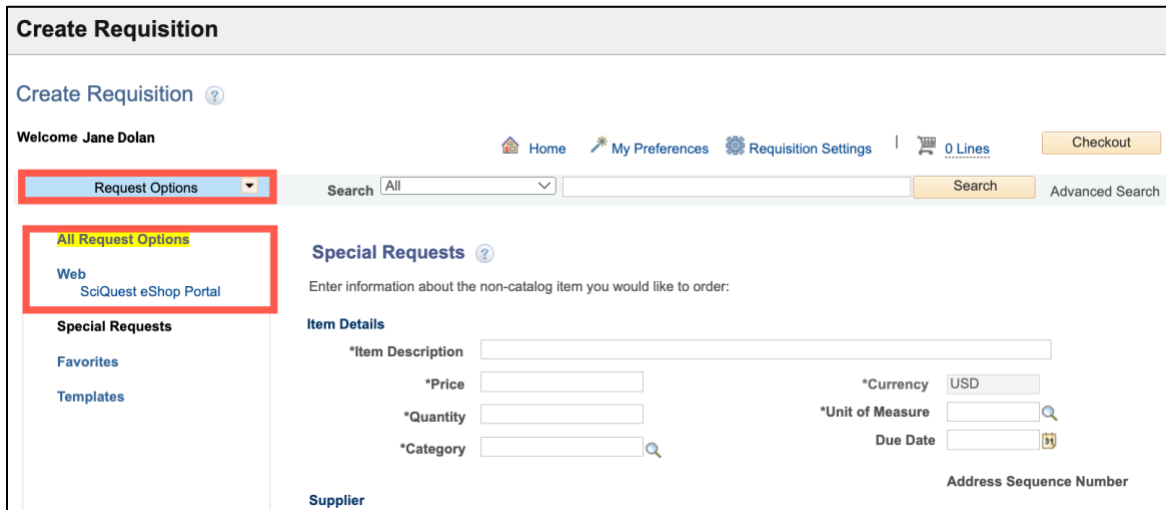
Carts are assigned to **Requesters** who will finalize the requisition for the shopper when they check out in Mav eSHOP. The requester finishes off the requisition that the shopper started. Once the cart is submitted by a Shopper, the Requester receives an email notification; do not use the link to navigate to the cart.

1. To navigate to the Create Requisition page select the **Procurement Operations Homepage** and click on the **Requisition** tile.



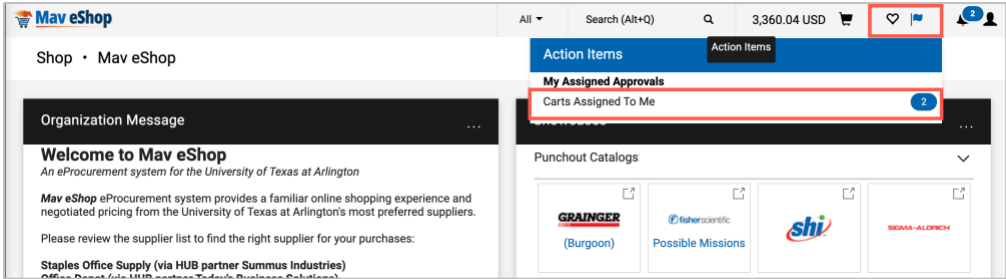
Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Create Requisition**.

2. The Create Requisition page is displayed.
3. Click the **Request Options** drop-down arrow.
4. Click on the **SciQuest eShop Portal** link.

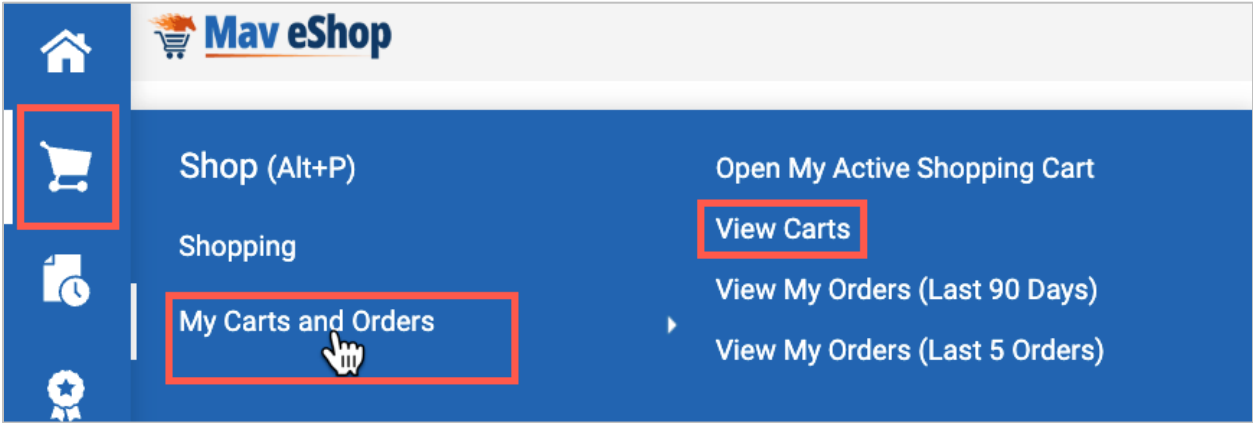


5. The MAV eSHOP screen will populate.
6. If you would like to exit MAV eSHOP without making a purchase, click the **Cancel Punchout button**, located in the top right corner of the page, to return to the UTShare Requisition page.

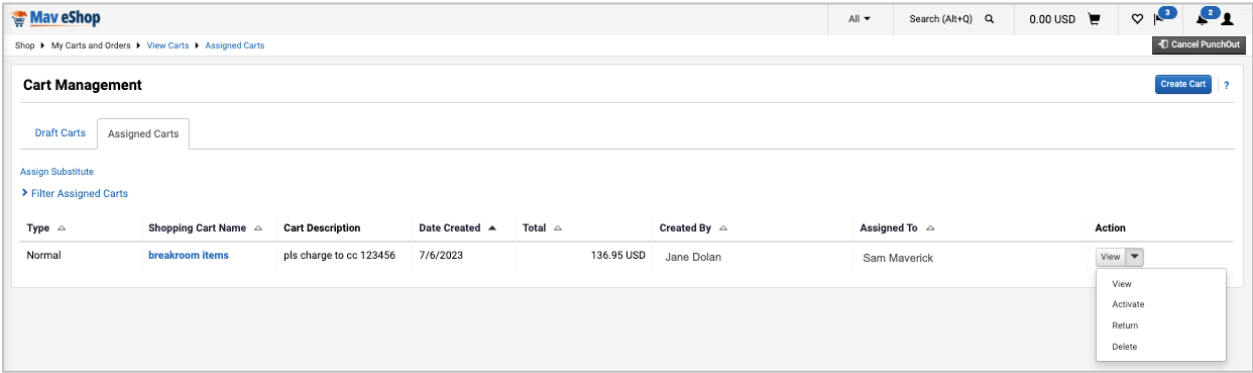
7. From the MAV eSHOP homepage, click the **Action Item** icon in the top banner and click **Carts Assigned to Me**.



a. Alternatively, you can also access the assigned cart from the Shop Menu (Shopping Cart Icon) **Shop > My Carts and Orders**.

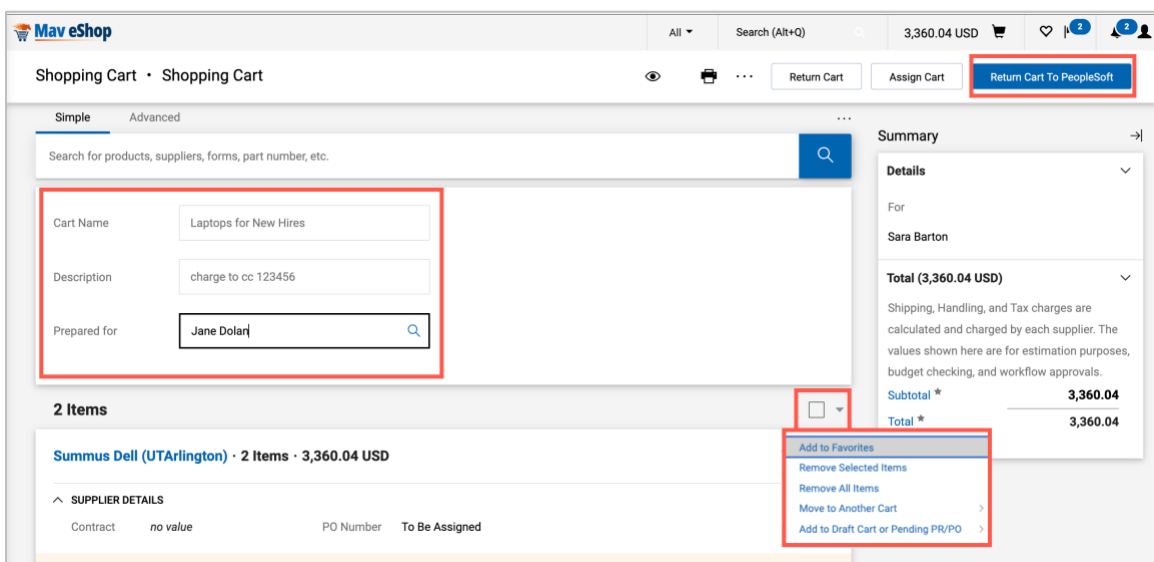


8. Then click on the **Assigned Carts Tab**. Select the cart you want to process.



9. Review the cart for accuracy.

10. A MAV eSHOP cart can only be for one supplier. If purchases from multiple suppliers are needed, a separate requisition and cart must be created for each supplier.
11. Update the **Cart Name**.
12. Add **Description** if desired.
13. Add whom the cart was **Prepared for**.
14. There are actions available in the **drop-down box**, including the Remove Selected Items option that can be used to remove items from the cart.
15. Once the cart is verified for purchase, click **Return Cart to PeopleSoft** to return the cart to the requisition.



- a. Once a MAV eSHOP cart has been returned to PeopleSoft (UTShare), it is no longer available to edit nor use in MAV eSHOP. Also, once the MAV eSHOP cart has been returned, the UTShare requisition must be saved. If not saved, the cart will **not** be available in MAV eSHOP to be pulled into a second requisition – the requester must start over with shopping.
16. The **Checkout – Review and Submit** page provides a summary of the line items that were downloaded from the MAV eSHOP cart. This page allows you to add accounting information and submit the requisition for approval.
17. Enter a **Requisition Name**. Using the same name as the MAV eSHOP cart helps to correlate the two documents.
18. Click the **expansion arrow** for the line item.



19. Enter or look up the **Ship To** location. Controlled assets should be shipped to Central Receiving (Ship To code **CENT110**).

a. A requisition should only have one Ship To address listed for all items.

20. Enter or look up the **Attention To** party.

**Checkout - Review and Submit**

Requisition Summary

Business Unit: UTARL  UT Arlington

\*Requester: 6001234567  Sam Maverick

\*Currency: USD

Requisition Name:

Priority: Medium

Custom Fields

Cart Summary: Total Amount 111.07 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price
1	TRU RED 8.5" x 11" Copy Paper,		Summus Industries Inc.- Staples	1.0000	carton	40.7200
Shipping Line 1		*Ship To: 642-300 <input type="text"/>		Add Shipto Comments	Quantity	1.0000
		Address: 701 S. Nedderman Dr. Room 300 Arlington, TX 76019		Add One Time Address	Price	40.7200
		Attention To: Jane Dolan <input type="text"/>				
		Due Date: <input type="text"/>				

21. The **Accounting Lines** section is used to enter or update chartfield information. It may be necessary to use the expansion arrow to open the Accounting Line section. To enter accounting information for the line items, if necessary, click the expansion arrow for Accounting Lines.

22. Click the **Chartfield2** tab to enter chartfield information.

23. The **Account** field defaults with the appropriate value based on the **Category** code that you selected in the line-item section. Verify that the account number that populated is appropriate.

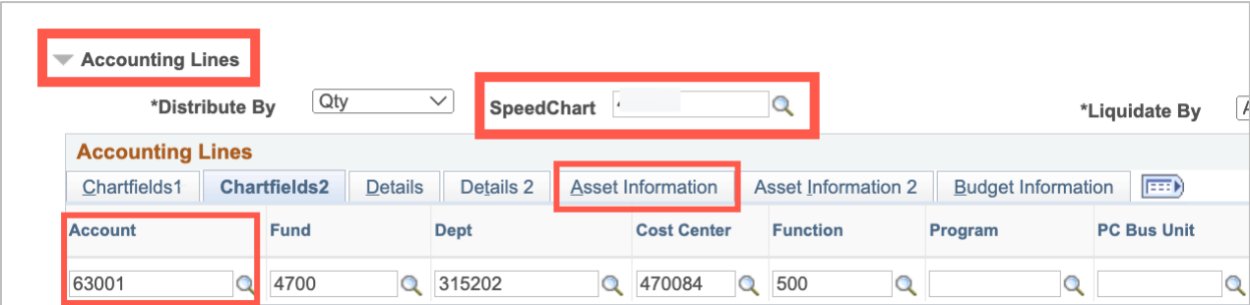
a. The GL account code mapping for computers is known to default with an incorrect code. Please ensure computers (including desktop computers, servers, tablets, or workstations) are coded with the appropriate GL account number (63163).

24. Click in the **SpeedChart** field or manually enter the remaining chartfield values for the requisition line.

a. You can manually enter the values into the appropriate fields (e.g., Fund, Dept, Cost Center, Function) or use the **SpeedChart** field to quickly populate the accounting lines.

b. Enter the **SpeedChart** you want to use for the expense line. SpeedChart values are either the 6-digit cost center number, 10-digit project ID, or 10-digit cost share ID.

- 25. Press **[Tab]** to populate the chartfields with the appropriate values.
- 26. If the item(s) being requested is a **Capital or Controlled Asset** (see Procedure BF-PM- PR1) enter the appropriate Profile ID. From the Accounting Lines section, click the **Asset Information** tab.
  - a. Enter **UTARL** in the AM Business Unit field.
  - b. Enter or look up the Profile ID for the asset.
  - c. For assistance with Profile IDs, contact the Property Management department.





- 27. Enter comments that relate to the whole purchase (including Final Delivery instructions) in the **Requisition Comments and Attachments** box. To enter more than one comment, use the **Add More Comments and Attachments** link.







- 28. If comments are entered, select the three checkboxes to make the remarks available for others to view:
  - a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier.
  - b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
  - c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable.
- 29. Click the **Check Budget** link. This will verify if the funding sources entered on the Accounting lines have the funds to pay for the purchase.

**Approval Justification**

Enter approval justification for this requisition



 **Check Budget**       Pre-Check Budget





 Save & submit     Save for Later     Add More Items     Preview Approvals

30. If the Budget Checking Status returns as **Error**, click the word **Error** to investigate and resolve the error. Once the necessary changes are made, again click the **Check Budget** link. A requisition must be in a **Valid** budget check status to be submitted.

**Approval Justification**

Enter approval justification for this requisition

 **Check Budget**       Pre-Check Budget      **Budget Checked Status****Error**



 Save & submit     Save for Later     Add More Items     Preview Approvals





**Note:** The Save & Submit button is grayed out because the budget check is not Valid.

31. If the Budget Checking Status returns as **Valid**. The dollar amount of the requisition has been successfully **Budget Checked** and **Pre-Encumbered**.

**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

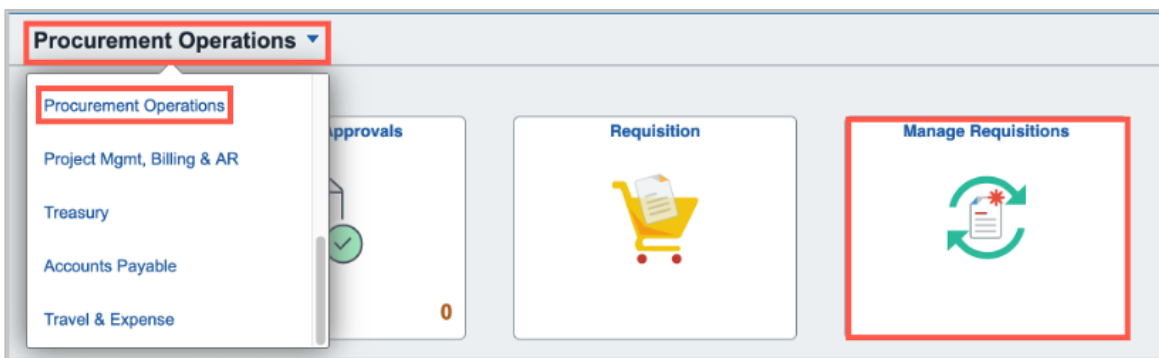
32. Once all requisition lines have been entered and a valid budget check obtained, click the **Save & Submit** button to submit the requisition for Workflow approvals.

## Manage Requisition Overview

The Manage Requisitions component in eProcurement provides you with the ability to track changes, review, edit, approve, or cancel requisitions. Requisitions can be modified until they are sourced into a purchase order. After the requisition is sourced, a purchase order (PO) is generated and then dispatched to the supplier. Once the PO is dispatched, the requester must contact Procurement Services if a correction is required.

The Manage Requisition page is used to search for an existing requisition or purchase order.

1. To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Manage Requisitions**.

2. The **Manage Requisitions** page is displayed. This page is used to search for an existing requisition or purchase order.
3. To find an existing requisition, you will need to enter one or more search criteria. You can perform a search by:
  - a. Requisition ID
  - b. Specific dates
  - c. Requester
  - d. Entered by
  - e. State
  - f. Purchase order ID number
4. To search by date:
  - a. Click in the **Date From** field.
  - b. Enter the desired information into the **Date From** field.
  - c. Click in the **Date To** field.
  - d. Enter the desired information into the **Date To** field.
  - e. Click the **Request State** list.
  - f. Select the appropriate state from the list.

g. Click the **Search** button.

**Note:** Based on your search criteria, the search engine found more than one requisition.

**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: Complete Budget Status: [ ]  
 Date From: 03/28/2023 Date To: 06/26/2023  
 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		
0000054894	Suzanne McDonald's Cale...	UTARL	06/23/2023	Complete	Valid	13.99 USD	[Select Action]	Go
0000052534	0000052534	UTARL	03/28/2023	Complete	Valid	750.00 USD	[Select Action]	Go

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

Requisition Lifecycle: Requisition (Active) | Approvals (Active) | Inventory (Inactive) | Purchase Orders (Active) | Change Request (Inactive) | Receiving (Active) | Returns (Inactive) | Invoice (Active) | Payment (Active)

Request Lifespan: Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Foam Cups, White, 20 oz	Closed	0.5000	USD	1,000.0000	EA	SCARBOROUGH SPECIALTIES INC

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

- The Expand icon to the left of the Requisition ID will allow you to view more information.
- The **Requisition Life Span** will allow you to see the different stages in the requisition. The icons that are complete or in progress are highlighted with active links, you can click the icons to view specific details.

**Note:** Only requisition lines that have been budget-checked to **Valid** status, approved, and have a supplier assigned to them, will continue through the purchasing process.

- The **Requisition** icon indicates that a requisition has been processed. When you click this link, you can view information such as:
  - Line-item details
  - Supplier information
  - Accounting details
- When the **Approvals** icon is active, this section will display workflow approval information.
- The **Inventory** section is **not** used by UT Arlington. This icon will always appear inactive.

- 10. After the requisition has been approved and sourced, the **Purchase Orders (PO)** link will become active and allow you to view the PO details.
- 11. If changes were made to the Purchase Order, the **Change Request** icon will be active.
- 12. An active **Receiving** icon indicates that some or all the line items have been received.
- 13. An active **Return** icon indicates that some or all the items have been returned.
- 14. An active **Invoice** icon indicates that a voucher is being processed. Information regarding the voucher can be found by clicking the icon. You will see the invoice date, invoice number, voucher number, and supplier information.
- 15. An active **Payment** icon indicates a payment was made. The check number (Payment Reference ID), check date, and other payment information can be found.
- 16. Click the **Select Action** drop-down menu.

**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: | 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

- 17. The **Select Action** drop-down menu displays the available actions for this requisition. You can,
  - a. Copy a Requisition
  - b. Edit a Requisition
  - c. Receive Items
  - d. View Approvals
  - e. View Printable version

Select the appropriate option from the list and click the **Go** button.

**Note:** Depending on the State of the requisition, the options in the drop-down menu may vary.

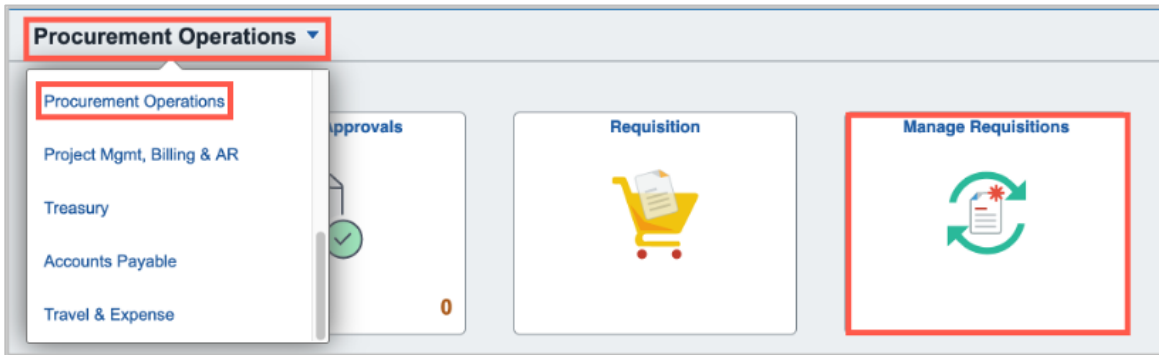
## View the Life Cycle of an Existing Requisition

Through the Manage Requisition page, you can view the lifespan of a requisition and follow it through each of the stages. The stages in the requisition that are complete or in progress are highlighted with active links.

The following steps will demonstrate how to view and interact with a requisition through its respective lifecycle. This involves viewing a requisition and the details of related transactions such as Change Requests, Purchase Orders, Invoices, Payments, etc.

To view the details of the requisition, use the Manage Requisitions page.

1. To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Manage Requisitions.**

2. The **Manage Requisitions** page is displayed.
3. Click the **Expand** Section button.
4. This section displays the lifespan of a requisition. Stages that are complete or in progress are highlighted with color and are active links.

**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: | Request State: All but Complete | Budget Status: | Date From: 04/26/2019 | Date To: 04/30/2019 | 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	
0000020914	0000020914	UTARL	04/30/2019	Received	Valid	124.38 USD	[Select Action] Go

Requester: Sam Maverick | Entered By: Sam Maverick | Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

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

**Request Lifespan:**

**Line Information**

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	EF 50mm f 1.8 STM Lens CA501...	Received	124.3800	USD	1.0000	EA	B&H PHOTO AND ELECTRONICS CORP

0000020913 | eppendorf test | UTARL | 04/30/2019 | Received | Valid | 638.78 USD | [Select Action] Go

0000020912 | Paper For Computer Lab | UTARL | 04/30/2019 | PO(s) Dispatched | Valid | 32.56 USD | [Select Action] Go

- To view the details of the requisition, click the **Requisition** link.
- The Requisition Details page is used to view details about a specific requisition.

**Requisition Details**

Requisition Summary

Business Unit	UTARL	Requisition Name	Organizer doors APT Life
Date	06/20/2023	Requisition ID	0000052328
Request State	Pending	Total Amount	1,889.80 USD
Requested For	6001234567	Pre-Encumbrance Balance	1889.80USD

Header Comments

Header Custom Fields

---

Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
1	HIGHBACK ORGANIZER,HINGED DO...	Not Source	No	1.0000 Each	815.40000USD	Pending	815.40

Line Comments

Comment 1: <<21N8136HBHL--KRB-CW ARROWOOD.81WX36H,HIGHBACK ORGANIZER,HINGED DOORS OPTION: KRB:RANDOM CORE,INSTALLED,BLACK OPTION: CW:CORDOVAN>>

Line Custom Fields



- 7. The **Requisition Lines** section displays line-item information and comments for a specific requisition line.
- 8. Click the **Expand** Section button.
- 9. This section will display information regarding the **Requisition Line**, including **Accounting Information**.

**Requisition Lines**

Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
1	TK81782093T Rubber Boot Shoe...	Complete	No	3.0000 Each	99.84000 USD	Approved	299.52

Line Custom Fields PO information

**Shipping Line 1** Ship To CENT110  
 1225 W. Mitchell St.  
 Room 110  
 Arlington, TX 76019

Quantity 3.0000  
 Price 99.84

Attention To Sam Maverick  
 Due Date 03/24/2023

Price Adjustment  
 Schedule Custom Fields

**Accounting Lines** Distribute By Qty Liquidate By Amt

Dist #	Status	Location	Quantity	Merchandise Amt	Percent	GL Unit	Entry Event	Account
1	Processed	525-151	1.5000	149.76	50.0000	UTARL		63103
2	Processed	525-151	1.5000	149.76	50.0000	UTARL		63103

- 10. The **PO information** link will only be available when a PO has been created for the requisition.
- 11. To view the **PO Information**, click the link.

PO Information for Line 1

Business Unit UTARL  
 Requisition ID 0000052412  
 Line Number 1

**PO information** Find | View All First 1 of 1 Last

PO ID	PO Status	Supplier	Receipt Status
0000052020	Dispatched	GRAINGER/BURGOON - UTARL	PO Not Received

**PO Line Information** Personalize | Find First 1 of 1 Last

PO Line	Sched	Due Date	Ship To	PO Qty	Price
1	1	03/24/2023	CENT110	3.0000	99.84000 USD

Return

- 12. The **PO Information** section displays the purchase order number, status, and receiving information.

13. Click the **Return** button.
14. Click the **Return to Manage Requisitions** link.
15. To view approval information, click the **Approval Chain** button.
16. The **Approval Chain** option in the bottom left of the page will show the approval path of the requisition.

**Requisition**

Request for Organizer doors APT Life  
1,889.80 USD

In Process - Multiple Approvers

**Summary**

Business Unit UTARL  
Routed Date June 20, 2023  
Requester Sam Maverick

**More Information**

Header comments and attachments >  
View Printable Version >

**Lines**

Line Number	Item Description	Unit Price	Quantity	Line Amount	Unit of Measure
1	HIGHBACK ORGANIZER,HINGED DOORS			815.40	USD
2	OVERHEAD CABINET,WALL MOUNT			779.40	USD
3	METROPLEX FACILITY SERVICES LABOR			295.00	USD

Approval Chain >

**Approval Chain** [x]

**Department Approval**

Organizer doors APT Life Pending

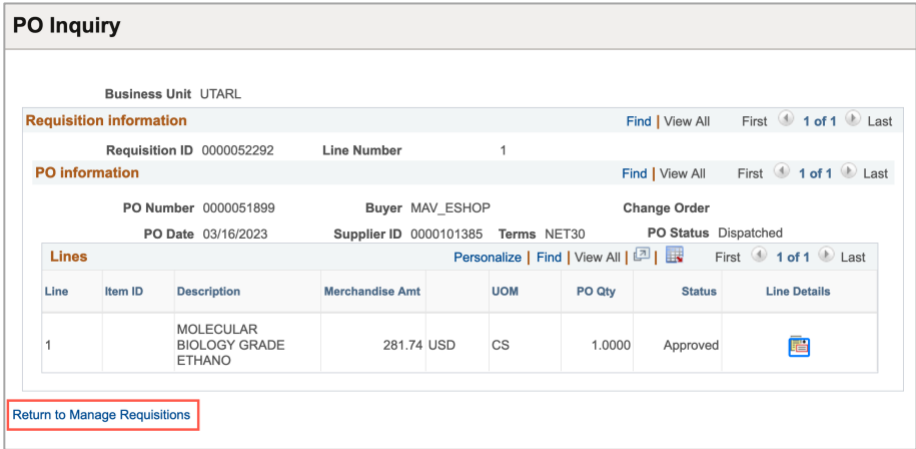
Start New Path

Department Approval

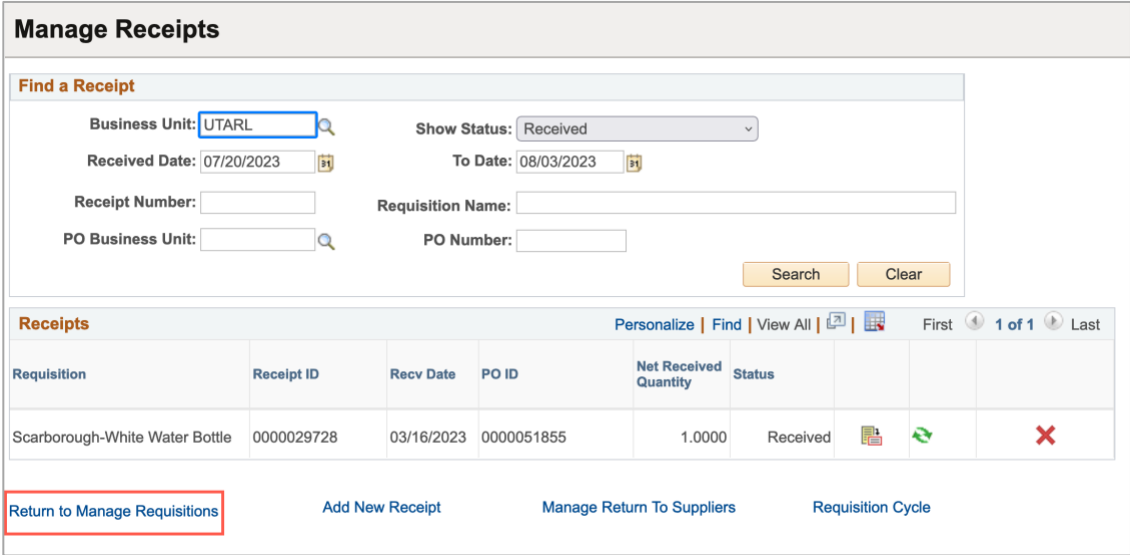
Pending +

Multiple Approvers Manager >

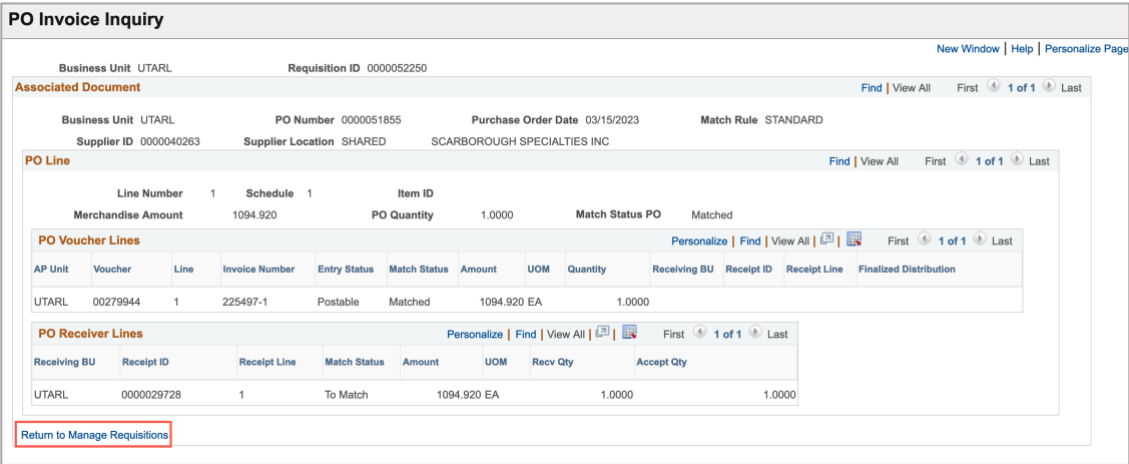
17. Click the **x** to close the window.
18. Click the **Return to Manage Requisitions** link.
19. The **Line Information** expansion section displays the items requested on the PO.
20. Click the **Return to Manage Requisitions** link.
21. To view information about the Purchase Order, click the **Purchase Orders** link.



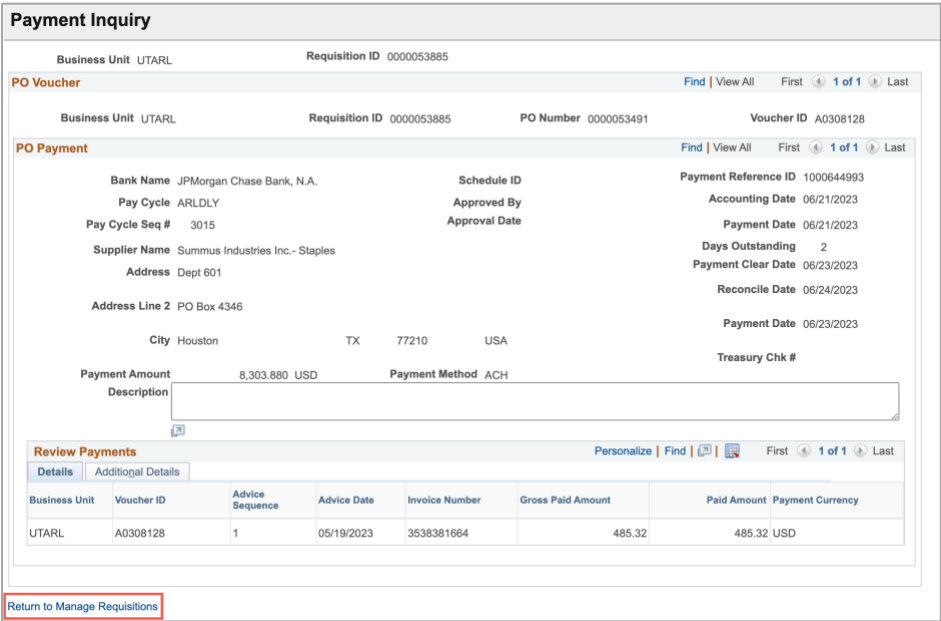
- 22. The **Purchase Order Inquiry** page provides the PO Number, the PO Status, and displays the items on the PO.
- 23. Click the Return to **Manage Requisitions** link.
- 24. To view receiving information, click the **Receiving** link.
- 25. The **Manage Receipts** page displays the Receipt information for the PO such as the receipt ID, the date the items were received, the number of items received, and the status.



- 26. Click the **Return to Manage Requisitions** link.
- 27. To view invoice information, click the **Invoice** link.



- 28. The Invoice Information page displays Voucher information for vouchers that have been matched to the requisition’s purchase order.
- 29. Click the **Return to Manage Requisitions** link.
- 30. To view payment information, click the **Payments** link.



- 31. The Payment Information page displays payment information for vouchers that have been matched to the requisition’s purchase order.
- 32. Click the **Return to Manage Requisitions** link.

## Copy a Requisition

Copying an existing requisition eliminates redundant data entry by using an existing requisition as a template. Any requisition can be copied, regardless of its Request State. If necessary, you can override any values that were copied over with the requisition.

Copying a Requisition can be helpful in the event you order the same items on a reoccurring basis. If you have ordered this specific item before, you create a new requisition by copying the previous one.

**Note:** *Mav eSHOP requisitions cannot be copied.*

1. To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Manage Requisitions.**

2. The Manage Requisitions page is displayed.
3. From the Manage Requisitions page, it may be necessary for you to enter one or more search keys to locate the requisition that you want to **Copy**.

### 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	Canceled	Valid	0.00 USD	[Select Action]	Go
▶ 0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD	[Select Action]	Go
▶ 0000052327	TEST	UTARL	06/20/2023	Canceled	Not Chk'd	0.00 USD	[Select Action]	Go
▶ 0000052326	B&H/PowerCables	UTARL	06/15/2023	Pending	Valid	256.04 USD	[Select Action]	Go
▶ 0000052291	Vamsee/Staples/Polysorbate	UTARL	03/16/2023	PO(s) Dispatched	Valid	62.14 USD	[Select Action]	Go
▶ 0000052126	KGibbs/B&H/PowerCables	UTARL	03/09/2023	PO(s) Dispatched	Valid	74.84 USD	[Select Action]	Go

4. To copy a requisition, click the **Select Action** drop-down on the requisition that you want to make a copy of.
5. Select **Copy** from the list. Click the **Go** button.
6. The **Checkout - Review and Submit** page is displayed with the information copied from the original requisition.
7. Now you can:
  - a. Remove or add additional items.
  - b. Modify the quantity and the price.
  - c. Add accounting details.
  - d. Save the requisition.
  - e. Perform a Budget check.
  - f. Submit the new requisition for approval.

## Edit a Requisition

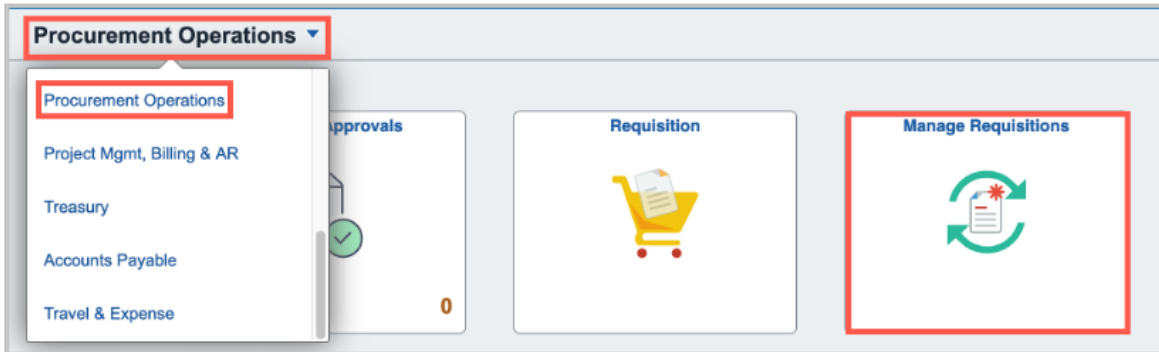
You may need to edit a requisition after creating it. Use the Edit Requisition link to perform activities such as adding comments, changing the number of items, and/or splitting expenses between Chartfield values.

It is possible to edit a requisition if the state is:

- a. Open
- b. Pending
- c. Approved

You cannot edit the requisition if the state is one of the following, you will need to contact Procurement Services to make changes or corrections:

- a. PO(s) Created
  - b. PO(s) Dispatched
  - c. Received
  - d. Partially Received
1. To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Manage Requisitions.**

2. The Manage Requisitions page is displayed.
3. From the Manage Requisitions page, it may be necessary for you to enter one or more search keys to locate the requisition that you want to **Edit**.
4. To edit a requisition, click the **Select Action** drop-down list on the requisition that you want to edit.

**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: | Request State: All but Complete | Budget Status: | Date From: 04/01/2023 | Date To: 06/27/2023 | Requester: 6001234567 | 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	
▶ 0000052329	Housing- Door	UTARL	06/26/2023	Pending	Valid	415.80 USD	Go
▶ 0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD	Go
▶ 0000052327	TEST	UTARL	06/20/2023	Pending	Valid	400.00 USD	[Select Action] Go
▶ 0000052326	CAM test Mav eSHOP	UTARL	06/15/2023	Pending	Valid	256.04 USD	[Select Action] Go

Approvals | Cancel | Copy | **Edit** | View Print | [Select Action]

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

5. The requisition **State** is now **Pending**. This indicates the requisition has been created, but not yet approved.

**Note:** Requisitions can be modified until they are sourced into a Purchase Order (PO). Once a PO has been created, if corrections are required, the requester must contact Procurement Services.

- 6. Select **Edit** from the list. Click the **Go** button.
- 7. Editing a requisition will take it out of the workflow process. You will see this message. Click ok to proceed with editing.



8. The **Edit Requisition - Review and Submit** page displays a summary of the line items already on the requisition.



**Edit Requisition - Review and Submit**

Review the item information and submit the req for approval.

My Preferences Requisition Settings

**Requisition Summary**

Business Unit: UTARL UT Arlington Requisition Name: Housing- Door  
 Requester: 6001234567 Sam Maverick Requisition ID: 0000052329  
 \*Currency: USD Priority: Medium  
 Custom Fields

Cart Summary: Total Amount 415.80 USD

Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete	
1	Office supplies		MARY SPENCER COMPANY	1.0000	Each	415.8000	415.80		Edit	Delete	
Shipping Line 1		*Ship To: 629-102	Address: 601 S. Nedderman Dr. Room 102 Arlington, TX 76019	Add Shipto Comments	Quantity: 1.0000	Add One Time Address	Price: 415.8000	Price Adjustment	Pegging Inquiry	Pegging Workbench	Custom Fields
		Attention To: Sam Maverick	Due Date: 07/19/2023	Accounting Lines							

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

9. To add another line to the requisition, use the **Add More Items** button to open a new Special Requests page.
10. To delete a line from the requisition, use the **Delete** icon, or select the line(s) to be deleted using the selection box to the left of the line-item number and use the **Delete Selected** link.
11. To change accounting information, shipping information, or due date for one requisition line, click the **expansion arrow** for the line to display the line information. Make the necessary changes.
12. To make a change to all lines on a requisition with one action, check the **Select All/ Deselect All** box, then click the **Mass Change** link. The information entered on the Mass Change screen will update to the selected line items.

**Note:** If a change to a requisition causes a funding change, either in amount or funding source, the budget check status will change to **Not Checked** and the budget check process must be run again.

- 13. To change the Shipping Information for all lines on the requisition, click the **Edit for All Lines** link under the Shipping Summary section.

- 14. This will display the **Edit Shipping for All Lines** page. Make the necessary changes and click **OK**.

Edit Shipping For All Lines

Note: The information in this page does not reflect the data in the selected requisition lines. When the "OK" button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

**Shipping Information**

Ship To Location  [Add One Time Address](#)

Due Date  Attention

Comments

**Accounting Lines**

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

**Accounting Information** Personalize | Find | First 1 of 1 Last

Chartfields1	Details	Asset Information	FEF				
Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

OK Cancel

15. Once the requisition is updated and has a valid budget check, click **Save & Submit** to submit the requisition for Workflow approvals.

**Approval Justification**

Enter approval justification for this requisition

Check Budget Pre-Check Budget **Budget Checked StatusValid**

Save & submit Save for Later Add More Items Preview Approvals

## Cancel a Requisition

The Cancel requisition business process is used to delete a requisition that is no longer needed. If a requisition has been sourced into a purchase order (PO), the requester will not be able to cancel the request.

You can Cancel a Requisition if the state is:

- a. Open
- b. Pending
- c. Approved

You cannot cancel the requisition if the state is one of the following, you will need to contact Procurement Services.

- a. PO(s) Created
  - b. PO(s) Dispatched
  - c. Received
  - d. Partially Received
1. To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.



Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Manage Requisitions.**

2. The **Manage Requisitions** page is displayed.
3. From the Manage Requisitions page, it may be necessary for you to enter one or more search keys to locate the requisition that you want to **Cancel**.

- 4. Verify the state of the requisition. To cancel a requisition, it must be in one of the following states:
  - a. Open
  - b. Pending
  - c. Approved
- 5. To cancel a requisition, click the **Select Action** drop-down list on the requisition that you want to cancel.

**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: | Request State: All but Complete | Budget Status: | Date From: 04/01/2023 | Date To: 06/27/2023 | Requester: 6001234567 | 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	
▶ 0000052329	Housing- Door	UTARL	06/26/2023	Pending	Valid	415.80 USD	Go
▶ 0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD	Go
▶ 0000052327	TEST	UTARL	06/20/2023	Pending	Valid	400.00 USD	[Select Action] Go
▶ 0000052326	CAM test Mav eSHOP	UTARL	06/15/2023	Pending	Valid	256.04 USD	[Select Action] Go

Approvals  
Cancel  
Copy  
Edit  
View Print  
✓ [Select Action]

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

- 6. Select **Cancel** from the list. Click the **Go** button.
- 7. Click the **Cancel Requisition** button. This will return you to the **Manage Requisitions Page**.

**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	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](#)

- Notice, the State of the requisition is now **Canceled**, the Total amount is \$0.00, and the Budget Status is **Not Chk'd**.
- To release the pre-encumbrance held by the requisition, click the **Select Action** drop-down list, and select **Check Budget**. 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

[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	
▶ 0000052329	Housing- Door	UTARL	06/26/2023	Canceled	Not Chk'd	0.00 USD	✓ [Select Action] <input type="button" value="Go"/>
▶ 0000052328	Organizer doors APT Life	UTARL	06/20/2023	Pending	Valid	1,889.80 USD	[Select Action] <input type="button" value="Go"/>
▶ 0000052327	TEST	UTARL	06/20/2023	Pending	Valid	400.00 USD	[Select Action] <input type="button" value="Go"/>

**Check Budget**

Copy

PreCheck Budget

Undo-Cancel

View Print

✓ [Select Action]

10. Notice the **Budget Status** is now **Valid** with the amt of \$0.00. The Requisition is now successfully canceled.

The screenshot shows the 'Manage Requisitions' interface. At the top, there are search filters for Business Unit (UTARL), Requisition Name, Request State (All but Complete), Budget Status, Date From (04/01/2023), Date To (06/27/2023), Requester, Entered By (6001234567), and PO ID. Below the search filters is a table of requisitions. The table has columns for Req ID, Requisition Name, BU, Date, Request State, Budget, and Total. One requisition is listed with Req ID 0000052329, Requisition Name Housing- Door, BU UTARL, Date 06/26/2023, Request State Canceled, Budget Valid, and Total 0.00 USD. The 'Request State' and 'Budget' columns for this requisition are highlighted with a red box.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000052329	Housing- Door	UTARL	06/26/2023	Canceled	Valid	0.00 USD	[Select Action] Go

### Re-Open a Requisition

The requisition Re-Open process allows you to reverse the State of a canceled requisition. Some reasons for re-opening a requisition would be if the requisition was canceled in error or if the requisition should have been modified and resubmitted instead of canceled.

In the event, the requisition was canceled by mistake. You can follow the steps below to re-open the requisition for processing.

- 1. To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.

The screenshot shows the 'Procurement Operations' navigation menu. The 'Procurement Operations' dropdown is open, showing options like Project Mgmt, Billing & AR, Treasury, Accounts Payable, and Travel & Expense. The 'Manage Requisitions' tile is highlighted with a red box. The tile features a circular arrow icon with a document and a red asterisk, indicating a re-open or refresh action.

Alternatively, navigate to the page using the Navigation path: **NavBar > Menu > Financials > eProcurement menu > Manage Requisitions.**

- 2. The Manage Requisitions page is displayed.
- 3. From the Manage Requisitions page, it may be necessary for you to enter one or more search keys to locate the requisition that you want to **Re-Open**.

**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: | Request State: All but Complete | Budget Status: | Date From: 06/22/2023 | Date To: 06/29/2023 | 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
▶ 0000052329	Housing- Door	UTARL	06/26/2023	Canceled	Valid	0.00 USD

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

Copy | **Undo-Cancel** | View Print | [Select Action] | Go

**Note:** Notice, the State of the requisition is **Canceled**.

- 4. To re-open a requisition, click the **Select Action** drop-down list for the requisition that you want to re-open.
- 5. Select Undo-Cancel from the list. Click the **Go** button.

**Requisition Details for:**

Business Unit: UTARL | Date: 06/26/2023  
Requisition ID: 0000052329 | Status: Canceled  
Requisition Name: Housing- Door | Total: 0.00 USD

**Line Details**

Line	Item Description	Status	Price	Qty	Total
1	Office supplies	Canceled	415.80000 Each	1.0000	415.80

**i** If you would like to Resubmit this Requisition first click the "Reopen Requisition" button and then select the "Edit Requisition" from the Manage Requisitions page and click Go. Once you are at the Requisition Summary page click the "Save and Submit" button.

**Reopen Requisition**

[Return to Manage Requisitions](#)



- Click the **Reopen** Requisition button.

The screenshot shows the 'Manage Requisitions' interface. At the top, there are search filters for 'Requisition Search' and 'Keyword Search'. Below this is a 'Search Requisitions' section with various input fields: Business Unit (UTARL), Requisition Name, Request State (All but Complete), Budget Status, Date From (06/22/2023), Date To (06/29/2023), Requester, Entered By, and PO ID. A 'Search' button and a 'Clear' button are present, along with a link to 'Show Advanced Search'. Below the search section is a table of 'Requisitions'. The table has columns for Req ID, Requisition Name, BU, Date, Request State, Budget, and Total. A single requisition is listed: Req ID 0000052329, Requisition Name Housing- Door, BU UTARL, Date 06/26/2023, Request State Open, Budget Not Chk'd, and Total 415.80 USD. A dropdown menu is open over the 'Request State' column, showing options: Check Budget, Copy, Edit (highlighted with a red box), PreCheck Budget, View Print, and [Select Action]. A 'Go' button is at the bottom right of the table. At the bottom of the interface, there are links for 'Create New Requisition', 'Review Change Request', 'Review Change Tracking', 'Manage Receipts', and 'Requisition Report'.

- Notice, the State of the requisition is now **Open**.
- To return to the requisition to make changes, click the Select Action drop-down list.
  - Select **Edit**. Click the **Go** button.
  - The Edit Requisition - Review and Submit page is displayed. This page provides a summary of the line items that were on the requisition that you re-opened. At this point, you can:
  - You can now:
    - Remove or add additional items.
    - Modify the quantity and the price.
    - Add accounting details.
    - Save, budget check, and submit the requisition for approval.

## View the Printable Version of a Requisition

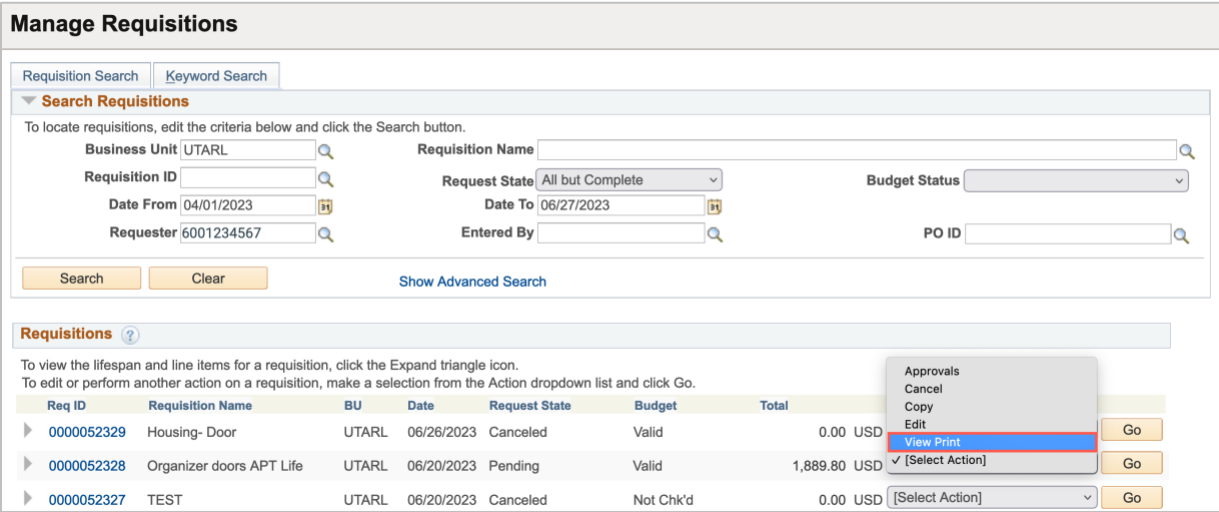
The View a Printable Version of Requisition process enables you to print a copy of the requisition if necessary.

- To navigate to the Manage Requisition page select the **Procurement Operations Homepage** and click on the **Manage Requisitions** tile.



Alternatively, navigate to the page using the Navigation path: **NavBar > Menu > Financials > eProcurement menu > Manage Requisitions.**

- 2. The Manage Requisitions page is displayed.
- 3. From the Manage Requisitions page, it may be necessary for you to enter one or more search keys to locate the requisition that you want to **Print**.
- 4. To View a Printable Version of a requisition, click the **Select Action** drop-down list for the requisition that you want to print.



- 5. Select **View Print** from the list. Click the **Go** button.
- 6. You can choose to display this report with or without the distribution details. The distribution details contain Chartfield information.

Requisition and Purchase Order Training Guide

<b>Business Unit:</b> UTARL		<b>Requester:</b> 6001234567		<b>Status:</b> Canceled			
<b>Requisition:</b> 0000052329		<b>Requested By:</b> Sam Maverick		<b>Currency:</b> USD			
<b>Requisition Name:</b> Housing- Door		<b>Entered Date:</b> 6/26/23		<b>Requisition Total:</b> 0.00			
<b>Header Comments:</b> Final delivery Sam Maverick 817-272-2155							
<b>Line:</b> 1	<b>Item Description:</b> Office supplies	<b>Quantity:</b> 1.0000	<b>UOM:</b> EA	<b>Price:</b> 415.8000	<b>Line Total:</b> 415.80		
					<b>Line Status:</b> Canceled		
<b>Line Comments:</b> <<Office supplies 2023>>							
<b>Ship Line:</b> 1		<b>Ship To:</b> 629-102		<b>Address:</b>			
<b>Attention:</b> Sam Maverick		<b>Due Date:</b> 7/19/23		<b>Shipping Quantity:</b> 1.0000			
<b>Ship Via:</b> BEST_WAY		<b>Freight Terms:</b> FOBDESTINT		<b>Shipping Total:</b> 415.80			
				601 S. Nedderman Dr. Room 102 Arlington TX 76019 United States			
Dist	Status	Location	Qty	Percent	Amount	GL Unit	Account
1	Canceled	CENT110	1.0000	100.00	415.80	UTARL	63204
Dept	Fund	Class					
543210	4700	500					
Open QTY	Open Amt						
0.0000	0.0000						
GL Base Amount	Currency	Sequence	Capitalize				
415.80	USD	0	N				
Chartfield 1							
123456							

**Note:** This image does not contain the distribution details.

## Purchase Orders

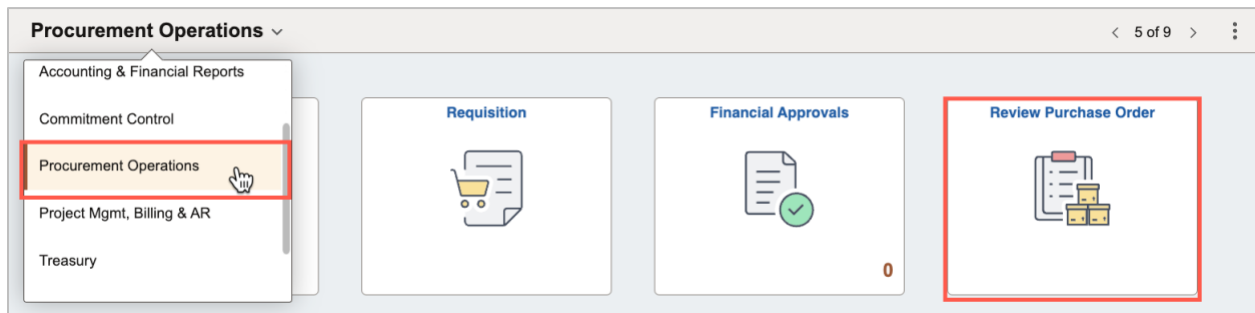
The requisition is the first step in the purchasing cycle. A requisition is an internal document and is used to specify products or services needed, delivery requirements and provides approvals for the purchase. It is the source document from which the purchase order (PO) is prepared. A PO is an external document that provides the supplier with the information needed to complete the order. Once a PO is budget checked and dispatched, the requisition pre-encumbrance is released, and a PO encumbrance is created.

At times it may be useful to view details about the PO, there are several ways to find the needed details of a PO. You can use the PO Inquiry page to view additional details about the PO, you can print a copy of the PO for physical records, and you can view the PO Activity Summary.

### PO Inquiry

The Purchase Order Inquiry page includes information such as PO status, receipt status, encumbrance balance, and direct links to related documents. Please note, some of the links open in a new window.

1. Select the **Procurement Operations** home page and click the **Review Purchase Order** tile.



Alternatively, navigate to the page by using the Navigation path: **NavBar > Menu > Financials > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.**

2. On the Find an Existing page, enter **UTARL** for the Business Unit (if it does not pre-populate) and the PO ID number for the PO number to view, then click **Search**.

**Purchase Order Inquiry** New Window | Help

**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 Choose from recent searches ✎ Saved Searches Choose from saved searches ✎

Business Unit = UTARL 🔍

PO ID begins with  🔍

Contract SetID begins with  🔍

Contract ID begins with  🔍

Release Number =

Purchase Order Date =  📅

PO Status =

Short Supplier Name begins with  🔍

Supplier ID begins with  🔍

Supplier Name begins with  🔍

Buyer begins with  🔍

Buyer Name begins with  🔍

[^ Show fewer options](#)

Case Sensitive

Search Clear

**Note:** If the PO number is unknown, other search criteria can be used to look up the PO.

3. The **PO Status** can be seen at the top right of the page.

**Purchase Orders**

Purchase Order Inquiry

**Purchase Order**

Business Unit UTARL **PO Status** Dispatched

PO ID 000061376 Budget Status Valid

▼ **Header**

PO Date 03/12/2024

Supplier Name SCARBOROUGH-005 Backorder Status Not Backordered

Supplier ID 0000040263 Receipt Status Received

Buyer Joseph S White  Hold From Further Processing

PO Reference

Header Details Activity Summary

All RTV Header Comments...

Matching Document Status

Actions

**Amount Summary**

Merchandise	12,673.66
Freight/Tax/Misc.	0.00
<b>Total</b>	<b>12,673.66 USD</b>
<b>Encumbrance Balance</b>	<b>12,673.66 USD</b>

Award Reason Prime Source

Justification Method Best Value

**Lines** Personalize | Find | View All | 📄 📄 First 1 of 1 Last

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		Flagship Cotton Crew Socks	45101700	1999.0000	LOT	12,673.66 USD	Active

[View Printable Version](#)  
[View Approvals](#)

Return to Search Previous in List Next in List Notify Related Links

4. To view Supplier details, click on the **Supplier Name**.

The screenshot shows a 'Purchase Order Inquiry' page. At the top, it displays 'Purchase Order' with 'Business Unit UTARL' and 'PO ID 0000061376'. A red box highlights the 'PO Status' as 'Dispatched' and 'Budget Status' as 'Valid'. Below this is a 'Header' section with fields for 'PO Date 03/12/2024', 'Supplier Name SCARBOROUGH-005', 'Supplier ID', and 'Buyer SCARBOROUGH SPECIALTIES, INC.'. A red box highlights the supplier details pop-up window, which includes: 'Short Name SCARBOROUGH-005', 'Phone +1 806/792-9925', 'Email ACCOUNTING@BRANDABILITY.COM', 'Location SHARED', '10501 INDIANA AVE', 'LUBBOCK, TX 79423-5179', 'United States', and 'Contact Name', 'Title', 'Phone', 'Email', 'Address 4512 Loma Grande Dr, El Paso, TX 79934'. To the right, there is a summary table with 'Merchandise 12,673.66', 'Freight/Tax/Misc. 0.00', 'Total 12,673.66 USD', and 'Combrance Balance 12,673.66 USD'. At the bottom, there are navigation buttons like 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

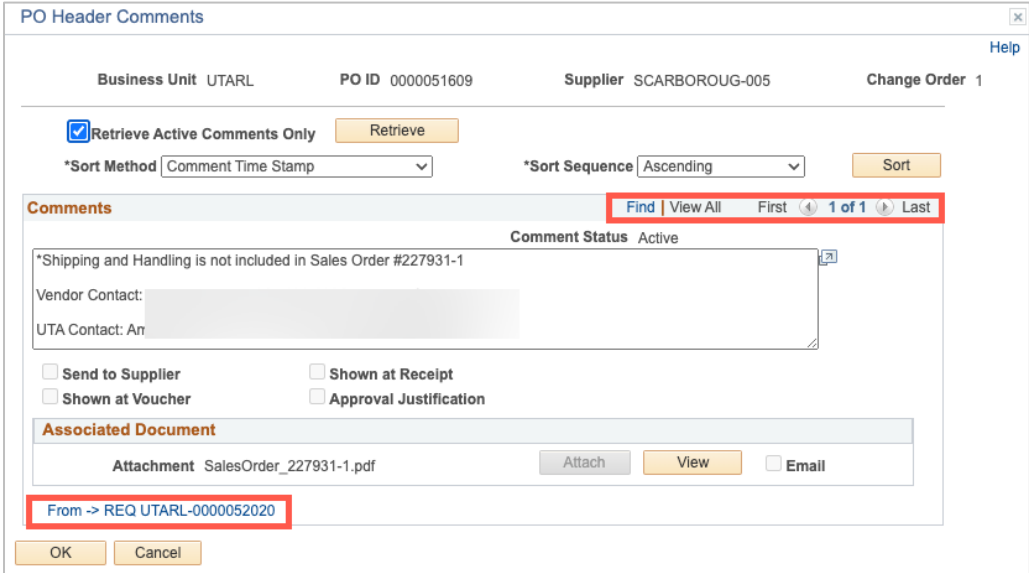
5. Click the **Header Details** to view details regarding the purchase order header.

The screenshot shows the 'PO Header Details' page. It includes fields for 'Business Unit UTARL', 'PO ID 0000051609', and 'Change Order 1'. The 'PO Details' section contains 'Supplier SCARBOROUGH SPECIALTIES INC', 'Budget Status Valid', 'PO Date 04/11/2023', 'PO Type General', 'Billing Location BILLTO', and 'Exchange Rate 1.00000000'. The 'Process Control Option' section has checkboxes for 'Hold From Further Processing' (unchecked) and 'Dispatch' (checked), along with 'Method Print' and 'STANDARD'. The 'Custom Fields' section lists 'Custom Character 1', 'Custom Character 2', 'Custom Date', and 'Custom Field 1' through 'Custom Field 4'. A 'Return' button is at the bottom left.

- 6. The **Change Order** link is used to view changes and corrections to the purchase order. If there is more than one, it may be necessary to use the navigation buttons to view all change orders.
- 7. The **All RTV** link is used to view items that are returned to the supplier. UTA does not use this module.
- 8. To view the Matching status, click the **Matching** link which displays the match status of the PO.



- 9. Click **Return** to go back to the Purchase Order Inquiry
- 10. Click **Header Comments** to view comments and attachments that apply to the entire purchase order.



11. The Document Status link is to view all documents related to the purchase order. To find information for one document type, click on the icon in the purchase order life cycle. The icons in color have actions at that status. To again show all document information, click the **Show All** button. To navigate to a particular document, click on the **DOC ID**.

**Document Status Purchase Order**

Business Unit UTARL **PO ID PDWRLSS14**  
 Document Date 01/13/2015 Status Compl  
 Currency USD Document Type Purchase Order  
 Buyer Blaze Nedderman Merchandise Amt 1,430.13  
 Budget Status Valid

Requisitions Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts(1) Returns Vouchers(8) Payments(7)

**Show All**

**Associated Document** Personalize | Find | View All | First 1-5 of 16 Last

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		UTARL	Receipt	0000001216	Received	05/08/2015	0000047992	SHARED	
▼ Actions		UTARL	Voucher	00026873	Posted	02/01/2015	0000047992	SHARED	

Return to Search

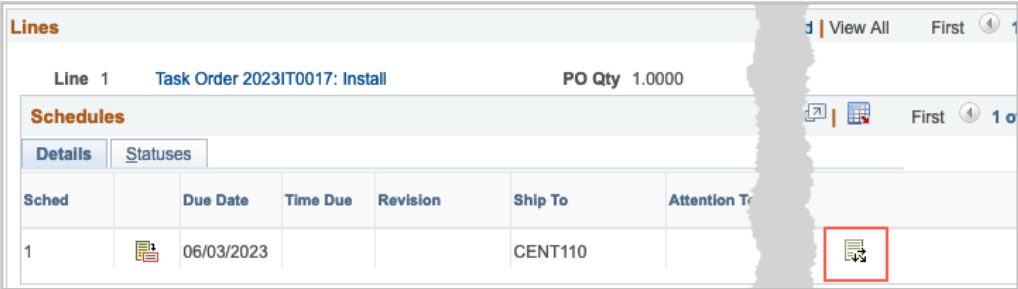
12. To view distribution information for a PO line, click on the **Schedule** icon for the PO line.

**Lines** Personalize | Find | View All | First 1 of 1 Last

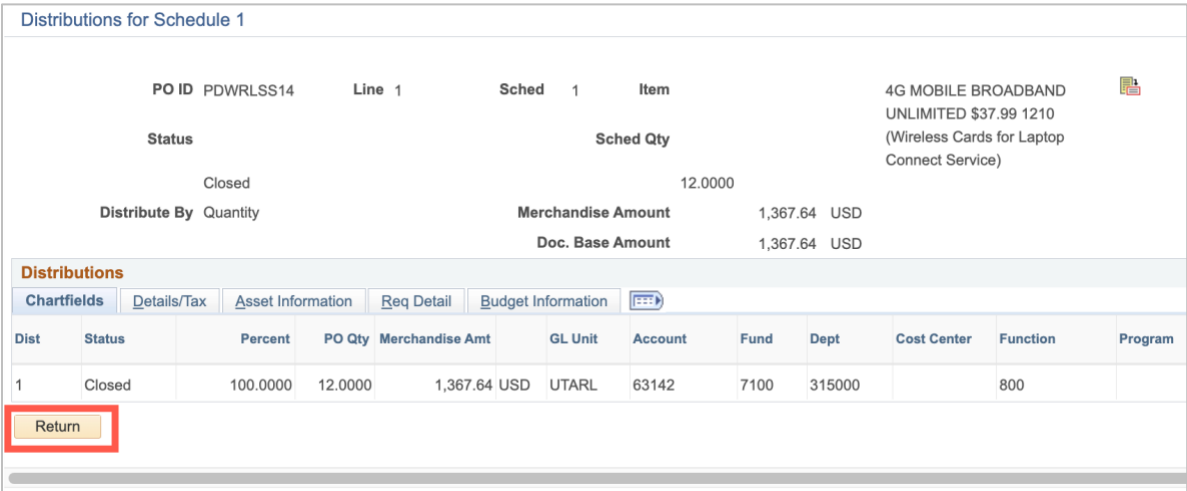
Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status		
1		Task Order 2023IT0017: Install	72141117	1.0000	LOT	14,289.74 USD	Active		

a. From the Schedules page, click on the **Distributions/ChartFields** icon.

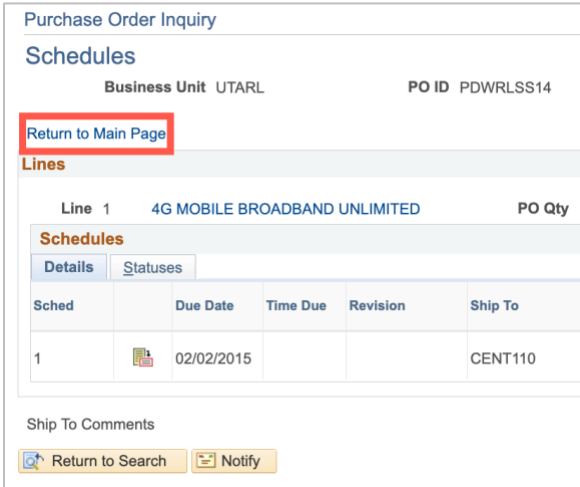




b. The distribution for the PO line will be displayed. To return to the Schedules screen, click the **Return** button on the Distributions page.



c. To return to the Purchase order Inquiry Screen click the **Return to Main Page** link on the Schedules screen.



### Print PO

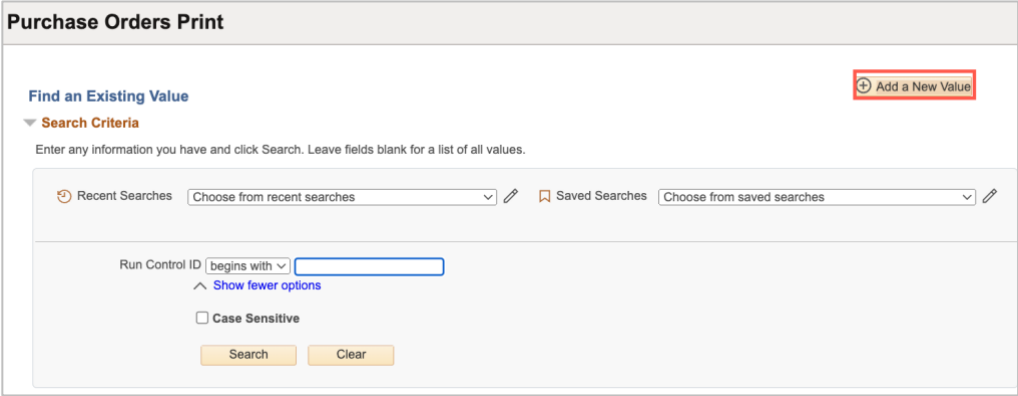
To Print a PO navigate to the page using the Navigation path: **NavBar > Menu > Financials > Purchasing > Purchase Orders > Review PO Information > Print POs.**

- 1. The Purchase Orders Print page is displayed. This page is used to search for an existing Run Control ID (Find an Existing Value) or to create a new Run Control (Add a New Value). The first time a purchase order report is printed, a Run Control ID must be created. A Run Control ID is a unique name used to identify which inputs on a page are saved and used to run a specific report. It is case-sensitive, can be up to 30 characters in length, and can contain underlines and dashes. It cannot contain spaces. Once a run control is created, it can be accessed from the **Find an Existing Value** tab.

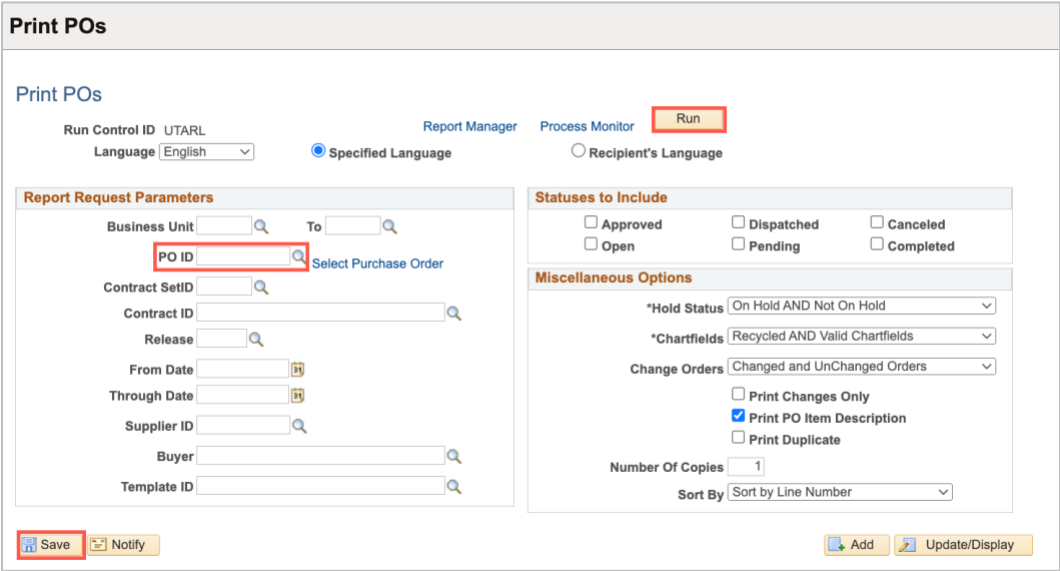


**Note:** A run control is user-specific and cannot be used by anyone other than the individual who created it.

- 2. Click the **Add a New Value** tab.



- 3. Click in the **Run Control ID** field and provide a name for the run control.
- 4. Click the **Add a New Value** button.
- 5. From the Print POs page, enter the values needed to run a purchase order report.
  - a. Enter **UTARL** into the Business Unit field.
  - b. Enter the Purchase Order number that you want to print in the **PO ID** field.
  - c. Click **Save**.
  - d. Click **Run**.



- 6. The Process Scheduler Request page will populate. From the **Type** drop-down menu, select:

- a. **Web**, which will make the report available in the Reports Manager
- b. **Email**, this will email the pdf PO to your email.

Process Scheduler Request

User ID 6001234567 Run Control ID UTARL

Server Name [dropdown] Run Date 07/14/2023 [calendar icon]

Recurrence [dropdown] Run Time 3:17:11PM [button: Reset to Current Date/Time]

Time Zone [dropdown]

Select	Description	Process Name	Process Type	*Type	Format	Distribution
<input checked="" type="checkbox"/>	PO Dispatch/Print	POPO005	SQR Report	Email [dropdown]	PDF [dropdown]	Distribution

OK Cancel

- 7. Click **OK**.
- 8. Click the **Process Monitor** link.

Print POs

Run Control ID UTARL Report Manager **Process Monitor** Run

Language English [dropdown]  Specified Language  Recipient's Language

- 9. Notice, the Run Status and the Distribution column. It may be necessary to click the **Refresh** button until the Run Status is displaying Success and the Distribution Status is Posted.

Process List Server List

View Process Requests

User ID 6001234567 [dropdown] Type [dropdown] Last [dropdown] [dropdown] Days [dropdown] Refresh

Server [dropdown] Name [dropdown] Instance [dropdown] Range Clear

Run Status [dropdown] Distribution Status [dropdown] Save On Refresh Report Manager Reset

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12353361		UTARL	SQR Report	POPO005	6001658605	07/14/2023 4:29:26PM CDT	Queued	N/A	Details	Actions
<input type="checkbox"/>	12353068		UTARL	SQR Report	POPO005	6001658605	07/14/2023 3:47:58PM CDT	Success	Posted	Details	Actions

Go back to Purchase Orders Print

Save Notify

Process List | Server List

- 10. Click the **Go back to Purchase Orders Print** link.

11. If Email was chosen to have the Printed PO emailed, an email should be received with the PDF of the PO attached.
12. If Web was chosen, click the **Report Manager** link. Dan

**Print POs**

Run Control ID UTARL

Language English

**Report Manager** Process Monitor

Specified Language  Recipient's Language

Run

13. Click the **Administration tab** to view the report.
14. Click the PO **Dispatch/Print link** to display the PO.
15. To go back to the Print PO screen, click the **Close** button to close the new window.
16. Click the **Go back to Purchase Orders Print** link.

List | Explorer | **Administration** | Archives

**View Reports For**

User ID 6001658605 Type Last 1 Days Refresh

Status Folder Instance to

**Report List** Personalize | Find | View All | First 1-3 of 3 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	13732852	12353024	<b>PO Dispatch/Print</b>	07/14/2023 3:45:55PM	Acrobat (*.pdf)	Posted	Details

Select All Deselect All

Delete Click the delete button to delete the selected report(s)

**Go back to Purchase Orders Print**

Save

List | Explorer | Administration | Archives

## PO Activity Summary

The PO Activity Summary page displays the status of the purchase order (PO) and the total amount of the merchandise. The PO Activity summary page gives insight into receiving, invoicing, matching, and any activities that have been performed on the selected PO.

1. Begin by navigating to the Activity Summary page using the Navigation path: **NavBar > Menu > Financials > Purchasing > Purchase Orders > Review PO Information > Activity Summary.**

- 2. From the PO Activity Summary search page, enter the **PO Number** to be viewed.
- 3. Click the **Search** button.

**PO Activity Summary**

**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: Choose from recent searches | Saved Searches: Choose from saved searches

\*Business Unit: [dropdown] UTARL

**PO Number**: [dropdown] begins with 2023EHS718

Purchase Order Date: [dropdown] [input]

Purchase Order Reference: [dropdown] begins with [input]

Supplier ID: [dropdown] begins with [input]

[Show fewer options](#)

Case Sensitive

**Search** Clear Save Search

**Search Results**

1 rows - Business Unit "UTARL" PO Number "2023EHS718"

View All | First | 1 of 1 | Last

Business Unit	PO Number	Purchase Order Date	Purchase Order Reference	Supplier ID	
UTARL	2023EHS718	09/27/2022	FY 23 Fire Extinguisher	0000040764	>

**Note:** Depending on how many line items are on the PO, it may be necessary for you to click the **View All** link or the **Show Next Row** button. In this example, all line items are displayed.

- 4. The Activity Summary search page is displayed. This page displays the status of the purchase order (PO) and the total amount of the merchandise.

**Activity Summary**

<b>Business Unit</b> UTARL	<b>PO Status</b> Dispatched
<b>Purchase Order</b> 2023EHS718	<b>Supplier</b> RANGER FIRE INC
<b>Merchandise Amount</b> 90,297.53 USD	<b>Supplier Location</b> SHARED
<b>Merchandise Receipt</b> 0.00 USD	
<b>Merchandise Returned</b> 0.00 USD	
<b>Merchandise Invoice</b> 0.00 USD	
<b>Merchandise Matched</b> 0.00 USD	

**Lines** Personalize | Find | View All | First 1 of 1 Last

<span>Details</span> <span><b>Receipt</b></span> <span>Invoice</span> <span>Matched</span> <span>RTV</span>									
Line	Line Details	Item	Item Description	UOM	Amount Received	Open Quantity	Open Amount	Currency	
1			FY 23 Fire Extinguisher Insp M	LOT		0.0000	0.000	USD	

Return to Search Notify

5. The **Details** section displays purchase order line-item information.
6. The **Receipt** section displays receiving information. This section provides how many items have been received, accepted and the number of items still open for receipt.
7. The **Invoice** section displays the items on the PO that have been invoiced.
8. The **Matched** section displays the items that have gone through the matching process. The matching process is performed to ensure that the purchase order, the receiving document (if required), and the invoice all correspond.
9. The **RTV** (Return to Vendor) section displays the items that have been returned to the vendor/supplier. UTA does not use this module.