Search for a Supplier

The purpose of this job aid is to explain how to search for a Supplier that is connected to PaymentWorks and can be used for ordering goods and services for the University of Texas at Arlington. A thorough search should be performed to select the correct supplier to avoid duplication.

Step 1: UTShare

There are two screens that can be used to search for a Supplier in UTShare, the Supplier Information page and the Review Supplier page.

Search for a Supplier using the Supplier Information Page

1) Navigating to the Supplier Information page: NavBar > Menu > Financials > Suppliers > Supplier Information > Add/Update > Supplier.

2) The Supplier Information page is displayed. From the Find an Existing Value tab, leave the default value “UTARL” in the SETID field. You may search for an existing Supplier by Supplier ID or Name. Enter the appropriate search criteria for the Supplier you want to view.

3) Click the Search button.

4) A Search Results table is displayed with a list of Suppliers that meet the search criteria entered. To view details for a specific Supplier, select the appropriate Supplier from the list. Clicking on any value on the supplier’s row will populate the Supplier Information screen.

5) The Summary tab will show general Supplier information, including the Supplier Status. To see further information, click on the appropriate tab.
Search for a Supplier using the Review Supplier Page

The Review Supplier page is used to search for an existing Supplier. This page provides additional fields not available on the “Supplier Information” page. It allows detailed information for multiple Suppliers to be viewed at one time. The Review Suppliers page includes several options for searching for a Supplier, including by Supplier ID, name or address.

1) Navigate to the Review Supplier Page: NavBar > Menu > Supplier > Supplier Information > Add/Update > Review Suppliers.

2) You may search for a Supplier by ID, name, or address. Enter the appropriate search criteria for the Supplier to be viewed. Using the search operator “Contains” will return more robust search results.

3) Click the Search button.

4) A Search Results table is displayed with a list of Suppliers that meet the search criteria entered. To view details for a specific supplier, click the appropriate tab (i.e. Main Information, Additional Supplier Info, and Audit Information).

Note: The Supplier Status is on the Additional Supplier Info tab.
5) If the Supplier is not found in the Review Supplier page search, go to Step 2: PaymentWorks.

Step 2: PaymentWorks

1. Navigate to PaymentWorks by going to: myapps.uta.edu and click on the PaymentWorks icon OR

2. Log in with your UTA email address and NetID password. Click Sign In.

3. Click on Setup and Manage Supplier Portal.

4. Click on the Suppliers tab.

5. The Supplier list is displayed and includes connected and non-connected Suppliers. The green dot in the “Connected” column indicates that the Supplier is connected and can be used for purchasing goods and services.
6. To display connected Suppliers only, click in the “Connected” search field and select Connected Only. Scroll through the connected Supplier list or enter the search parameter(s) in the required search field(s) and click Search. The specified Supplier information is displayed.

7. If the Supplier name and correct address are found, the Supplier is connected and can be used for purchasing goods and/or services at UTA. No additional searching is required. NOTE: Verify the Supplier address is the same as the Supplier for which you are searching.

8. If the Supplier name is found but does not display a green dot (connected), click on the Vendor Master Updates to review the Supplier’s percent completion in the registration process.

9. Click on the New Vendors tab.

10. The Filter Results panel is displayed, and you can search by the Supplier name or email address. It will default to the Requests Page. Choose Onboardings Tracker from the drop-down menu.

Note: You can click on the column headers to re-sort the column.
11. The search results will display and provide the Supplier status.

Onboardings expand to the details view when the user clicks the arrow to the bottom right of each row. The details view includes up to three tabs depending on where the payee is in the onboarding process:

1. Progress - created when the onboarding is initiated
2. Invitation Detail - created when the onboarding is initiated
3. Account Info - created when the payee verifies their account

The Progress tab of the details view displays the following:

- The current status
- The last previous status for each of the completed steps
- Similar to the list view, each status is hyperlinked to a tab or page that displays more details if applicable
- A timestamp for each status
- The user name and email address of any user who actioned this onboarding
- Any messages sent to the payee with the invitation approval, invitation rejection, or registration return
- If a registration was returned, the number of submissions for this onboarding
- Which steps remain until the onboarding is complete
12. If the Supplier name and correct address are found and the “New Vendor Registration” status is “Onboarding Complete” WITH a vendor number, then the Supplier is connected and can be used for purchasing goods and/or services for UTA.

13. If the Supplier name and correct location are found and the “New Vendor Registration” status is anything other than “Onboarding Complete” WITH a vendor number, then the Supplier has been invited and/or is in some stage of the registration process. The Supplier is not connected and cannot be used for purchasing goods and/or services at the current time. Note: Do NOT re-invite an already invited Supplier.

14. If the Supplier name is not found or the required Supplier address is not listed, log into PaymentWorks and send an invite to the Supplier. Refer to the “Invite a Supplier” Job Aid.