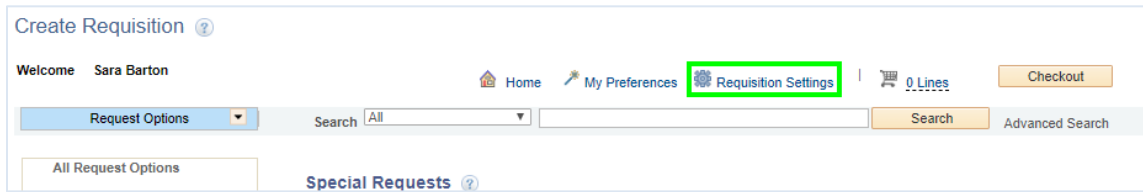


Special Request Requisition

The Special Request form is used to request goods or services that are not available from MAV eSHOP. This form captures the details of the purchase, such as item information, quantity, shipping terms, other purchase obligations or conditions.

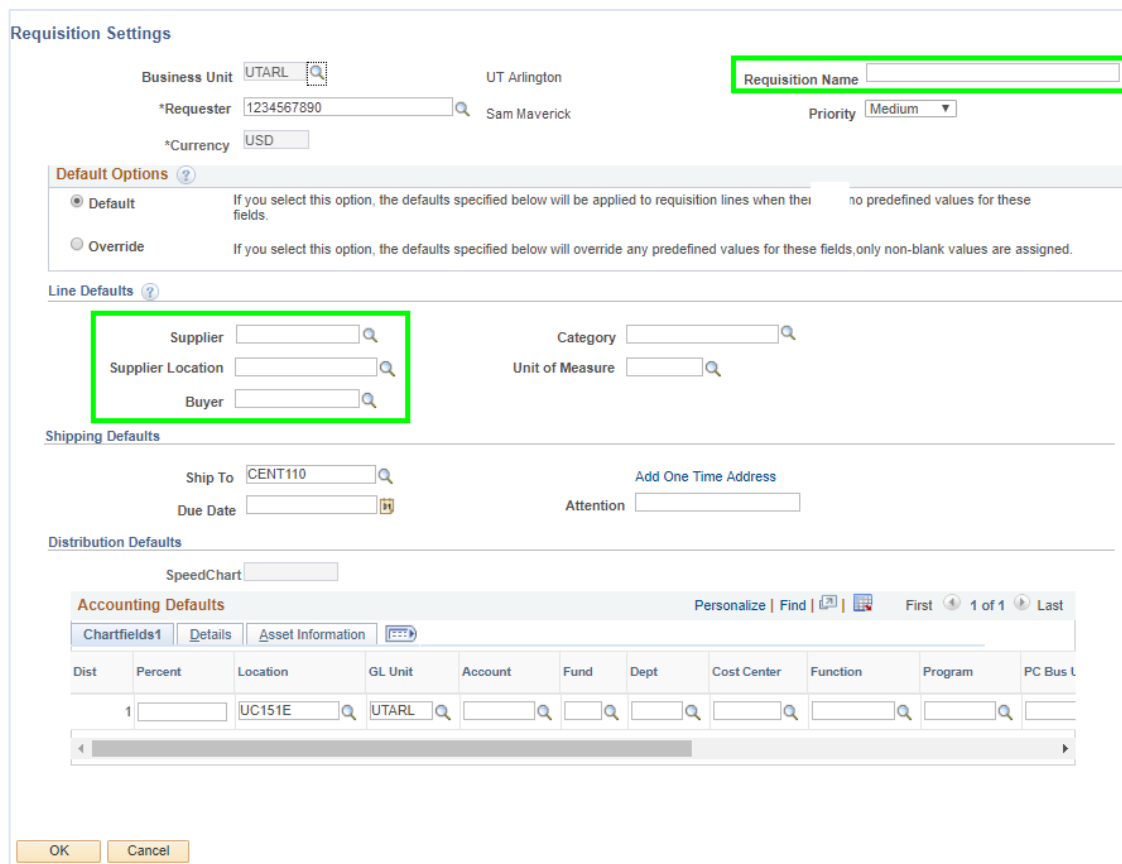
To submit a requisition for workflow approvals, complete the following steps:

- 1) Begin by navigating to the Requisition in UTShare at Navigator > Financials > eProcurement > Requisition. Alternatively, select the Procurement Operations homepage and click the Requisition tile.
- 2) The Create Requisition page is displayed:
 - a. Enter or lookup your Empl ID in the Requester field.
 - b. Click the OK button to start the requisition.
- 3) The Create Requisition page is displayed.
- 4) To access the Requisition Defaults, click on the Requisition Settings link. This will display the page where default values can be entered. Default values will be repeated on every line added to the requisition. Information entered in this section will help you avoid repetitive entries; however, data can be changed on individual lines as needed. This section should be used to enter the Requisition Name and enter or lookup the Supplier and Buyer information. All other fields are optional.



Note: To use the SpeedChart field on the Accounting Defaults, you must select the Override radio button in the Default Options section.

- 5) Once the appropriate values are entered, click the “OK” button to enter requisition line item information.
- 6) Values entered on the Requisition Settings page should populate on the line page. For all fields not populated, enter line item information to include:
 - a. A brief description of the item or service in the Item Description field (required).
 - b. A dollar amount of the item or service in the Price field. This is the per-unit price (required).
 - c. The number of units being purchased into the Quantity field (required).
 - d. The Unit of Measure (required).
 - e. The Category code (used to identify the item you are purchasing - required).
 - f. The Due Date for the good or service. This date indicates when the goods are expected to arrive. Note, for service/maintenance contracts, enter the end date of the service.
 - g. The Additional Information textbox can be used to provide any comments or remarks that relate to the item or service (e.g. product specifications). Selecting the Send to Supplier box



Requisition Settings

Business Unit: UT Arlington
 *Requester: Sam Maverick
 *Currency:
 Requisition Name: (highlighted)
 Priority:

Default Options

Default: If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
 Override: If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults (highlighted)

Supplier: (highlighted)
 Supplier Location: (highlighted)
 Buyer: (highlighted)
 Category:
 Unit of Measure:

Shipping Defaults

Ship To:
 Due Date:
 Add One Time Address:
 Attention:

Distribution Defaults

SpeedChart:

Accounting Defaults

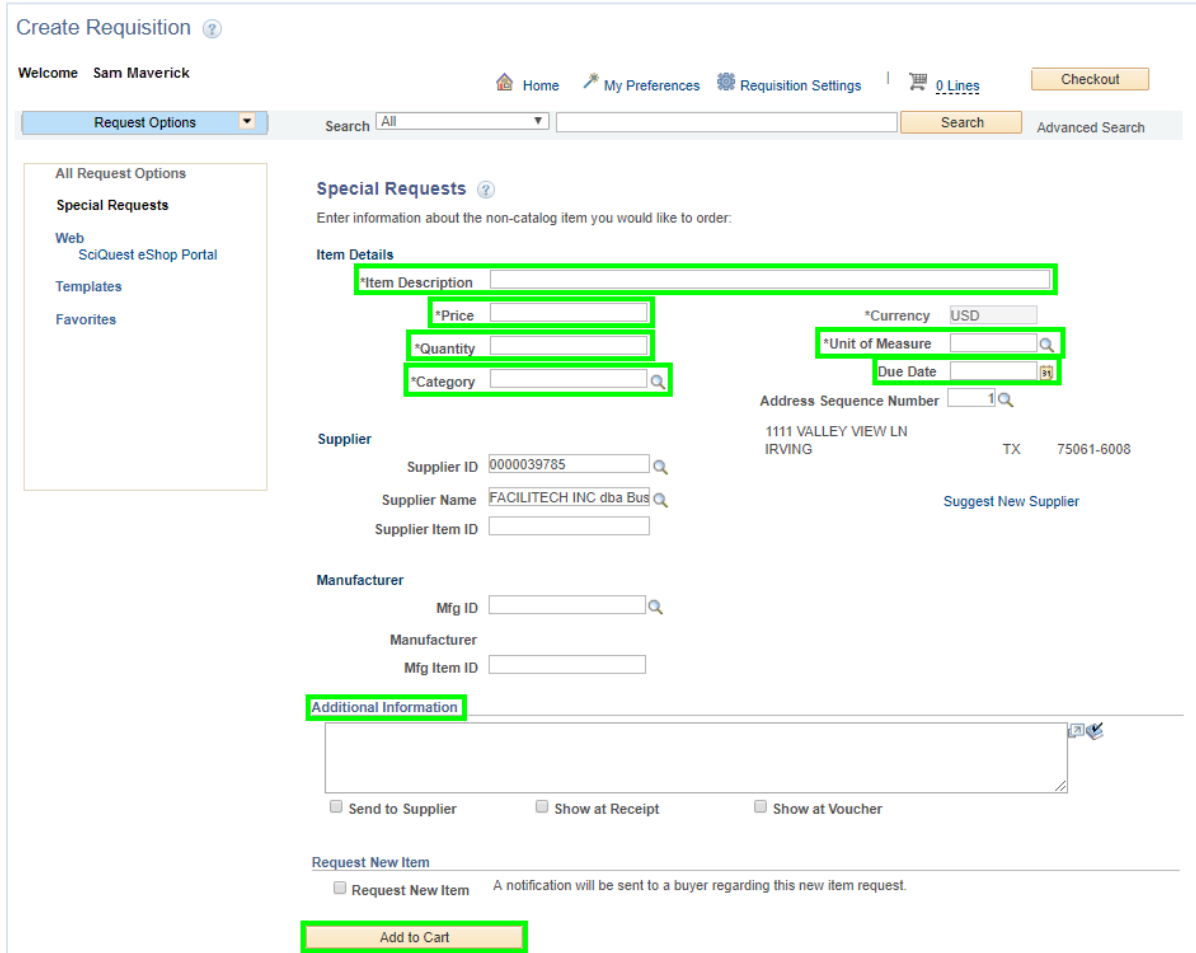
Personalize | Find | | | | First | 1 of 1 | Last

Chartfields1	Details	Asset Information								
Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center	Function	Program	PC Bus t
1		<input type="text" value="UC151E"/>	<input type="text" value="UTARL"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

will include the line item comment on the PO. Selecting the Show at Receipt box will allow the party entering the receipt for the item to see the comment. Selecting the Show at Voucher box will allow the party entering the voucher for the line item to see the comment.

Note: The cost of Shipping & Handling should be added as a separate line item on the Requisition. For S&H use category code 78121603 (Freight Fees).



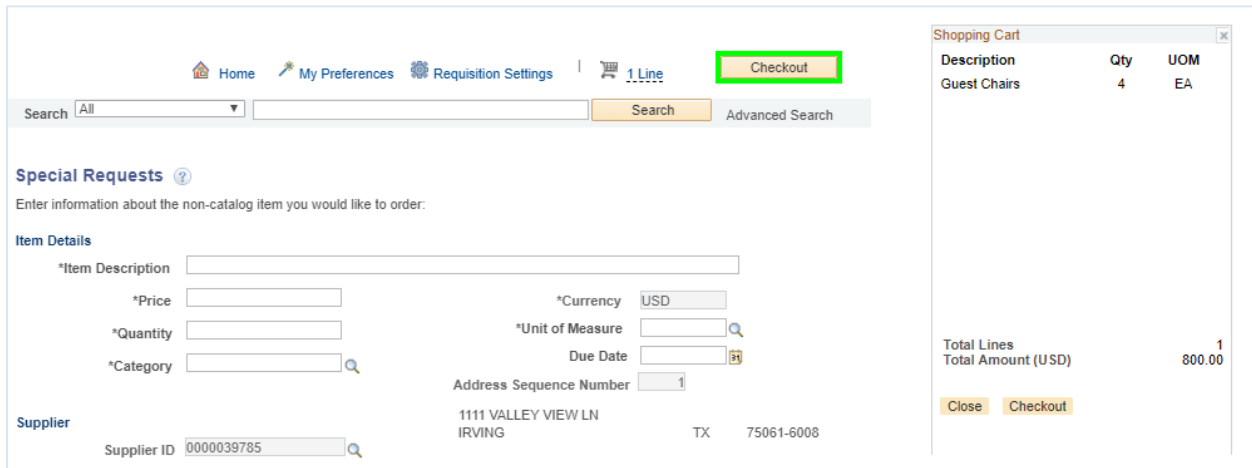
- 7) Click the Add to Cart button. Notice, the item is added to the Shopping Cart box. This section keeps a running total of the line items and the total cost of the Requisition. A blank Special Request page is displayed.

NOTE: If the Shopping Cart does not display on the right side of the screen, click on the My Preferences link at the top of the requisition. If it is not checked, click on the selection box for the "Auto display shopping cart when adding items" option under the Shopping Cart Display section.

- 8) If necessary, repeat step 6 and 7 to add additional line items.

Note: The Supplier ID and Name and Address Sequence Number fields are locked on subsequent lines so that only one vendor is entered on a requisition. If a change to the selected vendor needs to be made, it can be made on line item #1

- 9) Once all lines have been entered, click the Checkout button to finalize the requisition.



Home My Preferences Requisition Settings | 1 Line **Checkout**

Search All Search Advanced Search

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
 Address Sequence Number

Supplier
Supplier ID 1111 VALLEY VIEW LN TX 75061-6008
IRVING

Shopping Cart

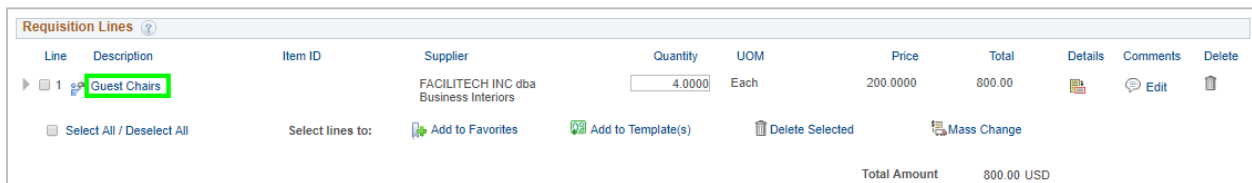
Description	Qty	UOM
Guest Chairs	4	EA

Total Lines: 1
Total Amount (USD): 800.00

Close Checkout

10) The Checkout – Review and Submit page provides a summary of the line items entered on the requisition. This page allows you to edit a line, add accounting information and submit the requisition for approval. Fields on this page will populate according to the information entered on the Requisition Settings/Defaults page.

To access the line for editing, click on the line item description.



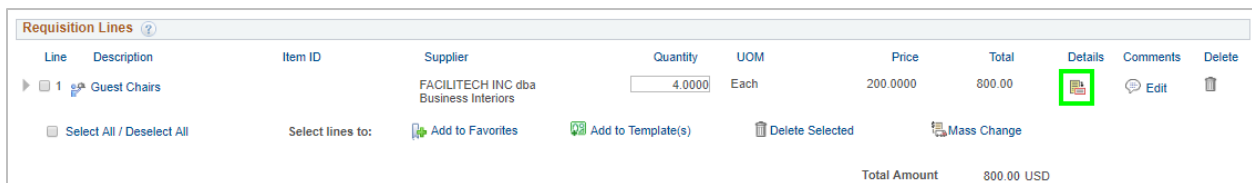
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Guest Chairs		FACILITECH INC dba Business Interiors	4,0000	Each	200,0000	800.00			

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

Total Amount: 800.00 USD

11) 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 setup 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.

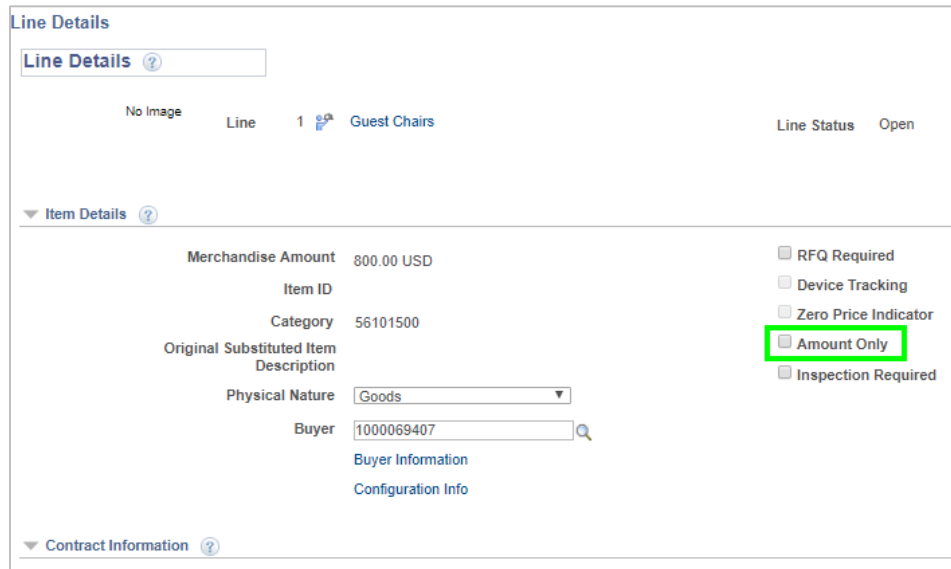
To flag an item as “Amount Only”, click on the Line Details icon, and click the box for “Amount Only”. Click “OK” to return to the Checkout page.



Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Guest Chairs		FACILITECH INC dba Business Interiors	4,0000	Each	200,0000	800.00			

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

Total Amount: 800.00 USD



Line Details

Line Details ?

No Image Line 1 Guest Chairs Line Status Open

▼ Item Details ?

Merchandise Amount 800.00 USD

Item ID

Category 56101500

Original Substituted Item Description

Physical Nature

Buyer

Buyer Information

Configuration Info

RFQ Required

Device Tracking

Zero Price Indicator

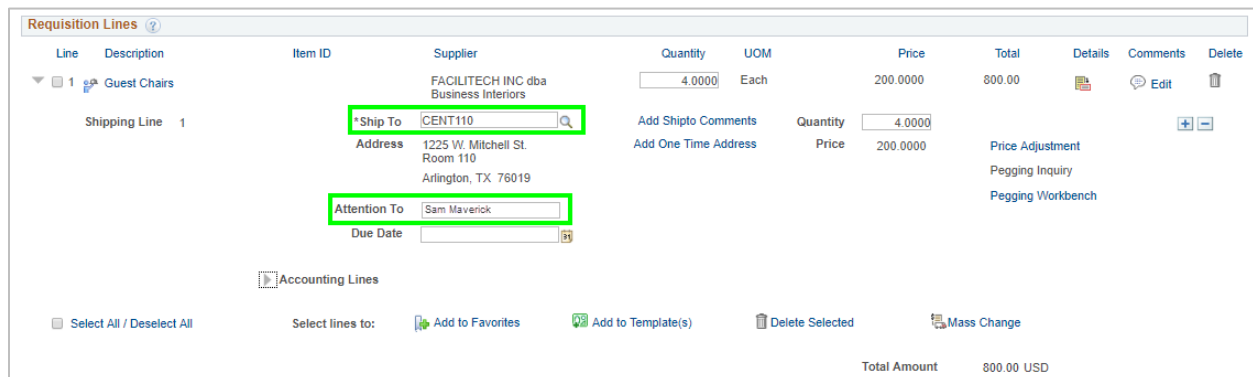
Amount Only

Inspection Required

▼ Contract Information ?

12) To enter Shipping and Attention To information for the line item, click the expansion arrow for the line item. (Arrows pointing to the right indicate that the section is collapsed; arrows pointing down indicate that the section is expanded.)

Enter or lookup the Ship To location and or the Attention To party.



Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▼ 1	Guest Chairs		FACILITECH INC dba Business Interiors	<input type="text" value="4.0000"/>	Each	200.0000	800.00			
Shipping Line 1										
		<input checked="" type="checkbox"/> Ship To	<input type="text" value="CENT110"/>	Add Shipto Comments	Quantity	<input type="text" value="4.0000"/>				
		Address	1225 W. Mitchell St. Room 110 Arlington, TX 76019	Add One Time Address	Price	200.0000		Price Adjustment	Pegging Inquiry	Pegging Workbench
		Attention To	<input type="text" value="Sam Maverick"/>							
		Due Date	<input type="text"/>							
Accounting Lines										
<input type="checkbox"/> Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change										
							Total Amount	800.00 USD		

13) To enter accounting information for the line items, if not entered on the Requisitions Setting page, click the line item expansion arrow. If necessary, click the expansion arrow for Accounting Lines.

NOTE: Requisition preference can be selected so that UTShare automatically opens the Accounting Lines section when expanding requisition lines. To set this preference, click the My Preference link at the top of the requisition, and, under the Checkout Page Display section, select the box for “Auto expand accounting lines when expanding requisition lines”.

- a. If the invoice line is charged to only one cost center or project, use the SpeedChart field to quickly populate the values into the fields.

Accounting Lines

*Distribute By: Qty *Liquidate By: Amt

Accounting Lines Personalize Find View All First 1 of 1 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		DH216	1.0000	100.0000	5.78	UTARL	

- b. If the line item is to be charged to multiple funding sources, first use the Distribute By field to indicate if the split will be made by Quantity or by Amount. Then, 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 are necessary.

Accounting Lines

*Distribute By: Qty *Liquidate By: Amt

Accounting Lines Personalize Find View All First 1-2 of 2 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		DH216	0.5000	50.0000	2.89	UTARL	
2	Open		DH216	0.5000	50.0000	2.89	UTARL	

Then, go to the Chartfields2 and Chartfields3 tabs to enter the chartfield values for each payer. The Chartfield values must be entered manually; entering a value into the SpeedChart field will remove any additional lines added on the Chartfields1 tab. Enter the Chartfield values for each line.

Accounting Lines

*Distribute By: Qty *Liquidate By: Amt

Accounting Lines Personalize Find View All First 1-2 of 2 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

Account	Fund	Dept	Program	Function
63204				
63204				

Accounting Lines

*Distribute By: Qty *Liquidate By: Amt

Accounting Lines Personalize Find View All First 1-2 of 2 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

PC Bus Unit	Project	Activity	Cost Center

Repeat for all lines. All requisition lines must have accounting information entered.

- 14) On the Chartfield2 tab, verify the GL account number. This number populates based on mapping from the category code selected on the line item information. Correct if the Account number is wrong.

- 15) 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.
- Enter "UTARL" in the AM Business Unit field.
 - Enter or lookup the Profile ID for the asset.



The screenshot shows the 'Accounting Lines' interface with the 'Asset Information' tab selected. The 'AM Business Unit' and 'Profile ID' fields are highlighted with a green box. The interface includes a search bar, a table with columns for AM Business Unit, Profile ID, Tag Number, CAP #, Sequence, and Empl ID, and a 'Budget Information' tab.

NOTE: For assistance with Profile IDs, contact the Property Management department.

- 16) Enter comments that relate to the purchase as a whole (i.e. contractual information, UTA contact who can answer questions about the purchase, Vendor contact information) in the Requisition Comments and Attachments. Selecting the Send to Supplier box will include the comment on the PO. Selecting the Show at Receipt box will allow the party entering the receipt for the item to see the comment. Selecting the Show at Voucher box will allow the party entering the voucher for the purchase to see the comment.

To enter more than one comment, use the Add more Comments and Attachments link.



The screenshot shows the 'Requisition Comments and Attachments' interface. It features a text input field for 'Enter requisition comments' and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Shown at Voucher'. A link for 'Add more Comments and Attachments' is visible at the bottom right.

Supporting documentation (source of pricing, scope of work, contract details, etc.) must be attached to the requisition. Click the Add more comments and Attachments link to upload the necessary attachments.

- 17) Once the required fields are completed, click the Check Budget link to check for available funds and validate chartfield values. After clicking Check Budget, you will see a prompt alerting you that your Requisition will be saved with an "Open" status. Click OK.

Requisition Comments and Attachments

Enter requisition comments

Pricing per quote 15648-48
UTA Contact: Blaze Davis (817-272-1234; bdavis@uta.edu)
Vendor Contact: Mav Woolf (817-555-7890)

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget Pre-Check Budget

Save & submit Save for Later Add More Items [Preview Approvals](#)

Note: If budget check fails, click the “Error” link located next to the Budget Checking Status field to view the error message. Make the necessary changes and re-run the budget check process.

18) Once a “Valid” Budget Status is displayed, click Save & Submit.

Check Budget
 Pre-Check Budget
Budget Checking Status: Valid

Save & submit Save for Later Add More Items [Preview Approvals](#)

19) The Requisition Confirmation page is displayed. Notice, a Requisition ID is assigned and the Status is “Pending”. Also, the current and future routing is displayed for the document.

Confirmation

Your requisition has been submitted.

Requested For Sam Maverick	Number of Lines	1
Requisition Name Lab Chairs_RMS Lab_B. Davis	Total Amount	800.00 USD
Requisition ID 0000020901	Pre-Encumbrance Balance	800.00 USD
Business Unit UTARL		
Status Pending		
Priority Medium		
Budget Status Valid		

[View printable version](#) [Edit This Requisition](#) [Check Budget](#) [Pre-Check Budget](#)

Department Approval

▼ Lab Chairs_RMS Lab_B. Davis: Pending [Start New Path](#)

Department Approval

Pending

Multiple Approvers Manager [+](#)

[Apply Approval Changes](#)

[Create New Requisition](#)
[Manage Requisitions](#)