Create Requisition
MAV eSHOP for Requesters

Presented by: Business Technology Services
**UT Share Terms**

**MAV eSHOP Requester**

- **Budget Check:** The process of checking for available funds.
- **Pre-Encumbrance:** A process that holds funds for an anticipated expense.
- **Encumbrance:** A process that reserves funds for a future expenditure.
- **Capital Asset:** Furniture or equipment with a single unit value of $5,000 or greater.
- **Controlled Asset:** Furniture or equipment with a single unit value of $500 to $4,999.99 that must be secured and tracked due to the nature of the item.
- **Sourcing:** The process of converting a requisition into a purchase order.
- **Dispatched:** The purchase order has been sent to the vendor.
- **Chart of Accounts:** is the foundation of the accounting system used to identify transactions in UT Share. It consists of a *Business Unit, Fund, Department, Cost Center, Function, Project PC Business Unit, Activity.*

| Business Unit | Account | Fund | Dept | Cost Center | Function | Program | PC Business Unit | Project | Activity |
**UT Share Terms**

**MAV eSHOP Requester**

- **ChartField:** Individual fields used to segregate budget data. The grouping or combination of chartfields is referred to as a “chartfield string”.

  - **Required fields for Non-Project (Cost Center):**
    - Business Unit (UTARL), Account, Fund, Department, **Cost Center**, Function
  
  - **Required fields for Project (Grant or Plant Fund):**
    - Business Unit (UTARL), Account, Fund, Department, Function, **Project**, **Project Costing Business Unit**, Activity

- **SpeedChart:** is used to automatically fill in the individual ChartField values on the Accounting distribution line. The SpeedChart is the same as the 6-digit Cost Center or 10-digit Project ID number in the chartfield string.

<table>
<thead>
<tr>
<th>Bus Unit</th>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Cost Centr</th>
<th>Function</th>
<th>Program</th>
<th>PC Bus Unit</th>
<th>Project</th>
<th>Activity</th>
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**Account (General Ledger Account):** is used to identify the nature of the transaction (e.g. 63003 – Office Supplies). Typically, users will use Accounts beginning with “6” or “8” when processing Requisitions or Vouchers in UT Share.

The Account number in the ChartField is not tied to the SpeedChart. When processing requisitions, this field will auto-populate based on the Category code.

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
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<th>Description</th>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1XXXX</td>
<td>Assets</td>
<td>4XXXX</td>
<td>Revenue</td>
<td>7XXXX</td>
<td>Transfers</td>
</tr>
<tr>
<td>2XXXX</td>
<td>Liabilities</td>
<td>5XXXX</td>
<td>Expense - Payroll</td>
<td>8XXXX</td>
<td>Capital Assets</td>
</tr>
<tr>
<td>3XXXX</td>
<td>Fund Equity</td>
<td>6XXXX</td>
<td>Expense-Non-payroll</td>
<td>9XXXX</td>
<td>Suspense</td>
</tr>
</tbody>
</table>
MAV eSHOP Overview
MAV eSHOP Overview

• What is MAV eSHOP?
  – A web-based purchasing system that allows UTA employees to buy goods more efficiently and more economically.
  – Connects directly to UTShare create requisition page.
  – Offers end-users a shopping cart experience designed to make day-to-day purchases easier.
  – Users can shop online from a variety of contracted and approved vendors.
  – It ensures the best overall value and streamlines the buying process.
MAV eSHOP Overview

Benefits

- Vendor Catalogs are Centrally Located
- One Stop Shopping Experience
- Search a wide Range of Products Online
- Reduce cost and improve productivity
- View Buying History
- Greater Flexibility to make Purchase
Methods for Requesting Goods or Services

**MAV eSHOP**
(SciQuest)

- Hosted catalogs are online versions of a supplier’s print catalog. The catalogs are available to all UT schools using the MAV eSHOP platform; which contain negotiated prices.
- Punch-Out Catalogs in MAV eSHOP direct you to the Suppliers external website. The catalog are specific to UTA and contain negotiated items and prices.

**ProCard**

- The ProCard is used to purchase goods or services for low-cost items ($4,000 or less) that do not exist in MAV eSHOP.

**Non-PO Voucher**

- Some purchases of goods and services may not require a purchase order. See the Best Value Purchasing Procedures, Section VII, Article 2 for the list of goods and services that do not require a purchase order.

**Special Request**
(Non-Catalog Items)

- The Special Request form in UTShare is used to request goods or services that do not exist in MAV eSHOP and are not eligible to purchase with a ProCard.
MAV eSHOP Overview

• Some of the UTA Preferred Suppliers:
• Things to know…

– Since contracted suppliers are being used, support documentation is not required for MAV eSHOP purchases.

– Buyers in Procurement will not see Purchase Orders (POs) less than $100K. After all approvals are received, Requisitions less than $100K are automatically sourced into a PO and dispatched to the vendor to be fulfilled.

**Note:** POs are sourced and dispatched every 2 hours (odd hours 7, 9, 11, etc.)

– PO Vouchers are automatically created, matched, budget checked and approved for MAV eSHOP purchases.
Shopping Cart Process
Shopping Cart Process

• Shopping carts represent items selected for Purchase.

• It contains the details about the goods being requested (i.e. Description, Qty, Price, etc.).

• This process varies depending on the employee role. The key roles are:
  – Shopper
  – Requester
Shopping Cart Process

**Shopper (MAV eSHOP)**
- Any employee can be a Shopper
- Cannot create a Requisition in UTShare
- Must log directly into MAV eSHOP to shop for items from an online catalog
- Assigns shopping cart to Requester

**Requester (MAV eSHOP)**
- Can create a Requisition in UTShare
- Can also be a Shopper
- Must log into UTShare and access MAV eSHOP from within the Create Requisition page
- Assigns Due Date, Shipping, Profile Asset ID and Accounting Information to Requisition
- Submit Requisition for Approval

**Approver**
- Cannot be a Requester
- Can be a Shopper and assign a shopping cart to a Requester
- Reviews Requisition in UTShare for accuracy
- Can approve or deny a Requisition in UTShare
Requesters Role in MAV eSHOP
Requesters Role

- The Requester is responsible for the following:
  - Creating the Requisition in UTShare
  - Shopping from an online catalog or picking-up a cart assigned by a Shopper and returning it to UTShare
  - Finalizing the Requisition by providing the due date, shipping location, Profile Asset ID (if applicable) and accounting information in UTShare
  - Budget checking and submitting the Requisition for approval
Requesters Role

- There are six basic tasks for a Requester:

  **Task 1:** Log into UTShare and navigate to the Create Requisition page

  **Task 2:** Create the Requisition and select the “SciQuest eShop Portal” link to punch-out to MAV eSHOP
Requesters Role

Task 3: Select the online catalog to begin shopping.
Requesters Role

**Task 4:** Search for the desired items, add items to shopping cart and then Submit Order to return to MAV eSHOP.
Requesters Role

Task 5: Return Cart to PeopleSoft (UTShare)

- Before returning the cart to UTShare, you should review the cart items and make changes if necessary.
- It is recommended that you update the Cart Name and Description. This will help you identify the cart later.
Requesters Role

Task 5: Return Cart to PeopleSoft (Cont’d)

**IMPORTANT NOTE:** Purchases from multiple suppliers in MAV eSHOP cannot be returned to UTShare. A separate cart should be created for each vendor before returning the cart to UTShare.

Punch-out Catalog Vendors will not allow you to move items between carts. You must delete the cart and re-create.

**Best Practice:** One vendor per cart.
Requesters Role

Task 6: Finalize Requisition by entering the following:

– Requisition Name
– Due Date
– Ship To Location
  • This must be the same for all line items
  • Capital and Controlled assets must be delivered to Central Receiving (CENT110)
– If applicable, add Asset Profile ID and AM Business Unit
  • For Capital and Controlled Assets
  • On the Asset Information tab
– Accounting Information
  • Using SpeedChart field or entering values on Chartfields2 tab.
– Final Delivery Instructions
  • Enter as Requisition Comment
  • Include name of party to receive item and building name and room number
– Check Budget
– Save and Submit document for approval
### Requesters Role

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

**Requisition Summary**

- **Business Unit**: UTARL
- **Requestor**: 1234567890
- **Currency**: USD

**Requisition Name**: Pena_CompLab104

**Priority**: Medium

**Cart Summary**: Total Amount $77.12 USD

**Expansion Details**

- **Line**: 1
- **Item ID**: 525-150
- **Supplier**: Summus Industries Inc - Staples
- **Address**: 300 W. First St., Room 150, Arlington, TX 76019
- **Attention To**: Sam Maverick
- **Due Date**: 04/30/2019

**Accounting Lines**

- **Accounting Line 1**
- **Charfielde2**: Details
- **Details 2**: Asset Information

**Accounting Line 2**

- **AM Business Unit**: Profile ID
- **Tag Number**: CAP #
- **Sequence**: Emp ID

**Price Adjustment**

- Pegging Inquiry
- Pegging Workbench
Requesters Role

Shipping Summary

Edit for All Lines

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ship To Location</td>
<td>525-150</td>
</tr>
<tr>
<td>Address</td>
<td>300 W. First St.</td>
</tr>
<tr>
<td>Room</td>
<td>150</td>
</tr>
<tr>
<td>Attention To</td>
<td>Sam Maverick</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
</tbody>
</table>

Requisition Comments and Attachments

Enter requisition comments

Final Delivery: Sam Maverick, University Center room 150

Add more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

Check Budget
Pre-Check Budget
Save & submit
Save for Later
Add More Items
Preview Approvals

Total Amount: $7.12 USD
Requesters Role

**Requester Process Flowchart**

1. **Requester**
   - Log into UT Share
   - Create Requisition
   - Punch-Out to MAV eSHOP
   - Finalize Requisition, Budget check and Submit for Approval
   - Workflow Approval
   - PO Sourced and Dispatched
   - Goods Rec’d

2. **Shop from online catalog or pick up assigned cart**
   - Return cart to UT Share Requisition Page

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**Optionally:**

- **Shop from online catalog or pick up assigned cart**
- **Return cart to UT Share Requisition Page**
Requesters Role

Class Activity
• Create Requisition with Punchout Catalog
Requisition Workflow Process
Requisition Workflow Process

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

- **Grant Funded?**
  - Yes → Department Approval → Principal Investigator (PI) Approval → Requisition Over $5000?
  - No → Department Approval → Commodity Approval

- **Commodity?**
  - Yes → Requisition Approved
  - No → Commodity Approval

- **Requisition Over $5000?**
  - Yes → Grants Central Office Approval (Grants & Contracts Svc)
  - No → Requisition Approved

- **Commodity Approval**
  - Yes → Requisition Approved
  - No → Commodity Approval
Process an Assigned Cart
Process an Assigned Cart

- Once the a cart is submitted by a Shopper, the Requester receives an email notification; similar to the one below:

  ![Email Example]

  - Re: A shopping cart has been assigned to you
  - Cart Name: 2017-04-26 maverick
  - Prepared for: Sam Maverick (Business Unit: UT Arlington)
  - Prepared by: Jane Dolan

  Dear Jane

  A shopping cart has been assigned to you by Sam Maverick (maverick@uta.edu). The shopping cart can be accessed for review in "Draft Carts".

  If applicable, the user has submitted the following additional comments:

  If you have any questions with regard to this shopping cart, please contact your campus Purchasing Department.

  Support Team Contact Information:
  +1 (555) 555-5552  eshop@uta.edu

  Thank you,
  University of Texas System
Process an Assigned Cart

Once in eShop from the Create Requisitions page, select the **Action Item** icon in the top banner and click **Carts Assigned To Me** to view carts that are ready for processing. Once displayed, click the **Shopping Cart Name**.

**Alternative:** You can also access the cart from the Shop menu (Shop > My Carts and Orders > View Carts, Assigned Carts).
Process an Assigned Cart

Return Cart to Peoplesoft (UTShare)

- Before returning the cart to UTShare, you should review the cart items and make changes if necessary.
- It is recommended that you update the Cart Name and Description. This will help you identify the cart later.
Processing an Assigned Cart

Finalize Requisition by entering the following:

– Requisition Name
– Due Date
– Ship To Location
  • This must be the same for all line items
  • Capital and Controlled assets must be delivered to Central Receiving (CENT110)
– If applicable, add Asset Profile ID and AM Business Unit
  • For Capital and Controlled Assets
  • On the Asset Information tab
– Accounting Information
  • Using SpeedChart field or entering values on Chartfields2 tab.
– Final Delivery Instructions
  • Enter as Requisition Comment
  • Include name of party to receive item and building name and room number
– Check Budget
– Save and Submit document for approval
Desktop Receiving
Desktop Receiving

• Desktop Receiving is a formal method for documenting acceptance of goods received from a vendor.

• For MAV eSHOP purchases, Desktop Receiving will be required for POs that are greater than $2500 and for any Controlled Assets (regardless of the dollar amount).

**Note:** Central Receiving will perform desktop receiving for items delivered to their office. Items shipped directly to the department, must be received by the employee that processed the Requisition in UT Share.

• The Receive Items page is used to perform Desktop Receiving. You can access this page using one of the following navigations:
  – **Manage Requisition** (Main Menu > eprocurement > Manage Requisition)
    • View receivable items for a specific Requisition created by the Requester.
  – **Receive Items** (Main Menu > eprocurement > Receive Items)
    • View receivable items for all Requisitions created by the Requester.
Receiving Items from the Manage Requisitions Page

The Receiving page displays PO Lines open for receiving. To receive an item:
1. Click “Add” on the Add a New Value tab to add a new receipt.
2. Enter the PO Unit and ID number and click “Search”.

Select Purchase Order

Search Criteria

PO Unit: UTARL
ID: 0000021215

Line / Schedule
Release
Item ID
Ship To
Ship Via

Retrieve Open PO Schedules

Receipt Qty Options
- No Order Qty
- Ordered Qty
- PO Remaining Qty
3. Select the PO line items to be received.
4. Click the “OK” button.
5. If necessary, adjust the total number of items received for each line item.
6. Click “Save” to save the receipt. This should populate a Receipt ID number and update the Receipt Status.
Manage Requisitions
The Manage Requisition page is used to search for an existing Requisition or Purchase Order (PO). Also, it displays the different stages of the Requisition.

- Search by Requisition ID, Requester ID, Date Range, Status or Purchase Order ID.
General Information

• The different stages of the Requisition that are complete or in progress are highlighted with an active link.

• The Manage Requisition page allows users to: view Approvals, Copy the requisition, Edit the requisition, Receive items, View Print the requisition.
General Information

- Requesters can edit or cancel a requisition if the document status is Open, Pending, or Approved.
- If changes or corrections are required and the Requisition State is one of the following, contact your Buyer in Procurement Services:
  - PO(s) Created
  - PO(s) Dispatched
  - Received
  - Partially Received
When a requisition is cancelled, the budget check must be performed to release the pre-encumbrance.

1. Select “Cancel” from the dropdown menu on the Manage Requisitions page, then click the “Go” button.
2. On the Requisition Details page, click the “Cancel Requisition” button.

After cancellation, the Total dollar amount of the requisition will be 0.00.
3. To complete the process, select Check Budget from the dropdown menu and then click the Go button.

When the process is complete, the Requisition State will be “Canceled”, the Budget “Valid”, and the Total dollar amount will be 0.00. The pre-encumbrance should now be released.
MAV eSHOP - PO Vouchers
Purchase Order Vouchers

- Invoices for MAV eSHOP purchases will arrive electronically from the vendor.
- Once the invoice is received, the PO Voucher is automatically created, matched, budget checked and approved.
- Voucher ID numbers created by a MAV eSHOP purchase will begin with an “A”.
Purchase Order Vouchers

• Things to Consider:
  – There are two types of Matching Processes in UT Share:
    • PO Vouchers less than $2500 will invoke 2-way matching. It verifies that the purchase order and the invoice information matches.
    • PO Vouchers greater than or equal to $2500 invokes 3-way matching. It verifies that the items are received and the invoice information matches the purchase order.
    • If a match is found, the PO Voucher is automatically made ready for payment processing. If matching fails, the PO Voucher is placed on hold and the invoice will not be paid until the issue is cleared.
Purchase Order Vouchers

PO Voucher Process Flowchart

1. Goods Rec’d from Vendor
2. Perform Desktop Receiving (if necessary)
3. E-Invoice is submitted by Vendor
4. PO Voucher automatically Created, Matched, Budget Checked, and Approved
5. Payment to Vendor is Processed
For more information about MAV eSHOP:  
  – www.uta.edu/mav-eshop

Support & Help:  
  – https://uta.service-now.com/selfservice  
  – 817-272-2155

Training Resources:  
  – https://www.uta.edu/business-affairs/training/  
    • Register for Classes  
    • Join Business Affairs Listserv  
    • View and/or Print Training Materials  
      – UPK  
      – Training Guides  
      – Job Aid  
      – Quick References