

Create/Process Requisitions and Receipts in PeopleSoft

Instructions for Requesters

Office of Contracts & Procurement

Fiscal Year 2017



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eShop Orders Only

OPTION 1 - Requester-generated Shopping Cart:

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OPTION 2 - Shopper-generated Shopping Cart:

- [Access eShop Portal through “Create Requisition”](#)
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- [Transfer Cart to PeopleSoft](#)
- [Complete, Review and Submit the Requisition](#)

Create Order Receipt* (Standard & eShop)

- [Navigate to “Manage Requisitions”](#)
- [Select Requisition and “Receive Order” Option](#)
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*a receipt is required for all goods (by Requisition) before a payment voucher can be approved in Accounts Payable. This is the responsibility of the Requester.

Glossary of Purchasing Terminology Additional Resources



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Purchasing Policies and Procedures

The **Requester** is responsible for initiating the Purchase Order cycle. This means that you, the Requester, must have a basic knowledge of the Purchasing “rules” that regulate how UT System Administration procures commodities or services. Therefore, it is very important that you familiarize yourself with these “rules” and procedures *BEFORE* you proceed with creating and forwarding a Requisition for approval. Your “best friend” in this endeavor is the [Basic Procurement Training](#) guide, found on **Contracts and Procurement’s Training Webpage**.

Still, your very BEST friend remains your Buyer, so please never hesitate to contact me! My contact information is on the [Additional Resources](#) page of this guide. I expect, however, that you will have “done your homework” and studied the Basic Procurement Training guide, as well as this guide.



ACQUIRE THE ROLE OF DEPARTMENTAL REQUESTER*

*each department within System must designate at least one individual to perform requisitions in PeopleSoft.

If you are the “designee”, then this guide is for you.

1. You must first be assigned the role of “Requester” by OTIS Helpdesk. You do this by simply clicking on the link below (you must log in with your SNAC) and filling in the applicable information:

FMS Authorization Request Form

The screenshot shows the 'PeopleSoft FMS Authorization Request' form. At the top is the University of Texas System logo and tagline. Below is a header bar with the title 'PeopleSoft FMS Authorization Request' and a link 'Click Here for FMS Authorization Instructions'. The form contains several input fields: 'Employee Name', 'Effective Date', 'EMPL ID', 'Department', 'Title', and 'Phone Number'. Below these is a 'Type of Request' section with three radio buttons: 'New Account', 'Modify Existing Account', and 'Disable Account'. The next section is 'Reason for Request' with a text area for 'Specific job duties in relation to PeopleSoft'. This is followed by a 'Roles Requested' section with the instruction '(Check all that apply)'. It includes four checkboxes: 'Procurement' (checked), 'Travel Administrator (create Travel vouchers)', 'Cost Center Reviewer', and 'Other'. At the bottom right is a 'Submit' button. Red arrows point to the 'Employee Name', 'Effective Date', 'Department', 'Phone Number', 'Specific job duties' text area, 'Procurement' checkbox, and the 'Submit' button.

(Continue next page)



ACQUIRE THE ROLE OF DEPARTMENTAL REQUESTER (CONT.)

2. The submittal button routes the form to your department head for approval.
3. Once approved, OTIS Helpdesk will assign the Requester role to you and set up your user preferences.
4. Purchasing is then notified by OTIS to *activate* you as a Requester.
5. A Buyer in Contracts and Procurement (CNP) will contact you when you are set up and ready to start creating requisitions.

OK...Let's get started!



LOG IN TO PEOPLESOFT

Click on this link: [UT System Administration PeopleSoft Portal](#) and follow the instructions below:

Step 1




UT SHARE

UT Share is a shared multi-institutional application. In order to authenticate you, we need to know which of the UT Share institutions you would like to login with.

Please select your home institution.

Use a suggested selection:

 The University of Texas System Ad...

Or select your institution from the list below

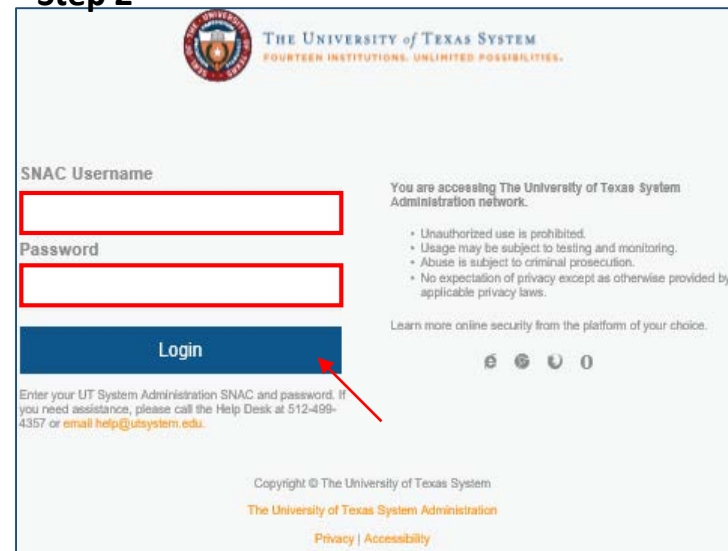
Please select your institution:

- <https://idp.utpa.edu/idp/shibboleth>
- <https://idp-test.uta.edu/idp/shibboleth>
- <https://idptest.uttyler.edu/idp/shibboleth>
- <https://shib3.utep.edu/idp/shibboleth>
- The University of Texas at Arlington
- The University of Texas at Brownsville
- The University of Texas at Dallas
- The University of Texas at El Paso
- The University of Texas at San Antonio
- The University of Texas at Tyler
- The University of Texas of the Permian Basin
- The University of Texas Rio Grande Valley
- The University of Texas System Administration
- The University of Texas-Pan American

Continue Help

Select "UT System Administration" from dropdown box, then click "Continue"

Step 2



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SNAC Username

Password

Login

You are accessing The University of Texas System Administration network.

- Unauthorized use is prohibited.
- Usage may be subject to testing and monitoring.
- Abuse is subject to criminal prosecution.
- No expectation of privacy except as otherwise provided by applicable privacy laws.

Learn more online security from the platform of your choice.

Enter your UT System Administration SNAC and password. If you need assistance, please call the Help Desk at 512-499-4357 or email help@utsystem.edu.

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[Privacy](#) | [Accessibility](#)

Enter your UT System Administration SNAC and password, then click "Login"

You will be routed to the 2FA (two-factor authentication)

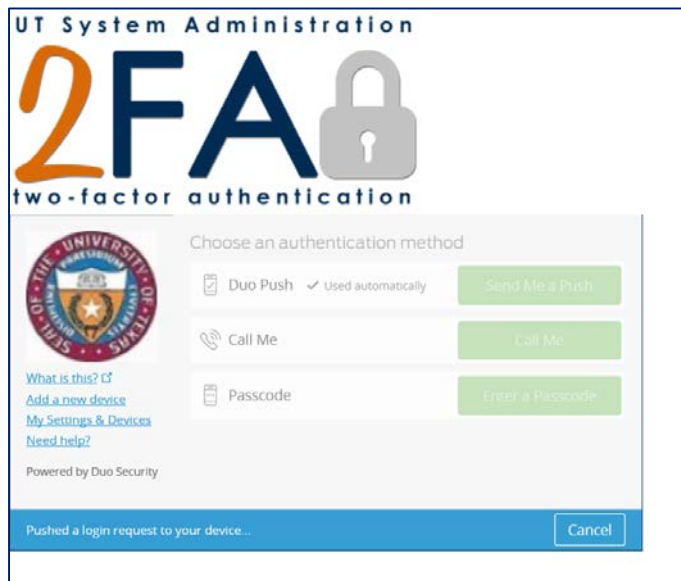


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LOG IN TO PEOPLESOFT (CONT.)

The 2FA* will notify you according to the authentication method you have chosen.



****UT System Administration utilizes the Duo-factor login procedure for added security. To set this up, please follow the instructions found at the link below:***

<https://community.utsystem.edu/sites/infosec/2fa/SitePages/GettingStarted.aspx>

Once you acknowledge the notification, you will be routed to your PeopleSoft Home Page.

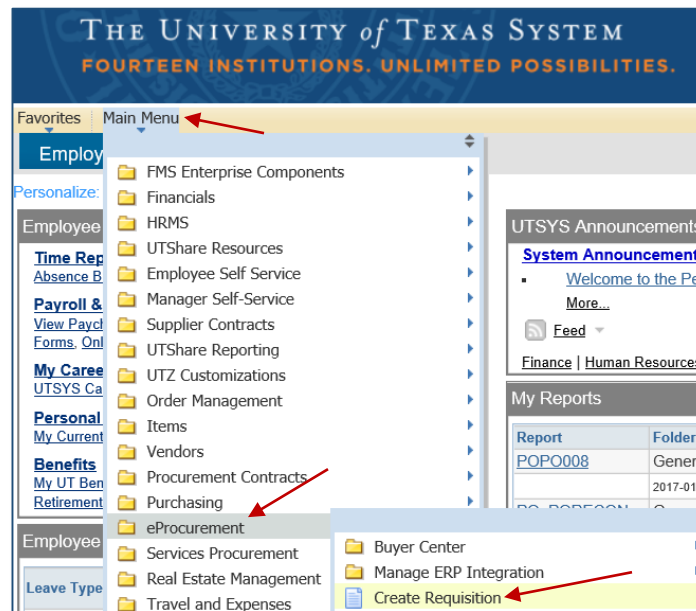


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Navigate to “Create Requisition” Page in PeopleSoft Menu

On your Homepage, click on Main Menu and a dropdown box will appear. Click on “eProcurement”. When that dropdown box appears, click on “Create Requisition”.



You will be routed to the Create Requisition Page.



SAVE CREATE REQUISITION AS “FAVORITES” LINK

Step 1

Favorites Main Menu > eProcurement > Create Requisition

My Page Employee Self Service New Employee Tools Training Guest

Create Requisition

Specify Business Unit and Requester

*Business Unit: SAD01 UT System Administration

*Requester:

OK

My Links Select One:

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

Total Amount (0): 0

Step 2

My Links Add to My Links

Select One:

Refresh My Links...

Add to My Links

Edit My Links

Requisition S S/C - SpeedChart

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

Total Amount (0): 0

Step 3

Add to Shortcuts

Add to My Links

A link to the following item will be added to your "My Links" dropdown list. Properties of this entry or any "My Links" entry can be updated by selecting "Edit My Links" from the "My Links" list.

Name: Create Requisitions

*Folder: My Links

Save Cancel

Step 4

Favorites Main Menu > eProcurement > Create

Recently Used

- Create Requisition
- Buyer Setup
- Manage Requisitions
- Add/Update Requisitions
- Add/Update POs

Favorites

- Add to My Links
- Edit My Links
- Add/Update POs
- Change sipt/bill to on PO
- Create Requisitions

For all future Requisitions, you can simply click here instead of navigating through the Main Menu tree.

Now you are ready to create a new requisition.



Create Requisition

(Standard, non eShop Orders)





CREATE A NEW REQUISITION

On the **Create Requisition** screen, enter your Employee I.D. number (if the field isn't already populated) and click the OK button.

Create Requisition

Specify Business Unit and Requester

*Business Unit:  UT System Administration

*Requester: 

You will be routed to the "Define Requisition" tab on the Create Requisition page. For illustration purposes, we will use Chris Palacios as the requester:



DEFINE THE REQUISITION

Step 1

Enter the Requisition Name, and then click on the arrow head to the left of **Line Defaults**

Step 2

Select "Override" option. Then click on Vendor search glass

-Next-



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DEFINE THE REQUISITION (CONT.)

Step 3

Vendor Search

Vendor ID:

Name:

Short Vendor Name:

Alternate Vndr Name:

City:

Country:

Postal Code:

State:

☐ HUB Vendors Only

Enter search criteria to find a vendor.

[Return to Define Requisition](#)

Enter beginning of Vendor name, then click the "Find" button

Step 4

Vendor Search

Vendor ID:

Name:

Short Vendor Name:

Alternate Vndr Name:

City:

Country:

Postal Code:

State:

☐ HUB Vendors Only

Enter search criteria to find a vendor.

[Return to Define Requisition](#)

Vendor ID	Name	Default Location	Default Location Description	HUB Class	Address	City	State
1 0000020854	WORKPLACE RESOURCE LLC	SHARED	Shared - Converted Location	WOF	PO BOX 730823	DALLAS	TX
2 0000037888	WORKPLACE SOLUTIONS INC	SHARED	Shared - Converted Location		2651 N HARWOOD ST STE 120	DALLAS	TX

Click on the correct Vendor ID (select the address that matches the vendor quote)

Step 5

Create Requisition

1. Define Requisition **2. Add Items and Services** **3. Review and Submit**

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UT System Administration

*Requester: Chris Palacios - UT System

*Currency:

Requisition Name:

Priority:

Line Defaults

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.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Defaults

Chartfields: Details Asset Information

Pct	Location	GL Unit	Account	Fund	Dept	Cost Centr	Function	Program	PC Bus Unit	Proj
	LAV1.122	SAD01								

The **Vendor** field has now been populated. Next, click on the **Ship To** search glass

-Next-



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DEFINE THE REQUISITION (CONT.)

Step 6

Look Up Ship To

SetID: SAD01

Ship To Location: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Ship To Location	Description
ASB4.500	Primary Circulation
CTJB.126	Equipment Storage

Select CTJB.126 if your office is at the main System complex. If you are at, or are ordering for a satellite office, then choose the appropriate Ship To location.

Step 7

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: SAD01 UT System Administration

*Requester: CPALACIOS-UTX Chris Palacios - UT System *Currency: USD

Requisition Name: Items for APS 04/04/14 Priority: Medium

Line Defaults

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.

Vendor: 0000020854 Vendor Location: SHARED

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: CTJB.126 Modify Onsite Address

Due Date: Attention:

Accounting Defaults

Pct	Location	GL Unit	Account	Fund	Dept	Cost Centr	Function	Program	PC Bus Unit	Proj
LAV1.122	SAD01									

Continue

The **Ship To** field has now been populated. Next, click on **Continue** to go to **Add Items and Services**

Now you are ready to Add Items and Services.



ADD ITEMS AND/OR SERVICES

Step 1

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web **Special Request**

Select a Request Type ?

Special Item Request an item that is not listed in the Catalog.

Fixed Cost Service Request a one-time service for a flat fee.

Variable Cost Service Request a service for which the fee is based on the time worked.

Time and Materials Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Click on *Special Item*

Step 2

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description: Herman Miller Conference Table

*Price: 600.00000

*Quantity: 1.0000

*Category:

*Vendor ID: 0000020854

Vendor Name: WORKPLACE RES

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

*Currency: USD

*Unit of Measure: EA

Due Date:

[Suggest New Vendor](#)

Additional Information

[Request New Item](#)

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

[Add Item](#) [Cancel](#) [Add or Start New Type](#)

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Add description (that matches quote), price and quantity, then click on *Unit of Measure* search glass (Note: Vendor ID and Name are already populated).

Step 3

CW	Hundred Weight	100weight
CYL	Cylinder	cylinder
DAY	Days	Days
DG	Decigrams	Decigram
DI	Dispenser	dispenser
DL	Deciliters	Deciliter
DM	Decimeters	Decimeter
DOZ	Dozen	Dozen
DP	Dozen Pair	12pair
DRA	Dram - Avoirdupois	(blank)
DRM	DRUM	DRUM
DRP	Dram - Apothecaries'	Dram
DS	Display	display
DZ	DZ <SQ>	DZ <SQ>
EA	Each	Each

Select the appropriate unit of measure for your purchase.

-Next-



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ADD ITEMS AND/OR SERVICES (CONT.)

Step 4

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web Special Request

Special Item

*Item Description: Herman Miller Conference Table

*Price: 600.00000

*Quantity: 1.0000

*Category: 0000020854

*Vendor ID: WORKPLACE RES

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

*Currency: USD

*Unit of Measure: EA

Due Date:

[Request New Vendor](#)

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

The **Unit of Measure** field has now been populated. Next, click on the **Category** search glass

Step 5

Create Requisition

Look Up Category

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

Search Categories

Search By: Category

Catalog	Category	Description	Find in Tree
1			

Browse Category Tree

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Select **Description** from drop-down box

Step 6

Create Requisition

Look Up Category

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

Search Categories

Search By: Description

Catalog	Category	Description	Find in Tree
1		Office furniture	

Browse Category Tree

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Type in the general description, or "class" of what you are wanting to purchase, then click "Find".

***HINT:** for greatest success, enter generic terms to describe the commodity/service.

-Next-



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ADD ITEMS AND/OR SERVICES (CONT.)

Step 7

Create Requisition

Look Up Category

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

Search Categories

Search By: Description Office furniture Find

Catalog	Category	Description	Find in Tree
1 ALL ITEMS	56101700	Office furniture	

Browse Category Tree

Return

Click on the appropriate Category number

Step 9

Special Item

*Item Description: Herman Miller Conference Table

*Price: 600.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 56101700

*Vendor ID: 0000020854

Vendor Name: WORKPLACE RES

Vendor Item ID: 1000000

Mfg ID:

Manufacturer:

Mfg Item ID: 22222

Additional Information

Size: 8 x 4', Oval
Wood top, Oak, stained
Frame and legs: Steel with chrome finish

☒ Send to Vendor ☒ Show at Receipt ☒ Show at Voucher

Add Item Cancel Add or Start New Type

Enter information in "Additional Information" box, click all three boxes below it, and then click **Add Item**

Step 8

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog Favorites Templates Forms Web Special Request

Special Item

*Item Description: Herman Miller Conference Table

*Price: 600.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 56101700

*Vendor ID: 0000020854

Vendor Name: WORKPLACE RES

Vendor Item ID: 1000000

Mfg ID:

Manufacturer:

Mfg Item ID:

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Add Item Cancel Add or Start New Type

The **Category** field has now been populated. Next, enter **Vendor item ID** for the product/service. (this information is listed on the vendor quote in front of the product/service description)

-Next-



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ADD ITEMS AND/OR SERVICES (CONT.)

Step 10

You will return to a “clean slate” where you have the option of entering a new item, following Steps 2-9. You will repeat this procedure for all of the items on the vendor quote. Note that the first item has been added to your requisition.

When you are finished entering items, click on **Review and Submit**. This will take you to a new screen.

*****PLEASE NOTE: Shipping charges must be entered as a separate line item.**

Please use Category Code 78121603 ***

Now you are ready to Review and Submit your Requisition



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REVIEW AND SUBMIT THE REQUISITION

[Back to 'Table of Contents'](#)

Step 1

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SAD01 UT System Administration
 *Requester: CPALACIOS-UTX Chris Palacios - UT System
 Requisition Name: Items for APS 04/04/14
 *Currency: USD
 Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Herman Miller Conference Table	WORKPLACE RESOURCE LLC	1.0000	Each	600.00000	600.00

Total Amount: 600.00 USD

Comments

Send to Vendor Show at Receipt Show at Voucher Approval Justification More...

Check Budget Pre-Check Budget

Save & submit Save & preview approvals Cancel requisition Find more items

On the new screen, click the arrow head to the left of the Line 1 check box to expand line item 1 detail (you will do this on every subsequent line item on the requisition).

Step 3

Comments

Send to Vendor Show at Receipt Show at Voucher Approval Justification More...

Check Budget Pre-Check Budget Budget Checking Status: Valid

Save & submit Save & preview approvals Cancel requisition Find more items

Once check is complete, a "Valid" status will appear. If you are satisfied that all information has been entered into the Requisition, you are ready to click the **Save & submit** button, which will take you to the "Confirmation" screen.

Step 2

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SAD01 UT System Administration
 *Requester: CPALACIOS-UTX Chris Palacios - UT System
 Requisition Name: Items for APS 04/04/14
 *Currency: USD
 Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Herman Miller Conference Table	WORKPLACE RESOURCE LLC	1.0000	Each	600.00000	600.00

Shipping Line: 1 Due Date: 05/16/2014 *Ship To: CTJB 125 Quantity: 1.0000 Price: 600.00000
 Status: Active *Distribute By: City SpeedChart: 21000046
 Attention To: Chris Palacios - UT System

Accounting Lines

Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		LAU1 119	1.0000	100.0000	600.00	SAD01

Comments

Send to Vendor Show at Receipt Show at Voucher Approval Justification More...

Check Budget Pre-Check Budget

Save & submit Save & preview approvals Cancel requisition Find more items

Note: The SpeedChart is the exact same number as the Cost Center you want to use.

In the Comments section, enter the Vendor quote number, quote date, Vendor and UT System Department contact information. Then check the first (3) boxes below the section.

Check the Line 1 box, enter **SpeedChart** number, then tab out of that field. Do this for every line item on the Requisition. Lastly, click the **Check Budget** button. It may take up to a minute for the system to check available funds.

-Next-



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REVIEW AND SUBMIT THE REQUISITION (CONT.)

Confirmation Screen

Confirmation

Requested For: Chris Palacios - UT System
 Requisition Name: Items for APS 04/04/14
 Requisition ID: 0000000010
 Business Unit: SADD1
 Status: Pending
 Priority: Medium
 Budget Status: Valid

Number of Lines: 1
 Total Amount: 600.00 USD
 Pre-Encumbrance Balance: 600.00 USD

Requisition Summary

Description	Qty	UOM
Herman Miller Conference T...	1	EA

Total Lines: 1
 Total Amount (USD): 600.00

To track the status of your order*

Buttons: Submit, Edit Requisition, Approve Changes, Check Budget, Pre-Check Budget, View printable version, Manage Requisitions, Create New Requisition

Note: If the item being purchased is a controlled item such as a computer or furniture, the requisition will route to a Commodity approver for final approval.

Software requires Commodity Code approval by the office of Contracts and Procurement, REGARDLESS of \$\$ amount.

CONTROLLED ITEMS SHOULD ONLY BE ORDERED BY OTIS (Computers), OR BY FACILITIES MANAGEMENT (Furniture).

For orders less than \$15,000.00, the requisition routes to the **Cost Center Approver** in **pending** status. Upon approval, the requisition converts to an approved, signed and ready-to-send Purchase Order.

You, as the Requester, will receive two emails: 1) confirmation email of Requisition Approval, 2) email with Purchase Order attached.

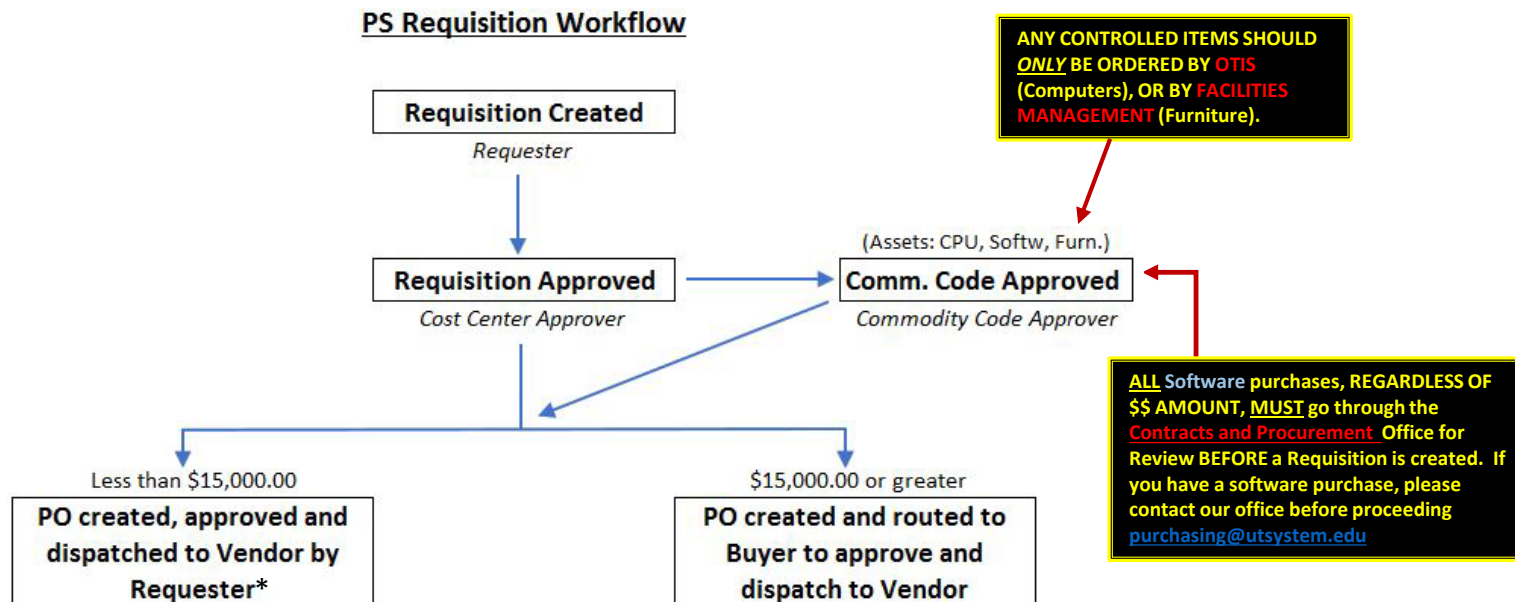
On orders \$15,000.00 or more, the approved requisition converts to a Purchase Order in "Created" Status. These Purchase Orders are reviewed, final approved and submitted to the vendor by **Purchasing**.

- Please see next page for the PeopleSoft Workflow Process graph, and [page 21](#) for Email Notifications -

***You can track your requisition as it goes through the various stages of processing/ workflow. Simply click on '[Manage Requisitions](#)' on the Confirmation screen and you will be routed to that page. You can also find it by going to **Main Menu -> eProcurement -> Manage Requisitions**. See more about this on [page 25](#)**



REQUISITION TO PURCHASE ORDER WORKFLOW⁺



***Requester receives an email with the approved and signed Purchase Order attached as a .pdf file. The Requester forwards this .pdf to the Vendor for processing.**

⁺Workflow is an electronic approval routing process that allows for multiple budgetary level approvers to communicate, verify and store documents.





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WORKFLOW NOTIFICATION EMAILS

You will receive the following emails upon Requisition approval:

Approved Requisition Notification Email

1.  Fuller, Jerry A  Palacios, Christopher

Requisition ID "0000000010" Business Unit "UT System Administration" Has Been "Approved"

Retention Policy UT-13Month_Inbox (1 year, 1 month)



The following requisition has been "Approved".

Requester: 6001031151
Business Unit: UT System Administration
Requisition ID: 0000001166
Requisition Name: Items for APS 04/04/14
Date: 2014/04/05

You can navigate directly to the approval page for more information by clicking the link below.


https://my.shared.utsystem.edu/psp/ZAPPRD/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=SAD01&REQ_ID=0000000010

Dispatched PO Notification Email (with signed and approved PO attached)

2.  UTShare.Donotreply  Palacios, Christopher

Dispatched Purchase Order

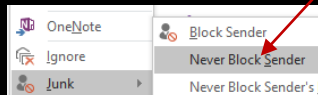
Retention Policy UT-13Month_Inbox (1 year, 1 month) Expires

 SAD01_0000001077_0.pdf
31 KB

Purchase Order, SAD01 / 0000001077, has been Dispatched. Please detach and print the attached Purchase Order.

NOTE: Some users have had issues with the 'Dispatched Purchase Order' email going to their 'junk' or 'spam' folders.

If you do not receive this email in your personal inbox within a day of the 'Approved Requisition' email, please check your junk folder for an email sent by 'UTShare.Donotreply'. If it is there, right click on the email and select the following:



You will receive the "Approved Requisition" email first.

If the order is **under \$15,000.00**, you will receive the "Dispatched PO" Notification a couple of hours later. The attached PO is what you will send to the vendor. **SAVE the PDF first** to a designated PO folder you create (on your shared drive), then send to the vendor in a separate email (see next page)

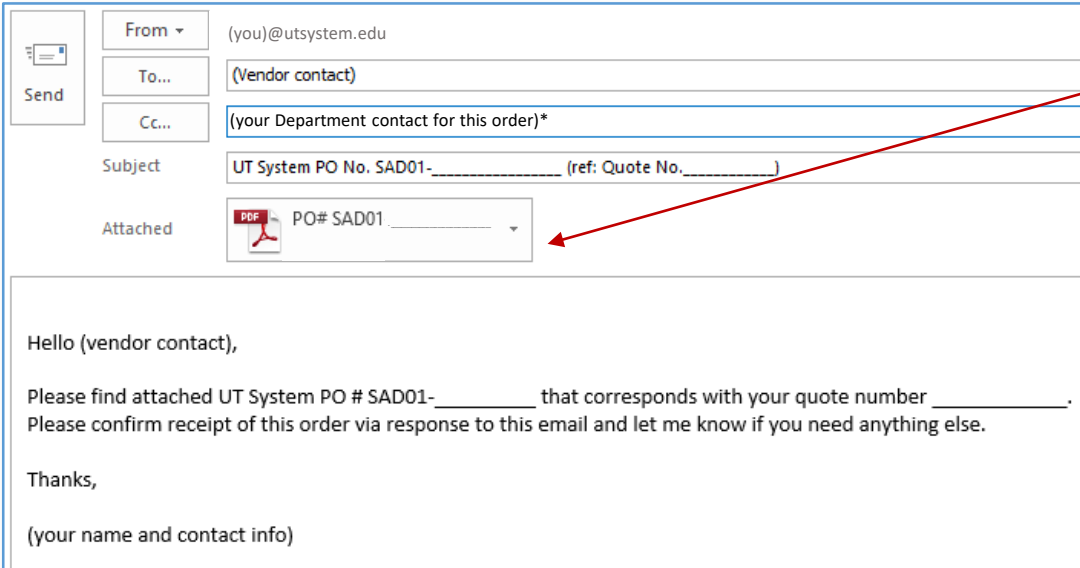


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SEND THE PO TO THE VENDOR

Sample email containing verbiage you should use when sending the PO to the vendor:




Send

From ▾ (you)@utsystem.edu

To... (Vendor contact)

Cc... (your Department contact for this order)*

Subject UT System PO No. SAD01-_____ (ref: Quote No._____)

Attached  PO# SAD01 _____

Hello (vendor contact),

Please find attached UT System PO # SAD01-_____ that corresponds with your quote number _____.
Please confirm receipt of this order via response to this email and let me know if you need anything else.

Thanks,

(your name and contact info)

Send **ONLY** the PO that you received in the “UTShare.DoNotReply” email (pg. 21) and possibly the vendor quote (not required, but as a courtesy).

*The Department contact is the person in your office that originally requested the goods/services. They are usually the person the vendor would contact regarding the items/services to “talk shop”. Copy them as a courtesy so they will know their order has been submitted to the vendor.

HIGHLY RECOMMENDED: Once the vendor confirms receipt of the order (some vendors might send a separate ACKNOWLEDGEMENT email), print out (or convert to pdf) the email and scan it with the rest of your backup documentation.



DOCUMENTATION RESPONSIBILITIES* OF THE REQUESTER DEPARTMENT

Under \$15,000.00

Each Department has the following documentation responsibilities on all orders under \$15,000.00:

- Vendor Quote and applicable email correspondence between Vendor and Department
- Copy of the signed Purchase Order
- Forwarding PO with Backup documentation to Accounts Payable.

Contact your Buyer if you need clarification on these requirements.

PLEASE READ CAREFULLY:

*CNP recommends that each department sets up a departmentally shared folder specifically for this Documentation. For efficiency, scan the **signed PO with the Vendor Quote** and **email/written dept. and vendor correspondence (including Vendor confirmation email)**, then save the file in .pdf format to the documentation folder referencing in the name: **PO number, Vendor name (in parenthesis) and a brief description of items/services purchased.***

Example: PO# SAD01-0000001053 (MICROSOFT CORP) SIS Irving MS Premier Support Svcs

Over \$15,000.00

For all orders above \$15,000.00, Purchasing will require that you forward via email to purchasing@utsystem.edu the following:

- All Vendor Quotes (as pdf or Word attachments)
- Applicable email or written correspondence with Vendor(s)
- Completed and signed [Exclusive Acquisition Justification](#) form, if applicable
- The Requisition Name (not number) referenced in the Subject line of the email.

**Texas Senate Bill 20 requires transparency of all purchases made by State and Higher Ed Agencies. It is very important that your departmental purchasing documentation is readily accessible.*

-See next page for documentation to submit to Accounts Payable -



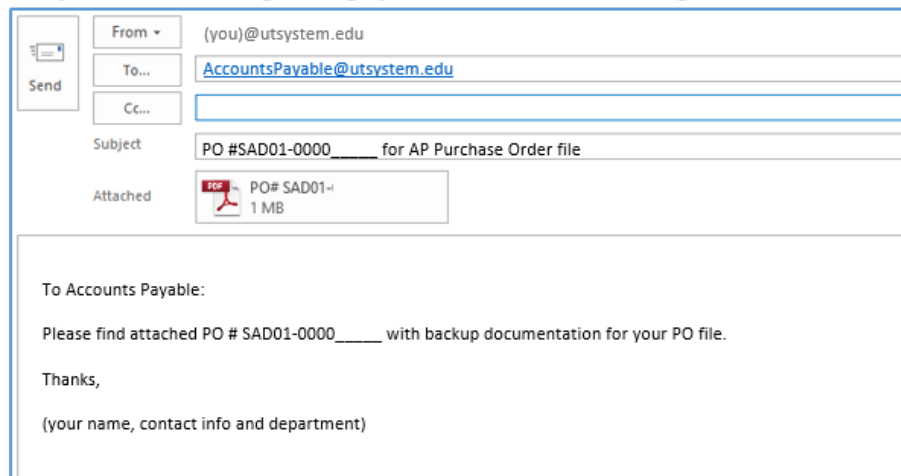
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SEND A COPY OF THE PO TO ACCOUNTS PAYABLE (AP)

For all orders **under \$15,000.00**, you, as the Requester, are also responsible for sending **UT System Administration Accounts Payable** a copy of your scanned PO **with ALL backup**. This is necessary so that AP can match the invoice to the PO once goods/ services have been received. **This copy needs to be sent within a day of scanning. If AP does not have your PO, then payment of the invoice will be delayed.**

Sample email containing verbiage you should use when sending the PO to AP:



The screenshot shows an email composition window. The 'From' field is '(you)@utsystem.edu'. The 'To' field is 'AccountsPayable@utsystem.edu'. The 'Subject' field is 'PO #SAD01-0000_____ for AP Purchase Order file'. The 'Attachments' section shows a PDF file named 'PO# SAD01-1 MB'. The email body text is as follows:

To Accounts Payable:

Please find attached PO # SAD01-0000_____ with backup documentation for your PO file.

Thanks,

(your name, contact info and department)

NOTE

ALL invoices should be sent BY THE VENDOR to the **Bill To** address on your PO, without exception. If you receive the invoice in your office or your email, please forward the invoice immediately to AccountsPayable@utsystem.edu, then let the vendor know that they need to follow the **Bill To** instructions on the PO when submitting future invoices.



MANAGING AND TRACKING REQUISITIONS

Main Menu -> eProcurement -> Manage Requisitions

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: 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	Status	Budget	Total	
0000000010	Items for APS 04/04/14	SAD01	04/07/2014	Approved	Valid	600.00 USD	<Select Action> Go
0000000009	Test order - Cisco Cata...	SAD01	04/03/2014	PO(s) Created	Valid	11,200.00 USD	<Select Action> Go
0000000008	Office Supplies 4/3/2014	SAD01	04/03/2014	PO(s) Created	Valid	370.50 USD	<Select Action> Go
0000000007	widgets for OTIS	SAD01	04/03/2014	PO(s) Created	Valid	50.00 USD	<Select Action> Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Select a date range, click search, and all of your requisitions within that date range will appear. This will show the status of all requisitions created and submitted by you.

If you would like a **printable** version of your requisition, see next slide.

-Next-



MANAGING AND TRACKING REQUISITIONS (PRINTING)

Step 1

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SAD01 Requisition Name: Request Status: All but Complete Budget Status: Date From: 03/31/2014 Date To: 04/07/2014 Requester: Entered By: PO ID:

Search Clear

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	BUI	Date	Status	Budget	Total		
0000000010	Items for APS 04/04/14	SAD01	04/07/2014	Approved	Valid	600.00 USD	<Select Action>	Go
0000000009	Test order - Cisco Cata...	SAD01	04/03/2014	PO(s) Created	Valid	11,200.00 USD	<Select Action>	Go
0000000008	Office Supplies 4/3/2014	SAD01	04/03/2014	PO(s) Created	Valid	370.50 USD	<Select Action>	Go
0000000007	widgets for OTIS	SAD01	04/03/2014	PO(s) Created	Valid	50.00 USD	<Select Action>	Go

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

Go to <Select Action> drop-down box, select 'View Printable Version', then click the Go button.

Step 2

Click 'Yes'

Do you want to print the requisition with distribution details ? (18026,11614)

Yes No

-Next-



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MANAGING AND TRACKING REQUISITIONS (PRINTING, CONT.)

Step 3

Business Unit: SAD01		Requester: CPALACIOS-UTX		Status: Approved			
Requisition: 0000000010		Requested By: Chris Palacios - UT System		Currency: USD			
Requisition Name: Items for APS 04/04/14		Entered Date: 4/7/14		Requisition Total: 600.00			
Line: 1	Item Description: Herman Miller Conference Table	Quantity: 1.0000	UOM: EA	Price: 600.00	Line Total: 600.00		
				Line Status: Approved			
Line Comments: << Size: 8 x 4', Oval Wood top: Oak, stained Frame and legs: Steel with chrome finish >>							
Ship Line: 1		Ship To: CTJB.126		Address:			
Attention: Chris Palacios - UT System		Due Date: 5/16/14		Shipping Quantity: 1.0000			
				Shipping Total: 600.00			
Address: Central Receiving 210 W. 6th Austin TX 78701 United States							
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	LAV1.119	1.0000	100.00	600.00	SAD01	63103
Dept		Fund	Class				
CON100		2100	700				
Open QTY		Open Amt					
1.0000		0.000					
GL Base Amount		Currency	Sequence				
600.00		USD	0				
Chartfield 1							
21000046							

This is the form you will print for your records, if so desired.



COPYING AN EXISTING REQUISITION

Main Menu -> eProcurement -> Manage Requisitions

You can also copy a previous requisition created by you.

This is a useful tool if you have recurring service renewals or commodity needs.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: 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	Status	Budget	Total	
0000000982	Metaflows SBO 2016	SAD01	09/15/2016	PO(s) Dispatched	Valid	8,296.80 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
0000000981	Aeron Chairs-Titanium	SAD01	09/14/2016	Received	Valid	5,182.38 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
0000000980	17SP100 PUF LANDS PHOTOS	SAD01	09/12/2016	Received	Valid	4,875.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>

[Create New Requisition](#)
[Review Change Request](#)
[Review Change Tracking](#)
[Manage Receipts](#)
[Requisition Report](#)

Enter Requisition ID or use the date range function, then click **Search** button. Find the requisition you want to copy, go to **<Select Action>** drop-down box, select '**Copy Requisition**', then click the **Go** button. This will take you to the **Create Requisition** page.

-Next-



COPYING AN EXISTING REQUISITION (CONT.)

Create Requisition

1. Define Requisition → 2. Add Items and Services → 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UT System Administration *Currency:

*Requester: Christopher G Palacios Priority:

Requisition Name:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	*Wk Chr.Aeron.Std-Ht Pneu..Tlt	WORKPLACE RESOURCE LLC	<input type="text" value="2.0000"/>	Each	715.34000	1,430.68
<input type="checkbox"/> 2	*Wk Chr.Aeron.Std-Ht Pneu..Tlt	WORKPLACE RESOURCE LLC	<input type="text" value="4.0000"/>	Each	715.34000	2,861.36
<input type="checkbox"/> 3	*Wk Chr.Aeron.Std-Ht Pneu..Tlt	WORKPLACE RESOURCE LLC	<input type="text" value="1.0000"/>	Each	715.34000	715.34
<input type="checkbox"/> 4	Delivery & installation..norma	WORKPLACE RESOURCE LLC	<input type="text" value="1.0000"/>	Each	175.00000	175.00
Total Amount:						5,182.38 USD

☐ Select All / Deselect All

Enter your new Requisition Name, then click through [1. Define Requisition](#), [2. Add Items and Services](#) and [3. Review and Submit](#) tabs, editing and/or adding Line Items, Cost Centers, etc. as needed on each respective tab. **Remember to enter new quote/ contact information in the Comments section of 3. Review and Submit**



Create Requisition

(eShop Orders only)



OPTION 1* -

Create a Requisition from a *Requester*-generated Shopping Cart

*Use this option if you, as Requester for your department, are directly ordering supplies. In this case, you are also the “shopper” The following instructions show you how to transfer your cart into PeopleSoft for processing.



ACCESS ESHOP PORTAL THROUGH “CREATE REQUISITION”

Step 1

Create Requisition

1. Define Requisition **2. Add Items and Services** 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms **Web** Special Request

Direct Merchants ? Personalize | Find | First 1 of 1 Last

Logo	Merchant	Description
	SciQuest eShop Portal	Direct Connect to SciQuest eShop Portal

[Review and Submit](#)

Step 2

Step 3

1) Click on **2. Add Items and Services**, then on 2) the 'Web' tab, and 3) finally on [SciQuest eShop Portal](#)
You will be rerouted to the eShop Shopping Dashboard

-Next-



NAVIGATE ESHOP PORTAL

eShop Portal

1. Click on 'Home'

2. Click on Punch-out Catalog

Instructions on using site

The screenshot shows the eShop Portal interface. The top navigation bar includes 'Employee Self Service' and 'Training'. The left sidebar contains links for 'Home', 'Shop', 'Documents', 'Contracts', 'Accounts Payable', and 'Reporting'. The main content area is titled 'Shopping Dashboard' and features a search bar, a 'Search From All Hosted Catalogs' section, and a 'Punchout Catalogs' section. The 'Punchout Catalogs' section displays four catalog tiles: 'REIDOOK GRADING', 'CDWG', 'shi', and 'TODAY'S'. A red arrow points from the 'Home' link in the sidebar to a yellow box labeled '1. Click on \'Home\''. Another red arrow points from the 'TODAY'S' catalog tile to a yellow box labeled '2. Click on Punch-out Catalog'. A blue arrow points from a red box labeled 'Instructions on using site' to the 'How to Use' section in the 'Welcome to eShop' area.

Welcome to eShop

An eProcurement system for the University of Texas System

Here you'll find the goods and services you need. The greatly expanded eShop eProcurement system provides a familiar online shopping experience and negotiated pricing from the University of Texas System's preferred suppliers.

How to Use

1. Click on the Punchout Catalog you wish to shop.
2. Browse for the items you need. You can search for items by keyword or item number.
3. When you find the item you need, just add it in your shopping cart.
4. If you have more shopping to do, click "continue shopping" and you will be returned to the catalog. Repeat step 3.
5. After you have filled your cart, click:

My Resources

purchasing@utsystem.edu | Phone: +1 (512) 579-5143

-Next-

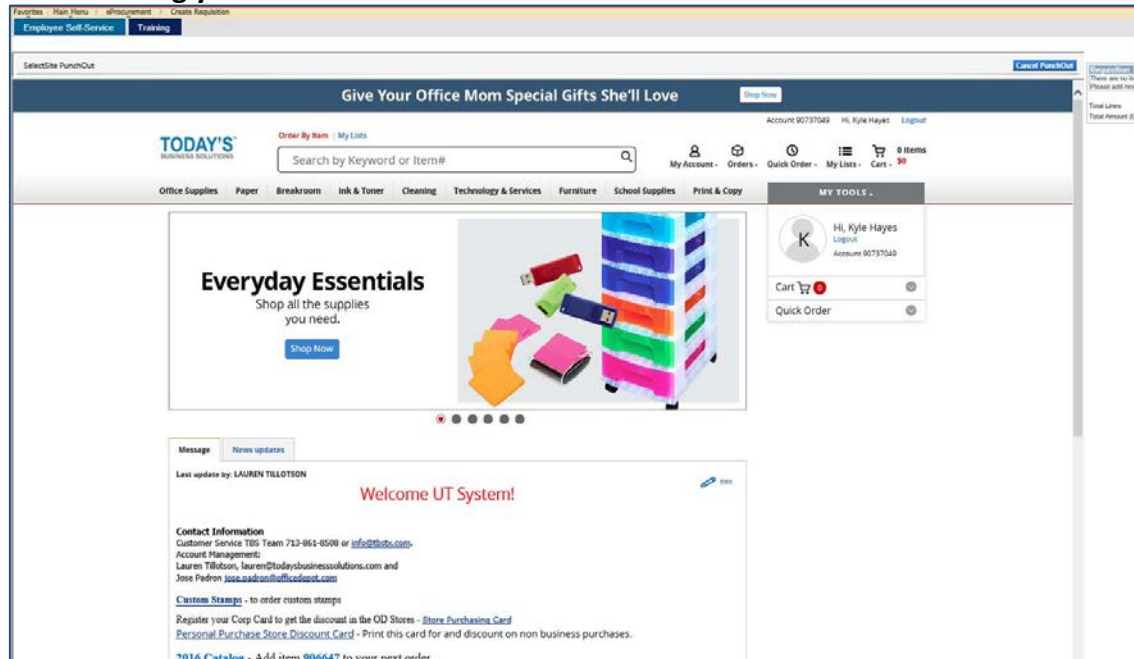


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SHOP IN A VENDOR PUNCH-OUT CATALOG

This will bring you to TBS order site:



Shop and fill cart and click the 'checkout' button. This will take you to your shopping cart:

-Next-



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CHECK-OUT CART AND TRANSFER TO PEOPLESOFT

Shopping Cart

The screenshot shows the 'Shopping Cart' page for Kyle Hayes. The cart contains 6 items with a total of 47.70 USD. Two yellow callout boxes provide instructions: Box 1 points to the 'Description' field with the text 'Enter a description then hit 'save''. Box 2 points to the 'Return Cart to PeopleSoft' button with the text 'Click this button when the cart is ready to transfer'. The 'Return Cart to PeopleSoft' button is circled in red. The 'Save' button is also visible. The cart details show a subtotal of 47.70 USD and a total of 47.70 USD.

1. Enter a description then hit 'save'

2. Click this button when the cart is ready to transfer

Return Cart to PeopleSoft

Save

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12	451906	DZ	7.95	6 DZ	47.70 USD

Supplier subtotal 47.70USD

Subtotal 47.70

Total 47.70 USD

The 'Return Cart' will transfer you back to the 'Create Requisition' [2. Add Items and Services](#) screen in PeopleSoft. Click on [3. Review and Submit](#) to see that your Cart items have automatically populated the Requisition:



COMPLETE, REVIEW AND SUBMIT THE REQUISITION

Favorites Main Menu > eProcurement > Create Requisition

Employee Self-Service Training

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SAD01 UT System Administration *Currency: USD
 *Requester: 6001030517 Kyle S Hayes Priority: Medium
 Requisition Name: Blue sharpies for office

1) Enter name

2) Expand section

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Sharpie(R) Permanent Fine-Point	TODAY'S BUSINESS SOLUTIONS LLC	6.0000	DZ <SQ>	7.95000	47.70

Consolidate with other Reqs ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: *Ship To: CTJB.126 Quantity: 6.0000 Price: 7.95000
 Status: Active Attention To: Kyle S Hayes
 *Distribute By: Qty SpeedChart: 21000053

3) Enter Cost Center

*Change Ship To if shipping to a remote site

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		LAV1.120	6.0000	100.0000	47.70	SAD01

Total Amount: 47.70 USD

4) Leave Section blank

5) Check budget

6) If budget is Valid, click 'Save & Submit'

When you click 'Save and Submit', the requisition will go through the normal PeopleSoft workflow, then convert to an approved PO which will route electronically to the vendor for processing. You can monitor the status of the requisition by going to Main Menu > eProcurement > Manage Requisitions.



OPTION 2* -

Create a Requisition from a *Shopper*-generated Shopping Cart

*These are carts generated by users within your department and assigned to you for processing. The following instructions show you how to retrieve a cart and process it through PeopleSoft.



ACCESS ESHOP PORTAL THROUGH “CREATE REQUISITION”

Step 1

Create Requisition

1. Define Requisition **2. Add Items and Services** 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) **[Web](#)** [Special Request](#)

Step 2

Direct Merchants ? [Personalize](#) [Find](#) [First](#) 1 of 1 [Last](#)

Logo	Merchant	Description
	SciQuest eShop Portal	Direct Connect to SciQuest eShop Portal

[Review and Submit](#) **Step 3**

1) Click on **2. Add Items and Services**, then on 2) the 'Web' tab, and 3) finally on [SciQuest eShop Portal](#)
You will be rerouted to the eShop Shopping Dashboard

-Next-



ACCESS "ACTION ITEMS" ON ESHOP HOMEPAGE

eShop Portal

The screenshot shows the eShop Portal interface. At the top right, a yellow callout box with the text "1. Click on the flag" has a red arrow pointing to a flag icon with a red "7" next to it in the user header. Below this, another yellow callout box with the text "2. 'Action Items' will appear. Click on 'Carts Assigned to Me'" has a red arrow pointing to the "Carts Assigned To Me" link in the "Action Items" dropdown menu. The interface includes a top navigation bar with the University of Texas System logo, a search bar, and a shopping cart. The main content area features a "Shopping Dashboard" with a search bar, shortcuts, and a "Shop By Catalog" section displaying various supplier logos like Grainger, CDW, Shi, Today's Business Solutions, Rockford, and Dell.

-Next-



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SELECT CARTS ASSIGNED TO YOU

[Back to 'Table of Contents'](#)

Draft Shopping Carts Page

The screenshot shows the 'Draft Shopping Carts Page' in the University of Texas System portal. The page header includes the University of Texas System logo, the user's name 'Kyle Hayes', and a search bar. The main content area is titled 'My Drafts' and contains a table of draft shopping carts. A red box highlights the cart with ID '2017-05-16 cpalacios@utsystem.edu 01', and a red arrow points to it from a yellow callout box.

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2017-04-27 6001030517@SAD01 02	4/27/2017		1,748.60 USD	Delete

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2017-04-25 cpalacios@utsystem.edu 01	4/25/2017	rockford test under 15k	13,083.30 USD	Delete
	2017-04-25 cpalacios@utsystem.edu 01	4/25/2017	rockford test over 50	53,080.65 USD	Delete
	2017-04-25 cpalacios@utsystem.edu 01	4/25/2017	rockford test over 15	21,425.00 USD	Delete
	2017-05-03 khayes@utsystem.edu 01	5/3/2017	test cart for SHI/Dell	1,053.63 USD	Delete
	2017-05-03 khayes@utsystem.edu 01	5/3/2017	test cart for SHI/Dell	765.85 USD	Delete
	2017-05-03 khayes@utsystem.edu 01	5/3/2017	test cart for SHI/Dell	765.85 USD	Delete
	2017-05-16 cpalacios@utsystem.edu 01	5/16/2017	sharpie test 5/16	59.88 USD	Delete

Select the cart you want to retrieve and click on the Shopping Cart Name. This will open the cart.



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TRANSFER CART TO PEOPLESOFT

Shopping Cart

Shopping Cart for Christopher Palacios

6 Item(s) for a total of **59.88 USD**

Return Cart to PeopleSoft or **Assign Cart**

Click this button When you are ready to transfer

Click on the button, and you will see this box appear:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12	451906	DZ	9.98	6 DZ	59.88 USD
Supplier subtotal					59.88USD
Subtotal					59.88
Total					59.88 USD

Note: You also have the option to reassign the cart to another Requester in your department:

Click on the button, and you will see this box appear:

Assign Cart

☐ Select from profile values ☒ Search for an assignee

Selected Assignee:

Assign Cart To:

Note To Assignee:

Assign **Close**

The 'Return Cart' will transfer you back to the 'Create Requisition' **2. Add Items and Services** screen in PeopleSoft. Click on **3. Review and Submit** to see that your Cart items have automatically populated the Requisition:



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COMPLETE, REVIEW AND SUBMIT THE REQUISITION

Favorites Main Menu > eProcurement > Create Requisition

Employee Self-Service Training

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: SAD01 UT System Administration *Currency: USD
*Requester: 6001030517 Kyle S Hayes Priority: Medium
Requisition Name: Blue sharpies for office

1) Enter name

2) Expand section

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Sharpie(R) Permanent Fine-Point	TODAY'S BUSINESS SOLUTIONS LLC	6.0000	DZ <SQ>	7.95000	47.70

☐ Consolidate with other Reqs ☒ Override Suggested Vendor

Shipping Line: 1 Due Date: *Ship To: CTJB.126 Quantity: 6.0000 Price: 7.95000
Status: Active Attention To: Kyle S Hayes
*Distribute By: Qty SpeedChart: 21000053

*Change Ship To if shipping to a remote site

3) Enter Cost Center

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		LAV1.120	6.0000	100.0000	47.70	SAD01

Total Amount: 47.70 USD

4) Leave Section blank

5) Check budget

6) If budget is Valid, click 'Save & Submit'

When you click 'Save and Submit', the requisition will go through the normal PeopleSoft workflow, then convert to an approved PO which will route electronically to the vendor for processing. You can monitor the status of the requisition by going to Main Menu > eProcurement > Manage Requisitions.



Create Order Receipt (Standard and eShop Orders)



NAVIGATE TO “MANAGE REQUISITIONS”

The screenshot shows the PeopleSoft navigation menu. The 'Main Menu' is expanded, and the 'Employee' section is selected. Within the 'Employee' section, the 'eProcurement' folder is expanded, and the 'Manage Requisitions' option is highlighted with a red box and a red arrow. The 'Manage Requisitions' option is located under the 'eProcurement' folder, which also includes 'Buyer Center', 'Manage ERP Integration', 'Create Requisition', 'Manage Requisition Approvals', 'Receive Items', 'Procurement Card Center', 'Reports', 'Administer Procurement', and 'My Profile'.

UTSYS Announcements

[System Announcements](#)

- [Welcome to the PeopleSoft Port...](#)
- [More...](#)

[Feed](#)

[Finance](#) | [Human Resources](#) | [System Announ...](#)

My Reports

Report	Folder
POPO008	General
	2017-05-13-00.00.1
PO_PORECON	General
	2017-05-13-00.00.0
POPO008	General
	2017-05-11-18.31.0
PO_PORECON	General
	2017-05-11-18.30.3
FS_BP	General
	2017-05-11-09.47.1

[Report Manager](#)

-Next-



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SELECT REQUISITION AND "RECEIVE ORDER" OPTION

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: SAD01

Requisition Name:

Requisition ID: 0000001287

Request Status: All but Complete

Budget Status:

Date From: 05/08/2017

Date To: 05/15/2017

Requester: 6001030517

Entered By:

PO ID:

Search

Clear

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	Status	Budget	Total	
▶ 0000001287	Blue sharpies for office	SAD01	05/09/2017	PO(s) Dispatched	Valid	47.70 USD	<div><div><Select Action></div><div>Copy Requisition</div><div>Edit Requisition</div><div>Receive Order</div><div>View Approvals</div><div>View Printable Version</div></div> <div>Go</div>

Create New Requisition

Review Change Request

Review Change Tracking

Manage Receipts

Requisition Report

Requisition must have 'PO(s) Dispatched' Status before the 'Receive Order' will appear in <Select Action> drop-down

Select 'Receive Order' from drop-down, then click the Go button.

-Next-



CREATE A RECEIPT – STEP 1

1. Check each item to be received or, if all items have been received, click the 'Check All' button

2. Click 'Receive Selected' and you will be routed to the Receive Form

Receive Items

You have 1 line open for receiving for requisition Blue sharpies for office

[Receive Selected](#) and go to the Receive Form.

Requisition Lines to Receive [Personalize](#) | [Find](#) | [View All](#) | [1 of 1](#) | [First](#) | [1 of 1](#) | [Last](#)

[Requisition Lines to Receive](#) | [Purchase Order Details](#)

Req BU	Requisition	Item Description	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Attention To	Vendor
<input type="checkbox"/> SAD01	Blue sharpies for office	Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12	6	0	DZ	CTJB.126	Kyle S Hayes	TODAY'S BU-001

[Check All](#) [Clear All](#)

[Inquire Receipts](#) [Manage Return to Vendors](#)

-Next-



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CREATE A RECEIPT – STEP 2

Receive Items

New Receipt

*Business Unit:

Receipt Status:

*Received Date:

[Add Header Comments](#) [Reject Shipment](#)

Receipt Lines ?									
Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Cancel Line	Receipt	PO
1		Sharpie(R) Permanent Fi	<input type="text" value="6.0000"/>	DZ	6.0000				

[Add New Receipt](#) [Manage Return to Vendors](#) [Inquire Receipts](#)

1. Enter actual Quantity received for each line item

2. Click 'Save Receipt'

-Next-



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CREATE A RECEIPT – STEP 3

Receipt Saved Successfully

You have saved receipt # 0000001316 containing the following items:

Receipt Lines		Personalize	Find			First	1 of 1	Last
Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity				
1	Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12	6.0000		6.0000				

[Return to Manage Requisitions](#)

[Return to Receiving](#)

This saved receipt will allow Accounting Services to approve the payment voucher and release funds to Vendor.

-Next-



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GLOSSARY OF PURCHASING TERMINOLOGY

REQUISITION

An electronic or paper document generated by a *user department* to notify the **purchasing** department of items it needs to order, their quantity, and the timeframe. It may also contain the authorization to proceed with the **purchase**. The requisition is generated in response to a quote received by a vendor. Also called **purchase request**.

VENDOR

A qualified and authorized seller or reseller of commodities, goods and/or services.

QUOTE

A document that a vendor provides to a buyer or user department that offers commodities, goods or services at a stated price, under specified conditions. This is the document the purchaser considers *before* issuing a Purchase Order. Also called a **quotation** or **proposal**.

INVOICE

A “bill” a vendor sends to the purchaser after goods, commodities have been shipped to the purchaser, or requested services have been rendered. The invoice should match the quote and the Purchase Order issued by the purchaser. The invoice should also reference the purchaser’s Purchase Order No.

COMMODITY

A transportable article (constructed physical thing) of trade or commerce that can be bartered or sold.

GOODS

Includes commodities, but also materials and supplies.

SERVICES

Acts of work or labor a vendor performs on behalf of, or for, the purchaser in exchange for monetary compensation.



ADDITIONAL RESOURCES

Purchasing Contact:

Christopher Palacios (512) 579-5143

Visit the Contracts and Procurement website for further information:

- [Staff directory](#)
- [Procedures](#)
- [Forms](#)
- [Guides](#)
- [Important Links](#)
- [Supplier Resources](#)

<https://www.utsystem.edu/offices/contracts-and-procurement>

