

# Create/Process Requisitions and Receipts in PeopleSoft

Instructions for Requesters

Office of Contracts & Procurement

Fiscal Year 2020



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[WWW.UTSYSTEM.EDU](http://WWW.UTSYSTEM.EDU)

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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.

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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.



# LOG IN TO PEOPLESOFT

Go to UT4U (<https://www.utsystem.edu/sites/ut4u>) & click on the "PeopleSoft" icon to access PeopleSoft. Then:

## 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

THE UNIVERSITY of TEXAS SYSTEM  
FOURTEEN INSTITUTIONS. UNLIMITED POSSIBILITIES.

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](mailto:help@utsystem.edu).

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The University of Texas System Administration  
[Privacy](#) | [Accessibility](#)

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

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



# 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:***

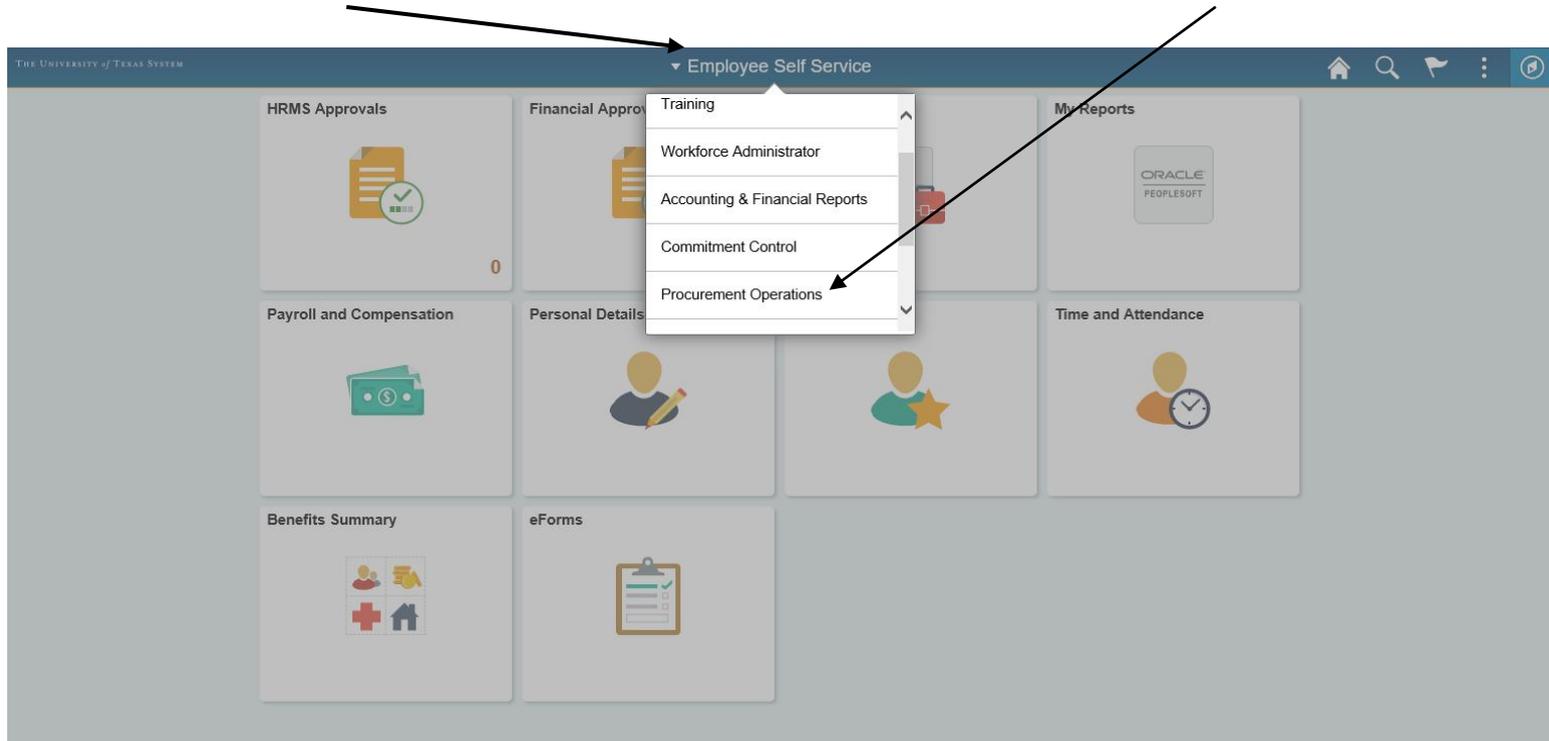
<https://community.utsystem.edu/sites/infosec/2fa/SitePages/GettingStarted.aspx>

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



# Navigate to “Create Requisition” Page in PeopleSoft Menu

Click on the “Employee Self Service” drop down box, then scroll down to select “Procurement Operations”



## Navigate to “Requisition” Page in PeopleSoft Menu (cont.)

On the “Procurement Operations” homepage, click on the “Requisition” icon.



***You will be routed to the Requisition Page.***



# SAVE "REQUISITION" AS "FAVORITES" LINK

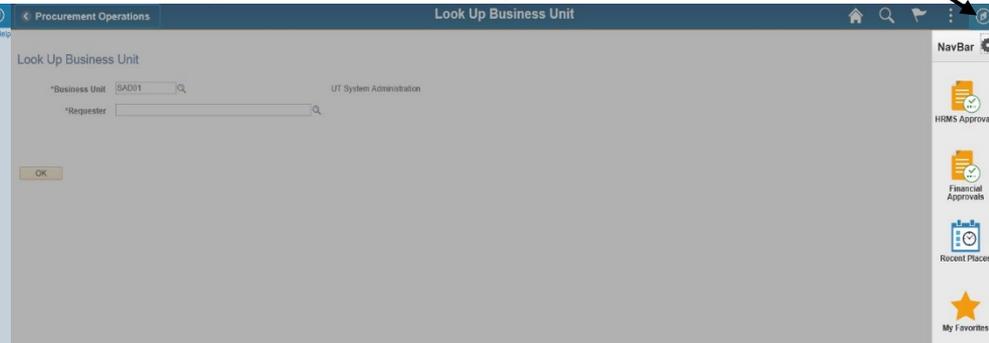
Step 1 - Click "3 dots" icon

Step 2 - Select "Add to Favorites"



Step 3 - Enter your name for link to "Requisition"

To access "My Favorites", click compass icon to access "NavBar"



*Now you are ready to create a new requisition.*



# Create Requisition

## (Standard, non eShop Orders)



# CREATE A NEW REQUISITION

On the **Requisition** screen, enter your Employee I.D. number (if the field isn't already populated) and click the OK button. (Use of the "magnifying glass" for Requester searching is not recommended on this step.)

Look Up Business Unit

\*Business Unit  UT System Administration

\*Requester

OK

*You will be routed to the Create Requisition front page. For illustration purposes, we will use Christopher G Palacios as the requester:*



# DEFINE THE REQUISITION

## Step 1

Click on "Requisition Settings"

Favorites > Main Menu > eProcurement > Requisition

Employee Self-Service Training

Create Requisition ?

Welcome Christopher G Palacios

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

### Special Requests ?

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

**Item Details**

\*Item Description

\*Price

\*Quantity

\*Category

\*Currency

\*Unit of Measure

Due Date

Address Sequence Number

**Supplier**

Supplier ID

Supplier Name

Supplier Item ID

[Suggest New Supplier](#)

**Manufacturer**

Mfg ID

Manufacturer

Mfg Item ID

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher

**-Next-**



# DEFINE THE REQUISITION (CONT.)

## Step 2

- Click on "Override"
- Enter "Requisition Name"
- Enter "SpeedChart"

**Now you are ready to Add Items and Services.**

Business Unit: SAD01  
\*Requester: 6001039650  
\*Currency: USD

UT System Administration  
Christopher G Palacios

Requisition Name: [Field]  
Priority: Medium

Custom Fields

**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**

Supplier: [Field]  
Supplier Location: [Field]  
Buyer: [Field]  
Category: [Field]  
Unit of Measure: [Field]

**Shipping Defaults**

Ship To: CNTRLREC  
Due Date: [Field]  
Add One Time Address  
Attention: [Field]

**Distribution Defaults**

SpeedChart: [Field]

**Accounting Defaults**

Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center	Function	Program	PC Bus Uni
1		ROB	SAD01			CNP100				

OK Cancel

**-Next-**



# DEFINE THE REQUISITION (CONT.)

Press "Checkout" button only after all of your items have been entered.

## Step 3

- Enter details for your first item in the "Item Details" area
- Enter the vendor/supplier info in the "Supplier" area
- Enter any part numbers related to your item in the "Mfg ID" field only
- If there is additional information for this item that should be referenced on the PO, enter that information in the "Additional Information" box AND check all 3 boxes underneath

The screenshot shows the 'Create Requisition' page. At the top, there are navigation tabs for 'Employee Self-Service' and 'Training'. Below that, the user is logged in as 'Christopher G Palacios'. The page has a search bar and a 'Checkout' button highlighted with a red box and an arrow from the text above. The main form is titled 'Special Requests' and contains several sections: 'Item Details' with fields for \*Item Description, \*Price, \*Quantity, \*Category, \*Currency (set to USD), \*Unit of Measure, Due Date, and Address Sequence Number; 'Supplier' with fields for Supplier ID, Supplier Name, and Supplier Item ID; 'Manufacturer' with fields for Mfg ID and Mfg Item ID; and 'Additional Information' with a large text area and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. All three checkboxes are checked. At the bottom, there is a 'Request New Item' section with a checkbox and a note: 'A notification will be sent to a buyer regarding this new item request.'

**NOW SCROLL TO THE BOTTOM OF THE PAGE AND CLICK "ADD TO CART"**



# ADD ITEMS AND/OR SERVICES

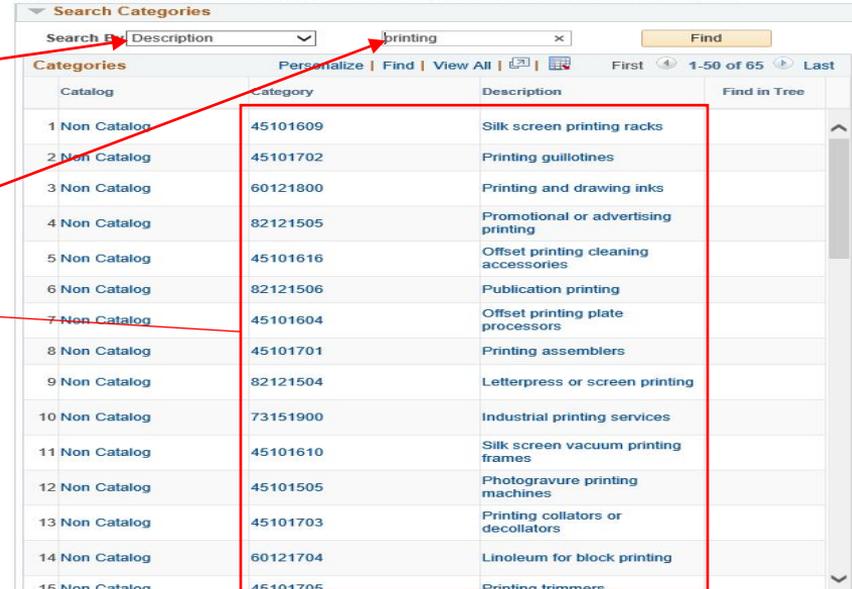


## “CATEGORY” field tips

- Change the drop down box to read “Description”
- Enter a one word, basic description in the search box
- Choose the most accurate choice of the options provided

### Look Up Category

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



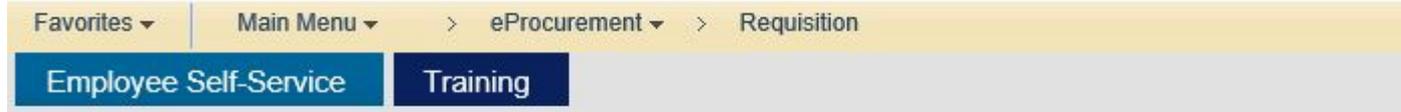
Categories	Personalize	Find	View All	1-50 of 65	First	Last
Catalog	Category	Description	Find in Tree			
1 Non Catalog	45101609	Silk screen printing racks				
2 Non Catalog	45101702	Printing guillotines				
3 Non Catalog	60121800	Printing and drawing inks				
4 Non Catalog	82121505	Promotional or advertising printing				
5 Non Catalog	45101616	Offset printing cleaning accessories				
6 Non Catalog	82121506	Publication printing				
7 Non Catalog	45101604	Offset printing plate processors				
8 Non Catalog	45101701	Printing assemblers				
9 Non Catalog	82121504	Letterpress or screen printing				
10 Non Catalog	73151900	Industrial printing services				
11 Non Catalog	45101610	Silk screen vacuum printing frames				
12 Non Catalog	45101505	Photogravure printing machines				
13 Non Catalog	45101703	Printing collators or decollators				
14 Non Catalog	60121704	Linoleum for block printing				
15 Non Catalog	45101705	Printing trimmers				

**-Next-**



# ADD ITEMS AND/OR SERVICES (CONT.)

“SUPPLIER ID” and  
“SUPPLIER NAME tips



Enter name of supplier in “Name” field. (Try entering just the first word in their name so the search will bring up all possible suppliers with that name.)

## Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country

Postal Code

State

HUB Vendors Only

**i** Enter search criteria to find a supplier.



# ADD ITEMS AND/OR SERVICES (CONT.)

After you click "Checkout", you will be brought to this page.

Doublecheck the following:

- Requisition name
- Line item details
- Ship To address

Favorites > Main Menu > eProcurement > Manage Requisitions > Requisition

Employee Self-Service Training My Li

### Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

#### Requisition Summary

Business Unit: SAD01 UT System Administration Requisition Name: test req  
Requester: 6001039650 Christopher G Palacios Requisition ID: 0000003366  
\*Currency: USD Priority: Medium  
Custom Fields

Cart Summary: Total Amount 10.00 USD

Expand lines to review shipping and accounting details

#### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	test		DELL MARKETING LP	10.0000	Each	1.0000	10.00		Add	

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

Total Amount 10.00 USD  
Pre-Encumbrance Balance 10.00 USD

#### Shipping Summary

Edit for All Lines

Ship To Location Address: CNTRLREC, 210 W 7th St, Austin, TX 78701  
Attention To Comments: Christopher G Palacios

**-Next-**



# ADD ITEMS AND/OR SERVICES (CONT.)

Enter the following Information in "Requisition Comments and Attachments":

- Reference the quote number (if no quote #, reference date of quote and vendor contact)
- Reference contract number (only if applicable)
- Departmental contact
- Check all boxes

If everything looks good, scroll down to the bottom of the page.

Total Amount 10.00 USD  
Pre-Encumbrance Balance 10.00 USD

## Shipping Summary

Edit for All Lines

Ship To Location CNTRLREC  
Address 210 W 7th St  
Austin, TX 78701  
Attention To Christopher G Palacios  
Comments

## Requisition Comments and Attachments

Enter requisition comments

Send to Supplier     Show at Receipt     Shown at Voucher

[Add more Comments and Attachments](#)

## Approval Justification

Enter approval justification for this requisition

Check Budget

Pre-Check Budget

Budget Checking Status: **Valid**

Save & submit

Save for Later

Add More Items

Preview Approvals

Enter reason for awarding to vendor in "Approval Justification" box (usually "low bid" or "contract purchase")



# REVIEW AND SUBMIT THE REQUISITION

Almost finished!

Total Amount 10.00 USD  
Pre-Encumbrance Balance 10.00 USD

## Shipping Summary

[Edit for All Lines](#)

Ship To Location CNTRLREC  
Address 210 W 7th St  
Austin, TX 78701  
Attention To Christopher G Palacios  
Comments

## Requisition Comments and Attachments

Enter requisition comments

Reference: Quote # 2515 / E-mail quote from vendor contact Joe Schmoeg on July 11, 2019  
Reference: UT System Supply Chain Alliance Contract # UTSSCA5114  
Departmental Contact: Christopher Palacios / cpalacios@utsystem.edu / 512-579-5143

Send to Supplier  Show at Receipt  Shown at Voucher

[Add more Comments and Attachments](#)

## Approval Justification

Enter approval justification for this requisition

UTSSCA contract purchase

Check Budget  Pre-Check Budget Budget Checking Status: **Valid**

- Check budget
- "Save & Submit" to move forward for departmental approval
- "Save for Later" to hold on your desk for submission later

**-Next-**



# REVIEW AND SUBMIT THE REQUISITION (CONT.)

Confirmation

Your requisition has been submitted.

Requested For	Christopher G Palacios	Number of Lines	1
Requisition Name	test req	Total Amount	10.00 USD
Requisition ID	0000003366	Pre-Encumbrance Balance	10.00 USD
Business Unit	SAD01	Approval Justification	UTGCCA-contract purchase
Status	Pending		
Priority	Medium		
Budget Status	Valid		

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

Cost Center Approval

test req: Pending [Start New Path](#)

Cost Center Approval

Pending

Multiple Approvers

Cost Center Approval

[Apply Approval Changes](#)

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

**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.

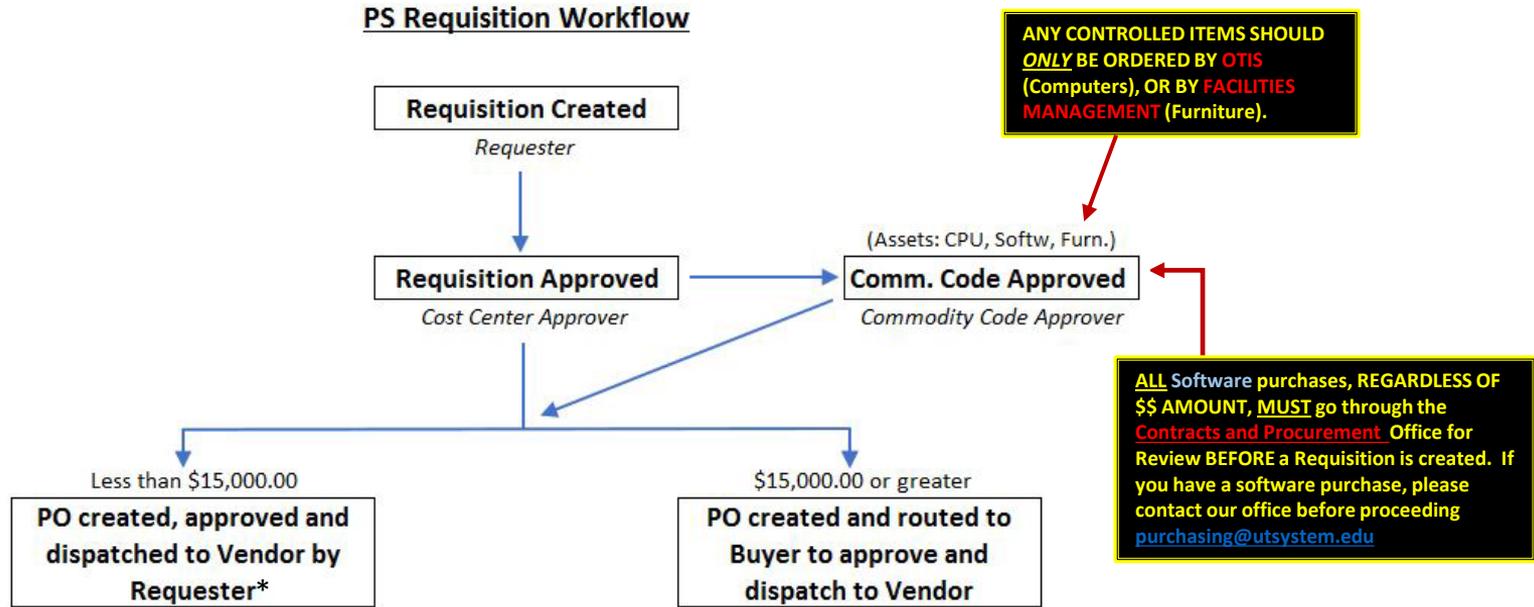
On orders \$15,000.00 or more, the approved requisition converts to a Purchase Order in "Created" Status. These Purchase Orders are reviewed, final approved and submitted to the vendor by **Purchasing**.

**- 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<sup>+</sup>



\*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.

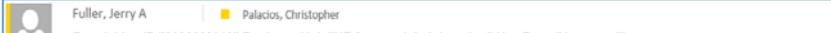
<sup>+</sup>Workflow is an electronic approval routing process that allows for multiple budgetary level approvers to communicate, verify and store documents.



# WORKFLOW NOTIFICATION EMAILS

You will receive the following emails upon Requisition approval:

## Approved Requisition Notification Email

1.  Fuller, Jerry A | Palacios, Christopher  
**Requisition ID "000000010" 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=000000010](https://my.shared.utsystem.edu/psp/ZAPPRD/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?action=U&BUSINESS_UNIT=SAD01&REQ_ID=000000010)

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

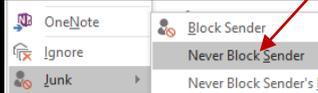
2.  UTShare.Donotreply | Palacios, Christopher  
**Dispatched Purchase Order**  
Retention Policy UT-13Month\_Inbox (1 year, 1 month) Expires

 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)**



# 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 PDF 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 the vendor quote.

\*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](mailto: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.*

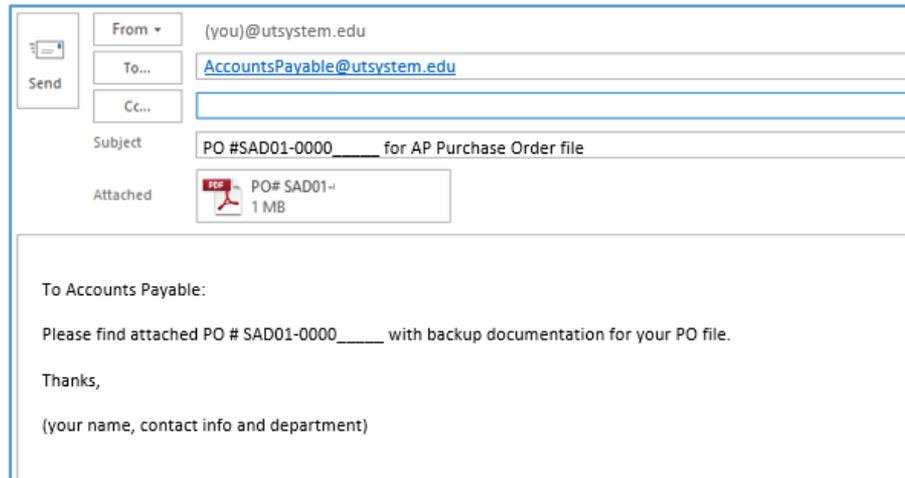
***-See next page for documentation to submit to Accounts Payable -***



# 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 with the following details:

- From:** (you)@utsystem.edu
- To:** [AccountsPayable@utsystem.edu](mailto:AccountsPayable@utsystem.edu)
- Subject:** PO #SAD01-0000\_\_\_\_\_ for AP Purchase Order file
- Attached:** PO# SAD01- 1 MB

The email body contains the following text:

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](mailto: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

To track the status of your requisitions, do the following:

- Enter your Empl ID # in the "Requester" field
- Enter a date range to be searched in the "Date From" and "Date To" fields
- Press "Search" button

## Manage Requisitions

Requisition Search
Keyword Search

**Search Requisitions**

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

Business Unit	SAD01	Requestion Name	
Requisition ID		Request State	All but Complete
Date From	07/05/2019	Date To	07/12/2019
Requester	6001039650	Entered By	
		Budget Status	
		PO ID	

Search
Clear
Show Advanced Search

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000003373	0000003373	SAD01	07/12/2019	Approved	Valid	4,725.00 USD	[Select Action]	Go
▶ 0000003372	SYS AUD Supplies 7.11.19	SAD01	07/11/2019	PO(s) Dispatched	Valid	43.69 USD	[Select Action]	Go
▶ 0000003371	0000003371	SAD01	07/11/2019	PO(s) Dispatched	Valid	12,224.00 USD	[Select Action]	Go
▶ 0000003370	0000003370	SAD01	07/11/2019	PO(s) Dispatched	Valid	8,176.00 USD	[Select Action]	Go
▶ 0000003369	Ink for Jose's Printer	SAD01	07/10/2019	PO(s) Dispatched	Valid	255.56 USD	[Select Action]	Go
▶ 0000003368	0000003368	SAD01	07/10/2019	PO(s) Dispatched	Valid	273.93 USD	[Select Action]	Go

**-Next-**



# MANAGING AND TRACKING REQUISITIONS (PRINTING)

## Manage Requisitions

Requisition Search | Keyword Search

▼ Search Requisitions

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

Business Unit SAD01 | Requisition Name |

Requisition ID | Request State All but Complete | Budget Status |

Date From 07/05/2019 | Date To 07/12/2019 |

Requester 6001039650 | Entered By | PO ID |

Search | Clear | Show Advanced Search

## Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000003373	0000003373	SAD01	07/12/2019	Approved	Valid	4,725.00 USD	View Print   Go
▶ 0000003372	SYS AUD Supplies 7.11.19	SAD01	07/11/2019	PO(s) Dispatched	Valid	43.69 USD	[Select Action]   Go
▶ 0000003371	0000003371	SAD01	07/11/2019	PO(s) Dispatched	Valid	12,224.00 USD	[Select Action]   Go

Step 1 – Select requisition you wish to print, then change drop down box to “View Print”

## Step 2

Message

Do you want to print the requisition with distribution details ? (18036,11614)

Yes No

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

Click 'Yes'

**-Next-**



# MANAGING AND TRACKING REQUISITIONS (PRINTING, CONT.)

## Step 3

<b>Business Unit:</b> SAD01	<b>Requester:</b> CPALACIOS-UTX	<b>Status:</b> Approved					
<b>Requisition:</b> 000000010	<b>Requested By:</b> Chris Palacios - UT System	<b>Currency:</b> USD					
<b>Requisition Name:</b> Items for APS 04/04/14	<b>Entered Date:</b> 4/7/14	<b>Requisition Total:</b> 600.00					
<b>Line:</b> 1	<b>Item Description:</b> Herman Miller Conference Table	<b>Quantity:</b> 1.0000	<b>UOM:</b> EA	<b>Price:</b> 600.00	<b>Line Total:</b> 600.00	<b>Line Status:</b> Approved	
<b>Line Comments:</b>							
<< Size: 8 x 4', Oval							
Wood top: Oak, stained							
Frame and legs: Steel with chrome finish >>							
<b>Ship Line:</b> 1	<b>Ship To:</b> CTJB.126	<b>Address:</b>		<b>Shipping Quantity:</b> 1.0000			
<b>Attention:</b> Chris Palacios - UT System	<b>Due Date:</b> 5/16/14	Central Receiving		<b>Shipping Total:</b> 600.00			
		210 W. 6th					
		Austin TX 78701					
		United States					
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	LAV1.119	1.0000	100.00	600.00	SAD01	63103
<b>Dept</b>	<b>Fund</b>	<b>Class</b>					
CON100	2100	700					
<b>Open QTY</b>	<b>Open Amt</b>						
1.0000	0.000						
<b>GL Base Amount</b>	<b>Currency</b>	<b>Sequence</b>					
600.00	USD	0					
<b>Chartfield 1</b>							
21000046							

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



# COPYING AN EXISTING REQUISITION

You can also copy a previous requisition created by you.

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

Do NOT copy requisitions for office supply orders, as pricing changes frequently.

## Manage Requisitions

Requisition Search  Keyword Search

▼ Search Requisitions

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

Business Unit  Requestion Name

Requisition ID  Request State  Budget Status

Date From  Date To

Requester  Entered By  PO ID

[Show Advanced Search](#)

### Requisitions [?](#)

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000003366	test req 1	SAD01	07/10/2019	Canceled	Valid	0.00 USD	[Select Action] ▼	Go
▶ 0000003234	mouse for Lis	SAD01	05/15/2019	PO(s) Completed	Valid	15.90 USD	[Select Action] ▼	Go
▶ 0000003066	Tableau Erica Haynes	SAD01	03/04/2019	Complete	Valid	319.00 USD	Copy ▼	Go

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.)

Requisition Summary My Preferences Requisition Settings

Business Unit  UT System Administration Requisition Name

\*Requester  Christopher G Palacios Priority

\*Currency  Custom Fields

Cart Summary: Total Amount 1,020.00 USD

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

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input type="checkbox"/> 1	Boise ASPEN 30 Multipurpose Pa		MANUFACTURING PARTNERING GROUP LLC	<input type="text" value="10.0000"/>	Case	85.0000	850.00		Add	
<input type="checkbox"/> 2	Lemi Shine Booster Dishwasher		MANUFACTURING PARTNERING GROUP LLC	<input type="text" value="24.0000"/>	Each	5.0000	120.00		Add	
<input type="checkbox"/> 3	Freight Charges (not to exceed)		MANUFACTURING PARTNERING GROUP LLC	<input type="text" value="1.0000"/>	Batch Lot	25.0000	25.00		Edit	
<input type="checkbox"/> 4	Freight charges (not to exceed)		MANUFACTURING PARTNERING GROUP LLC	<input type="text" value="1.0000"/>	Batch Lot	25.0000	25.00		Edit	

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

Total Amount      1,020.00 USD

Enter your new Requisition Name, then edit Line Items, Cost Centers, etc. as needed. **Remember to enter new quote/ contact information in the Comments section of Requisition Comments and Attachments.**



# 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"

1) Click on **SciQuest eShop Portal**. (You may need to click the arrow next to "Request Options" to see the eShop link.) You will be rerouted to the eShop Shopping Dashboard.

**-Next-**



# NAVIGATE ESHOP PORTAL

## eShop Portal

The screenshot shows the eShop Portal interface. A red box highlights the 'Home' link in the top navigation bar, with a yellow callout box containing the text '1. Click on 'Home''. A blue arrow points from a red box containing the text 'Instructions on using site' to the 'How to Use' section of the 'Welcome to eShop' message. A yellow callout box with the text '2. Click on Punch-out Catalog' has a red arrow pointing to the 'TODAY'S' catalog tile in the 'Punchout Catalogs' section.

**1. Click on 'Home'**

**Instructions on using site**

**2. Click on Punch-out Catalog**

**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**

**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:

The screenshot displays the TBS order site interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'eProcurement', and 'Requisition'. Below this are buttons for 'Employee Self-Service' and 'Training', and a 'My Links' dropdown. A search bar is present with the text 'Search by Keyword or Item#'. The site header includes 'Account 82617105', 'Hi, Christopher Palacios', and a 'Logout' link. Navigation categories include 'Office Supplies', 'Paper', 'Ink & Toner', 'Breakroom', 'Cleaning', 'Technology', 'Furniture', 'School Supplies', 'Print + Copy', and 'Services'. A 'MY TOOLS' dropdown menu is open, showing 'Hi, Christopher Palacios', 'Logout', 'Account 82617105', 'Cart 0', 'Recently Viewed', and 'Order By Item'. A promotional banner for Centon memory products is featured, with the text 'Save on Memory from Centon' and a 'Shop Now' button. The banner shows various Centon memory products, including a 480GB C-380 Series SSD and several microSD cards with an adapter.

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

**-Next-**



# CHECK-OUT CART AND TRANSFER TO PEOPLESOFT

## Shopping Cart

The screenshot shows the PeopleSoft Shopping Cart interface. At the top, the user is logged in as Kyle Hayes with a total of 47.70 USD. The cart contains 6 items for a total of 47.70 USD. Two yellow callout boxes provide instructions: '1. Enter a description then hit 'save'' points to the 'Save' button, and '2. Click this button when the cart is ready to transfer' points to the 'Return Cart to PeopleSoft' button. The 'Return Cart to PeopleSoft' button is circled in red. Below the cart items, there is a table with columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The first item is 'Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12' with a unit price of 7.95 and a quantity of 6, totaling 47.70 USD. The subtotal and total are both 47.70 USD.

1. Enter a description then hit 'save'

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

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	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 – Checkout – Review and Submit" screen in PeopleSoft.



# COMPLETE, REVIEW AND SUBMIT THE REQUISITION

## Checkout - Review and Submit

Review the item information and submit the req for approval.

**Requisition Summary**

Business Unit: SAD01 | UT System Administration | Requisition Name: paper | Priority: Medium

\*Requester: 6001039650 | Christopher G Palacios

\*Currency: USD

Cart Summary: Total Amount 366.00 USD

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Bose(R) ASPEN(R) Multipurpose		TODAY'S BUSINESS SOLUTIONS LLC	10.0000	carton	36.6800	366.80			
							Total Amount	366.80 USD		

**Shipping Summary**

Ship To Location: CNTRLREC  
Address: 210 W 7th St, Austin, TX 78701  
Attention To: Christopher G Palacios

**Requisition Comments and Attachments**

Enter requisition comments

Send to Supplier |  Show at Receipt |  Show on Voucher

**Approval Justification**

Enter approval justification for this requisition

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

If you haven't entered your Cost Center in "Requisition Settings", you can do so here or enter it in "Mass Change".

Enter "Requisition Name"

Check Shipping Address and modify if necessary.

Leave "Requisition Comments and Attachments" BLANK.

Enter approval justification.

When you click 'Check Budget', then '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 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"

Favorites ▾ Main Menu ▾ > eProcurement ▾ > Requisition

Employee Self-Service Training

Create Requisition ?

Welcome Christopher G Palacios

Home My Preferences Requisition Settings | 0 Lines Checkout

Request Options Search All Search Advanced Search

**Special Requests**

Web  
SciQuest eShop Portal  
Favorites  
Templates

**Special Requests** ?

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

**Item Details**

\*Item Description

\*Price

\*Quantity

\*Category

\*Currency

\*Unit of Measure

Due Date

Address Sequence Number

20900 FM 1093 RD APT 8104 TX 77407  
RICHMOND

Suggest New Supplier

**Supplier**

Supplier ID

Supplier Name

Supplier Item ID

**Manufacturer**

Mfg ID

Manufacturer

Mfg Item ID

Click 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 user profile for 'Kyle Hayes' is visible with a notification bell icon showing '11' and a shopping cart icon showing '0.00 USD'. A yellow callout box with the text '1. Click on the flag' has a red arrow pointing to a small flag icon with a red '7' next to it. Below this, a dark blue 'Action Items' dropdown menu is open, showing 'My Assigned Approvals' and a list item 'Carts Assigned To Me' with a red '7' in a box. A second 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' item. The main content area includes a search bar with 'Everything' selected, a search button, and a section for 'Shop By Catalog' featuring logos for GRAINGER (Burgoon), CDW, shi, TODAY'S BUSINESS SOLUTIONS, ROCKFORD, and DELL (Dell-SHI). A sidebar on the left contains navigation icons and a 'Shopping Dashboard' section.

**-Next-**



# SELECT CARTS ASSIGNED TO YOU

## Draft Shopping Carts Page

The screenshot shows the 'Draft Shopping Carts Page' in the University of Texas System portal. The page displays two tables of draft carts. The first table, 'My Drafts', contains one cart. The second table, 'Drafts Assigned To Me', contains seven carts. A red box highlights the cart '2017-05-16 cpalacios@utsystem.edu 01' in the 'Drafts Assigned To Me' table, with a red arrow pointing 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	<a href="#">Delete</a>

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	<a href="#">Delete</a>
	2017-04-25 cpalacios@utsystem.edu 01	4/25/2017	rockford test over 50	53,080.65 USD	<a href="#">Delete</a>
	2017-04-25 cpalacios@utsystem.edu 01	4/25/2017	rockford test over 15	21,425.00 USD	<a href="#">Delete</a>
	2017-05-03 khayes@utsystem.edu 01	5/3/2017	test cart for SHI/Dell	1,053.63 USD	<a href="#">Delete</a>
	2017-05-03 khayes@utsystem.edu 01	5/3/2017	test cart for SHI/Dell	765.85 USD	<a href="#">Delete</a>
	2017-05-03 khayes@utsystem.edu 01	5/3/2017	test cart for SHI/Dell	765.85 USD	<a href="#">Delete</a>
	2017-05-16 cpalacios@utsystem.edu 01	5/16/2017	sharpie test 5/16	59.88 USD	<a href="#">Delete</a>

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



# TRANSFER CART TO PEOPLESOFT

## Shopping Cart

Shopping Cart for Christopher Palacios

Return Cart

Save

Return Cart to PeopleSoft or Assign Cart

Cart Name: 2017-05-16 cpalacios@utsyste  
Description: sharpie test 5/16  
Prepared for: Christopher Palacios  
Select a different user...

Supplier / Line Item Details

Hide line details

Today's Business Solutions [more info...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)  
Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/16/2017 9:53:37 AM

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Sharpie(R) Permanent Fine-Point Markers, Blue, Pack Of 12 <a href="#">more info...</a>	451906	DZ	9.98	6	59.88 USD
Manufacturer Name: Sanford L.P.					
Manufacturer Part Number: 30003					
Supplier Part Auxiliary ID: 451906					
<a href="#">more info...</a>					
Supplier subtotal					59.88USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.					
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:  Search for an assignee

Note To Assignee:

Assign Close

The 'Return Cart' will transfer you back to the 'Checkout – Review and Submit' screen in PeopleSoft.



# COMPLETE, REVIEW AND SUBMIT THE REQUISITION

## Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SAD01 UT System Administration Requisition Name: paper  
\*Requester: 6001039650 Christopher G Palacios Priority: Medium  
\*Currency: USD

Cart Summary: Total Amount 366.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Bose(R) ASPEN(R) Multipurpose		TODAY'S BUSINESS SOLUTIONS LLC	10.0000	carton	36.6800	366.80			

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

Total Amount 366.80 USD

Shipping Summary

Ship To Location: CNTRLREC  
Address: 210 W 7th St, Austin, TX 78701  
Attention To: Christopher G Palacios

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher 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

If you haven't entered your Cost Center in "Requisition Settings", you can do so here or enter it in "Mass Change".

Enter "Requisition Name"

Check Shipping Address and modify if necessary.

Leave "Requisition Comments and Attachments" BLANK.

Enter approval justification.

When you click 'Check Budget', then '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 eProcurement > Manage Requisitions.



# Create Order Receipt

## (Standard and eShop Orders)



# NAVIGATE TO “MANAGE REQUISITIONS”

<b>Financial Approvals</b>  0	<b>Requisition</b> 	<b>Manage Requisitions</b>  <b>CLICK HERE!</b>	<b>Supplier Inquiry</b> 
<b>Review Purchase Order</b> 	<b>Reconcile PCards</b> 		

**-Next-**



# FINDING YOUR PURCHASE ORDER NUMBER

You MUST know your Purchase Order (PO) number in order to receive items in PeopleSoft!

If the PO number isn't referenced on the packing slip and you don't know the PO number related to your requisition, follow these steps:

- Go to "Manage Requisitions"
- Enter your Empl ID # in "Requester" field, set a "date from" and "date to" Range, set "Request State" To "All but Complete", then press "Search"
- Click triangle/arrow next to the Requisition # to expand, then click "Purchase Orders"

**Manage Requisitions**

Requisition Search | Keyword Search

**Search Requisitions**

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

Business Unit: SAD01 | Requisition Name: | Request State: All but Complete | Budget Status: |

Requisition ID: | Date From: 06/01/2019 | Date To: 07/18/2019 |

Requester: 6001030999 | Entered By: | PO ID: |

Search | Clear | Show Advanced Search

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000003387	0000003387	SAD01	07/18/2019	PO(s) Created	Valid	170.46 USD	[Select Action]	Go
▶ 0000003351	0000003351	SAD01	07/01/2019	PO(s) Dispatched	Valid	275.29 USD	[Select Action]	Go

Requester: Jennifer E Hosey | Entered By: Jennifer E Hosey | Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

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

Request Lifespan:

**Line Information**

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	Case Logic 17.3 Laptop and T...	PO Dispatched	35.6900	USD	2.0000	EA	TODAY'S BUSINESS SOLUTIONS LLC	✘



# FINDING YOUR PO NUMBER – STEP 2

You'll be brought to this screen, and your PO Number can be found here.

Business Unit SAD01

**Requisition information** Find | View All First 1 of 9 Last

Requisition ID 0000003351 Line Number 1

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

PO Number 0000003161 Buyer 6001039650 Change Order

PO Date 07/01/2019 Supplier ID 0000018921 Terms NET07 PO Status Dispatched

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

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		Case Logic 17.3 Laptop and Tablet Case	71.38 USD	EA	2.0000	Approved	

[Return to Manage Requisitions](#)

**-Next-**



# CREATE A RECEIPT – STEP 1

## Manage Requisitions

Requisition Search    Keyword Search

**Search Requisitions**

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

Business Unit     Requisition Name

Requisition ID     Request State     Budget Status

Date From     Date To     PO ID

Requester     Entered By

**Requisitions** ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000003375	Nagios Renewal	SAD01	07/15/2019	PO(s) Dispatched	Valid	9,047.50 USD	[Select Action]	Go
▶ 0000003341	19UL06I Battery Backup	SAD01	06/24/2019	PO(s) Dispatched	Valid	22,027.10 USD	Receive	Go
▶ 0000003336	VEEAM Backup & Replication	SAD01	06/21/2019	Received	Valid	13,475.88 USD	[Select Action]	Go
▶ 0000003335	ODOP Refresh FY 19	SAD01	06/21/2019	Received	Valid	11,598.66 USD	[Select Action]	Go
▶ 0000003327	TIS Refresh (Partial)	SAD01	06/18/2019	Partially Received	Valid	3,696.91 USD	[Select Action]	Go
▶ 0000003326	OCP and (part)AUF Refresh	SAD01	06/18/2019	Partially Received	Valid	11,569.00 USD	[Select Action]	Go

[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' from drop-down, then click the Go button.

**-Next-**



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# CREATE A RECEIPT – STEP 2

You'll be brought to this page.

Simply click the "Add a New Value" tab, then click "Add".

## Receiving

Find an Existing Value

Keyword Search

Add a New Value

Business Unit SAD01



Receipt Number NEXT

PO Receipt

Add



# CREATE A RECEIPT – STEP 3

Insert the PO Number in the ID field, then click "Search".

## Select Purchase Order

### Search Criteria

PO Unit

Days +/- Today

ID

Start Date

Line / Schedule  /

End Date

Release

Supplier Name  [Supplier Lookup](#)

Item ID

Supplier Item ID

Ship To

Manufacturer ID

Ship Via

Manufacturer's Item ID

Retrieve Open PO Schedules

Search

### Receipt Qty Options

No Order Qty

Ordered Qty

PO Remaining Qty

OK

Cancel

Refresh



# CREATE A RECEIPT – STEP 4

Click the “Sel” box for any item(s) you received.

Leave non-received items unchecked.

Then click “OK”

Retrieved Rows Personalize | Find | View All | First 1 of 1 Last

Selected Rows Shipping Related More Details

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input type="checkbox"/>	SAD01	0000003139	3	1		06/19/2019	2.0000			Dell Latitude 7390 with the fo

Select All Clear All



# CREATE A RECEIPT – STEP 5

On this page, confirm that the appropriate items are listed.

If you received a partial shipment, change the quantity to match the number you received.

Click "Save".

Maintain Receipts

## Receiving

Business Unit SAD01      Receipt Status Open ✖

Receipt ID NEXT      Header Comments/Attachments      Activities

[Header Details](#)

▶ **Header**

[Select Purchase Order](#)      [Close Short All Lines](#)      [Print Delivery Report](#)      [Run PO Receipt Accrual](#)

### Receipt Lines

[Receipt Lines](#) | [More Details](#) | [Links and Status](#) | [Item / Mfg Data](#) | [Optional Input](#) | [Source Information](#) | [Personalize](#) | [Find](#) | [View All](#) | [Add](#)

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	AM Status	Device
1		Dell Latitude 7390 with the fo	2.0000	EA	1609.56000	2.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Pending	Device Track

Interface Receipt       Run Close Short      [Interface Asset Information](#)

[Save](#)   [Notify](#)   [Refresh](#)      [Add](#)



# CREATE A RECEIPT – STEP 6

Your receipt is confirmed when a Receipt ID is assigned and Receipt Status changes to "Partially Received" / "Fully Received"

Maintain Receipts

## Receiving

Business Unit SAD01      Receipt Status Fully Received 

Receipt ID 0000003713      Header Comments/Attachments      Activities

Header Details      Document Status

**Header**

Select Purchase Order      [Close Short All Lines](#)      [Print Delivery Report](#)      [Run PO Receipt Accr](#)

### Receipt Lines

Personalize | Find | View All | 

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information							
Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	
1		Dell Latitude 7390 with the fo	2.0000 	EA 	1609.56000	2.0000	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA 	P

Interface Receipt       Run Close Short      [Interface Asset Information](#)

[Save](#)      [Notify](#)      [Refresh](#)



# 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 / SUPPLIER

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>

