Purchasing Request System Overview

Purpose – used to initiate the following types of purchases: Procard, UT Market, Web Orders and Purchase Orders (PO’s).

- You’ll primarily refer to the Expense Requests to make new requests and/or My Requests to track a request or copy a prior request to re-order. Ignore all other sections on home page.
- URL: [https://utdirect.utexas.edu/apps/services/requests/](https://utdirect.utexas.edu/apps/services/requests/)
- Two options to make a request: 1) create a new request or 2) copy a prior request from your history

How do I submit a NEW request?

- Select “Create” under *Purchase Request* which will take you to the *Purchase Request* page (screen shots below)
- Each request will be assigned a unique Request ID for tracking progress and viewing in the My Request section.
- Refer to the “?” in each section header for helpful hints

Purchase Request Screen – Step 1

- Use “Add Attachment” button to upload quotes, PI approvals if submitting on behalf of, EAJs, Federal Cost Justification forms (if using federal funds). Upload one item at a time.
Purchase Request Screen – Step 2

- Fill in the “Requester Information”, after you do this the first time it will populate when you select “Autofill”

- Under “Item Information”
  - Provide a description/reason for this purchase including priority level.
  - Under Items enter part/item information including website links in the Description field
  - Use the “Add item” to include multiple.

![Purchase Request Screen](image-url)
Purchase Request Screen – Step 2, cont.

- Under “Account Information” list 10-digit account. You may enter an allocation % or $ for each account you listed. Use “Add account” if using multiple to pay. Always enter “No” for departmental codes.

- Section “Vendor Information” Select “no” under “Suggest Vendors”. Depending on the type of order we may have offline discussions about vendors.

- Select “Continue” to move to the final step of assigning request to Physics Purchasing.

- Select “Save for Later” if you are not ready to forward the request to Physics Purchasing.

- Under “Advanced Options” never select Save & Finalize. Use Copy to copy the request, use Delete to delete request.
Purchase Request Screen – Step 3: Assign the request

- Select PHY PURCHASING (00127) in the “Assign to” filed. **Do not** select EID.
- Assignment Note field, can be used to state urgency or any other notes you want the purchaser to be aware of including requesting a meeting if you have more info to share and prefer a 1x1.

Summary of Request

- After you Assign your request, you will see a summary of your submission. On the “Home Screen” of the individual Purchase Request you can select History and view all of the changes of that document. Good for tracking purposes.
Request Home Screen

- **My Requests Inbox**
  - If the purchaser sends the request back to you for edits, you will see it the, see screen shot below. You select the Request ID number and to see the full list of items, select the link in the section.

- **My Requests**
  - This section captures your history of requests.

**Ordering the same item again?**

- Navigate to My Requests section and search your prior requests. Select it and copy to initiate a new request.

---

### MY REQUESTS INBOX

Requests that require action by me

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Description</th>
<th>Request Type</th>
<th>Creator</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQ99ZZGB</td>
<td>Test</td>
<td>Travel Authorization Request</td>
<td>Christopher A Carpenter</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(cac7742)</td>
</tr>
<tr>
<td>REQ990DR4</td>
<td></td>
<td>Travel Authorization Request</td>
<td>Virginia Oviedo</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(vo736)</td>
</tr>
</tbody>
</table>

To view complete information, click here.

---

### MY REQUESTS

Requests created by me or for me

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Description</th>
<th>Request Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQ990DR4</td>
<td></td>
<td>Travel Authorization Request</td>
<td>Created</td>
</tr>
<tr>
<td>REQ99WRLL</td>
<td>Silver plated copper wire from Accu Glass</td>
<td>Purchase Request</td>
<td>In Progress</td>
</tr>
<tr>
<td>REQ999LQJ</td>
<td>NACUBO F&amp;A Long Form</td>
<td>Travel Authorization Request</td>
<td>Finalized</td>
</tr>
<tr>
<td>REQ999HLF</td>
<td>Travel reimbursement for RTA TV14843187</td>
<td>Travel Reimbursement Request</td>
<td>Finalized</td>
</tr>
<tr>
<td>REQ999BW1</td>
<td>7 University Conference</td>
<td>Travel Authorization Request</td>
<td>Finalized</td>
</tr>
</tbody>
</table>

Not displaying all requests; see all 23 in My Requests.