

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/>
- **Two options to make a request: 1)** create a new request or **2)** copy a prior request from your history

EXPENSE REQUESTS

Entertainment Payment Request	Create
Payment Request	Create
Purchase Request	Create
Travel Authorization Request	Create
Travel Reimbursement Request	Create

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.

Attachments ? [Add Attachment](#)

Attach a File ? * Indicates a required field. X

* Select File Files cannot be larger than 100 MB.
Accu-Glass Quote 7457_renewed.pdf

* Category (dropdown menu open with options: Approvals, Items to Order, Quote, Scope of Work, Sole Source, Other)


Description

I certify that the attached files I have scanned or photographed are complete copies of the original documentation. I acknowledge that I must be able to produce the original documentation until the request is fulfilled or payment is received.

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.

Requester Information

* Requester UT EID  Virginia Oviedo (vo736)

Autofill Requester Info

* Requester Email

* Requester Phone


Delivery Information

* Department Name	* Building	* Room
<input type="text" value="Physics"/>	<input type="text" value="PMA"/>	<input type="text" value="0.000"/>

Item Information

Describe what the item(s) will be used for.
67 characters used out of 1000

Item(s)

Item 1 

Part Number	Description	
<input type="text" value="33492-349"/>	<input type="text" value="INCLUDE: Item Name, specs of item
REQUIRED: add website link (if available)"/> 75 characters used out of 4800	
Quantity	Unit of Measure	Unit Cost
<input type="text" value="2"/>	<input type="text" value="each"/>	<input type="text" value="2000.00"/>
Work Order Number	Inventory Unit Code	Equivalent parts or brands acceptable?
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No

Estimated Total \$4000.00

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.

Account Information ⓘ

Account(s)	Account Number	Description	Allocation (\$)	Allocation (%)	
	<input type="text" value="2611111150"/>	<input type="text" value="DOE Name of Project"/>	<input type="text"/>	<input type="text" value="100"/>	<input type="button" value="X"/>

Enter department codes? Yes No

Vendor Information ⓘ

Suggest vendors? Yes No

* Indicates a required field.

- Save and Finalize
- Copy
- Delete

Purchase Request Screen – Step 3: Assign the request

- Select PHY PURCHASING (00127) in the “Assign to” field. **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.

* Indicates a required field.

Choose Assignee ?

* Assign to

Assignment Note

Make Default

Assign

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.

Purchase Request

Purchase Request REQ99WRLR was assigned to the group PHY PURCHASING.

Request History Assign

Assigned To	PHY PURCHASING (00127)	Created By	Virginia Oviedo (vo736)
Assigned On	March 19, 2021, 9:20 a.m.	Created On	March 17, 2021, 8:34 a.m.
Request ID	REQ99WRLR	Last Updated By	Virginia Oviedo (vo736)
Request Type	Purchase Request Form	Last Updated On	March 19, 2021, 9:20 a.m.
Status	In Progress		
Requester	Virginia Oviedo (vo736)		
Description	Silver plated copper wire from Accu Glass		
Request Notes	ADD: additional notes helpful to the Physics Purchaser		

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

Request ID	Description	Request Type	Creator
REQ99ZZGB	Test	Travel Authorization Request	Christopher A Carpenter (cac7742)
REQ990DR4		Travel Authorization Request	Virginia Oviedo (vo736)

To view complete information, click [here](#).

MY REQUESTS

Requests created by me or for me

Request ID	Description	Request Type	Status
REQ990DR4		Travel Authorization Request	Created
REQ99WRLL	Silver plated copper wire from Accu Glass	Purchase Request	In Progress
REQ999LQJ	NACUBO F&A Long Form	Travel Authorization Request	Finalized
REQ999HLF	Travel reimbursement for RTA TV14843187	Travel Reimbursement Request	Finalized
REQ999BW1	7 University Conference	Travel Authorization Request	Finalized

Not displaying all requests; see all 23 in [My Requests](#).