

# User Guide for Making eSHOP Purchases

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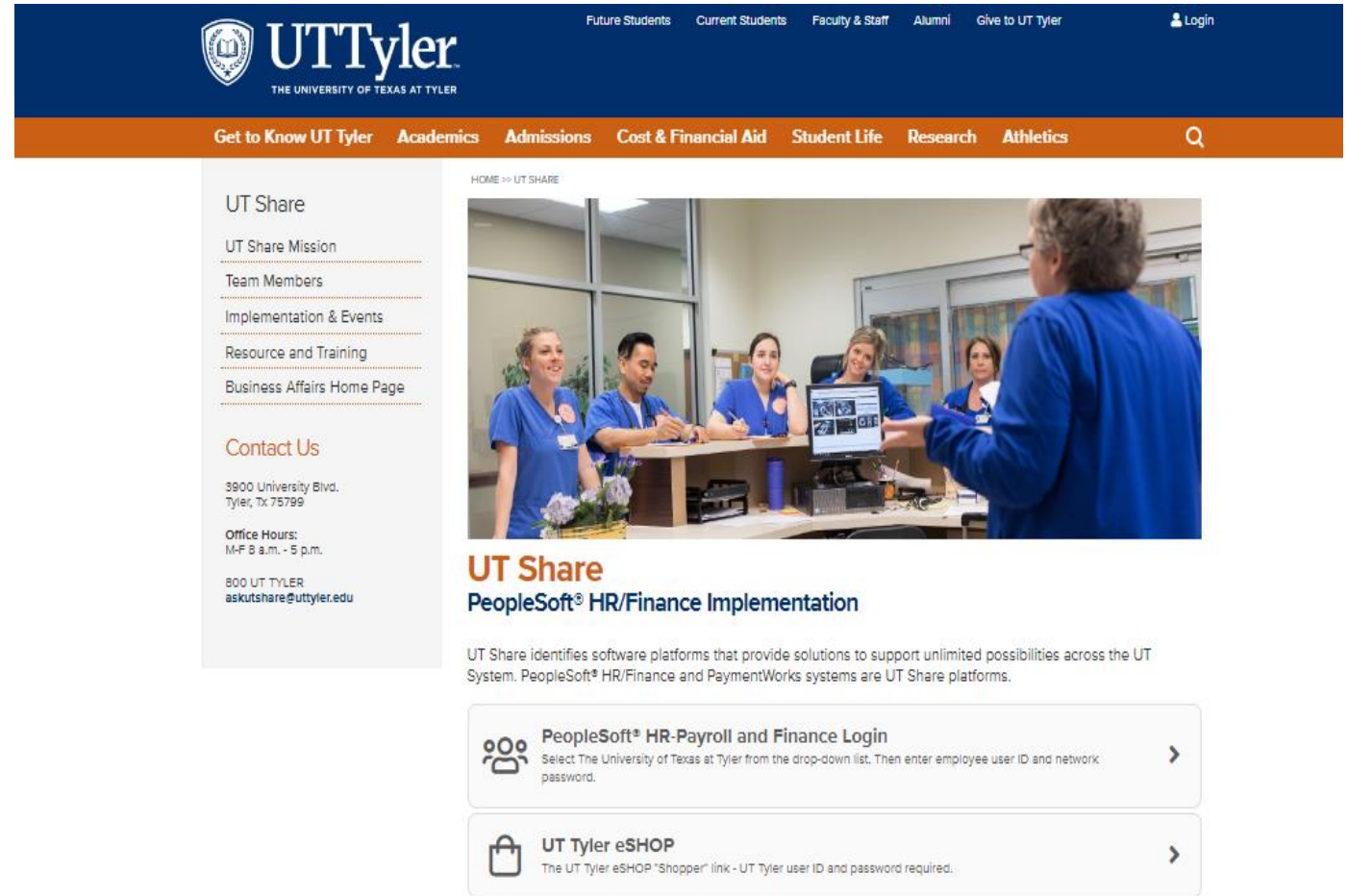
Procedures for eSHOP Purchases

# What is eSHOP?

- Link to UT Share/Peoplesoft and eSHOP “Shopper” page:

<https://www.uttyler.edu/utshare/>

eSHOP is a role-based online shopping tool that allows the University to take advantage of pre-negotiated contracts for pre-approved goods from well known suppliers.



The screenshot displays the UT Tyler website's navigation and content. At the top, the UT Tyler logo is centered, with navigation links for Future Students, Current Students, Faculty & Staff, Alumni, and Give to UT Tyler on the right. Below the logo is a secondary navigation bar with links for Get to Know UT Tyler, Academics, Admissions, Cost & Financial Aid, Student Life, Research, and Athletics. The main content area is divided into two columns. The left column contains a list of links for UT Share, including Mission, Team Members, Implementation & Events, Resource and Training, and Business Affairs Home Page. Below these links is a 'Contact Us' section with the address (3900 University Blvd., Tyler, TX 75799), office hours (M-F 8 a.m. - 5 p.m.), and contact information (800 UT TYLER, askutshare@uttyler.edu). The right column features a large image of staff members in blue scrubs working at a computer. Below the image is the heading 'UT Share PeopleSoft® HR/Finance Implementation' and a paragraph explaining that UT Share identifies software platforms that provide solutions to support unlimited possibilities across the UT System. At the bottom of the right column are two buttons: 'PeopleSoft® HR-Payroll and Finance Login' with instructions to select the University of Texas at Tyler and enter user ID and password, and 'UT Tyler eSHOP' with a note that a UT Tyler user ID and password are required.

UT Tyler

THE UNIVERSITY OF TEXAS AT TYLER

Future Students Current Students Faculty & Staff Alumni Give to UT Tyler Login

Get to Know UT Tyler Academics Admissions Cost & Financial Aid Student Life Research Athletics

HOME >> UT SHARE

UT Share

UT Share Mission

Team Members

Implementation & Events

Resource and Training

Business Affairs Home Page

Contact Us

3900 University Blvd.  
Tyler, TX 75799

Office Hours:  
M-F 8 a.m. - 5 p.m.

800 UT TYLER  
askutshare@uttyler.edu

UT Share  
PeopleSoft® HR/Finance Implementation

UT Share identifies software platforms that provide solutions to support unlimited possibilities across the UT System. PeopleSoft® HR/Finance and PaymentWorks systems are UT Share platforms.

PeopleSoft® HR-Payroll and Finance Login  
Select The University of Texas at Tyler from the drop-down list. Then enter employee user ID and network password.

UT Tyler eSHOP  
The UT Tyler eSHOP "Shopper" link - UT Tyler user ID and password required.

# Entering as Shopper or Requester?

- Shopper – A Shopper is anyone on campus that does not have security access to create a Requisition in UT Share/Peoplesoft
- Requester – Requesters are users who have the authority to create requisitions in UT Share/Peoplesoft



## UT Tyler eSHOP

The UT Tyler eSHOP "Shopper" link - UT Tyler user ID and password required.



## PeopleSoft® HR-Payroll and Finance Login

Select The University of Texas at Tyler from the drop-down list. Then enter employee user ID and network password.



## Shoppers

Shoppers can search and shop the site for goods. At checkout, you will be asked to assign shopping cart to an approved Requester in order to complete the Requisition process.

Shopper training manual:

<https://www.uttyler.edu/finserv/files/eshop-shoppers-training-manual.docx>

## Requesters

Requesters are responsible for creating, reviewing, editing and submitting carts to become formal requisitions for approval by budget authorities.

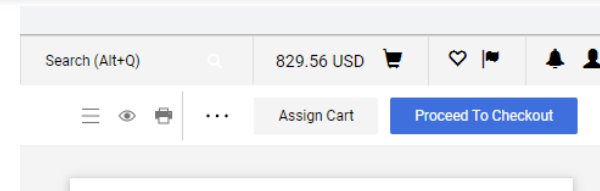
Requester training manual:

<https://www.uttyler.edu/finserv/files/eshop-requesters-training-manual.docx>

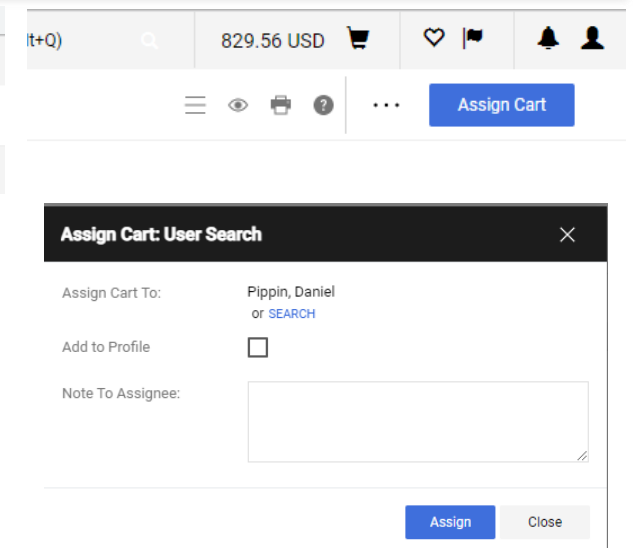
# Navigation as a Shopper

The shopping experience for a Shopper is the same as a Requester up until completing checkout. See slides 6-7 for relevant information.

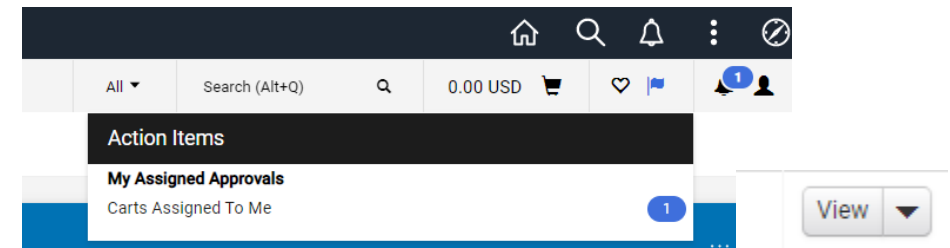
- Instead of being directed to return cart to Peoplesoft, a Shopper will be asked to click “Proceed To Checkout” and “Assign Cart”.



- Assign Cart requires the Shopper to select an approved Requester to complete the requisition steps (Slides 8-10). Click “SEARCH” hyperlink and enter name of approved Requester. Select name from list by clicking “+” sign. Then, click “Assign”.



- The Requester will receive an email notifying them that a cart has been assigned. They will then enter eSHOP through Peoplesoft “Sciquest eSHOP Portal” and retrieve cart by clicking Action Item flag and then click “Carts Assigned To Me”. Click “View”.



# Navigation as a Requester

NavBar



Menu



Financials



eProcurement



Create Requisition

SciQuest eSHOP Portal (Link)

Create Requisition

Welcome Daniel Lee Pippin

Home

My Preferences

Requisition Settings

0 Lines

Checkout

Request Options

Search All

Search

Advanced Search

All Request Options

Web

SciQuest eShop Portal

Special Requests

Favorites

Templates

Special Requests

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

Item Details

\*Item Description

\*Price

\*Currency

\*Quantity

\*Unit of Measure

\*Category

Due Date

Address Sequence Number

Supplier

Supplier ID

Supplier Name

Supplier Item ID

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

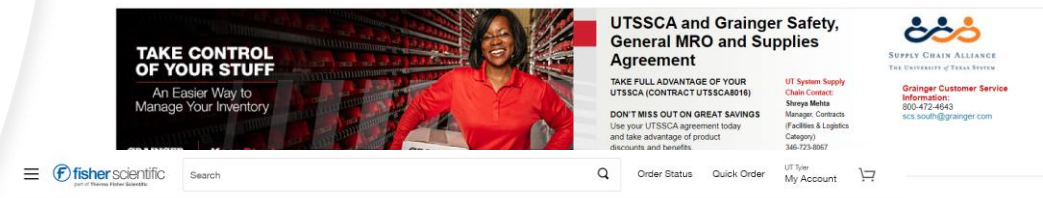
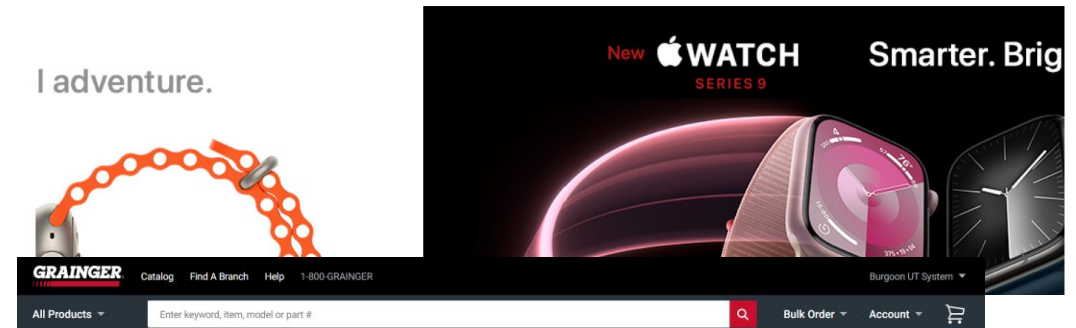
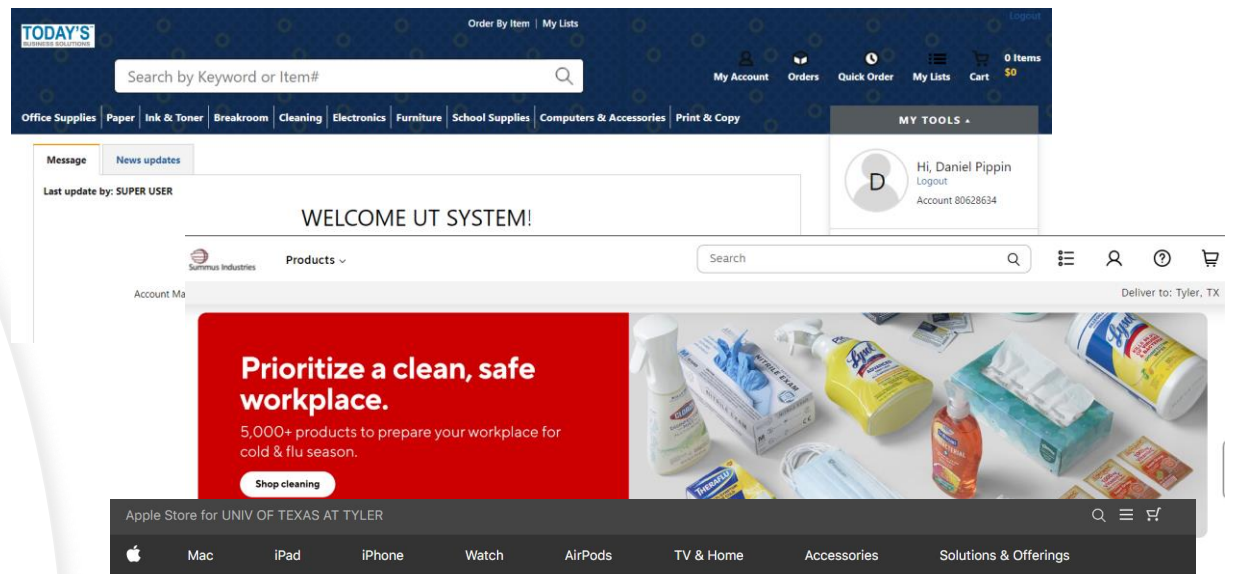
# Click the Punchout Catalog of your choice

*Note: If a new screen does not open after clicking catalog, please check pop-up blocker settings on the browser.*

The screenshot displays the UT Tyler eSHOP interface. At the top, the header includes the UT Tyler eSHOP logo, a currency dropdown set to 0.00 USD, a search bar with the text 'Search (Alt+Q)', and user profile icons. Below the header, the page title is 'Shop • Shopping Dashboard'. A blue banner reads 'Search From All Hosted Catalogs (Does Not Include PunchOut Catalogs)'. Below this banner, there are tabs for 'Simple' and 'Advanced' search, and links for 'Go to: Favorites | Forms | Quick Order' and 'Browse: Suppliers | Categories | Contracts'. A search input field contains the placeholder text 'Search for products, suppliers, forms, part number, etc.' with a search icon on the right. The main content area is divided into two columns. The left column has a green header 'Organization Message' and contains a 'Welcome to eShop' message, a description of the eProcurement system, and a link for 'Punch-out Shopping' under 'Further Reading & Training'. The right column has a yellow header 'Shop By Catalog' and contains two sections: 'Hosted Catalogs' with a dropdown arrow and one catalog card for 'eppendorf' and 'Summus Industries (VWR - Core Lab)'; and 'Punchout Catalogs' with a dropdown arrow and six catalog cards: 'Airgas', 'BURGOON GRAINGER HUB', 'Cell Signaling', 'fisherscientific Possible Missions-HUB', 'STAPLES Summus', and 'TODAY'S HUB'. Below these are two more cards: 'DELL Summus - UT Tyler' and 'UT Tyler Only'.

# Shopping Experience

- The various punchout catalogs provide a shopping experience very similar to Amazon and other online shopping sites with the filling of shopping carts and checkout.
- However, each site is particular to the individual company and operate uniquely in some ways including verbiage and location of various functions.
- The purpose of checkout is to return an eSHOP order requisition to an order summary page so the cart can be returned to Peoplesoft for creation of a Peoplesoft requisition.



# Return Cart to Peoplesoft

- After checkout is completed or a cart was assigned, you should see a summary page of your shopping cart. Check order for completeness and Click “Return Cart to Peoplesoft”
- Please note that an order is not placed until the cart is returned to Peoplesoft and requisition approved for dispatch of PO number.

The screenshot displays the 'Create Requisition' interface for the UT Tyler eSHOP. The page title is 'Shopping Cart • Shopping Cart'. The main content area includes a search bar and a form with the following fields:

- Cart Name: 2023-10-10 5000111415@UTTYL 01
- Description: (empty)
- Prepared for: Daniel Pippin

Below the form, there is a section for '1 Item' with a dropdown arrow. The item listed is 'Today's Business Solutions' with a quantity of 1 and a price of 5.05 USD.

At the bottom, the 'SUPPLIER DETAILS' section shows a contract number of UTSSCA5714 and a PO Number of 'To Be Assigned'.

On the right side, a 'Summary' panel provides a breakdown of costs:

Summary	
Details	
For Daniel Pippin	
Total (5.05 USD)	
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 *	5.05
Total *	5.05

A yellow button labeled 'Return Cart To Peoplesoft' is located in the top right corner of the page.



# Complete Requisition in Peoplesoft

- 1) Fill in Requisition Name field (optional)
- 2) Click on arrow triangles to pull down Accounting Lines
- 3) Enter cost center number into SpeedChart field and hit Enter

## Checkout - Review and Submit

Review the item information and submit the req for approval.

### Requisition Summary

Business Unit  UT Tyler  
\*Requester  Daniel Lee Pippin  
\*Currency

Requisition Name  **1**

Priority

Custom Fields

Cart Summary: Total Amount 829.56 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input type="checkbox"/> 1	OptiPlex Micro (Plus 7010);Opt		Summus Industries - Dell	1.0000	Each	829.5600	829.56		<a href="#">Add</a>	
	Shipping Line 1									
		*Ship To	<input type="text" value="PHY108"/>	<a href="#">Add Shipto Comments</a>	Quantity	<input type="text" value="1.0000"/>				
		Address	3201 Old Glory Rd Tyler, TX 75799	<a href="#">Add One Time Address</a>	Price	829.5600		<a href="#">Price Adjustment</a>		
		Attention To	<input type="text" value="Daniel Lee Pippin"/>					<a href="#">Pegging Inquiry</a>		
		Due Date	<input type="text"/>					<a href="#">Pegging Workbench</a>		
								<a href="#">Custom Fields</a>		

**2**

Accounting Lines

\*Distribute By

SpeedChart

**3**

### Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		<input type="text" value="STE123"/>	1.0000	100.0000	829.56	<input type="text" value="UTTYL"/>	

Select All / Deselect All

Select lines to:

[Add to Favorites](#)

[Add to Template\(s\)](#)

[Delete Selected](#)

[Mass Change](#)

Total Amount 829.56 USD

# Complete Requisition in Peoplesoft

- 4) Attach any quotes or purchase authorization information, as necessary, by clicking “Add more Comments and Attachments”
- 5) Click “Check Budget”
- 6) Click “Save & Submit”

*Budget Authority can then approve Requisition for dispatch into Purchase order*

## Requisition Comments and Attachments

Enter requisition comments

Send to Supplier

Show at Receipt

Shown at Voucher

4

Add more Comments and Attachments

## Approval Justification

Enter approval justification for this requisition

5

Check Budget

Pre-Check Budget

6

Save & submit

Save for Later

+ Add More Items

Preview Approvals

# PO Number Issued and Order Placed

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- An order is placed with supplier when a purchase order number is issued by Peoplesoft. Requester should receive an email indicating the PO number and that the PO was sent to supplier.
- Depending on supplier, Requester might receive other emails confirming order.

Re: PURCHASE ORDER#: UTTYL.0000038459  
Cart name: 2023-05-30 5000111415@UTTYL 02  
Requisition number: 172525476  
Supplier: Summus Dell (UTTYler)  
Sent Via: CXML  
Date/Time: 5/30/2023 3:05 PM

Dear Daniel Pippin,

The purchase order listed above has been created for your requisition "2023-05-30 5000111415@UTTYL 02 (172525476)" and has been sent to the supplier. You can update and track the status of this purchase order on line by using " document search "

If you have any questions with regard to your purchase order, please contact your SelectSite Support Team.

Support Team Contact Information:  
[purchasing@uttyler.edu](mailto:purchasing@uttyler.edu)

Thank you,  
University of Texas System

# Receipt of Product & Invoicing

- Invoicing is an automated process for eSHOP purchase orders. After items are shipped, the supplier sends an invoice directly to UT Share/Peoplesoft. There is no need for a Requester to enter a manual voucher.
- Controlled items will require tagging before delivery to department (OptiPlex, Latitude, and Precision models will arrive already tagged). In addition, computer orders will be sent to IT for imaging.
- When IT notifies department that item has arrived or item is delivered to department, Requester can enter Receipt in Peoplesoft.

For instructions, please see “Procedures for Receiving PO in Peoplesoft” under User Guides and Job Aids on the Procurement Services website. <https://www.utt Tyler.edu/procurement-services/>

## User Guides and Job Aids

UT Share / Peoplesoft

- **Pulling PO Information into a Non-PO Voucher**
- **Procedures for \$15,000-\$50,000 Procurements**
- **Procedures for Group Purchasing Organization (GPO) Purchases**
- **Procedures for Receiving PO in Peoplesoft**
- **Procedures for Canceling PO Receipt in Peoplesoft**
- **Procedures for Canceling a Requisition in Peoplesoft**
- **Applying Discount Lines on PO Voucher**
- **How to Change the Account Code on Requisition**

## Creating a PO Receipt

Procedures for Receiving a PO in PeopleSoft

# Issues and Questions

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- For unresolved issues, status updates or return requests, please review information and instructions on individual punchout catalogs in eSHOP.
- For more information regarding ordering process, please visit Procurement Services website at <https://www.uttyler.edu/procurement-services/>
- For questions, you can also email [purchasing@uttyler.edu](mailto:purchasing@uttyler.edu)