THE UNIVERSITY OF TEXAS AT EL PASO

Miner Mall

Shopper and Creator Training
Agenda

• Procure to Pay Process
• Purchasing Thresholds
• Purchasing Information
  – HUB
  – Procurement Card Program
  – Contract Administration
  – PeopleSoft
• Miner Mall live-site Demonstration
What will you learn today?

- Sign On
- Set up E-mail Notification Preferences
- Creating a Cart
- Creating a Non-Catalog Order
- Quotes
- Accounting Codes
- Commodity Codes
- Requesting a New Supplier
- Process a Change Order/ Cancel or Close an Order
- Alternate Ship-to Address
- Invoices
- Contracts Administration
Purchase-to-Payment Processes

- Miner Mall is the university’s system of record for the procurement of goods and services. The majority of purchase-to-payment processes will be conducted in Miner Mall.
## Dollar Thresholds

<table>
<thead>
<tr>
<th>PO Amount</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $15,000 Open Market</td>
<td>No competitive procurement required. The department must obtain a quote* and it must be electronically attached to the requisition in Miner Mall.</td>
</tr>
<tr>
<td>$15,000 – $50,000 Informal Bid</td>
<td>The department must obtain a minimum of three quotes*. Two must be from HUB vendors and all quotes must be electronically attached to the requisition in Miner Mall.</td>
</tr>
<tr>
<td>&gt; $50,000 Formal Bid</td>
<td>An official solicitation is required in the event there is no established contract or cooperative agreement in place.</td>
</tr>
</tbody>
</table>
Quotes

• Quotes are valid for 30 days from the date on the quote unless otherwise specified.
• Quotes need to be attached to requisition documents.
• Request freight and shipping estimates up-front.
• Quotes must match the requisition amount.
• Purchases equal to or greater than $15,000 require three quotes.
• Quotes requiring a signature and/or review of Terms and Conditions must go to our Contract Administration team for review.
Sign On – my.utep.edu
Sign On – minermall.utep.edu

Welcome To Miner Mall

Miner Mall is an innovative web-based e-procurement system that provides a one-stop shop system for ordering goods and services.
Miner Mall will be offline for scheduled upgrades to the site beginning Friday, April 9, 2021 at 6:00 p.m. thru Sunday, April 11, 2021 at 11:00 a.m.

PaymentWorks

PaymentWorks will be used for requesting new suppliers and requesting updates to existing supplier information. To access PaymentWorks or on the menu below, UTEP PaymentWorks. Additional resources can be found on the Purchasing and General Services website.

Purchasing Assistance

For purchasing assistance contact buyers@utep.edu or your designated Purchasing Buyer. For purchasing contracts assistance contact cal@utep.edu

Shipments to Central Receiving

As the UTEP Recovery level has been designated at Low Demand Operations, please contact Central Receiving at 915-747-7149 to arrange for delivery of your packages if you will be returning to campus.

Cooler Machine Leasing

Cooler machine leases and renewals are to be initiated by the department. Contact your buyer should you have any questions regarding your cooler lease. Click on this link for additional Cooler Resolution Guidelines.

Hosted Suppliers

- [Supplier 1]
- [Supplier 2]
- [Supplier 3]
- [Supplier 4]

Forms

- Change Order Request
- [Form 1]
- [Form 2]
- [Form 3]

Punch-out Suppliers

- [Supplier 1]
- [Supplier 2]
- [Supplier 3]
- [Supplier 4]
Set Up Profile

Click on 'logo' then on View My Profile

Click on Notification Preferences then Shopping, Carts & Reqs. Then Purchase Orders
# E-mail Notification Preferences

## Denise Rodriguez

### User Profile and Preferences
- User Name: 68309970

#### Default User Settings
- User Roles and Access
- Ordering and Approval Settings
- Permission Settings

#### Notification Preferences
- Administration & Integration

### Shopping, Carts & Requisitions

#### Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

<table>
<thead>
<tr>
<th>Prepared By - Cart Assigned Notice</th>
<th>Default</th>
<th>Override</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared By - PR line Item(s) rejected</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Prepared By - PR rejected/returned</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Cart Assigned Notice</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Receive PR and PO notifications for Carts Assigned to Me</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Assigned Cart Processed Notification</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Assigned Cart Deleted Notification</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>PR submitted into Workflow</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>PR pending Workflow approval</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>PR Workflow Notification available</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>PR Workflow complete / PO created</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>PR line Item(s) rejected</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
<tr>
<td>Cart/PR rejected/returned</td>
<td>Default</td>
<td>Override</td>
<td>Email &amp; Notification</td>
</tr>
</tbody>
</table>
Creating a Cart

Click on a displayed catalog, or create a Non-Catalog order.
Hosted and Punch-out Suppliers

Hosted Supplier

Punch-Out Supplier
Non-Catalog Order

Add Non-Catalog Item

- **Supplier:** Existing Supplier
- **Select supplier** search

<table>
<thead>
<tr>
<th>Description</th>
<th>Catalog No.</th>
<th>Quantity</th>
<th>Price</th>
<th>Packaging</th>
</tr>
</thead>
</table>

254 characters remaining

**Additional Details**

- **Commodity Code**
- **Manufacturer Name**
- **Manufacturer Part No.**

**Product Flags:**
- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star

**Required fields**

- **Save**
- **Save And Add Another**
- **Close**
Freight/Shipping/Delivery and/ or Handling Charges

<table>
<thead>
<tr>
<th>Description</th>
<th>Catalog No.</th>
<th>Quantity</th>
<th>Price</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freight</td>
<td>N/A</td>
<td>1</td>
<td>25.00</td>
<td>EA - Each</td>
</tr>
</tbody>
</table>

If the vendor has not provided you an amount, please enter an estimated line item charge.
Non Catalog Checkout

After Saving, you will be Returned to your Home Page and your Cart will be Displayed in the Upper Right Corner
Check-Out

Incomplete items:
- Required: Shipping address
- Required: Speed Chart
- Required: Fund
- Required: Department
- Required: Function
- Required: Account

Total (1,025.00 USD):
- Subtotal: 1,025.00
- Shipping: 0.00
- Handling: 0.00
- Total: 1,025.00
Complete all required fields

Always choose Central Receiving

You can add your extension number and building name
Update Accounting Codes

Identify the **Speed Chart (Cost Center or Project number)**

Click “Select from Values” link and choose from the account values provided.
Split an Accounting Code

Click the Add Split option

Click the drop-down arrow. Enter the desired percentages or the dollar amount to be distributed.

Line level splits
Attachment and Notes

- Internal Notes can be used to reference anything that may be of significance to you such as a project name or location. These are only visible to UTEP end-users.
- External notes are used to send a short text to the vendor. This may be a quote number, instructions, or a reference. These notes are sent to the Supplier.
Items flagged in the catalogs as hazardous will require building and room numbers for storage purposes.
Final Step
Returned Carts

- If a requisition is returned, check the requisition history for the error message.
Forms

- Change Order Request
- Exclusive Acquisition - Sole Sou...
- Direct Pay Form
- xerox
  Campus Print Shop
- Non-Standard Computer Requisition
- Pepsi Product Order Form
Process a Change Order/Cancel or Close an Order

- Canceling a purchase order
- Canceling a line item on purchase order
- Closing a purchase order to relieve an open encumbrance
- Correcting an error

Change orders should only be used for the following:
- To cancel a purchase order
- To cancel a line item
- To modify a line item
- To change the funding source
- To close a purchase order to relieve an open encumbrance
- To encumber additional funding due to unforeseen circumstances

If your change order request is to change an account number, indicate the total PO amount above. Upon checkout be sure the new account number is referenced in the accounting codes section of your cart.

If your change order request is to add additional funds to the purchase order, indicate only the additional amount in the Revised PO Amount section above. Upon checkout be sure the original account number is referenced in the accounting codes section of your cart.

For all other changes, enter a 0 dollar amount in the Revised PO Amount section above.

- No – DO NOT send updated PO to supplier.
- Yes – send updated PO to supplier.

Specific Reason for Change(s):

1000 characters remaining
Alternate Ship-to Address

Live animal and Cadavers
Hazardous chemicals
Off Campus research
Construction Job Sites
Purchase Order Invoices

• Invoices should always be forwarded to the Accounts Payable office as indicated in the address on the PO.
• Invoices received at the departments should be forwarded to the Accounts Payable department immediately.
• Upload invoices to your Miner Mall PO via a comment and address it to billing@utep.edu.
Upload an Invoice

Click on Comments

Search for the Accounts Payable user

Who the comment will be addressed to.

Add Comments
The goal of the HUB Program is to promote participation of HUB businesses in procurement and contracting opportunities with UTEP.

HUBs include:
- Minority-owned businesses
- Woman-owned businesses
- Service-Disabled Veteran-owned businesses

Departments should make a sincere, good-faith effort to purchase from HUB vendors whenever possible.

Contact your Purchasing office Buyer or the HUB Program Administrator for any HUB related questions or inquiries.
Procurement Card Program

• The Pro Card Program is designed to give departments a quick and efficient way in which to make small dollar purchases.

• The Pro Card is a Citibank MasterCard and is issued to an individual employee for UTEP business purchases only.

• For more information regarding the Pro Card, please visit the Purchasing and General Services website purchasing.utep.edu
Contract Administration and Compliance

• The Purchasing office includes a team of Contract Administrators responsible for;
  – Reviewing and executing standard contract documents
  – Reviewing and negotiating contracts
  – Monitoring the status of contracts
  – Monitoring scope of work performance in contracts
  – Advising departments of contractual rights and obligations
  – Assisting in the resolution of contract disputes
Signature Authority

• Department Chairs, Deans, Directors or administrative staff **may not** sign contracts on behalf of the University.

• Any purchasing contracts requiring an official University signature should be forwarded to the Purchasing office for review.
PeopleSoft

• PeopleSoft is the universities ERP system of record.

• The system handles all transactions for Finance (FMS) and HR (HCM)
  ▪ Finance (Payroll, A/P, Receivables, Billing, Budget)
  ▪ HR (Benefits, Time & Labor, Recruiting, Hiring)

• For more information regarding PeopleSoft, visit the website at peoplesoft.utep.edu
Payment Works

• Vendor onboarding tool that requires vendors to register to do business with the university and maintaining their vendor profiles.
• Payment Works will help verify tax ID’s, addresses, banking information, and run the vendor through the government sanctions lists (Visual Compliance).
• Vendor information will route through an internal workflow and be final approved by Purchasing.
• For more information regarding PaymentWorks, visit the Purchasing website.
For More Information

- Miner Mall website minermall.utep.edu
- Purchasing and General Services website purchasing.utep.edu
- HR webpage for registration for Miner Mall and Pro Card Training: campusedge.utep.edu, click on Training and Development link
- Contact the Purchasing Office at 915-747-5601.
Questions