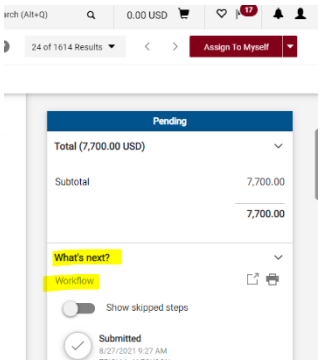
UNIVERSITY OF WISCONSIN LA CROSSE UWL

ShopUW+

# Requester Tips and Tricks

## DEFINITIONS:

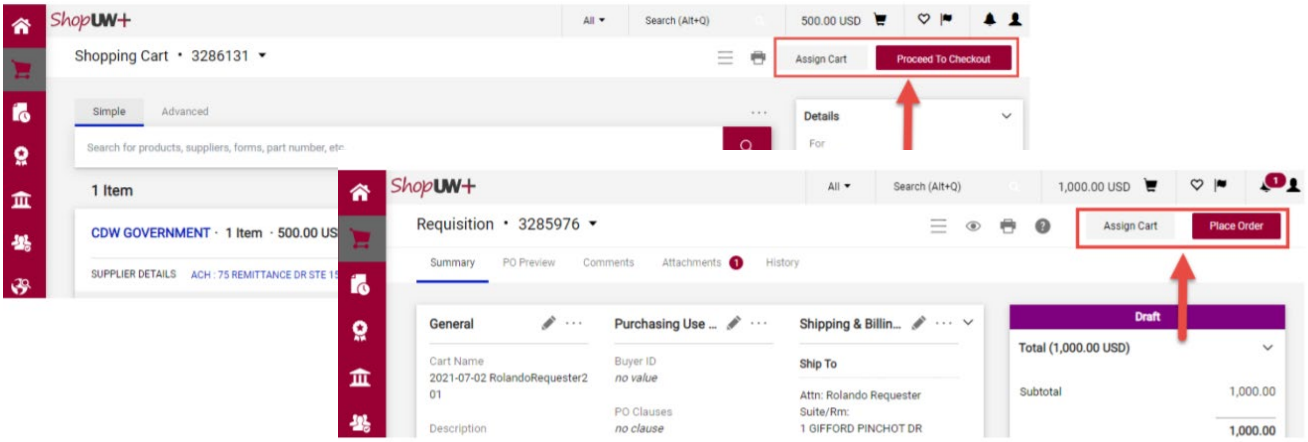



In the Workflow – when a Requester clicks the Place Order button the request becomes live and is submitted into the system workflow to be processed. The workflow can be followed in the right hand column labeled What's Next?

Draft Cart/Draft Requisition: Requests are considered in a Draft stage when they are not in the workflow. Purchasing Services cannot see a cart if it has never been submitted into the workflow (Purchasing can view live and returned/rejected requests).

- Draft Cart
  - If Shopper does not know funding they can **Assign Cart** to a Requester at this stage

- Draft Requisition
  - If Shopper wants to add funding, add Comment or Internal notes they should **Proceed to Checkout** to go to the draft Requisition stage before assigning their cart to a Requester.




- Shoppers will only see the **Assign Cart** option in the Draft Requisition stage.

Comments: Functionality present along the top of request and related documents. Use Comments to provide information relevant to the request/document.

- In Draft stage Comments can only be added to the request.
- Once a request is in the workflow Comments can be sent to any employee.
- Attachments can be added to a Comment.
- **Comments should be used to communicate with Purchasing and Accounts Payable about requests**.

Catalog Supplier – Suppliers who have punchout catalogs on ShopUW+. These orders, if under $5,000, do not go to Purchasing Services, but are electronically transmitted to the supplier after Approval 1.

Active Supplier (supplier in the system) – these are suppliers who have been entered into the Shared Financial System (SFS) shared supplier file and can be selected for Non-Catalog Item requests and Direct Payment requests.

Unknown Supplier – Fictitious supplier file created to move Non-Catalog Item requests forward when the supplier is not in the SFS system. Unknown supplier cannot be selected for Direct Payments.

Approval 1: WISER manager. Requests under $100 do not flow to Approval 1.

Approval 2: Dean/Division Vice-Chancellor. Requests $5,000 and up flow to Approval 2.

Approval 3: Vice-Chancellor of Administration & Finance. Requests $25,000 and up flow to Approval 3.

Prepared For field: The Prepared For field will contain the name of the Shopper who assigned the cart to a Requester. The Prepared For field cannot contain any name in the workflow Approval 1-3 or the request will stall. Requesters must remove the name of the Approval 1-3 employee and replace it with their own name or that of another employee associated with the request.

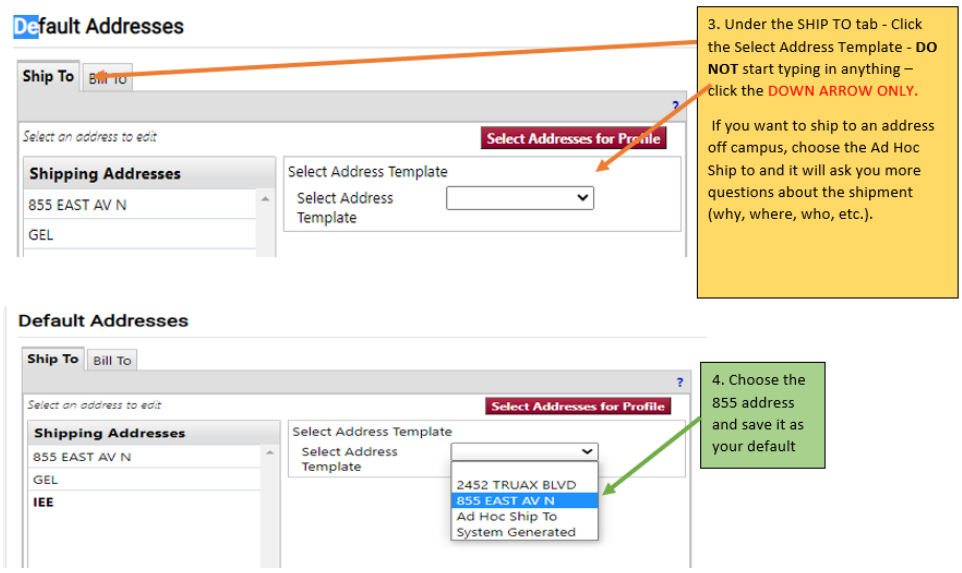
## TIPS & TRICKS

- All employees have access to view all UWL requests in ShopUW+

- When you have planned out of office find another Requester to sub for you – Requesters can submit orders for any department. Coordinate with your sub on who to ask if there is a question about funding.

- All Shoppers should set default shipping, billing and funding and notifications.
    - Select the system generated shipping address for 855 East Av N. and save as default.

- Shipping off campus? Select Ad Hoc address in draft Requisition.
    - Sends approval request specific to address to Approver 1




- Don't use Req Wizard or Standing Order Form
    - Use Non-Catalog Item request
        - Use Comments to indicate if pre-payment or deposit required
        - Use Comments to indicate if Blanket PO request

- Shipping/Freight/Handling needs its own line as it is accounted for separately

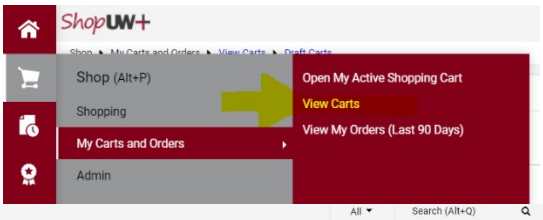
- Commodity Code – use best judgement – Purchasing reviews this field and will update if needed

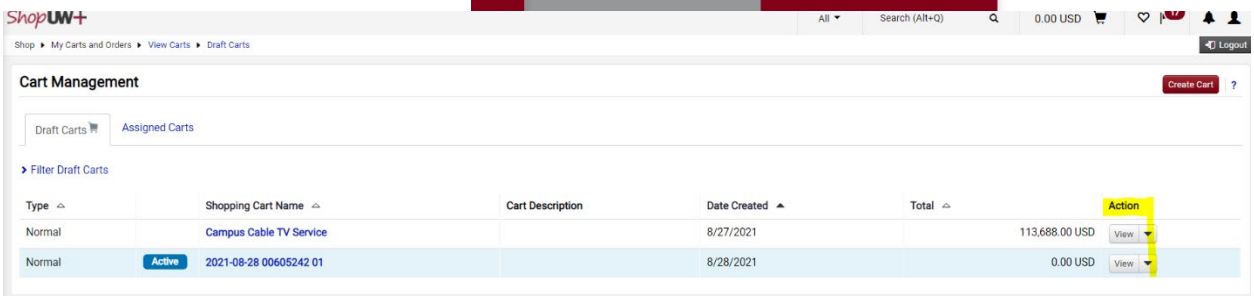
- Account Code – use best judgement – Purchasing reviews this field and will update if needed

- Use Comments to:
  - **Provide email address for supplier for PO dispatch**
  - Request special handling for delivery/shipping
    - Purchasing can dispatch the PO to you and/or the Shopper so you can place the order with the supplier to control delivery.
  - Request priority processing (this has to be done after submitted into workflow)
  - Send a follow up to a team member in Purchasing or Accounts Payable
  - Request a change to a PO this is in soft close or has been fully closed

- Your active cart is always shown in upper right hand corner by icon
  - If you want to save that cart and start new cart:

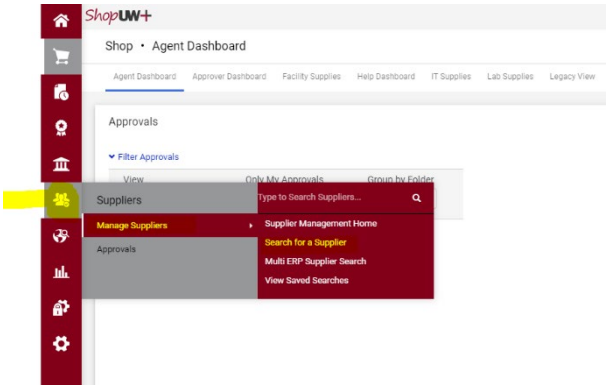
- To Find/Open/Delete carts
  - My Carts and Orders
    - View Carts



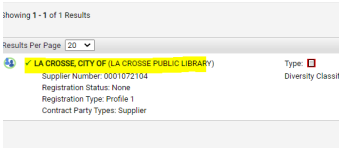




- Supplier selection
  - Use Manage Supplier look up feature to verify Supplier if you are unsure the supplier you are selecting is the correct supplier.
    - Open a second session of ShopUW+ in a new tab/window

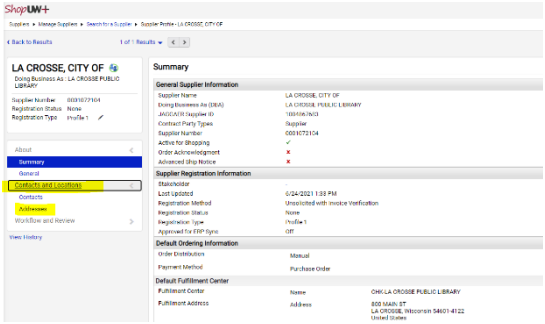
- Select Supplier, Manage Supplier and the Search for Supplier




- Click on the Supplier name

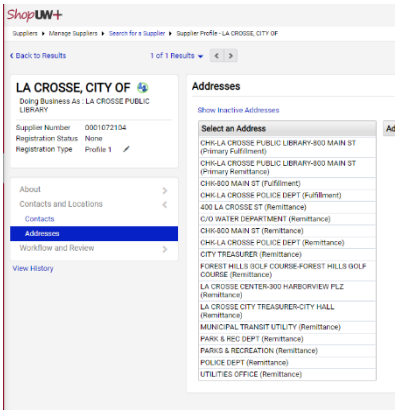



- Click on Contacts and Locations, then Addresses

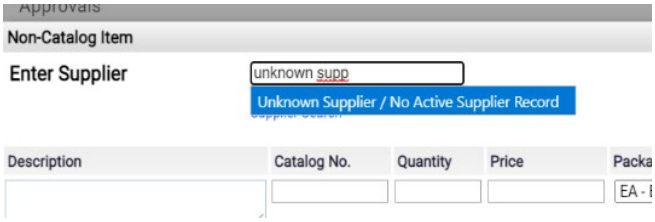



- This will call up all active addresses associated with this Supplier.

- If you do not see the address on your quote/invoice, then select Unknown Supplier as shown below to continue with your request.

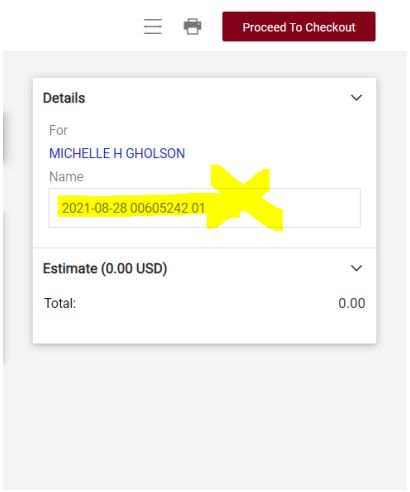


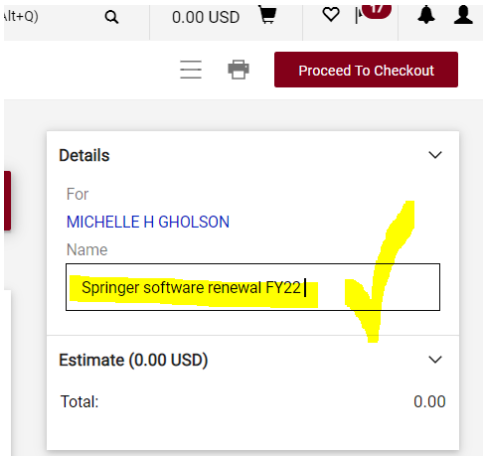
- Use Unknown Supplier if:
  - The supplier is not found. OR
  - If you are unsure the supplier selected is the correct supplier.
    - Leave Comment for Purchasing to check Supplier.




- W9s for new suppliers should be sent to Business Services through Liquid Files.

- Rename Cart to something meaningful so you can easily identify its contents.

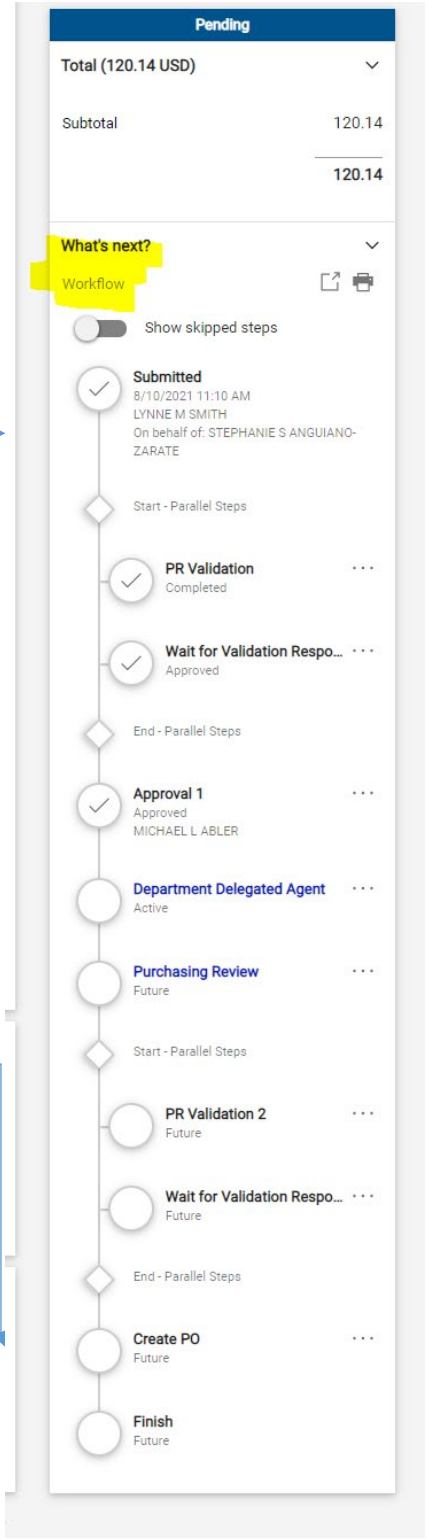


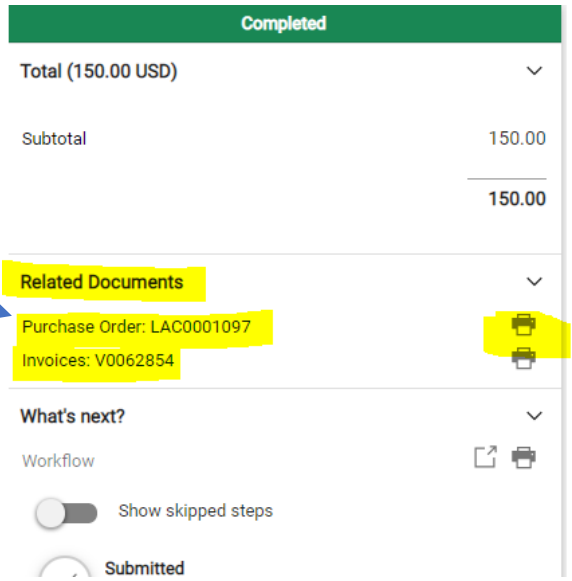
**PART II – September 16, 2021**

- Click on the Blue workflow steps in the What's next? Section to see names of the Approvers responsible for the Active and Future workflow steps.

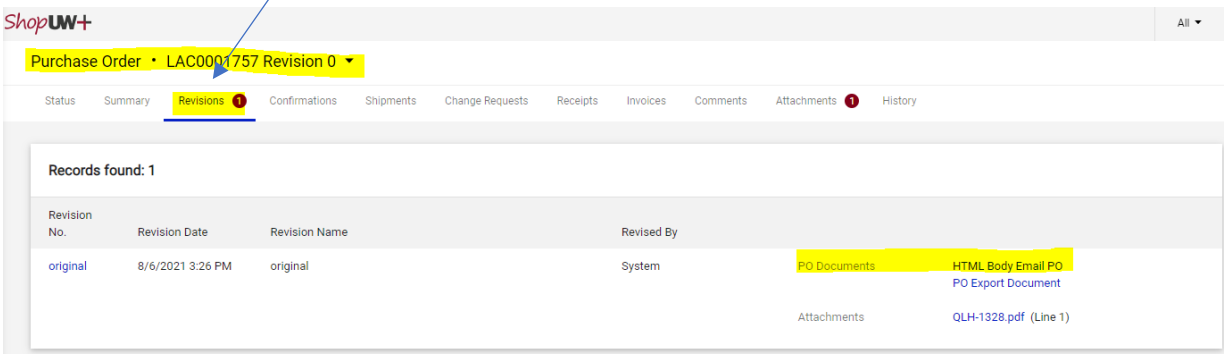
  - The What's Next? section of the requisition provides information on workflow status.
  - You can click on each stop in the workflow to see the name of the person responsible for that action.
    - When the request was submitted
    - Approval status
      - Approval 1 = WISER manager
      - Approval 2 = (5K) Dean/Division VC
      - Approval 3 = (25K+) VC Admin & Finance
    - Department Delegated Agent
      - Purchasing Service
        - All Buyers listed = request in queue
        - Only one Buyer listed = Buyer assigned and is working on request.
    - Purchasing Review
      - Purchasing Director reviewing for approval
        - All Buyers listed = request in queue
    - Create PO
      - Purchase Order is created and dispatched.



- Related documents

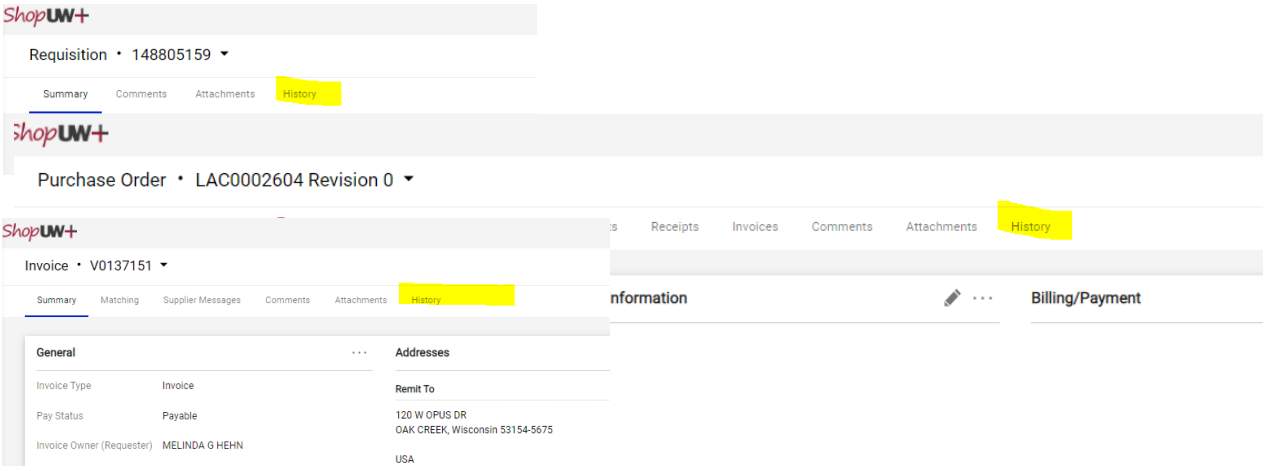



    - The **Related Documents section** of the Requisition provides a link to:
        - Purchase Order (PO)
            - Click on the printer icon to print a PO summary document
            - Click on the link for the Purchase Order to see the actual PO emailed to the supplier.
                - The PO document can be found under the Revisions tab of the Purchase Order document, along with any attachments emailed with the PO.

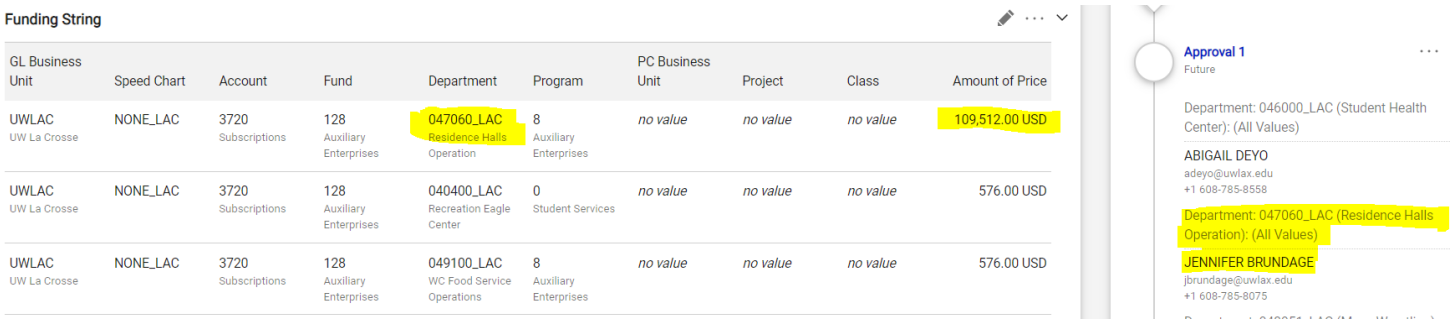



        - Change Request, if applicable
        - Invoice(s)
            - Available once Accounts Payable enters the invoice into ShopUW+

- History tab on all documents
    - Requisitions - identify errors on returned carts/requisitions
    - Purchase Orders - when PO emailed and to what addresses
    - Invoices – payment date and check number



- Split funding with different approvers – how to identify who is approving what:



Funding String

| GL Business Unit | Speed Chart | Account | Fund | Department | Program | PC Business Unit | Project | Class | Amount of Price |
|---|---|---|---|---|---|---|---|---|---|
| UWLAC UW La Crosse | NONE_LAC | 3720 Subscriptions | 128 Auxiliary Enterprises | 047060_LAC Residence Halls Operation | 8 Auxiliary Enterprises | *no value* | *no value* | *no value* | 109,512.00 USD |
| UWLAC UW La Crosse | NONE_LAC | 3720 Subscriptions | 128 Auxiliary Enterprises | 040400_LAC Recreation Eagle Center | 0 Student Services | *no value* | *no value* | *no value* | 576.00 USD |
| UWLAC UW La Crosse | NONE_LAC | 3720 Subscriptions | 128 Auxiliary Enterprises | 049100_LAC WC Food Service Operations | 8 Auxiliary Enterprises | *no value* | *no value* | *no value* | 576.00 USD |

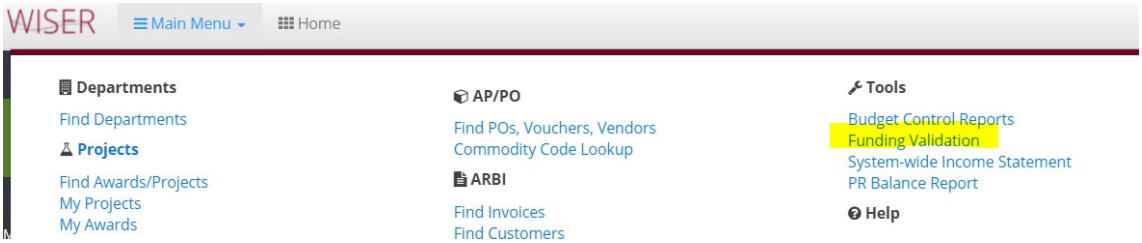


- Funding – Header Level and Line Level, Split funding

- Funding – program codes are problematic as the system will allow any digit 0-9 without validation. Check WISER before entering (see below).

    - Rejected requisitions – check History tab – most likely funding and most likely program code.
        - *Example: Line: 1, Split: 1 - Invalid Chart Field combination: Combo error for fields DEPTID/ PROGRAM_CODE/ FUND_CODE in group ORGEDIT.*

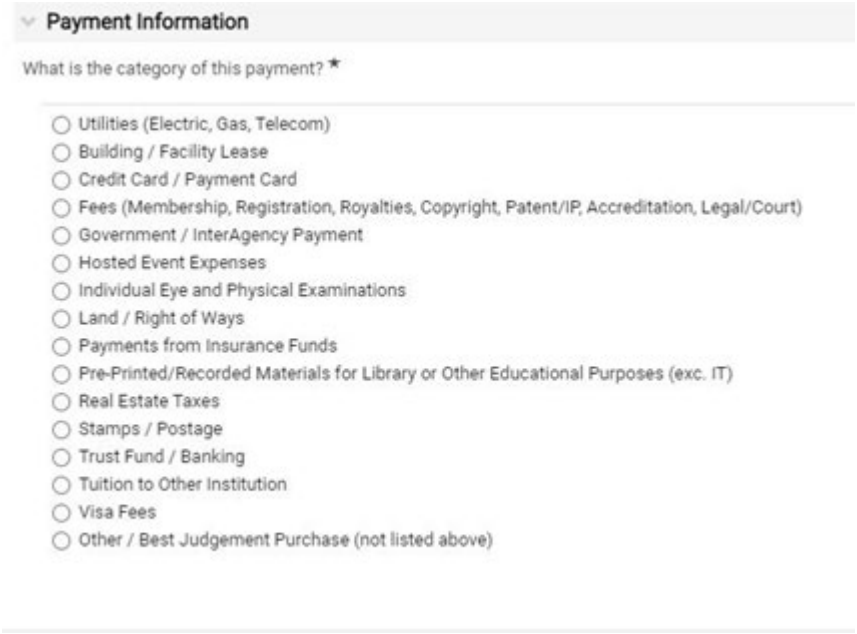
- Please validate your funding. You can check with your Budget manager if you are unsure, or you can use WISER to validate (see below). Most of the time the error is with the one digit program code.




- Request a change to a Requisition (PO not yet created)
    - Requester can select Withdraw Entire Requisition

- Request a change on dispatched PO
    - Change Request tab – only Requesters – Shoppers can initiate
    - Cannot change funding if the line on PO has been invoiced against, use PAT tool

- Direct Payments
    - Use only if you can select a category besides Other/Best Judgement'.
    - If 'Other/Best Judgement' is the only applicable category, STOP and complete a Non-Catalog Item Request instead. Most likely this invoice needed to be purchased via a PO and Accounts Payable will not pay via Direct Payment request.




- Catalog Orders
    - Supplier information for customer service contact, shipping and return information
    - cXML data transfer - no time for Receipting
    - Large quote direct from supplier – call customer service listed in
    - ShopUW+ Essentials to see if they have Quote to Order on their punchout catalog.

- Blocked items on catalog – email Problem Solvers

- Higher prices than on supplier website – email Problem Solvers

- Some catalog vendors will send order update mails that have Madison/Verona address for billing. This is okay – all catalog orders are processed through the ShopUW+ team in Madison/Verona.

- Chartwells expenses should be submitted through a non-catalog item request:

    1. Request quote or Catertrax order
    2. Have an *approved* food expense approval form (submit to Business Services for approval)
    3. Enter non-catalog request in ShopUW+ attaching quote/order and *approved* food expense approval form (supplier = Compass)
    4. PO will be dispatched by Purchasing
    5. Invoices emailed to accountspayable@uwlax.edu to pay against the PO

- Lamers - charter or school bus service
    - Lamers is the mandatory contracted provider for our campus
        - Due to a driver shortage, if Lamers is not able to provide service for your trip dates, you must have that in writing from Lamers before requesting a quote from Ready, Go Rightway or other

    1. Request quote from Lamers
    2. Enter non-catalog request in ShopUW+ attaching quote/estimate and the email from Lamers declining your request if using other supplier
    3. PO will be dispatched by Purchasing
    4. Invoices emailed to accountspayable@uwlax.edu to pay against the PO

    ASSAs
    - ASSAs follow the non-catalog item request process
    - https://www.uwlax.edu/business-services/our-services/contracts/contracting-for-personal-services/

**Questions on how to use ShopUW+ or how to make a purchase:**

- **Contact: Purchasing Services**
    - **Teams: Shelle Gholson**
    - **Email: purchasing@uwlax.edu**
    - **Phone: 785-8501**

**Technical difficulties with ShopUW+**

- **Contact: UWSA Problem Solvers: uwsaproblemsolvers@uwsa.edu or 608/263-3100**