

DEFINITIONS:

<u>In the Workflow</u> – 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?

<u>Draft Cart/Draft Requisition</u>: 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).



- o 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.

ShopUW+	Al	I • Search (Alt+Q)	500.00 USD 👻 🗢 🏴 🖡	1	
Shopping Cart ・ 3286131 ▼		= +	Assign Cart Proceed To Checkout		
Simple Advanced			Details	~	
Search for products, suppliers, forms, part number, etc.		0	For		
① 1 Item 合	Shop un +		All • Search (Alt+Q)	1,000.00 USD 👻	♥ ► 🔎
CDW GOVERNMENT · 1 Item · 500.00 US	Requisition • 3285976		≣ ⊛	Assign Cart	Place Order
SUPPLIER DETAILS ACH : 75 REMITTANCE DR STE 1	Summary PO Preview Co	omments Attachments 🚺 His	story		•
Q.	General 🖋 ···	Purchasing Use 💉 ····	Shipping & Billin 🖋 \cdots 🗸	Draft	
#	Cart Name 2021-07-02 RolandoRequester2	Buyer ID	Ship To	Total (1,000.00 USD)	~
	01	PO Clauses	Attn: Rolando Requester Suite/Rm:	Subtotal	1,000.00
-22,	Description	no clause	1 GIFFORD PINCHOT DR		1,000.00

• Shoppers will only see the **Assign Cart** option in the Draft Requisition stage. <u>Comments</u>: 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.

<u>Catalog Supplier</u> – 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.

<u>Active Supplier (supplier in the system)</u> – 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.

<u>Unknown Supplier</u> – 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.

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

<u>Prepared For field</u>: 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

efault Addresses			3. Under the SHIP TO tab - Click the Select Address Template - DO
Ship To Bin 10			NOT start typing in anything – click the DOWN ARROW ONLY.
Select an address to edit		Select Addresses for Provide	If you want to ship to an address off campus, choose the Ad Hoc
Shipping Addresses		Select Address Template	Ship to and it will ask you more
855 EAST AV N	-	Select Address	questions about the shipment
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Select an address to edit		Select Addresses for Profile	855 address
Shipping Addresses		Select Address Template	and save it as
855 EAST AV N	^	Select Address	your default
GEL		2452 TRUAX BLVD	
IEE		855 EAST AV N Ad Hoc Ship To	

- 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
 - o 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:

UW+					
opping Cart • 148074	230 🔽		= 0	Assign Cart Proceed To Checkout	
Simple Advanced	Empty Cart Create New Cart View Carts View Cart history		C Details	HOLSON	
1 Item			Campus Ca	ole TV Service	
SPECTRUM · 1 Item · 11	3,688.00 USD		Entimate /119	400 m Hem)	
To Find/ ○ M	Open/Delete carts ly Carts and Orders View Carts	Shop (Alt+P)	Hore View Carte View Carte View Carts	ropping Cart	
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- 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

Results Per Page 20 💌	
LA CROSSE, CITY OF (LA CROSSE PUBLIC LIBRARY)	Type:
Supplier Number: 0001072104	Diversity Classi
Registration Status: None	
Registration Type: Profile 1	
Contract Party Types: Supplier	

Click on Contacts and Locations, then Addresses

ShopUW+			
Suppliers + Manage Suppliers + Search for a Supplier +	Suppler Prote - LA CROSSE, OTY OF		
C Back to Results 1 of 1 8	tesuits 👻 🤇 🗲		
LA CROSSE, CITY OF	Summary		
LIBRARY	General Supplier Information		
Supplier Number 0001072101 Registration Status None Registration Type Profile 1	Suppler Name Doing Business An (DEA) JADEA/R Supplier ID Contract Party Types Supplier Name	LA CROSSE, CITY OF LA CROSSE PUBLIC LE 1094/676/0 Supplier CODIC72104	anaary
About <	Active for Shopping Order Acknowledgment Advanced Unix Notice	×	
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Yiew History	September of the system	with the second se	
	Default Ordening Information		
	Order Distribution	Manual	
	Payment Method	Purchase Order	
	Default Fulfilment Center		
	Fulfilment Center	Name	CHKLA CROSSE FUELIC LIBRARY
	Fulfilment Address	Address	600 MAIN 97 LA OROBER, Wisconsin 54601-4122

- 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.

Non-Catalog Item				
Enter Supplier	unknown supp			
	and the second			
		r / No Active Su	ipplier Record	
Description	Catalog No.	Quantity	Price	Packa

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

	HOME > ADMINISTRATION & Business Service	FINANCE > BUSINESS SERVICES		
	WISER Log In	WISER Information	Travel Information	Expense Reimbursement
	Food	PCards	Purchasing	ShopUW+ Log In
	Cashier's	Forms	Grants	Student Orgs
키	Submit documents : Welcome to the Rusiness	Securely to Business S	ervices using LiquidFi	es

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

Pro	ceed to Checkout	= -	Dropped To Checkput
Details	~		Proceed to Checkout
For MICHELLE H GHOLSON Name		Details	~
2021-08-28 00605242 01		For MICHELLE H GHOLSON Name	
Estimate (0.00 USD) Total:	~ 0.00	Springer software renewal FY22	
		Estimate (0.00 USD)	~
		Total:	0.0

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.

$\circ \quad \text{Purchasing Review}$

- Purchasing Director reviewing for approval
 - All Buyers listed = request in queue
- \circ Create PO
 - Purchase Order is created and dispatched.



Velateo	elated documents			Completed			
				٦	Total (150.00 USD)		
∘ T R	he Related equisition	d Document provides a lir	s section of the section of the se	the s	Subtotal		150
•	 Purchase Click o summa Click o 	Order (PO) n the printer ary documen n the link for	icon to print a t the Purchase	a PO	Related Documents Purchase Order: LACO nvoices: V0062854	001097	150
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	with the f	any attachm PO.	ents emailed	with	Submitted		
Shop uw+	with the F	any attachm	ents emailed	with	Submitted		All -
Shop UW+ Purchase (Status	Order • LAC000175 Summary Revisions •	7 Revision 0 •	Change Requests Receipts	with Invoices Comments	Submitted	,	All -
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Shop UN+ Purchase I Status Records Revision No. original	Func with the F	7 Revision 0 + Confirmations Shipments Revision Name original	Change Requests Receipts	Invoices Comments Revised By System	Attachments History PO Documents	HTML Body Email PO PO Export Document	All -

- 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

Shop um+					
Requisition • 148805159 -					
Summary Comments Attachments History					
Shop uw+					
Purchase Order • LAC0002604 Revision 0	•				
Shop uw+		s Receipts	Invoices Comme	ents Attachments	History
Invoice • V0137151 -					
Summary Matching Supplier Messages Comments Attachments	History	nformation		ø ····	Billing/Payment
General	Addresses				
Invoice Type Invoice	Remit To				
Pay Status Payable	120 W OPUS DR OAK CREEK, Wisconsin 53154-5675				
Invoice Owner (Requester) MELINDA G HEHN	USA				

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

Funding String	J								<i>*</i> ··· <i>*</i>	1 Y	
GL Business Unit	Speed Chart	Account	Fund	Department	Program	PC Business Unit	Project	Class	Amount of Price	Ģ	Approval 1
UWLAC UW La Crosse	NONE_LAC	3720 Subscriptions	128 Auxiliary	047060_LAC Residence Halls	8 Auxiliary	no value	no value	no value	109,512.00 USD		Department: 046000_LAC (Student Health Center): (All Values)
UWLAC UW La Crosse	NONE_LAC	3720 Subscriptions	Enterprises 128 Auxiliary Enterprises	Operation 040400_LAC Recreation Eagle Center	Enterprises 0 Student Services	no value	no value	no value	576.00 USD		ABIGAIL DEYO adeyo@uwlax.edu +1 608-785-8558 Department: 047060_LAC (Residence Halls Operation): (All Values)
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		JENNIFER BRUNDAGE jbrundage@uwlax.edu +1 608-785-8075

- 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.

ISER ≡ Main Menu - III Home		
🗒 Departments	€ AP/PO	J [€] Tools
Find Departments	Find POs. Vouchers, Vendors	Budget Control Reports
△ Projects	Commodity Code Lookup	Funding Validation
Find Awards/Projects	🖹 ARBI	PR Balance Report
My Projects My Awards	Find Invoices Find Customers	⊙ Help

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.

v Pay	ment Information
What is	the category of this payment? *
0	Utilities (Electric, Gas, Telecom)
0	Building / Facility Lease
0	Credit Card / Payment Card
0	Fees (Membership, Registration, Royalties, Copyright, Patent/IP, Accreditation, Legal/Court)
0	Government / InterAgency Payment
0	Hosted Event Expenses
0	Individual Eye and Physical Examinations
0	Land / Right of Ways
0	Payments from Insurance Funds
0	Pre-Printed/Recorded Materials for Library or Other Educational Purposes (exc. IT)
0	Real Estate Taxes
0	Stamps / Postage
0	Trust Fund / Banking
0	Tuition to Other Institution
0	Visa Fees
0	Other / Best Judgement Purchase (not listed above)

- Catalog Orders
 - Supplier information for customer service contact, shipping and return information
 - o 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

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

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

- Contact: Purchasing Services
 - Teams: Shelle Gholson
 - Email: <u>purchasing@uwlax.edu</u>
 - Phone: 785-8501

Technical difficulties with ShopUW+

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