Disclaimer: This manual was prepared for use by the staff, faculty, and students in the Department of Metallurgical Engineering. Instructions are based on the purchasing procedures for that department. If you are in a different department, the descriptions of how UShop works may still be useful to you; however, check with your own department to learn its preferred procedures, particularly regarding approvals, cart assignment, completion of checkout information, etc.
# Table of Contents

Get Started .................................................................................................................. 4  
  Take UShop Training ............................................................................................. 4  
  Go to UShop .......................................................................................................... 4  
  Sign Up for Amazon ............................................................................................... 4  

Purchase Approval ..................................................................................................... 5  

Overview of the Process ............................................................................................ 6  

Create a Shopping Cart ............................................................................................... 7  
  Select a Shopping Form to Use ............................................................................. 7  
  Create a Cart Using a Punch-out Catalog (Online Supplier Catalog) .................. 8  
    Create a Cart for Amazon ................................................................................... 9  
  Create a Cart for a Noncatalog Order ................................................................... 10  
    Enter a Supplier ................................................................................................... 10  
    Enter the Purchase Details ................................................................................. 11  
    Health & Safety Disclosures ............................................................................... 12  
    Sole Source or Bid Requests ............................................................................ 12  
    Save a Noncatalog Purchase to Your Shopping Cart ...................................... 13  
    Add Another Item to Your Noncatalog Shopping Cart .................................... 14  

Print & Carry ............................................................................................................. 15  

Shipping Information ............................................................................................... 18  
  Add an Address to Your Profile .......................................................................... 19  
  Accounting Distribution ....................................................................................... 20  
    Split the Distribution ......................................................................................... 23  
  Attach an Approval or Quote to Your Shopping Cart ......................................... 24  
  Comments ............................................................................................................... 25  
  When Checkout is Complete ................................................................................. 25  

Manage a Shopping Cart .............................................................................................
Assign a Cart .................................................................................................................. 33
Set Default Cart Assignees ......................................................................................... 34
Suppliers ..................................................................................................................... 36
  Supplier Search ......................................................................................................... 36
  Suppliers That Require P-Card .................................................................................. 37
  Add a New Supplier to UShop .................................................................................. 38
What Happens after You Assign Your Cart ................................................................. 40
  Approvals ................................................................................................................ 40
Following Up on Your Purchase ................................................................................... 41
  Searching for Documents ........................................................................................ 41
  What Happens after Your Submit a Cart for a New Supplier .................................. 42
  Returning an Item .................................................................................................... 42
  Change Order ........................................................................................................... 43
Faster Processing: Dotting the I’s and Crossing the T’s .......................................... 44
Before using UShop, you must complete the online training at http://fbs.admin.utah.edu/ushop/ushop-training/online-shopper-training/.

The training consists of eight short videos and

After watching the videos, click on Shopper Role Activation Request. Fill out the form and submit it.

Ask the department office for the Org ID.

Ask who will requisition your purchases.

You (and your chosen requisitioner) will receive an email confirming that you have been approved as a shopper.

Once you are approved as a UShop shopper, you will have a UShop tile in the Campus Information System (CIS). Go to the Financial and Business Services page in CIS and click on the UShop tile.
Purchase Approval

Purchases for research must be approved by the Principal Investigator.
Purchases for use in a class require an approval from both the instructor and the department chair.

There are three points at which your supervisor or principal investigator (P.I.) may approve your purchase:

1. on paper or email (uploaded as an internal attachment),
2. in the cart (as an assignee), or
3. as a requisition (after submission).

One of these is required, but only one. Ask your advisor whether s/he prefers to approve in writing, or electronically in UShop either as a cart or as a requisition.

If the document to be attached is on paper, scan it and save as a pdf. If the document is in some other program (e.g., an email or jpg), print it to pdf.

If using the department’s fillable pdf buying request without printing it to paper to get a signature, print it to pdf before attaching, so that the fields are no longer editable. If the buying request is not signed, you must use one of the other approval methods.

The approval must be a permanent part of the purchase's record. If the P.I. approves by a buying request or email, upload that to UShop rather than linking to a webpage or cloud drive.
Overview of the UShop Process

Once you have selected out what you want to buy and where you want to buy it, you prepare a shopping cart, check out, and assign your cart.

Shop

Prepare a shopping cart, using one of the following:

- Punchout Catalog
- Noncatalog Order
- Print & Carry

Save your shopping cart. Check out.

Checkout

Upload attachments such as a quote, an approval, a sole-source justification, etc.

Enter the shipping address.

Enter the accounting distribution.

Paper Approval: Prepare a buying request and get the project P.I.’s (usually your supervisor) signature. Scan the buying request and upload it.

Assign

Cart Approval: Assign the shopping cart to the project P.I. for their approval. The P.I. adds a comment that the purchase is approved and specifies the project. The P.I. assigns the cart to the requisitioner.

or

Assign the cart to your requisitioner in the department office.

The requisitioner checks that your shopping cart includes all necessary information and is ready to be submitted. If it is, the requisitioner submits the shopping cart. Your shopping cart becomes a requisition.

Requisition Approval: The P.I. approves the requisition online.

or

The Office Manager checks for the P.I.’s approval. The Office Manager approves the requisition.

The approved requisition goes to Purchasing for a purchase order to be issued.
Your choice of supplier affects which form you should use to create a shopping cart in UShop.

- If the company has a link in UShop to their online catalog, use a Punch Out Catalog. This is the quickest and simplest way to order in UShop!
- If the company doesn’t have a punch-out catalog, yet is already set up in UShop, your order is under $5,000, and you don’t have other un-submitted carts, use the Non-Catalog Quick Order.
- If you have other carts, if the company is not yet set up in UShop, or if your order is over $5,000, use the Non-Catalog Form.
- If the company is signed up to accept printed purchase orders for will-call orders, use the Print & Carry PO Request. Only a few companies are set up! Check in UShop which suppliers are signed up for Print & Carry POs.
- Use the Quick Order form to add part numbers to an existing cart.
- If you have an invoice, but a purchase order wasn’t issued beforehand, you must submit a payment request instead of using UShop. (Avoid this situation!)
Create a Cart Using a Punch-Out Catalog

UShop has direct links to the online catalogs of some major suppliers, allowing the shopper to select items from the catalog and add them to a UShop cart. This is called a punch-out catalog. Using these catalogs is the easiest way to make a purchase through UShop.

Before you start shopping in a punch-out catalog, if you have a cart for another supplier which hasn’t yet been assigned to your supervisor or requisitioner, first create a new cart, and make it your default. Otherwise UShop will add the items to your existing cart, and you will need to separate the carts before sending them to your requisitioner.

On the UShop Home page, click on the tile for the supplier you wish to purchase from.

Select items in the supplier’s online catalog and add them to the supplier’s shopping cart. When you have selected all your items, click “submit” or “checkout” or whatever term the supplier uses. Your items will be transferred to a cart in UShop.

The Supplier heading for your cart will say the items were retrieved from the supplier’s catalog.
Create a Cart from Amazon

If you have attended a UShop training session for Amazon, you will have an Amazon tile on your UShop home page.

This page is still being drafted.
Create a Cart for a Non-Catalog Purchase

If the supplier doesn’t have a punch-out catalog, create a cart using either the Quick Non-Catalog Form or the Non-Catalog Form.

- Use the Non-Catalog Quick Order if the company is already set up in UShop, your order is under $5,000, and you don’t have any other carts.
- Use the Non-Catalog Form if you have other carts, if your order is over $5,000, or if the company is not yet set up in UShop.
- Use the Print & Carry PO Request for a will-call order to one of the local companies which are signed up to accept printed purchase orders.

Enter a Supplier

The process to enter the supplier’s name is similar for the Quick Noncatalog Purchase, Noncatalog Purchase, and Change Order forms.

As you type the name of a supplier into the Enter Supplier editbox, UShop looks for a match in its database of suppliers. The search engine will find any supplier with a word in its name that starts with the string of letters.

Click on the supplier’s name. The address and other information will fill in.

If you don’t easily find your supplier, see the chapter “Suppliers” to learn how to search or enter a new supplier.
Enter the Purchase Details

On the non-catalog quick order form, or on the non-catalog form,

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No.</th>
<th>Quantity</th>
<th>Price Estimate</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>precision surgical-grade stainless steel tweezers</td>
<td>501-073</td>
<td>2</td>
<td>7.95</td>
<td>1</td>
</tr>
</tbody>
</table>

Non-Catalog Quick Order
purchase details

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Quantity</th>
<th>Estimated Line Unit Price</th>
<th>Catalog No.</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heat treatment furnace</td>
<td>1</td>
<td>3,600.00</td>
<td>HT-601</td>
<td>1</td>
</tr>
</tbody>
</table>

Non-Catalog purchase details

Enter
- the product description
- the catalog or SKU number
- the quantity
- the price per unit
- the package size

If the item is sold by some unit other than one item per package (“each”), such as by length, weight, or volume, or by the dozen, gross, pack, etc., select the appropriate unit from the Packaging drop menu. (UOM = unit of measure.)
**Health & Safety Disclosures**

You must complete the Product Health & Safety Disclosure when using the Noncatalog Order, Noncatalog Quick Order, or the Print & Carry forms.

**Product Health & Safety Disclosures:** According to State of Utah law and University of Utah procurement policy, you are required to list any hazardous materials or controlled substances being delivered to or used on campus. These requests will require the approval of the Department of Environmental Health & Safety and/or Radiological Health.

Are any of the items on this purchase a controlled substance, hazardous and/or radioactive?

If yes, select all that apply from the list below.

Health and Safety
- [ ] Controlled substance
- [ ] Recycled
- [ ] Hazardous material
- [ ] Radioactive
- [ ] Rad Minor
- [ ] Select Agent
- [ ] Toxin
- [ ] Energy Star
- [ ] Green

If any item in the order is a controlled substance, hazardous, radioactive, and/or toxic, etc., check the button for “yes”, and also check the appropriate box(es) below.

If none of those apply, check “no”.

You **must** check either “yes” or “no”. If you don’t, you will get an error when you save your cart.

**Sole Source or Bid Request (Purchases over $5,000)**

If you are using the Non-Catalog form and your purchase is less than $5,000, check “no”.

If your purchase is greater than $5,000, you must use the Non-Catalog form rather than the Non-Catalog Quick Order. Check “yes” where it asks if the order requires a bid or other special attention. Attach bids or a Sole Source approval as internal documents.
Save a Noncatalog Purchase to Your Shopping Cart

Once you have filled out the noncatalog purchase page for your first item, save the item to your shopping cart.

On the Non-Catalog Quick Order form, there are buttons at the bottom of the window.

If this is your only item, or your last item, for this supplier, click Save and Close. If you want more items from this supplier, click Save and Add Another.

On the Non-Catalog form, use the menu Available Actions.

If you have no other carts, and this is your only item or your last item for this supplier, leave the menu Available Actions on the default, Add and go to Cart.

If you have carts for other suppliers that you are still working on, select Add to new Cart.

If you have other items to purchase from the same supplier, select Add to Cart and Return.

Click Go.
Add Another Item to Your Noncatalog Shopping Cart

If you selected Save and Add Another in the Non-Catalog Quick Order form, the item you just added will be shown at the top of the form. You may add another item in the product description blanks. Either Save and Close, or Save and Add Another to continue.

If you select Add to Cart and Return in the Non-Catalog form, a new blank Non-Catalog window will open. Add your next item in the product description blanks. Select Add and go to Cart if that is your last item, or Add to Cart and Return to add another item.

If you close the Non-Catalog form or the Non-Catalog Quick Order form before you have entered all your items, you can still add more items later. See the chapter “Managing Your Carts”.

![Non-Catalog Quick Order](image-url)
Print & Carry

A few local companies will accept a printed purchase order for shopping in person.

See the instructions for the Non-Catalog form to complete the Print & Carry form.

Print & Carry Supplier requirements:

Costco:
- Must have a valid departmental Costco membership.
- Anyone who tries to use a personal membership will be denied as the tax exemption is tied to the University of Utah.
- Note only two people may be on the departmental membership card per Costco policy.
- Departmental membership card must be in hand with the Print & Carry form to be valid for purchase.

Fed-Ex:
- 200 S University St. location only.
- Should you desire to go to another location you must call that location first to verify they will accept the Print & Carry form in exchange for goods/service and that they will send the invoice to ap@admin.utah.edu and reference the PO number for payment.
- Must have Print & Carry PO in hand.

Smith's:
- 455 S 500 E, and 402 E 6th Ave. locations have agreed to the print and carry terms.
- Should you desire to go to another location you must call that location first to verify they will accept the Print & Carry form in exchange for goods and that they will send the invoice to ap@admin.utah.edu and reference the PO number for payment.
- Not valid for gift card purchase per Kroger corporation.
- Must go to the customer service desk to check out.
Give Your Shopping Cart a Useful Name

UShop gives the shopping cart a default name consisting of the date, your ID, and a number, starting with 01 each day.

If you are working on several purchases, that name isn’t helpful to identify a particular cart again for adding to, editing, or assignment.

Once you have saved your shopping cart, rename it so you can easily recall its contents. Click update to save the name change.

... and later you will easily be able to identify the shopping cart you want.
If you need to add more items to a cart, click **Continue Shopping** (near the top). If you are ready to submit the cart for requisitioning, click **Proceed to Checkout**.

If you aren’t ready to submit the cart for requisitioning, for instance because you will be adding more items or you need to discuss items with your advisor, you can close the cart and come back to it later. (You can do the Checkout steps first even if you will be editing the cart later.)
Checkout

At the shopping cart, click *Proceed to Checkout.*

Shipping

From the Requisition menu, select *Shipping.*

Click *edit.*

In the field 'Nickname/Address Text', type *Metallurgical Engineering.*

Click *select from org addresses.*

After the first time, it will appear in the drop menu as you start typing. Click on it to select it.

Click *Search.*
Add an Address to Your Profile

You can add an address to your profile so you don’t have to search for it every time.

Click *Save this address for future use.*

An edit box will open, asking you to name the address. Change the default name to something meaningful to you.

Check *Check this box to make this the default address in the future.*

Click *Save.*

Next time you check out a cart, your shipping address will already be entered.
In the Requisition menu, click on Accounting Distribution.

Click Required field or edit.

The Accounting Distribution edit box will open.

Type the project (8 digits) or activity (5 digits) in the Acct Dist Shortcut box.

Type the account in the Account box. The account indicates what sort of thing you are buying.
Most purchases will be on one of the following accounts:
- 62600 lab supplies, including equipment under $1,000
- 66300 service, such as repairs, analysis, or machining
- 61400 insurable equipment, costing $1,000 or over, yet under $5,000
- 61000 capital equipment, costing $5,000 or over
- 61100 fabrication of capital equipment

If the number you entered in the shortcut box is an activity (5 digits), type 1 in the A/U box. If the number is a project (8 digits), leave the A/U empty.

Optional: Click validate values. The system looks up the project or activity entered in the Shortcut and fills in its BU, ORG, and FUND. This is a quick way to check that you typed the project or activity number correctly.

If it isn’t a valid project or activity, you will get an error message.
UShop will identify the values to in the chartfield. Look at the information to double-check that you entered the shortcut correctly.

<table>
<thead>
<tr>
<th>Acct Dist Shortcut</th>
<th>BU</th>
<th>Org</th>
<th>Fund</th>
<th>Activity</th>
<th>Project</th>
<th>Account</th>
<th>A/U</th>
</tr>
</thead>
<tbody>
<tr>
<td>55800101 UKELELE STRING CORROSION</td>
<td>01</td>
<td>METALLURGICAL ENGINEERING</td>
<td>5000 GRANTS AND CONTRACTS</td>
<td>no value</td>
<td>55800101 UKELELE STRING CORROSION</td>
<td>62500 LAB AND TECHNICAL SUPPLIES</td>
<td>no value</td>
</tr>
</tbody>
</table>

The Org should say Metallurgical Engineering, unless (a) you are using overhead or start-up, in which case it is College of Mines and Earth Sciences-Dean, or (b) you know the project is through a different department.

If you didn’t fill in an A/U, UShop will remind you that the A/U field is empty.

If you are using a project (8 digits), the A/U is supposed to be empty. Ignore the reminder.

If you are using an activity (5 digits), edit the accounting distribution and enter the A/U (usually 1).

... and the Accounting Distribution is checked off!
Split the Accounting Distribution

If dividing the purchase among more than one chartfield, click *add split*.

If the cost is split between the chartfields by a percentage, leave the dropbox on **% of Price**, and type the percent to be charged to each chartfield in the boxes.

If each chartfield is paying a specific amount, select **Amount of Price** in the dropbox, and type the amount to be charged to each chartfield in the boxes.

If you are buying several of a single item, you can also divide the cost by **% of Qty** [quantity].

Click **Save**.
Attach an Approval or Quote to Your Shopping Cart

Internal attachments are for viewing within the university (by your advisor, by the department, or by Accounts Payable). Suppliers cannot see internal notes or attachments.

External attachments accompany the purchase order to the supplier.

If your advisor provides a written approval or a signed buying request, attach it to your shopping cart as an internal attachment. See *Purchase Approval* for more information.

If the supplier has provided a quotation, especially for a custom item or a discount, attach a copy to the shopping cart as an external attachment.

Click either Internal Notes and Attachments or External Notes and Attachments as appropriate.

Browse to the file location. Click on the file to be attached or uploaded, and click Open.

The file name now displays below the Select files button. Click Save Changes.

The Add Attachments window closes. The file name displays under Internal Notes and Attachments.

At the bottom of the Requisition menu, Attachment Overview shows the total number of attachments.
Sponsors and government agencies want to be sure that their money is spent on items necessary for the project. Course fees have to be justified. The university needs to track the location of university property.

For these and other reasons, certain pieces of information need to be part of the purchase order record. These include:

1. the business purpose of the purchase; that is, how it will be used and its relevance to the project,
2. the room number and building where it will be used or kept,
3. the asset number, in the case of fabrications,
4. the course number, for supplies provided in class, and
5. what the item is, if that isn’t obvious from the description in the shopping cart.

If there is anything special about your order that the requisitioner needs to know, add an internal comment.

Special instructions to the supplier can be added as an external note.

To create a note, click on Internal Notes and Attachments on the requisition menu. Click edit.

In the text field of the pop-up window, provide the purpose and location, plus other information as appropriate, and save.

**WILE E COYOTE [Reply To] [New Comment]**

Applies To: Requisition - 98765432
Requisition assigned - 1/25/2016 5:19 PM

Lab class CRT E 5800-3, in 219 CJB. Protective gear for students. See attached approvals from instructor & chair.

**WILE E COYOTE [Reply To] [New Comment]**

Applies To: Requisition - 9883253
Requisition assigned - 2/3/2016 12:28 PM

Asset #123456. Child’s swingset seat. Fabricating lab-scale prototype of gigantic slingshot, being assembled in CJB bay.
When Checkout is Complete

When you have completed all the information for checkout, all items will be checked green, and the notice at the top of the checkout screen will turn green. The notice text depends on whether you are using an activity and an A/U, or a project with no A/U.

Do a Final Review to check that all information is correctly entered.

You may now assign your cart to your requisitioner.
Assign a Cart

When you are ready to proceed with the purchase and have completed checkout, assign it to your advisor for approval or to the office for requisitioning.

If the name displayed isn’t the assignee you want, open the menu to select someone else from your profile.

If the assignee isn’t in your profile, search for them.

You may add a note to your assignee.
You may add the assignee to your profile for future purchases. Click Add to Profile.
Click Assign. Your assignee will receive an email that they have a cart.
Set Default Cart Assignees

To avoid having to search every time you want to assign a cart, you can save an assignee to your profile. Click your name at upper right.

Click **Cart Assignees**.

Click **View My Profile**.

Click **Default User Settings**.

Click **Add Assignee**.

Type the assignee’s name, or at least the first few letters.

Click **Search**.
Find the person in the search results. Click [select].

The assignee is added to your profile.

Click on Set as Preferred for the assignee you will use most often.

Now this person’s name will be listed first when you are assigning a cart.
Suppliers
Supplier Search

Search for a Supplier

Supplier Search ...

The database includes common variants of a supplier’s name; for instance, a search for “U.S.” will find a supplier with “United States” in its name.
Some suppliers will not accept purchase orders from the University of Utah. UShop posts the names of these suppliers on the page ‘Suppliers that require P-Card’. Be aware that some suppliers on this page may in fact not accept a purchasing card either.

Scroll down to the menu My Resources. Double-click PCard Only Supplier List to open a list of the companies who said no when UShop contacted to ask if they will

Scroll to the alphabetical position where your supplier would be, if listed.

If your supplier is listed, UShop has already tried to set up an account, and the supplier won't accept purchase orders. To place your purchase, contact the purchasing card holder in your department.

If the supplier is not on the list, go back to your shopping cart and enter them as a new supplier.
Add a New Supplier to UShop

As you type the name of a supplier into the Enter Supplier editbox on the Non-Catalog Order shopping cart page or the Noncatalog Order Quick Order page, UShop tries to match from its database of suppliers. It suggests companies with the string of letters anywhere in the name, not just at the beginning.

When it can't find any matches to suggest, UShop responds “Try searching again.”

Double-check the company's name. If the name you are entering is correct, check whether the supplier is on the list of suppliers that have already said they won't take purchase orders. See “Suppliers That Require a Purchasing Card.

If you submit a cart for a supplier on that list, your purchase will be delayed by going through the process of being submitted to UShop, then rejected, then starting over as a purchase card order. Always check the list before entering a new supplier.

Once you've verified that a supplier you want to purchase from is not on the list of Suppliers That Require P-Card, you may put them in as a new supplier using the Noncatalog Purchase form.

Never use a new supplier if you are in a hurry. The set up process takes at least a week or often longer.
Under New Supplier Details, type the name of the supplier in the Supplier Name box.

Type the company's phone number in the Contact Name and/or Phone Number box. If the company's website offers several numbers, give UShop the number for the company's accounting department.

If you have been in touch with a salesperson at the company, provide that person's name and phone number.

Type the company's email and fax in the PO Email Address or Fax Number box.

Type the company's address in the Supplier Address box.

Type information that might be important when contacting the company in the Additional Supplier Information box.

Complete the rest of the Non-Catalog Order form as usual. See “What Happens after You Submit a Cart for New Supplier”.

When you close the shopping window and go to your cart, it should say ‘New Supplier’.

If it says ‘Supplier Unknown’, you didn’t enter ‘New Supplier’ in the Enter Supplier box. Edit the cart and type ‘New Supplier’ in the Supplier box.
More Approvals, or, What Happens after You Assign a Cart

Approval

The Administrative Manager and the project P.I. are notified that a requisition is waiting for approval.

Requisition Approval: The project P.I. approves the requisition.

If the project P.I. has approved the purchase using a buying request or a comment added to the shopping cart, the Administrative Manager approves the requisition.

The requisition is submitted to UShop, through several more layers of approvals.

UShop issues a purchase order.

The purchase order goes to the supplier.

The supplier ships the item(s) and sends an invoice to Accounts Payable.

Accounts Payable sends the supplier a check to pay for the items.
Following Up on Your Purchase

Searching for Documents

This page is still being drafted.

<table>
<thead>
<tr>
<th>Supplier:</th>
<th>POLYSCIENCES INC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status:</td>
<td>Completed</td>
</tr>
<tr>
<td>Document Total:</td>
<td>4,846.50 USD</td>
</tr>
<tr>
<td>View Related Documents</td>
<td></td>
</tr>
</tbody>
</table>
What Happens after You Submit a Cart for a New Supplier to UShop

When the requisition is approved, UShop will contact the supplier and set up an account with them. Typically the process takes several days. Once the account is set up, UShop will submit your purchase order. (The supplier may correct the contact information you gave UShop to their preferred office for purchase orders.)

If the company responds that it is unable or unwilling to accept purchase orders from the university (or doesn’t respond at all), UShop will note this in the requisition’s internal notes, and copy you by email. The Supplier will be added to the PCard Only Supplier List.

Usually, however, UShop is successful. When you wish to buy from that company again, the name will appear in the suggestions as you type it into the Supplier box.

Returning an Item

If you need to return an item, contact the supplier for a return authorization number.

If the item is hazardous or toxic, shipping must be arranged through the university’s Occupational and Environmental Health department.

If the item is nonhazardous, repackage the item for shipping.

If the supplier is arranging for pickup by UPS, give the pickup location as 412 WBB and bring the package to the department office. UPS and FedEx will pick up packages with prepaid labels from the department office.

If the supplier is not taking care of the shipping, bring the package to the department office. Complete a shipping request and get it signed. The shipping request should include

The shipping address
Recipient’s phone number
The project or activity paying for the shipping
A one or two-word description of the contents, e.g., documents, equipment, chemicals, etc.
The dimensions of the package
An estimated weight of the package
Small packages may be carried to the campus store Post Office and paid for with a campus order.

Large packages may be shipped by UPS or FedEx, through the Receiving department. The office will prepare the shipping document. The package may either be left in the department
Change Order

Use the Change Order Request if a purchase order has already been issued but needs to be revised.

This page is still being drafted.
Faster Processing: Dotting the I’s & Crossing the T’s to Make Your Purchase Go through More Quickly

Make sure you have followed the approval procedure your supervisor prefers.

For fast processing, use suppliers who have punchout catalogs. Don’t use new suppliers. Don’t use suppliers outside the U.S. Don’t use a supplier who requires payment by wire transfer. Get a purchase order before a supplier does work, instead of waiting until you have an invoice.

Enter all the checkout information that you can.

Enter the distribution on the cart (checkout) level during checkout, instead of on the line level, unless a particular item is being charged to a different project.

Learn the more commonly used account codes, such as Laboratory Supplies (62600), Other Services (66300), Insurable (61400), and fabricated Equipment (61100).

Set up defaults for assignee and shipping address so you don’t need to fill those in each time.

If you are using a new supplier, check that they are not on the P Card Only Suppliers list.

Attach documents at the appropriate level. Unless there is a reason to attach a document to a line (individual) item, attach documents to the cart during checkout.

Use internal and external attachments appropriately. Quotes should be external attachments. Approvals should be internal attachments. Suppliers can see external attachments; they cannot see internal attachments.

UShop does not offer choices of shipping speed.

The accounting distribution, the shipping address, and documents can be attached either to specific items in the shopping cart, or to the entire shopping cart. Unless there’s a reason to attach something to one item but not others, it’s generally best to add the accounting distribution, shipping, and attachments during checkout.