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 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.

v. January 2018
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Get Started

Take UShop Training

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 takes about half an hour.

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 the department office who will requisition your purchases.

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

Go to UShop

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 must be approved by the Principal Investigator.

There are three points in the process at which your supervisor or principal investigator (P.I.) may approve your purchase: on paper, in the cart, or as a requisition. 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 using the department’s pdf-form buying request without printing it to paper, print it to pdf before attaching, so that the fields are no longer editable. You must use one of the other approval methods if the buying request is not signed.

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), print it to pdf.

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 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,

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.)

Non-Catalog Quick Order purchase details

<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 EA - Each</td>
</tr>
</tbody>
</table>

Non-Catalog purchase details

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

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

Fill in the product details required.
*NOTE: The Product Description

Product Description

Ceramic tile

OBE

200 characters remaining

Quantity

3

Estimated Line Unit Price

67.00

Catalog No.

TB-M-OBE

Packaging (UOM)

1 EA - Each
**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.

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.

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**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”.
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.
Check That Everything Is Correct

When you have saved your shopping cart, check that everything is entered correctly.

- the supplier name
- the product descriptions
- the part numbers
- the unit prices,
- the quantities, and
- the total.

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.*

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

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.**

In the search results, click **select** next to the shipping address you want.

If the package should be shipped to someone else’s attention, change the ATTN line from your name to theirs.

Click **Save.**

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

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.

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

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, so it will accompany the purchase order and the supplier can associate the order with your earlier inquiry.

To upload an approval or a buying request, click **Internal Notes and Attachments**. Suppliers cannot see internal notes or attachments.

To upload a quotation or other document you want the supplier to see, click **External Notes and Attachments**.

### Internal Notes and Attachments

A pop-up window opens. Click **Add Attachments**.

**Click Select files.**

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**.
At the bottom of the Requisition menu, Attachment Overview shows the total number of attachments.

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

**Explain the Business Purpose**

Add an internal comment describing how the purchased item(s) will be used.

**When Checkout is Complete**

When you have completed all the information for checkout, the notice at the top of the checkout screen will turn green.

You will see one of two messages, depending on whether you are using an activity and an A/U, or a project with no A/U.

You may now assign your cart to your requisitioner.

**Project with no A/U**

⚠️ You need to be aware of the following issue(s), but it will not prevent you from submitting your request.

- Empty field: A/U
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 View My Profile.

Click Default User Settings.

Click Cart Assignees.

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.
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.

Type New Supplier in the supplier editbox.

Click on the drop-down suggestion to get it to stay.
**New Supplier Details:**

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Acme Explosives Corporation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name/Phone Number</td>
<td>Mel Blanc, 575-555-1212</td>
</tr>
<tr>
<td>Email/Fax</td>
<td><a href="mailto:sales@acme.com">sales@acme.com</a>, fax 575-555-1213</td>
</tr>
<tr>
<td>Supplier Address</td>
<td>265 Road Runner Rd Radium Springs NM 88054</td>
</tr>
<tr>
<td>Additional Information</td>
<td>Hours 7:30 a.m. to 2:30 p.m. Mountain Time Monday through Thursday</td>
</tr>
</tbody>
</table>

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.
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

Comment: I cannot get a response from this company. It might be best for you to purchase through their web site. Please advise if you would like me to cancel this requisition.
Change Order

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