



# SHOP UW+ GUIDE

*Department of Chemical & Biological Engineering*

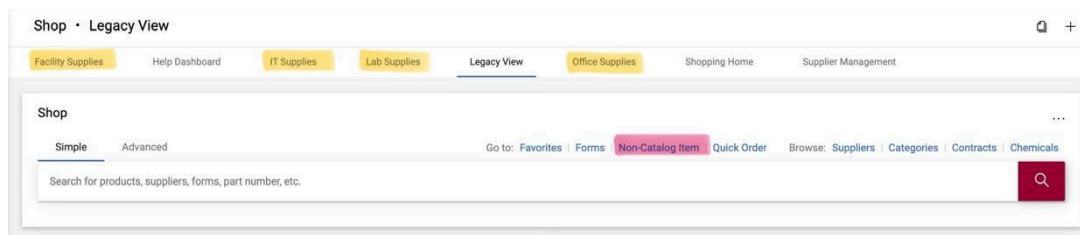
## PURCHASING: STEP-BY-STEP

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### Creating a Cart

1. Under the cart icon tab of Shop UW+, select “My Carts and Orders”.
2. Redirected to new screen, upper right-hand corner “Create Cart” ☐ add items

You can add **catalog** or **non-catalog** items to cart.



### Adding Purchase Requests to Cart, Catalog Items

**View Active Cart**

cart icon > My Carts and Orders > "View Carts"

**Select Supplies Category**

choose from IT, Office, Lab, or Facility Supplies

**Select Supplier > Redirected to Website**

shop within website as normal

**Review & Proceed to Checkout**

upon completing shopping

**Redirected to Shop UW+**

\*cart is incomplete, add necessary logistics info

**Adding Purchase Requests to Cart, Non-Catalog Items****View Active Cart**

cart icon > My Carts and Orders > "View Carts"

**Select "Non-Catalog Items"****Search for Existing Supplier**

"Request new supplier" if not in system

**Fill in **all** Information****Including Cart Descriptions**

For funding string 133 or 144 a detailed justification for purchase as it pertains to usage is required. Failure to do so and the cart will be returned to abide by protocol for audits.

- Acceptable descriptions include

- o The items in the PO
- o How items are used in research
- o The analysis to be achieved with PO
- o **Relate it to the specific project**

## PURCHASING: ESSENTIALS FOR APPROVAL

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### **Adding a Non-Catalog Item**

- If item does not appear in a catalog and details are manually entered, to ensure efficiency of cart purchase approvals, make each individual non-catalog item its own cart. Include the supplier email, too.

### **State/Federal Funding**

- The item must specifically benefit the research directly. Any general use items should be charged to your PI's discretionary funding.
- 133 and 144 funding justifications should not include "general use"

## REQUIRED INFO: CART VIEW

<u>General</u>	<u>Purchasing Use Only</u>	<u>Shipping &amp; Billing Info</u>
<p>Cart Name: PI's last name &amp; numbers generated by ShopUW+</p> <p>Description: <b>Must include for fundings 133 and 144.</b></p> <p>Prepared By: your name</p> <p>Prepared For: <b>PI name</b></p> <p>Supplier Email: If <u>non-catalog</u> supplier, fill in.</p> <p>Business Purpose: <b>Select from drop down</b></p> <p>Business Unit: UW-Madison (UWMSN)</p>	<p>Auto-generated by ShopUW+ given cart item details, project, etc.</p>	<p>Ship To: <b>Attn: your name</b> <b>Suite/Rm: XX</b> 1415 Engineering Dr Engineering Hall Madison, WI 53706-1607</p> <p>Delivery Options: Ship Via: Best Carrier-Best Way</p> <p>Requested Delivery Date: XX/XX/XXXX only if necessary</p> <p>Bill To: Accounts Payable 21 N Park St, Suite 5301 Madison, WI 53715</p>

<u>Funding String</u>									
GL Business Unit	Speed Chart	<b>Acct.</b>	Acct. Code Warning	<b>Fund</b>	Dpt	<b>Program</b>	PC Bus. Unit	<b>Project</b>	Class
UWMSN	NONE_MSN				191200				
<ul style="list-style-type: none"> <li>The account number is a four-digit code that categorizes the nature of the transaction e.g. 3105 – laboratory supplies. Details can be found <a href="#">here</a>.</li> <li>The fund can be found in WISER – note when the fund is 133 or 144. Extra information will need to be provided for these via a detailed description.</li> <li>Search for Department &amp; selection from drop down options for program.</li> <li>The project number can be obtained by talking to your Principal Investigator (PI).</li> </ul>									

<u>Internal Notes and Attachments</u>	<u>External Notes and Attachments</u>
Optional area to add supplementary information to cart for internal view	Optional Area to add supplementary information for supplier view