

With the elimination of the paper Campus Order in July 2018, UShop provides a payment method for selected internal, or campus, suppliers. UShop is an electronic procurement system that generates internal Purchase Orders (POs) and distributes these POs to internal suppliers. BU02, or hospital and clinics, employees have access only to a select group of internal suppliers in UShop. Orders are placed as the internal supplier receives a UShop PO. Internal suppliers invoice against these internal POs.

- NOTE:**
- Each transaction in UShop requires both a Requisitioner (you) and an Approver (the person who has signing authority for the Accounting Distribution used for the internal order).
 - An Approver is defined as a person with Granting Financial Authority (GFA). GFA is an application in Campus Information Services (CIS) and is used to maintain delegate financial responsibility for an Org. It also captures and maintains all the signatures for authorized individuals. GFA is integrated with UShop to verify that financial transactions are authorized by the correct individuals.
 - Before you shop, be sure there is an Approver in your department, an Account Executive with GFA who can approve the order you submit. (See Hospital Approver Training)

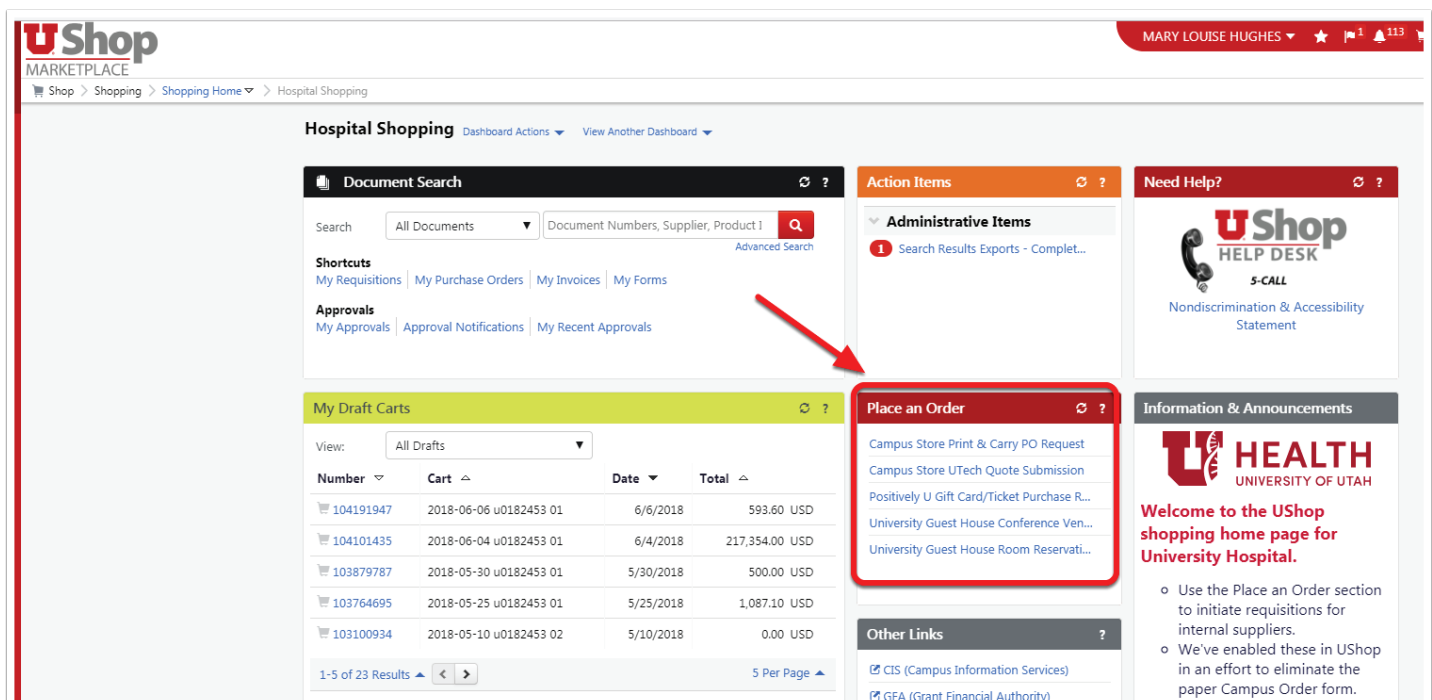
To order goods or services from an internal supplier in UShop, follow the three steps outlined below:

- A. Fill the Cart
- B. Proceed to Checkout
- C. Submit the requisition

A. Fill the Cart

I. A cart is filled with the goods or services needed.

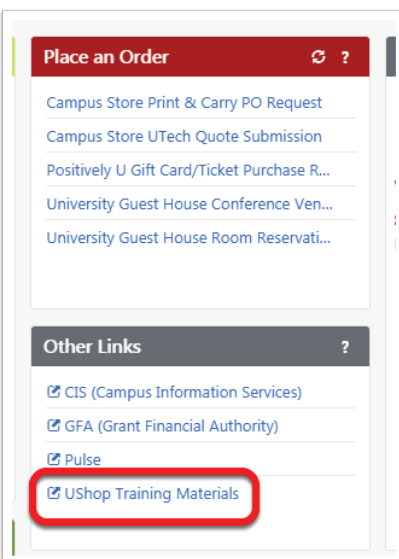
1. Go to the Place an Order section and select the form you wish to use.



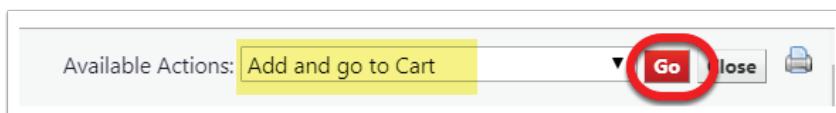
The screenshot shows the UShop Marketplace interface. The top navigation bar includes the UShop logo, a user profile for Mary Louise Hughes, and notification icons. The main content area is titled 'Hospital Shopping' and contains several sections:

- Document Search:** Includes a search bar, filters, and links to 'My Requisitions', 'My Purchase Orders', 'My Invoices', and 'My Forms'.
- Approvals:** Includes links to 'My Approvals', 'Approval Notifications', and 'My Recent Approvals'.
- My Draft Carts:** A table listing draft carts with columns for Number, Cart, Date, and Total. A red arrow points from this section to the 'Place an Order' section.
- Place an Order:** A red-bordered box containing links to 'Campus Store Print & Carry PO Request', 'Campus Store UTech Quote Submission', 'Positively U Gift Card/Ticket Purchase R...', 'University Guest House Conference Ven...', and 'University Guest House Room Reservati...'.
- Other Links:** Includes links to 'CIS (Campus Information Services)' and 'GFA (Grant Financial Authority)'.
- Need Help?:** Includes a 'UShop HELP DESK' section with a '5-CALL' button and a 'Nondiscrimination & Accessibility Statement' link.
- Information & Announcements:** Includes a 'Welcome to the UShop shopping home page for University Hospital.' message and a list of instructions for using the 'Place an Order' section.

2. Please note that a How-To guide for each specific form type is available on the Training Materials page, found in the Other Links Section.

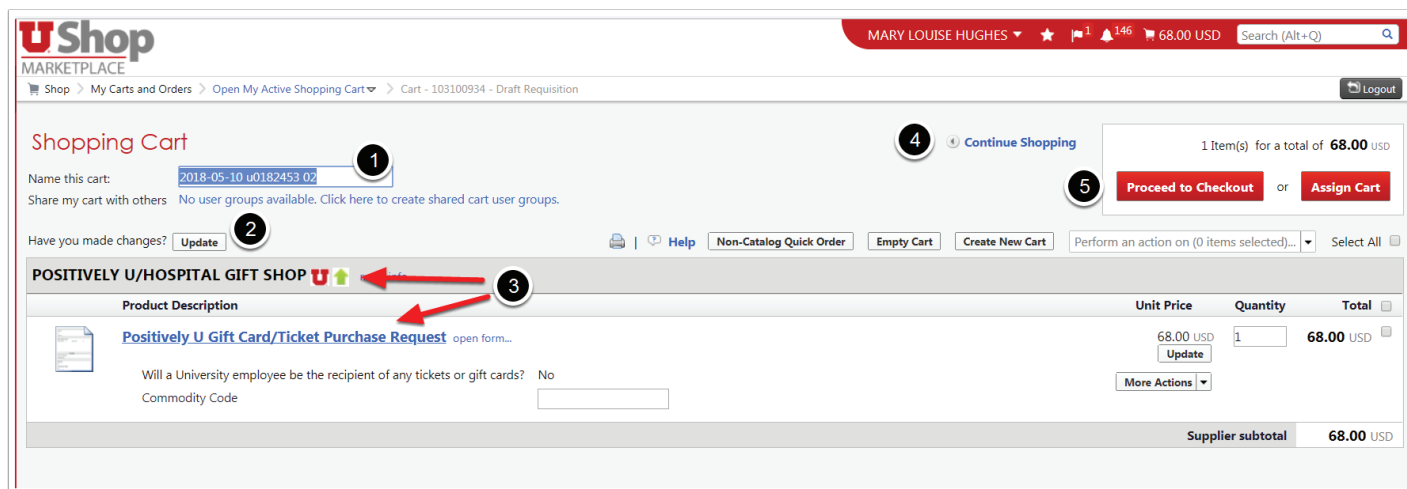


3. When you complete your form, Select Add and go to cart from the Available Actions dropdown in the upper right corner. Click Go. The system will take you to the UShop Shopping Cart.



II. Name the Cart and proceed to Checkout.

1. In the cart, the system will display a default cart name, including the date and your uNID. It is a best practice to re-name the cart to indicate the contents of the cart and its business purpose.
Example: "Gift Cards for Sloan Study participants". A department may determine a naming protocol that they all follow. Be aware of HIPAA requirements when you determine your naming protocol.
2. After naming the cart, click the Update button.
3. The supplier name and product description are displayed in the cart.
4. If you need to add items to your cart, click Continue Shopping to return to the Shopping Dashboard.
Note that it is best practice to add only one supplier to a UShop cart.
5. When you are finished shopping and your cart is complete, click Proceed to Checkout.



B. Proceed to Checkout

I. Checkout Page

1. On the Checkout page you will see a list of tabs on the left side of the page. Each tab opens a page allowing modifications to the requisition.
2. Note that a green check indicates that no action is required, while a gray check indicates a required action. Shipping and Accounting Distribution are required for every order. Other tabs are used as needed.

UShop
MARKETPLACE

Shop > My Carts and Orders > Open My Active Shopping Cart > Shipping - 103100934 - Draft Requisition

< Return to shopping cart

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Shipping address
- The form "Positively U Gift Card/Ticket Purchase Request" is incomplete or has errors. Open the form and correct the errors.
- Required field: Account
- Required field: Acct Dist Shortcut

The A/U is only required if using a BU01 Activity and an Expense Account (Account Range: 60000-79999). For all others, you must leave this field empty. 1 = Allowable; 0 = Unallowable

- Empty field: A/U

Requisition: 103100934
2018-05-10 u0182453 02

Status: Draft
Document Total: 68.00 USD
What's next for my order?

Shipping

Ship To
Shipping address

Lines

POSITIVELY U/HOSPITAL GIFT SHOP

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Positively U Gift Card/Ticket Purchase Request			68.00	1	68.00 USD
2 Positively U Gift Card/Ticket Purchase Request			0.00	1	0.00 USD

Supplier subtotal 68.00 USD

Subtotal 68.00 USD

II. Shipping Address

1. Click on the Shipping tab to open the page.
2. To select a Ship To address, click on the edit link.

Requisition: 103100934
2018-05-10 u0182453 02

Status: Draft
Document Total: 68.00 USD
What's next for my order?

Shipping

Ship To
Shipping address

Lines

3. Click on the link: select from org addresses. Note: only University addresses are available to select.

Ship To

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address

select from your addresses

select from org addresses

Cancel

4. In the search field, type a key word of your department name. This is an alpha search, do not type numbers. Click Search.



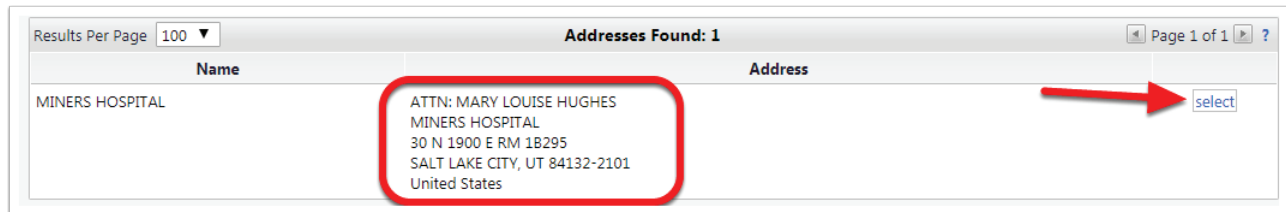
Address Search ?

Nickname / Address Text

Miners

Search

5. A list of all addresses containing that key word will display. Click select to the right of the correct address.



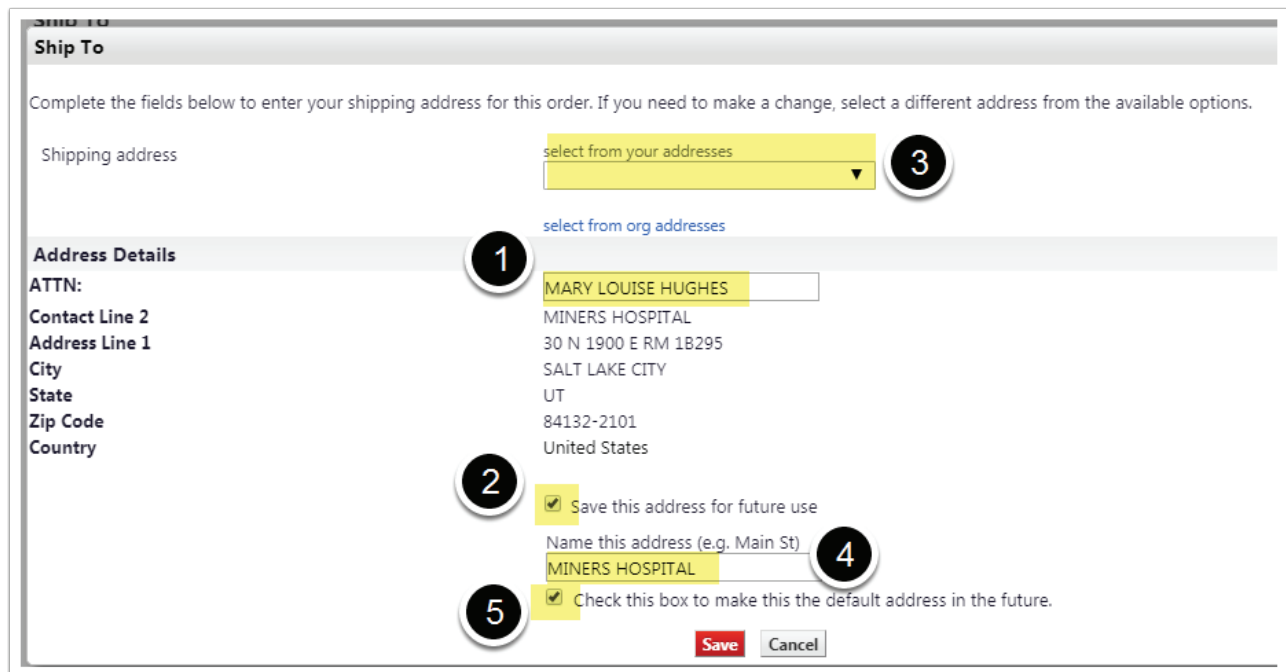
Results Per Page 100 Addresses Found: 1 Page 1 of 1 ?

Name	Address
MINERS HOSPITAL	ATTN: MARY LOUISE HUGHES MINERS HOSPITAL 30 N 1900 E RM 1B295 SALT LAKE CITY, UT 84132-2101 United States

select

6. The selected address will appear in the Ship To page.

1. Note that the in the Attention to line, the system defaults to the name of the person currently logged in. This can be edited to display the desired name. A phone number or other information may be added here as well.
2. Click the box to save the address for future use. The address will be saved in your profile with the attention to name currently indicated.
3. The saved address will be added to a list you can access via this dropdown.
4. You may give the address a nickname which will identify it in the dropdown list.
5. If you choose an address as your default, the system will display it every time you initiate an order. However, you always have the option to edit the address and select a different one for a particular order.



Ship To

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address

select from your addresses 3

select from org addresses

Address Details

1

ATTN: MARY LOUISE HUGHES

Contact Line 2 MINERS HOSPITAL

Address Line 1 30 N 1900 E RM 1B295

City SALT LAKE CITY

State UT

Zip Code 84132-2101

Country United States

2

☒ Save this address for future use

Name this address (e.g. Main St) 4

MINERS HOSPITAL

5

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

Save Cancel

III. Accounting Distribution

1. To provide the accounting string to pay for this purchase, click on the Accounting Distribution tab.
2. Click on the edit link to open the required fields.

Requisition: 103100934
2018-05-10 u0182453 02

Status: **Draft**
Document Total: **68.00 USD**
What's next for my order?

Requisition ▾

- General ✓
- Shipping ✓
- Billing ✓
- Accounting Distribution**
- Internal Notes and Attachm... ✓
- External Notes and Attachm... ✓

Accounting Distribution Document Actions ▾ History ?

Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U
no value Required field	no value	no value	no value	no value	no value	no value Required field	no value Empty field

edit

1

2

POSITIVELY U/HOSPITAL GIFT SHOP

more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Positively U Gift Card/Ticket Purchase Request			68.00	1	68.00 USD

Three editable fields will display.

1. Acct Dist Shortcut: Populate this field with the numerals 02 (dash) your Org ID, i.e. 02-XXXXX
2. Account: Populate this field with 02 (dash) Account code, i.e. 02-XXXXX
3. A/U: Do not populate this field - leave it empty. It refers to Allowable/Unallowable purchases and does not pertain to BU02 accounting distributions.
4. The system will give you a warning because the A/U field is left empty, but this will not impede your order.
5. Click Save.

Accounting Distribution ? X

Select from your code favorites ▾

Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U
02-91029 Select from profile values... Select from all values... Required field	no value	no value	no value	no value	no value	02-62500 Required field	Empty field

add split

recalculate / validate values

5 Save Cancel

Continued on next page

C. Submit Requisition

1. When all of the required steps are completed, as indicated by green check marks in the left column, the order is ready to submit.
2. If actions are required, the needed steps will be listed at the top of the page. Note that the A/U field should remain empty for BU02, regardless of the warning message.
3. Click Submit Requisition. The order will now be directed to the person(s) with GFA signing authority for department approval. See [Requisition Workflow](#) for details.

[Return to shopping cart](#)

The A/U is only required if using a BU01 Activity and an Expense Account (Account Range: 60000-79999). For all others, you must leave this field empty. 1 = Allowable; 0 = Unallowable
 • Empty field: A/U

Requisition: 103100934
 2018-05-10 u0182453 02

Status: Draft
 Document Total: **151.90 USD**
[What's next for my order?](#)

Requisition ▾

- General ✓
- Shipping 1 ✓
- Billing ✓
- Accounting Distribution ✓
- Internal Notes and Attachm... ✓
- External Notes and Attachm... ✓
- Additional Approvals ✓
- Supplier Information ✓
- Final Review ✓

PR Approvals

Comments

Attachment Overview

General

Cart Name: 2018-05-10 u0182453 02
 Description: no value
 Ship Via: Best Carrier-Best Way
 Requisitioner: MARY LOUISE HUGHES
 Shopper: MARY LOUISE HUGHES

Lines Selected Line Item Actions ▾

POSITIVELY U/HOSPITAL GIFT SHOP
[U](#) [more info...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 Positively U Gift Card/Ticket Purchase Request more info... General (same as header) edit			68.00	1	68.00 USD	<input type="checkbox"/>
2 Positively U Gift Card/Ticket Purchase Request more info... General (same as header) edit			83.90	1	83.90 USD	<input type="checkbox"/>
					Supplier subtotal	151.90 USD
Total					151.90 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.