



# Materials Distributions Services (MDS) Account Application, Activation, and Registration

Procedure #: 610.1

Rev.: 0

Effective Date: September 1, 2018

**Related Policy:** [MDS Policy](#)

**Functional Owner:** Materials Distribution Services, Division of Business Services

**Contact:** Financial Program Supervisor: (608) 497-4403  
dan.purcell@wisc.edu

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### I. Procedure Statement

An active account is required to access and order product through the Material Distribution Services (MDS) online marketplace, Shop@UW. Shop@UW offers users the opportunity to shop from and purchase products from over 20 contracted vendors. Access is controlled through a combination of custom in-house programming and third party serviced software (Great Plains and JAGGAER). User name and profile information is set up and maintained through Great Plains. The JAGGAER software is integrated to coordinate the retail shopping and processing functionality. These systems in aggregate are referred to as the MDS system.

The MDS system allows for Subordinate accounts to be used for purchasing and Parent accounts to be used in the monitoring of Subordinate account activity. Accounts are assigned to selected employees and are approved by a Department Leader and a Divisional Dean, Director &/or Financial Officer. To obtain an account, the employee completes an online training course (effective 12/1/18) and an online application (effective 9/1/18). Upon submission, the application is routed, via email and online workflow, to the employee's supervisor and Divisional leadership for approval. Once both the supervisor and Divisional leader issue their approval an email is sent to the Shop@UW Customer Service department notifying them of a new account approval. An Office Operations Associate (OOA) handles account setup, activation and user notification. (*exception: UW Eau-Claire has developed their own version of the online application and will fax or email this form to Shop@UW Customer Service once all approvals have been obtained*)

### II. Who is Affected by This Procedure

Employees who apply for an MDS account; Divisional Business Office staff; MDS personnel

### III. Procedure

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- A. **Account application:** To apply for a MDS purchasing account, an employee must complete an online training course and submit the online application for a Subordinate account at the appropriate campus. The form can be found at <https://www.bussvc.wisc.edu/shopuw/account.html> . All divisional leaders (approvers) are automatically assigned a parent account, an electronic application for additional parent accounts is available at (insert link). Parent account request are routed through the same workflow approval process as new Shop@UW accounts. Once approved, an OOA handles review of the parent account application and setup.
- B. **Approval process:**
1. **Supervisor Approval:** The applicant provides the name and email address of their current supervisor as part of the application process. Upon submission, notification of the application is emailed to the supervisor who assesses the need for the account and reviews the application for completeness and accuracy. Once the supervisor issues his/her approval via the online workflow an email is sent to the Divisional Business Office notifying them of the new account application.
  2. **Divisional Business Office approval:** The Divisional Business Office, generally the Chief Financial Officer (CFO) or their designee, receive notification of the application awaiting approval via email. The name of the CFO and their email address is hardcoded into the online application and must be selected by the applicant via a dropdown. Once the CFO receives the application they review it for accuracy and appropriateness. Once the CFO issues his/her approval an email notification is sent to the Shop@UW customer service department notifying them that a new account has been approved for set-up. If the CFO denies the new account, the application is closed. The CFO also has the ability to revert an application for editing without outright denial of the application.
- C. **Training:** MDS maintains online training tutorials and reference materials at <http://www.bussvc.wisc.edu/shopuw/tutorials.html> . The tutorials address navigation through the purchasing process in Shop@UW. Records of training attendance are maintained. Online Shop@UW training is required prior to account activation. (effective 12/1/18)
- D. **Account Setup and Activation:** The OOA is responsible for account set up and performs the following:
1. The OOA receives the application and verifies all required information is complete.
    - i. Verifies the provided funding string is a valid string
    - ii. Obtains the next sequential account number from the manual tracking log and uses it to set up a new account in Great Plains. Great Plains will not allow the same account to be used more than once.
    - iii. Writes new MDS number on the application
    - iv. Signs and dates the application to evidence input of account information
  2. A second OOA verifies that all information from the application was accurately input into the Great Plains system.
- E. **Account Activation:** An account can't be used until the status has been updated to an active online status:
1. An OOA examines evidence that required training has been completed by the account holder (effective 12/1/18).
  2. OOA accesses Great Plains and activates the online status of the new account.

3. An email is sent to the account holder and each approver of the application to advise that all requirements have been met and the account setup is complete. The email advises that login information will be sent to the account holder separately.
4. OOA sends an email to the new account holder with access instructions, user name and initial password. The system requires a change to initial password at first login.

#### IV. Contact Roles and Responsibilities

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- A. **Account Holder:** responsible for obtaining approvals, submitting an application, enrolling in and attending the mandatory purchasing program training, and accessing the system for the first time to update password. Purchasing decisions are an ongoing responsibility of the account holder.
- B. **Supervisor:** responsible for evaluating the responsibilities of an applicant for an MDS account and determining whether there is a business need for the employee to have purchasing capability. Also responsible for issuing approval for an account to be set up.
- C. **Divisional Leader:** responsible for evaluating the responsibilities of an applicant for an MDS account and determining whether there is a business need for the employee to have purchasing capability. Also responsible for issuing approval for an account to be set up.
- D. **Office Operations Associate (OOA):** responsible for complete and accurate account set up and activation in Great Plains, verification that training completed (if required) and notification when account is set up and operational.
- E. **Financial Program Supervisor (FPS):** responsible for the administration of Great Plains user rights including roles to set up new MDS accounts. Supervises MDS accounting staff and the Shop@UW Administrator/Customer Service Supervisor.

#### V. Definitions

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- A. **MDS Account:** An account that can be used by an approved employee to make online business purpose purchases through the Shop@UW site from a variety of contracted vendors at contracted prices.

#### VI. Related References

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- [<Materials Distribution Services Policy link>](#)  
[<Materials Distributions Services Account Use and Monitoring link>](#)[<Materials Distributions Services Warehouse and Inventory link>](#)

#### VII. Revisions

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Procedure Number	610.1
Date Approved	August 31, 2018
Revision Dates	

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