



ShopUW+

Basic instructions for signing in,
making a cart, and assigning to a
PI or a requester.

<https://shopuwplus.wisc.edu/>

This is the homepage for all of the ShopUW+ information, more detailed training, and also where you sign in.

SHOPUW+ LOGIN

 **ShopUW+ Essentials**
UW System Purchasing and Payables System

Q Search

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Phase 2 Project Updates Now on ShopUW+ Essentials

ShopUW+ Essentials has been updated to include updates on the work on Phase 2 business functions. This is your place for everything related to the updates and resources of these new business functions of ShopUW+. Watch this [demonstration video](#) to learn more about the new navigation and information available.

Definitions

- **Shopper** - anyone who has a UWM panther ID and password. They can browse , create and assign carts
- **Requestor** - they have the ability to edit carts assigned to them and forward the order to the Approvers. This is myself, Kevin, Wendy.
- **Approver** - L&S Admin level, they actually place the orders

Dashboards • Shopping Home

- Accounts Payable Dashboard
- Facility Supplies
- Help Dashboard
- IT Supplies
- Lab Supplies
- Legacy View
- Office Supplies
- Shopping Home**

Organization Message

PunchOut issues

We are experiencing issues with Firefox opening PunchOuts. We are currently looking into it.

McKesson Medical Supply

The McKesson Medical Supply punchout catalog is now live in ShopUW+. This enablement was more complicated than most, so if you identify any issues with pricing, shipping, shipping labels, etc. please do not hesitate to contact ShopUW+ customer service (uwsaproblemsolvers@uwsa.edu)

New change to ShopUW+

In an effort to increase system performance and reduce system overhead, the workflow steps located on the right side panel of any document type (Requisition, PO, Invoice) now default to a minimized view.

To view the status of your workflow, click to expand the workflow steps section.



The New Updates Are Here!

To learn more about the updates [click here](#).

Welcome to ShopUW+

We are very excited about this investment in you, your work and the work across all UW institutions. To help you transition quickly, our learning and development team has created courses, job aids and videos based on your role. You can access training on the [ShopUW+ Essentials website](#), the hub for training, announcements and support.

Guided Buying



Lab Supplies



IT Supplies



Facility Supplies



Office Supplies



Help



Legacy View

My Draft Carts

Draft Cart Type Drafts Assigned To Me

No results found

My Requisitions

View as Graph View as List

Number	Requisition	Requisitioner	Date	Total
✓ 153088552	2022-01-17 005...	SHELLEY A HARRINGTON HAGEN	1/17/2022	68.97 USD
✓ 153051615	2022-01-14 005...	SHELLEY A HARRINGTON HAGEN	1/14/2022	5,920.00 USD

Creating a cart is very similar to the old Shop@UW system. It just looks a bit different. You start by clicking a category, and it will show the vendors.

Guided Buying

 Lab Supplies	 IT Supplies
 Facility Supplies	 Office Supplies
 Help	 Legacy View

Lab Supplies Category

From this landing page you can either choose a specific vendor tile, like **Fisher or Eppendorf**, etc, or you can use the **search bar** to search across all vendors at once. If you choose a vendor, you will “punch out” to that specific vendors website. You may add items from different vendors into one cart, no need to create separate carts for each vendor. Just a quick note Sigma is still not charging for shipping if we order direct from their website. If we order through ShopUW+ shipping is charged. So for now, even though we can order Sigma through ShopUW+, we will stich to the old way.

Shop • Lab Supplies

Shop

Facility Supplies Help Dashboard IT Supplies **Lab Supplies** Legacy View Office Supplies Shopping Home

Simple Advanced

Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | [Quick Order](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Search for products, suppliers, forms, part number, etc.

Organization Message

UNIVERSITY of WISCONSIN
UWMILWAUKEE

PunchOut issues
We are experiencing issues with Firefox opening PunchOuts. We are currently looking into it.

McKesson Medical Supply
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Lab Suppliers

Lab Suppliers

 Abcam	 Bio Rad	 Dot Scientific	 Eppendorf
 Fisher Scientific	 IDT	 ThermoFisher Scientific formerly Life Life Technologies	 McKesson

Once you have all your items in your cart, you will need to assign your cart to a Requestor, or a PI if appropriate. At the top right, click Assign Cart

Shopping Cart • 153094515 ▾

☰ 🖨️ Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc. 🔍

2 Items □ ▾

FISHER SCIENTIFIC COMPANY LLC CATALOG SUPPLIER · 2 Items · 217.59 USD ... □

SUPPLIER DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 1/17/2022 6:13:57 PM

- TUBE SCREW CAP GRAD 500/CS
- TUBE CONIC 50ML WRACK 500CS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 TUBE SCREW CAP GRAD 500/CS	1443222	CS	107.47	<input type="text" value="1"/> CS	107.47	... □

Details ▾

For
SHELLEY A HARRINGTON HAGEN

Name

Estimate (217.59 USD) ▾

Total: 217.59

Assign Cart: User Search ✕

Assign Cart To: *no value*
[SELECT](#) ▾ or [SEARCH](#)

Note To Assignee:

Assign Close

A pop up box overlay will appear. The first time you do it, or if you are assigning to a new person you will click search.

New pop up, many search options to find your requestor or PI. I've found last name or email to be the most accurate in narrowing it down. Click Search

User Search [Close]

Last Name ⓘ

First Name ⓘ

User Name ⓘ

Email ⓘ

Business Unit ⓘ

Department ⓘ

Role ⓘ

Results Per Page

Search Close

A new pop up will appear. Once you find the correct person, click the + sign on the right.

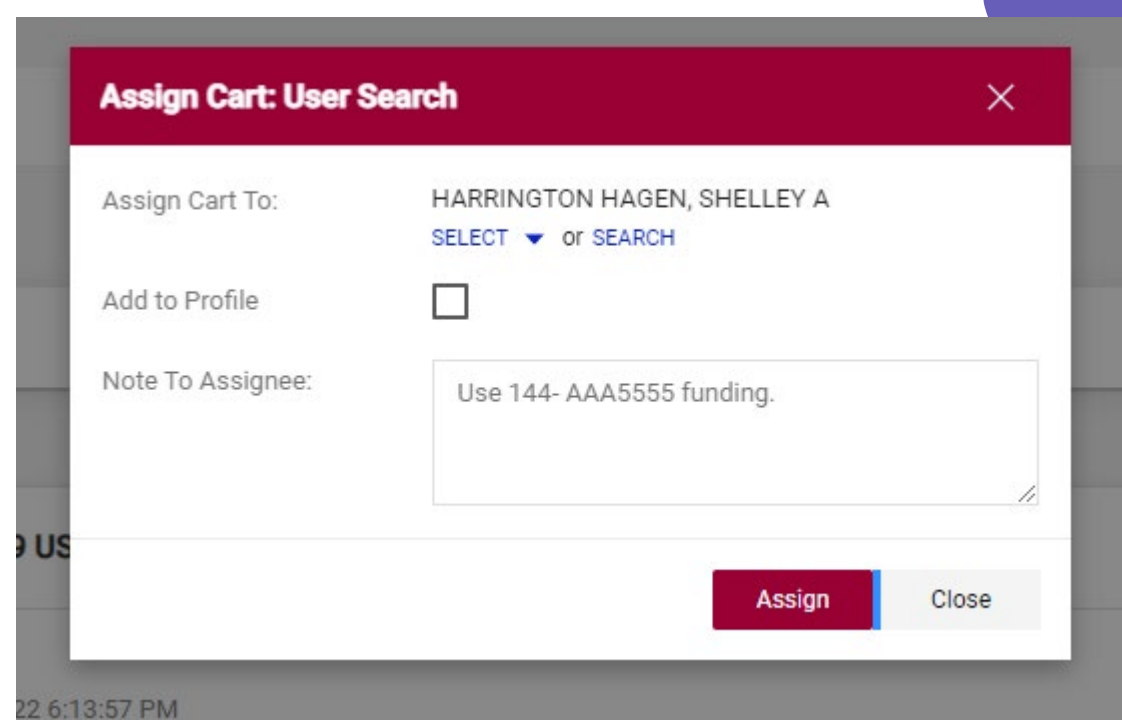
User Search [Close]

New Search

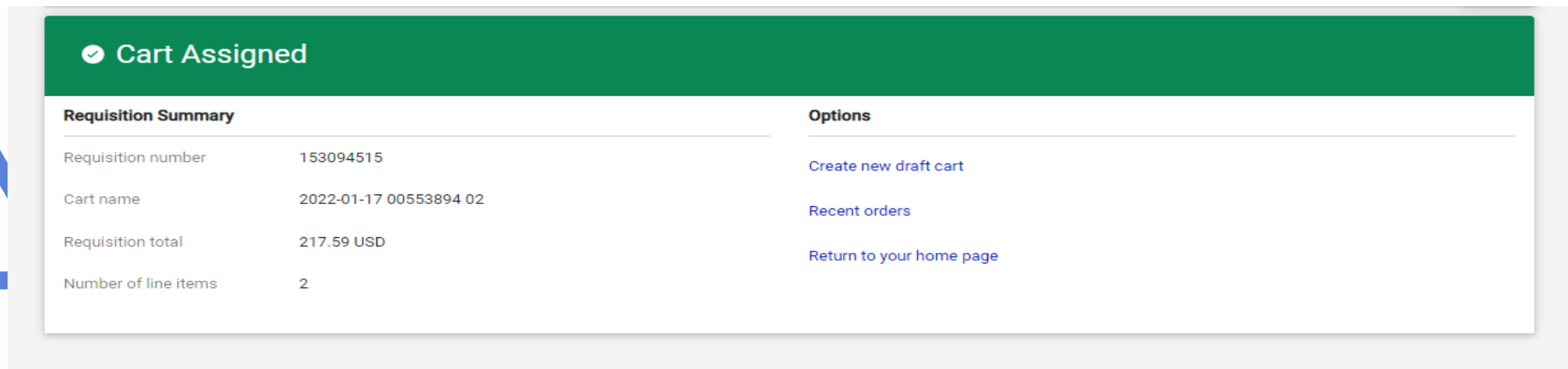
Name ↑	User Name	Email	Phone	Action
HARRINGTON HAGEN, SHELLEY A	00553894	harrings@uwm.edu	+1 414-229-4412	+

Close

Another new pop up. Now it should say the person's name. If you check the box that says Add to Profile, next time you want to assign a cart to them, you will just be able to click select, and click their name instead of going through the search process. Here you can also add any note needed for the next person in the chain. Funding, or why you want it, etc. Then click Assign.

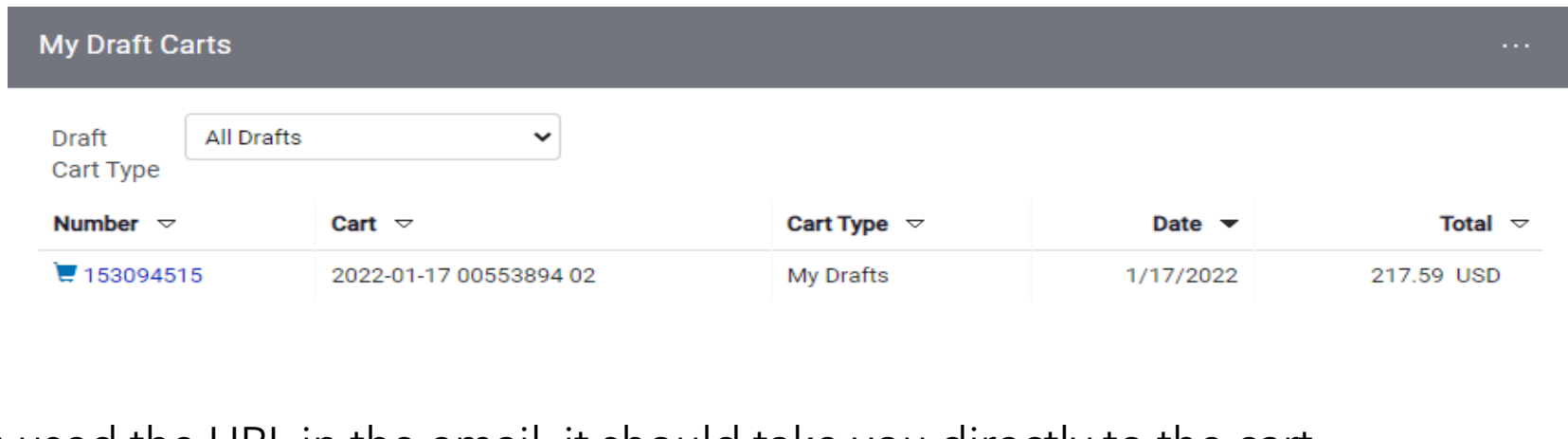



Cart is now assigned to the Requestor, or the PI, for the next step in the process.



- Once the cart is assigned, the person it is assigned to will get an email saying they have a cart assigned to them.
- If it is a student assigning to a PI, then the PI should either sign-in to their account, or you can select the url in the email, and proceed to review the cart.

If you sign into your account, you can find the cart in My Draft Carts, on the left side, in the middle. It is filtered here to All Drafts. This will be any carts assigned to you, or any carts that you made, but haven't submitted yet, carts that you've assigned to others, and returned carts. Just click on the [blue](#) Cart number and it will take you to the cart.



Number	Cart	Cart Type	Date	Total
 153094515	2022-01-17 00553894 02	My Drafts	1/17/2022	217.59 USD

If you used the URL in the email, it should take you directly to the cart.

This is what the cart will look like.

You will start the assigning process by clicking Assign Cart and continue from there. It starts on Slide# 7

The screenshot displays the ShopUW+ Shopping Cart interface. At the top, the header includes the ShopUW+ logo, a search bar, the current total of 217.59 USD, and navigation icons for cart, heart, and notifications. Below the header, the cart is titled "Shopping Cart • 153094515" and includes "Assign Cart" and "Proceed To Checkout" buttons. The main content area shows "2 Items" and a search bar. The first item is from "FISHER SCIENTIFIC COMPANY LLC CATALOG SUPPLIER" with a total value of 217.59 USD. It lists two items:

- TUBE SCREW CAP GRAD 500/CS (1 unit, 107.47 USD)
- TUBE CONIC 50ML WRACK 500CS (1 unit, 110.12 USD)

Below each item is an "ITEM DETAILS" section with a "Commodity Code" field (set to 15) and a "Capital Expense" checkbox. A sidebar on the right contains a "Details" section for "SHELLEY A HARRINGTON HAGEN" with a name field (set to 2022-01-17 00553894 02) and an "Estimate (217.59 USD)" section showing a total of 217.59.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 TUBE SCREW CAP GRAD 500/CS	1443222	CS	107.47	1 CS	107.47
2 TUBE CONIC 50ML WRACK 500CS	1495949A	CS	110.12	1 CS	110.12

After carts are created and assigned, they will show up under My Requisitions, middle right. But only on the account of the person who created the cart, not the PI, or the Requester.

Once they have been processed, assigned a PO # and order placed, they will show up under My Purchase Orders. Again, only on the account of the cart creator.

The screenshot displays four panels from a procurement system interface:

- My Draft Carts:** Shows a table with columns for Number, Cart, Cart Type, Date, and Total. A single draft is listed with Number 153094515, Cart 2022-01-17 00553894 02, My Drafts, Date 1/17/2022, and Total 217.59 USD.
- My Requisitions:** Shows a table with columns for Number, Requisition, Requisitioner, Date, and Total. Five requisitions are listed, all with Requisitioner SHELLEY A HARRINGTON HAGEN. The total values range from 30.03 USD to 5,920.00 USD.
- My Purchase Orders:** Shows a table with columns for Number, Supplier, Requisition, Date, and Total. Five purchase orders are listed, all linked to requisitions from the previous panel. The total values range from 30.03 USD to 5,920.00 USD.
- Action Items:** A message box stating "There are no Action Items to display."


Number	Cart	Cart Type	Date	Total
153094515	2022-01-17 00553894 02	My Drafts	1/17/2022	217.59 USD

Number	Requisition	Requisitioner	Date	Total
153088552	2022-01-17 005...	SHELLEY A HARRINGTON HAGEN	1/17/2022	68.97 USD
153051615	2022-01-14 005...	SHELLEY A HARRINGTON HAGEN	1/14/2022	5,920.00 USD
152969548	2022-01-12 005...	SHELLEY A HARRINGTON HAGEN	1/12/2022	30.03 USD
152969041	2022-01-12 005...	SHELLEY A HARRINGTON HAGEN	1/12/2022	78.66 USD
152968472	2022-01-12 005...	SHELLEY A HARRINGTON HAGEN	1/12/2022	221.13 USD

Number	Supplier	Requisition	Date	Total
MIL0006872	FISHER SCIENTIFIC COMPANY LLC CATALOG SUPPLIER	153088552	1/17/2022	68.97 USD
MIL0006864	APPLIED PHOTOPHYSICS INC	153051615	1/14/2022	5,920.00 USD
MIL0006802	DOT SCIENTIFIC INC	152969548	1/12/2022	30.03 USD
MIL0006801	FISHER SCIENTIFIC COMPANY LLC CATALOG SUPPLIER	152969041	1/12/2022	78.66 USD
MIL0006799	FISHER SCIENTIFIC COMPANY LLC CATALOG SUPPLIER	152968472	1/12/2022	221.13 USD

A couple things to keep in mind

- If you are assigning a cart that contains something needed immediately, send me a separate quick email
- Once I push the order through, it goes to an approver in L&S Admin. They have been great at getting orders pushed through same day, or next morning if I pushed it through late in the day.
- If the order is less than \$100 , it doesn't need to go to an Approver, it can be pushed through at the department level.
- Whoever creates the cart is the person who will get all the notifications. Shipping, status updates, requests for End Use forms, etc, so if you created a cart, make sure you are paying attention to your emails for that info.
- I still keep a record of all the orders, so if you didn't get something, let me know when you ordered it, and from what Vendor, I'll be happy to check on it.
- This presentation is just a quick overview, I'd suggest looking through the Shoppers training on the main page for much more detail <https://shopuwplus.wisc.edu/>
- The \$5000 limit still applies before a purchase order is needed.



I will be attending the faculty meeting on February 2nd, at the end if any of the faculty has questions on the presentation, or anything about ShopUW+ that wasn't covered. Please also feel free to call, email, or stop by my office.

If any students have questions, feel free to email, call, or stop by my office.

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CHEM 331

