



How to Purchase Lab Stuff

Lab Management Community of Practice
May 25, 2022
11am - 12pm

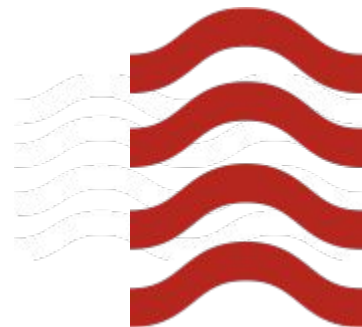




ShopUW+

Primary application for lab supply purchases

- Fisher
- VWR
- Life Technologies
- IDT
- Etc.



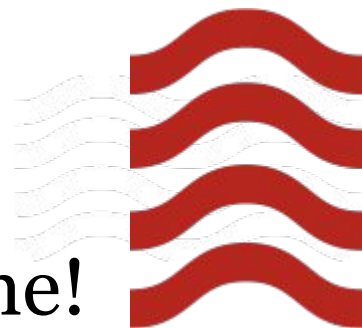


ShopUW+

What is your ROLE?

- Shopper?
- **Requester?**
- Approver?

If you are not a Requester, ASK to be one!

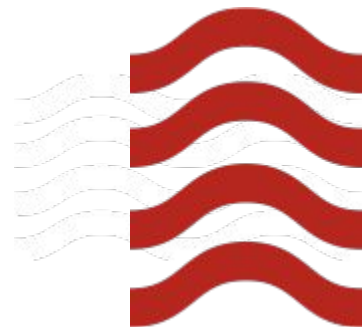




ShopUW+

Make ordering faster by setting up Preferences

The screenshot shows the ShopUW+ user interface. At the top, there is a search bar with the text "Search (Alt+Q)", a currency indicator "0.00 USD", and icons for a shopping cart, a heart, a notification bell with a red "3" badge, and a user profile icon with a red circle around it. Below the search bar, a dark red header displays the name "JACKIE COOPER" and a profile picture icon. A dropdown menu is open, listing several options: "View My Profile" (highlighted with a red box), "Dashboards", "Manage Searches", "Manage Search Exports", and "Set My Home Page". Below these options, there are two sections: "My Recently Completed Requisitions" with a red badge showing "141", and "My Recently Completed Purchase Orders" with a red badge showing "141". At the bottom right of the dropdown menu, there is a "Logout" button.





ShopUW+

ADDRESSES

Choose your
Bill To Address

(there is only
one option for
UW Madison)

JACKIE COOPER

User Name 00044795

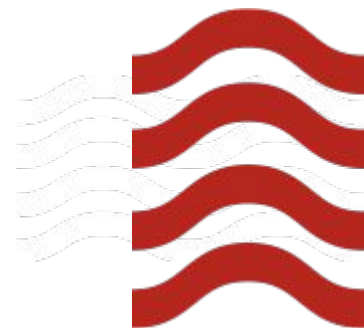
- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Financial Approvers
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Default Addresses

Ship To **Bill To**

Select an address to edit Select Addresses for Profile Delete Address

Billing Addresses	Edit Selected Address
Madison Accounts Payable	Nickname <input type="text" value="Madison Accounts Payable"/>
	Default <input checked="" type="checkbox"/>
	Current Default Address Madison Accounts Payable
	ADDRESS
	Contact Line 1 UW Madison
	Contact Line 2 Accounts Payable
	Contact Line 3 ap-invoices@bussvc.wisc.edu
	Address Line 1 21 N Park Street
	Address Line 2 Suite 5301
	City Madison
	State WI
	Zip Code 53715
	Country United States
	Save





ShopUW+

ADDRESSES

Create Ship To Address(es) from List (then personalize)

You can have MULTIPLE ship to addresses!

JACKIE COOPER
User Name 00044795

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Financial Approvers
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Default Addresses

Ship To Bill To

Select an address to edit

Shipping Addresses	Edit Selected Address
3207 EH	Nickname 3207 EH
Gas Cylinders	Default <input checked="" type="checkbox"/>
Pfleger Lab	Current Default Address 3207 EH

ADDRESS

Attn: * Jackie Cooper

Suite/Rm: 3207 EHall

Address Line 1 1415 ENGINEERING DR

Address Line 2 ENGINEERING HALL

Address Line 5 ZN 2

City MADISON

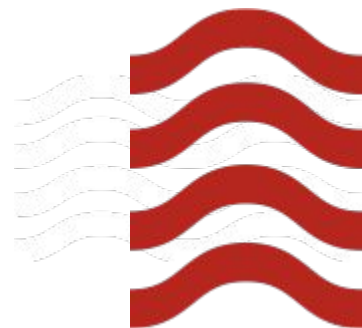
State WI

Zip Code 53706-1607

Country United States

Save

Select Addresses for Profile Delete Address





ShopUW+

FUNDING

Add funding strings that you are using for purchases

You can add a LOT to have in your "favorites" list!

JACKIE COOPER

User Name 00044795

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Financial Approvers
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings
- Notification Preferences >
- User History >
- Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) | Codes | **Code Favorites** | Internal Information ?

Business Units: UW - Madison (UWMSN) v

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Funding String ?

Benson_AAJ7369 Edit Delete

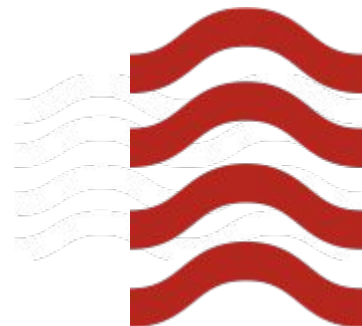
GL Business Unit	Speed Chart	Account	Fund	Department	Program	PC Business Unit	Project	Class
UWMSN UW Madison	NONE_MSN	3105 Supplies- Laboratory	144 Fed Aid- Special Projects	191500_MSN CIVIL & ENV ENGR*CIV&EN ENGR	4 Research	UWMSN UW Madison	AAJ7369_MSN CRESP_Vanderbilt	no value

DEPT 101 Edit Delete

GL Business Unit	Speed Chart	Account	Fund	Department	Program	PC Business Unit	Project	Class
UWMSN UW Madison	NONE_MSN	3105 Supplies- Laboratory	101 General Program Opns Doctoral	191500_MSN CIVIL & ENV ENGR*CIV&EN ENGR	2 Instruction	no value	no value	no value

Fratte_AAI1772 Edit Delete

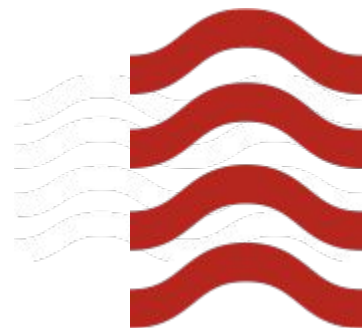
GL Business Unit	Speed Chart	Account	Fund	Department	Program	PC Business Unit	Project	Class
UWMSN UW Madison	NONE_MSN	3105 Supplies- Laboratory	133 Non- Federal	191500_MSN CIVIL & ENV ENGR*CIV&EN	4 Research	UWMSN UW Madison	AAI1772_MSN Wi Groundwater-	no value





*Shop***UW+**

Create an Order and
Proceed to Checkout





ShopUW+

If you have setup your preferences, the list of issues to correct is very small:

- (1) Business Purpose
- (2) Funding

Draft

✖ Correct these issues. ▼
Shoppers may still assign cart to a Requester.

[Required: Business Purpose](#)

[Required: Account](#)

[Required: Fund](#)

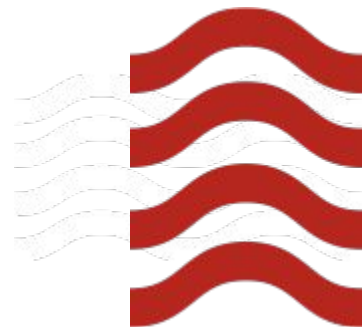
[Required: Department](#)

[Required: Program](#)

Total (62.73 USD) ▼

Subtotal	62.73
	<hr/>
	62.73

What's next for my order? >





ShopUW+

TIP: Give your cart a useable name

Example:
Faculty Last Name - brief description of ordered items

Edit General

General

Cart Name * Pfleger_applicators

Description

Prepared by JACKIE COOPER

Prepared for JACKIE COOPER

Supplier Email (Non-Catalog Only)

Business Purpose * Laboratory / Classroom

OTHER Business Purpose

Business Unit UW - Madison (UWMSN)

Previous PO Number

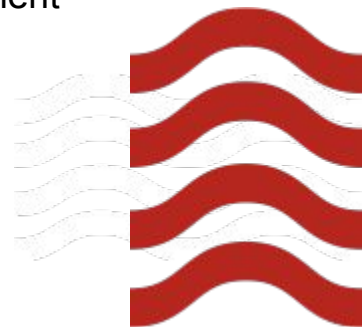
Receiving Required/Positive Approval?

★ Required fields Save Close

Business Purpose:

No need for anything but Laboratory/ Classroom

Unless otherwise directed by your department





ShopUW+

Edit Funding String [Close]

Funding String

GL Business Unit *	Speed Chart *	Account *	Fund *	Department *	Program *	PC Business Unit	Project	Class
[Dropdown]	NONE_MSN - [Dropdown]	[Search] [Required]	[Search] [Required]	[Search] [Required]	[Dropdown] [Required]	No Value	[Search]	[Search]

[+]

[Heart Icon]

[Save] [Close]

Draft

Correct these issues.
Shoppers may still assign cart to a Requester.

- Required: Business Purpose
- Required: Account
- Required: Fund
- Required: Department
- Required: Program

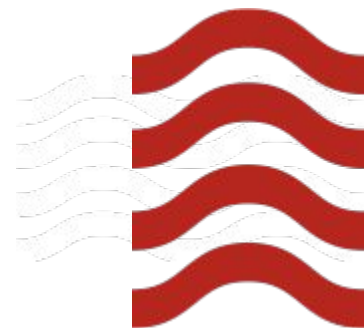
Total (62.73 USD)

Subtotal 62.73

62.73



What's next for my order? >



To resolve the Account/Fund/Department/Program issues, click on one of the links - then click on the HEART in the bottom right hand corner of the Edit Funding String window





ShopUW+

Project  Class 

Search  Search 

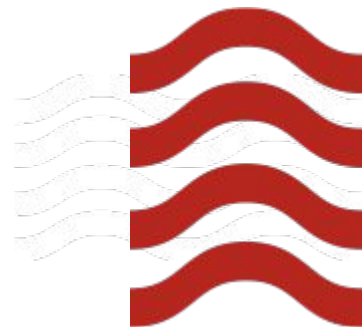
Subtotal

What's next for my order?

- Benson_AAJ7369
- DEPT 101
- Fratta_AAI1772
- GLE_PRJ77YD
- Har_133FF36
- Har_233CK18
- Har_AAH5857
- Lab_PRJ64WB
- McM_AAH3489
- McM_AAJ1869

The list of your saved funding strings will now appear - scroll and select a fund to charge

FYI - I have 28 different funds to choose from on my list!





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If needed, edit/
choose your
shipping address

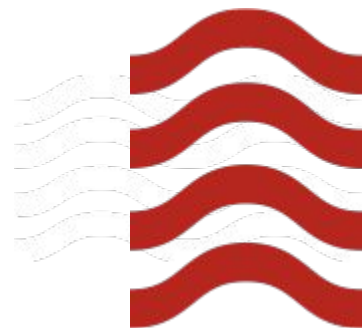
If you set up the Bill
To Address in your
preferences (there
is only one for
UW-Madison), this
will not be an issue
to resolve

Shipping & Billing Information



Ship To

Attn: Jackie Cooper/Ziyan
Suite/Rm: 3207 EHall
1415 ENGINEERING DR
ENGINEERING HALL
ZN 2
MADISON, WI 53706-1607
United States





ShopUW+

I have THREE shipping addresses for my orders

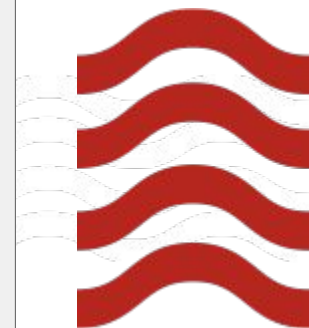
Edit Shipping & Billing Information

Ship To ★

- Current Address** - Jackie Cooper/Ziyan, 3207 EHall, 1415 ENGINEERING DR, ENGINEERING HALL, ZN 2, MADISON, WI 53706-1607, United States
- 3207 EH** - Jackie Cooper/Ziyan, 3207 EHall, 1415 ENGINEERING DR, ENGINEERING HALL, ZN 2, MADISON, WI 53706-1607, United States ★
- Gas Cylinders** - Jackie Cooper/icp, 3225/ChemE Loading Dock, 1415 ENGINEERING DR, ENGINEERING HALL, ZN 2, MADISON, WI 53706-1607, United States
- Pflegger Lab** ↻ ✓ 🗑️

Attn: *	<input type="text" value="Pflegger Lab"/>	Nickname *	<input type="text" value="Pflegger Lab"/>
Suite/Rm:	<input type="text" value="2034 EHall"/>	Make default	<input type="checkbox"/>
Address Line 1	1415 ENGINEERING DR		
Address Line 2	ENGINEERING HALL		
Address Line 5	ZN 2		
City	MADISON		
State	WI		
Zip Code	53706-1607		
Country	United States		

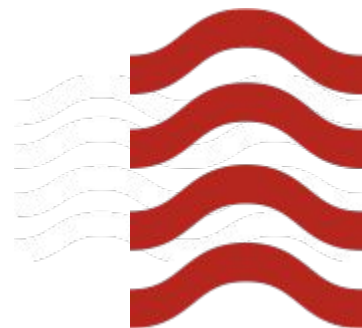
Search additional Results Per Page 10





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Submit your order!





Requisitions using ShopUW+

Purchases > \$5,000

Non-Catalog Items

Forms

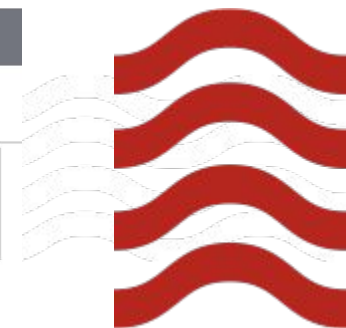
Procurement Forms

[Bio Safety Cabinet Request Form](#)

[Cylinder Rent Adjustment Form](#)

[Requisition Wizard](#)

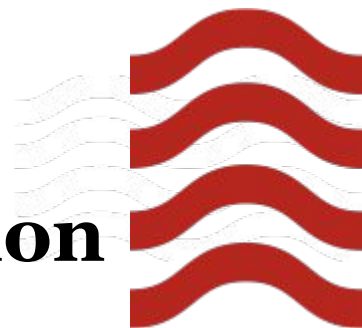
[Standing Order Request](#)





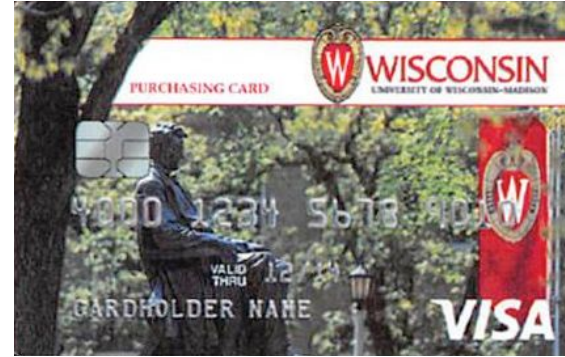
Amazon is an option if you can't find something via ShopUW+:

- Purchased w/ Credit Card
 - OR order via non-catalog item within ShopUW+
- Include name of person requesting item in documentation/**justification**



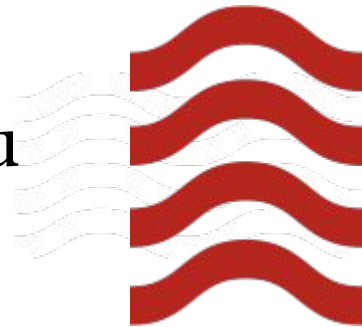


UW Purchasing Card



- Documentation! (save everything as PDFs!)
- Reconciliation is done by the Card Holder (are you a card holder?)
- If you don't have purchasing card, you may want to ask to get one

○





Questions?

