Training for New Users

21 N. Park Street, Room 5045
August 17, 2016
8:30 AM – 10:00 AM
UW-Madison Purchasing Services

http://www.bussvc.wisc.edu/purch/purch.html
New User Training Topics

- Shop@UW reference website
- Products and vendors found on Shop@UW
- Differences: hosted and punch-out suppliers
- Searching for items
- Add to favorites
- Filtering product searches
- Quick look at special punch-out functions
- Overview of the ordering process
- Order history and transaction lookup
Advanced Shop@UW Training

• Advanced training topics include:
  – Parent/Child account for MD numbers
  – Change the default funding on MD numbers
  – Create MDS transaction reports
  – Create reports about carts, orders, and invoices

• Advanced training starts at 10:15 AM
Why Use Shop@UW

• Provides users with an efficient method to order and pay
  – MD account associated to UDDS string for direct funding
• Features commonly purchased products at a negotiated contract price
• Order and transaction history easily accessed for reporting

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shop@UW Reference Website Overview
http://www.bussvc.wisc.edu/shopuw/shopuw.html

• Vendor partners and preferred products
• Tools for MD account setup and revision
  – http://www.bussvc.wisc.edu/shopuw/account.html
• Training information: PDFs and video
• Contact information:
  – Shop@UW customer service
  – Vendor partners
• Login
Types of Products

- Office supplies: Staples
- Computers: Dell
- Computer peripherals: SHI
- Remanufactured toner: EIS
- Specialty gases: Airgas
- Janitorial: Kranz and MDS Warehouse

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Types of Products (cont.)

• Lab supplies:
  – Dot Scientific, Rainin, Santa Cruz Biotechnology, Bio-Rad, Eppendorf, Fisher Scientific, IDT, Promega, Qiagen, Roche, VWR, and Sigma-Aldrich

• MRO (maintenance, repair, and operations):
  – Anixter, Crescent Electric Supply, Fastenal, Grainger, MSC Industrial Supply, Unisource, and Newark

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Navigating the Shopping Websites

• Login at the Shopper Entry webpage
  – Enter the MD number and password
  – Guest account access with a NetID

• Enter the Store Lobby
  – Final Cart Review
  – Outstanding Orders
  – Transactions
  – Link to shop in the Storefront from the vendors

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shop@UW Storefront

• Icons on the left navigation:
  – Home
  – Shopping carts and favorites
  – Document history

• Icons on the top navigation:
  – MD account shopping profile
  – Active shopping cart contents

• Organizational message area

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shop@UW Storefront (cont.)

• Shop & Compare search
  – Used for hosted suppliers and searchable punch-out suppliers
• Supplier stickers or icons
• Hosted catalogs
• Punch-out suppliers
  – Special supplier websites that feature State and UW-Madison contract items

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shop@UW Search

• Use the Shop & Compare for hosted and searchable punch-out catalogs
  – Open “Advanced Search” to enter more criteria
  – Enter item number, manufacturer item number, and descriptive key words

• Supplier sticker search
  – Limits search return

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Hosted catalogs:

Searchable punch-out catalogs:
- See Eppendorf, Fisher Scientific, Promega, Roche, VWR, and Sigma-Aldrich
- “Order from Supplier” link; see Bio-Rad and Qiagen

http://www.bussvc.wisc.edu/shopuw/shopuw/shopuw.html
Search Results Window (cont.)

- Review “Manufacturer Info” links

- Search narrowed down to items for C-1301-G

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Filter Shop@UW Search Results

- Use the filters in Shop@UW to narrow down the search results
- Filter by keywords, category, manufacturer, supplier, etc.

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Filter Shop@UW Search Results (cont.)

• Click on the funnel icon to review all filter options
• Check all that apply and click the “Filter” button.
Favorites

- Simplify ordering by creating favorites
  - Hosted catalogs
- Use the “add favorite” link from the search results window
Favorites (cont.)

• “Add to Cart”
• Use “Display items that are no longer available” checkbox to view old, hosted items

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Punch-out Catalog Functions

• Punch-out websites are special websites prepared by suppliers for Shop@UW
  – Not the same as the consumer XXX.com site

• Quote-to-order
  – http://www.bussvc.wisc.edu/shopuw/tutorials.html

• Product availability

• Create favorites -- Staples

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shopping Process Overview

• Add items to the Shop@UW cart from the hosted catalog search window and punch-out supplier website cart

• Shop from many suppliers
  – Add to one cart

• Check-out process to “Final Cart Review”

• Click on “Send Order” button to execute the order and create a PO

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shopping Process Overview (cont.)

• Add items to the cart from:
  – Shop@UW search results window
  – Shop@UW favorites
  – Punch-out websites

• Shopping cart icon at top navigation

• Click the “Checkout” button

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shopping Process Overview (cont.)

- Final Cart Review
  - Change quantity
  - Delete items

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Shopping Process Overview (cont.)

• Shipping Information
  – Enter additional shipping information

  – **Important:** Click the “Send Order” button
Shopping Process Overview (cont.)

• “My Recently Checked-out Carts”
  – See “recently check-out cart” items on the “Final Cart Review” screen in Store Lobby

• PO number is assigned when the “Send Order” button is clicked
  – Review “Outstanding Orders” in Store Lobby

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Checking Order History

• Use the Store Lobby
  – Outstanding Orders
  – Transactions for invoiced orders

• Use report export functions
  – Review “checked-out” cart, PO, and invoice detail from “Document History”
  – For more information, attend Shop@UW advanced training today from 10:15-11:30 AM

http://www.bussvc.wisc.edu/shopuw/shopuw.html
Questions???

- Stay for the Advanced class
- Email me at janet.deutsch@wisc.edu
- Contact Shop@UW customer service
Resources

• Shop@UW Tutorial Index
  – Download PDF’s
  – Watch video

• Advanced Shop@UW Training
  – See the Business Services Topics catalog at the [Office of Talent Management website](http://www.bussvc.wisc.edu/shopuw/tutorials.html)
Shop@UW Contacts

• Shop@UW customer service
  – Phone 608-497-4400
  – Email shopuw@bussvc.wisc.edu

• Vendor Contact, Return, and Shipping Info
  – http://www.bussvc.wisc.edu/shopuw/contact-vendors.html

• Shopper Feedback Form
  – http://www.bussvc.wisc.edu/shopuw/shopperfeedback.html