Catalog purchasing with the new workday system

*First: If your order will be capitalized (*part of a fabrication*), please just put in a Purchasing Request (PR) and let Sami take care of your order for you:

https://app.physics.wisc.edu/purchasing-req/

Fabrications get coded to a different cost center, and ideally we want to have them all created by Sami since there are ongoing issues with who is allowed to make receipts. Having Sami create the req in Workday makes sure she will have access to see the PO/create a receipt.*

Logging in to workday and accessing ShopUW+ catalog:

https://www.wisconsin.edu/workday/

Select "Procurement & AP UW" from the menu in the top left corner:
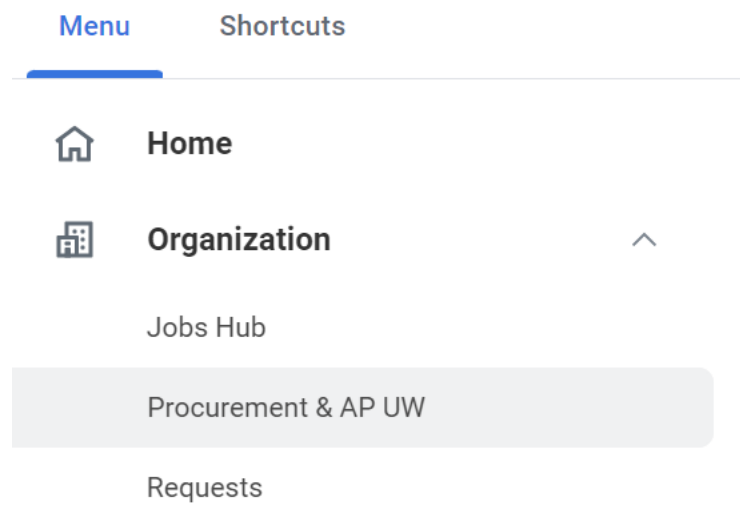
From the next screen, find "Connect to ShopUW+" and select "Request catalog items & Access ShopUW+"

Procurement & AP UW

MDS Core Stock
Required source for toilet tissue, gloves, can liners, copy paper -- and many more campus...
Request from Inventory

Connect to ShopUW+
Connect to ShopUW+
Request Catalog Items & Access ShopUW+

You will likely get this pop up asking who you are requesting for; just put your own name and most of the fields should automatically fill:

Edit Requisition Details

|	
Requesting for *	✕
Requesting Entity	
Company *	
Currency *	
Requisition Type	
Deliver-To	
Ship-To *	
Additional Worktags	

OK   Cancel   Reset to Default

After filling in your name & hitting OK, select "connect" to get to ShopUW+ (make sure you use the ShopUW+ not ChemManager+):

| ShopUW+ | Shop UW+ | ☑ | Catalog Ordering System | Connect |

After a nice long load time, you should be back to a familiar screen with ShopUW+ as normal. You can use punchout etc like normal here to fill up your cart. Once you are finished, you'll notice the old "checkout" button is now "send to workday":
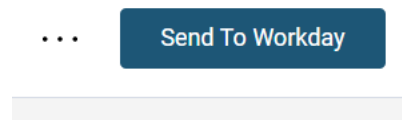
Send To Workday

Click on that button to be brought back to workday with your cart.

In workday, it will have a cart now with all your items; at the bottom left, there is a "checkout" button- click it.

Checkout   Continue Shopping ▾
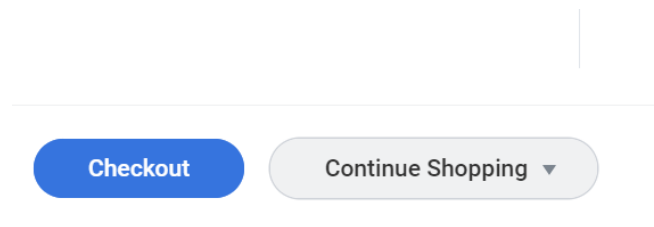
Make sure to select that this is a catalog order; you will get errors if you don't. This is very easy to miss as it's right away when you open the screen under "requisition type".

Requisition Type *   Search

○ 1 CATALOG - ShopUW & University Warehouse

Submitted by

Spend category field should auto-populate from ShopUW+, so you shouldn't have to worry about it. If you are missing the spend category field, the most common ones used will be:
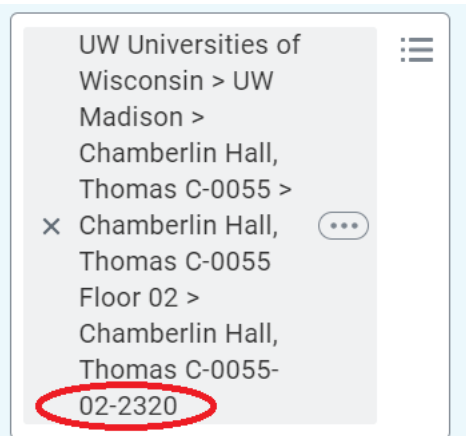
SC00083- lab supplies

SC00082- classroom supplies

SC00249- office supplies

If you're at all unsure, you're welcome to contact Sami any time to ask for help.

Continuing to scroll right, other important fields are going to be the ship-to address (this will default to Chamberlin- PSL folks, please make sure to change this or your orders will be sent here) and the Deliver-to address (this is BIG for Airgas orders- this is where you need to select your room number! If you type in "Chamberlin" and your room then hit enter, you should be able to find it fairly easily).

As an example, here is for room 2320 (the mailroom here in Physics):

UW Universities of
Wisconsin > UW
Madison >
Chamberlin Hall,
Thomas C-0055 >
× Chamberlin Hall,   (•••)
Thomas C-0055
Floor 02 >
Chamberlin Hall,
Thomas C-0055-
02-2320

Please check this bottom part where the red circle is to make sure the floor/room are correct, and you can see it says Chamberlin hall. This is crucial in making sure your room-delivery nitrogen makes it to the right place!

The final hard part is funding; if you don't put any funding, please email Sami with the info so I can figure out which funding to use. If I receive a cart with no idea what the funding is, I will probably send it back, so please make sure to indicate what funding you want somehow! The codes are not the same as before; you can find the info in our PR system (courtesy of Dan Bradley- thank you so much Dan!!). Here's an example:

Forest - AAP3631 GR000038076 - Realta WHAM Data for
Verification & Validation

Previously this grant would have used project code AAP3631, but now it will be under GR000038076.

If you know your old project ID you can look up your new Work-tag here: https://fdmmapping.atp.wisconsin.edu/Crosswalk

If you do not know your old project ID, please ask Aimee, Susan, or Sylvia for your new Work-tag.

In workday, there are four fields; grant, project, gift, or program:

Program	Grant	Project	Gift

What workday DOESN'T tell you is that you only need to fill *one* of those fields. You can tell which one it is based on the starting letters of your driver worktag;

GR0000xxxxx- this is a grant (GR)

PG0000xxxxx- this is a program (PG)

GF0000xxxxx- this is a gift (GF)

PJ00000xxxx- this is a project (PJ); *these seem to ONLY coordinate to fabrications. I believe instead of being called fabrications now, they are called projects. Part of why fabrications are complicated is because they each have their own project code now to use instead of the normal grant funds.

If you're unsure about what the driver worktag is for your funding, you can look that up here or ask Aimee, Susan, or Sylvia: https://fdmmapping.atp.wisconsin.edu/Crosswalk

As an example, here is our AAP3631 again:

FDM MAPPING RULES

SFS Search

🔍 AAP3631

Workday Search

🔍 Search Workday keywords...

☑ Display Workday Names
Show more filter options

SFS Unit	SFS Department	SFS Fund	SFS Program	SFS Project	SFS Class	WD Cost Center	WD Fund	WD Function	WD Grant
UWMSN	486700	133	4	AAP3631		UWMSN	L&S	Physics	Non-Federal Grants and Contracts	Research	UWMSN	L&S	Physics - Forest Realta 2024_2024120

GR000038076

If you type the old grant name into the SFS search (AAP3631), it will give you the driver worktag for workday (hover over and you can see that GR000038076 we retrieved before from the PR system).

Once you fill in the appropriate field for funding on your requisition, you should be able to submit in the lower left corner:

Submit **Save for Later** **Continue Shopping** **...**

Once submitted, this should route to the appropriate person (Sami/Harpreet/Dawn) and we will take care of it from there. 😊

Any questions or difficulties just let Sami know and she can always help! She is happy to screen share or meet with anyone as needed to go through orders, just email her any time at sami@physics.wisc.edu