



Advanced Functions

21 N. Park Street, Room 5045

August 17, 2016

10:15 AM – 11:30 AM

UW-Madison Purchasing Services

<http://www.bussvc.wisc.edu/purch/purch.html>



Topics

- Parent/Child account for MD numbers
- Change the default funding on MD numbers
- Create MDS transaction reports
- Create reports about carts, orders, and invoices

Parent/Child Accounts

- One login to access many MD accounts for shopping and monitoring activity
- Call customer service to set up;
608-497-4400
- Additional information
 - <http://www.bussvc.wisc.edu/shopuw/faq.html#parentChild>

Parent/Child Accounts (cont.)

- Account Entry

- <http://mds.bussvc.wisc.edu/order/parent default.asp>



The screenshot shows the 'Account Entry' page on the Shop@UW website. The page has a red header with the Shop@UW logo and a link to 'About Shop@UW'. The main content area is white with a yellow sidebar on the left. The title 'Account Entry' is in bold black text. Below the title, there is a paragraph of instructions: 'Please enter your Parent Account (email address) and password. If you do not have a Parent Account with MDS but would like one, please contact [MDS Customer Service](#) to request setup.' There are two input fields: 'Parent Account:' with the value 'jdeutsch@bussvc.wisc.edu' and 'Password:' with a masked password of ten dots. An 'Enter' button is located below the password field. At the bottom of the page, there is a footer with the text: 'Contact [Shop@UW](#) with questions or comments. © 2016 Board of Regents of the [University of Wisconsin System](#)'.

Parent/Child Accounts (cont.)

- Access many MD accounts from one screen
- Linked to Shop@UW Store Lobby
 - Use the “Back to Account List” link on Store Lobby to return to Parent/Child Account Entry

[Logout of Parent Account](#)

[Change Parent Account Password](#)

[View All Child Orders](#)

[View All Child Invoices](#)

[Back to Account List](#)

Account Entry

[Click here to generate Parent Reports](#)

The Parent reports allow you to generate downloadable and/or printable reports about all transactional activity for child accounts.

Please select one of the available Child Accounts to shop with that account.

MD Number ▲▼	Funding ▲▼	Notes ▲▼
MD12656	3100101A0365001	Current testing and demonstration account Edit
MD17783	3100101A0301011	Old testing account Edit

Contact [Shop@UW](#) with questions or comments.
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Default Funding Overview

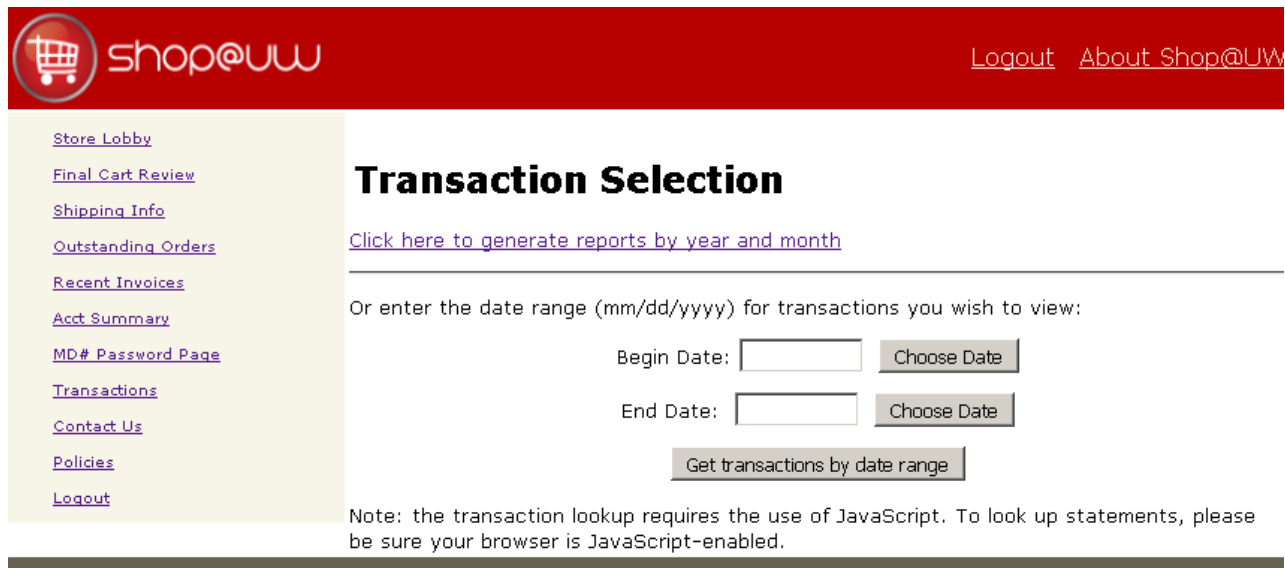
- Reasons to change default funding on the MD account default
 - Expired grant/project
 - Need a change for future purchases
 - Assign a different department ID
- *Attention:* It is not practical to make several changes during the day

Change Default Funding

- See the link at Shop@UW Tools
 - Default Funding Overview
 - <http://www.bussvc.wisc.edu/shopuw/DefaultFunding/FundingUpdate.html>
 - Use the MD Account Setup & Revision form to update an MD account
 - <http://www.bussvc.wisc.edu/shopuw/account.html>
 - Review alternative methods for changing funding after a purchase
 - <http://www.bussvc.wisc.edu/shopuw/tools.html>

MDS Transaction Reports

- Download and print reports
 - From the Parent/Child Account Entry
 - Invoice Transaction link at Store Lobby

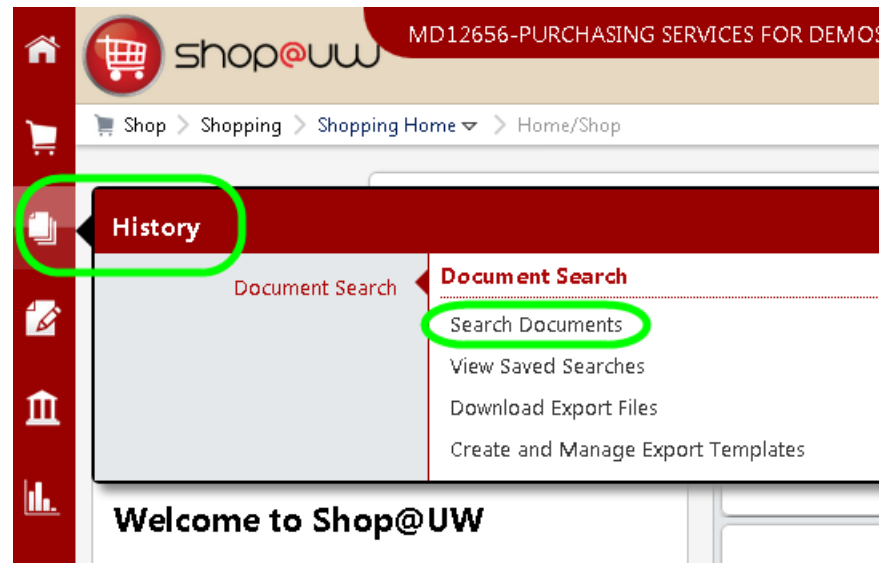


The screenshot shows the Shop@UW website interface. At the top, there is a red header with the Shop@UW logo on the left and links for "Logout" and "About Shop@UW" on the right. Below the header is a navigation menu with links: "Store Lobby", "Final Cart Review", "Shipping Info", "Outstanding Orders", "Recent Invoices", "Acct Summary", "MD# Password Page", "Transactions", "Contact Us", "Policies", and "Logout". The main content area is titled "Transaction Selection" and includes a link "Click here to generate reports by year and month". Below this, there is a form for selecting a date range with "Begin Date" and "End Date" input fields, each with a "Choose Date" button, and a "Get transactions by date range" button. A note at the bottom of the form states: "Note: the transaction lookup requires the use of JavaScript. To look up statements, please be sure your browser is JavaScript-enabled."

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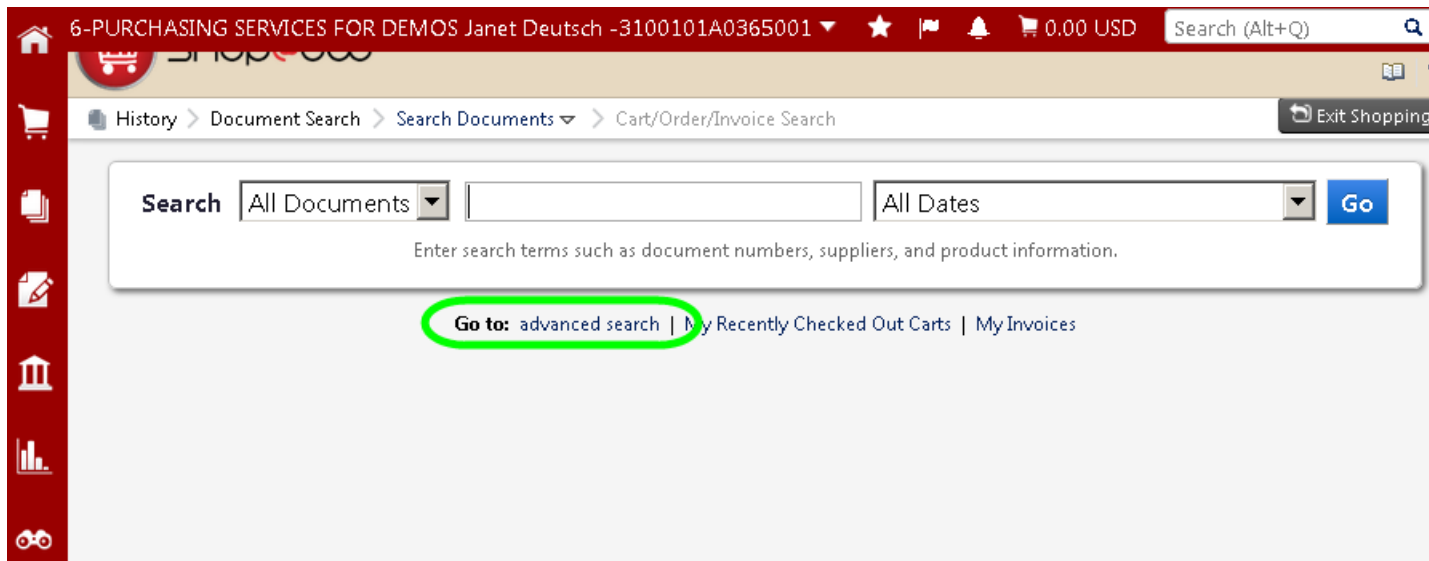
Shop@UW Document Search

- Find the “History” icon and select the “Search Documents” option



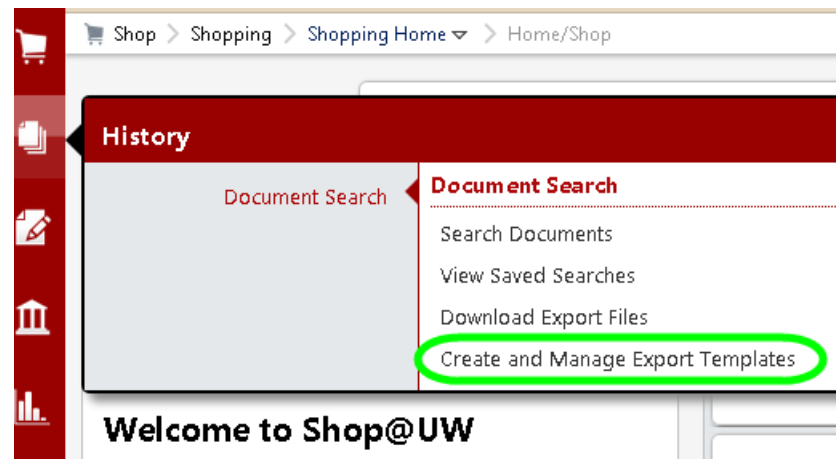
Shop@UW Document Search (cont.)

- Simple search is the default
- Advanced search provides more options



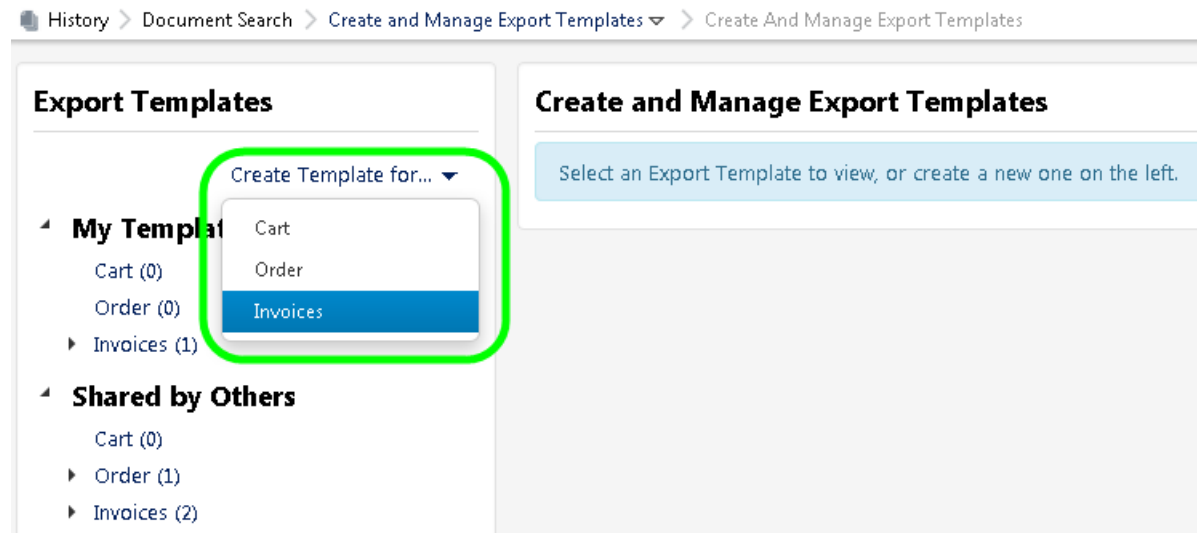
Document Search Export Report Data

- Create a custom template for reports to use again and again
- Click on the “Create and Manage Export Templates” link
 - *Hint:* Create the template *before* doing the document search



Create Export Templates

- Use the “Create Template for...” dropdown
- For this example, the “Invoices” option is selected



History > Document Search > Create and Manage Export Templates > Create And Manage Export Templates

Export Templates

Create Template for... ▼

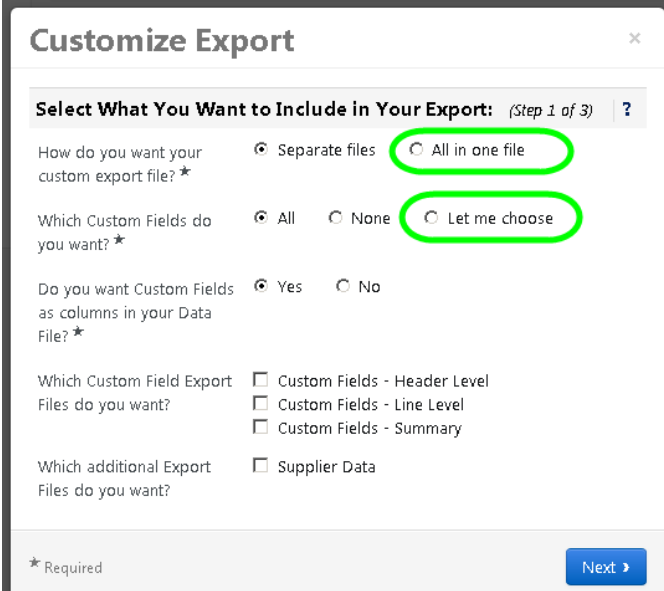
- My Templates
 - Cart (0)
 - Order (0)
 - Invoices (1)
- Shared by Others
 - Cart (0)
 - Order (1)
 - Invoices (2)

Create and Manage Export Templates

Select an Export Template to view, or create a new one on the left.

Create Export Templates (cont.)

- Select these options for the template:
 - How do you want your custom export file?
 - All in one file
 - Which Custom Fields do you want?
 - Let me choose



Customize Export ×

Select What You Want to Include in Your Export: (Step 1 of 3) ?

How do you want your custom export file? *****

Separate files All in one file

Which Custom Fields do you want? *****

All None Let me choose

Do you want Custom Fields as columns in your Data File? *****

Yes No

Which Custom Field Export Files do you want?

Custom Fields - Header Level
 Custom Fields - Line Level
 Custom Fields - Summary

Which additional Export Files do you want?

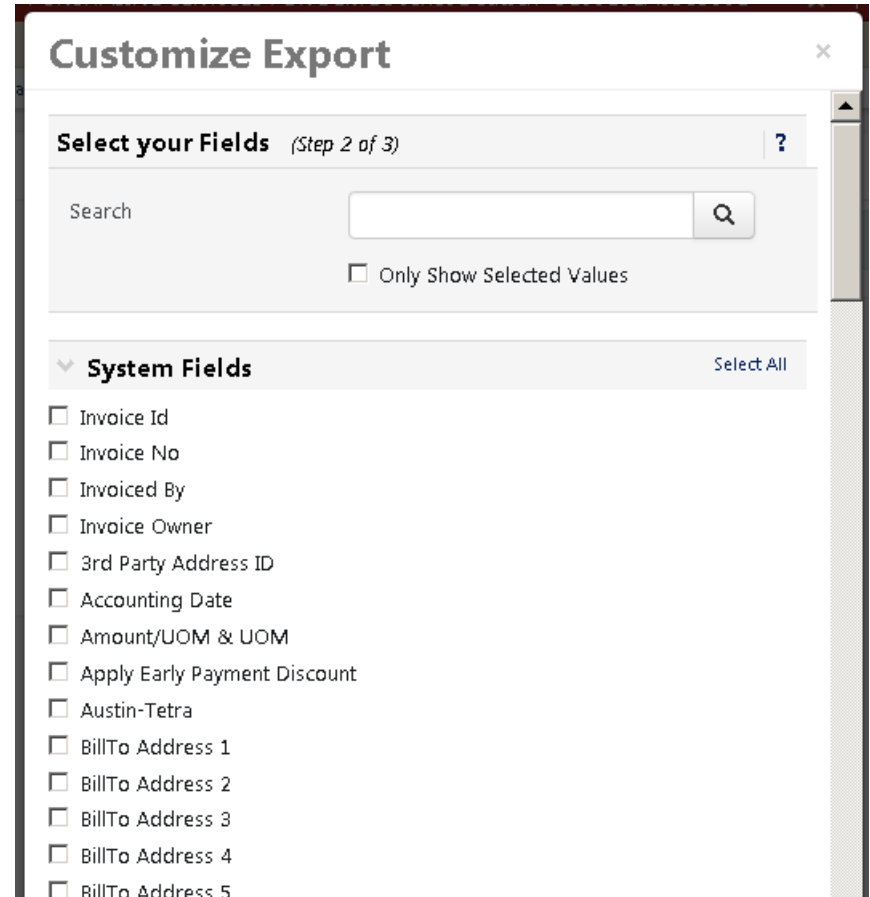
Supplier Data

* Required

[Next >](#)

Create Export Templates (cont.)

- Customize the export report
- Select from the list of System Fields
- Templates are always editable



The screenshot shows a 'Customize Export' dialog box with a close button (x) in the top right corner. The main heading is 'Customize Export'. Below it, the sub-heading is 'Select your Fields (Step 2 of 3)' with a help icon (?). There is a search input field with a magnifying glass icon and a checkbox labeled 'Only Show Selected Values'. Below the search field, there is a section titled 'System Fields' with a dropdown arrow and a 'Select All' link. The list of fields includes: Invoice Id, Invoice No, Invoiced By, Invoice Owner, 3rd Party Address ID, Accounting Date, Amount/UOM & UOM, Apply Early Payment Discount, Austin-Tetra, BillTo Address 1, BillTo Address 2, BillTo Address 3, BillTo Address 4, and BillTo Address 5. Each field has an unchecked checkbox next to it.

Create Export Template (cont.)

- Enter a name for the template and “Save”
- Find the template at “Create and Manage Export Templates”

Customize Export (Step 3 of 3)

Name & Save (Step 3 of 3)

Template Name * JAD-InvoiceTemplateforDemo

Template Description

100 characters remaining

Doc Type Invoices

Custom Export File Choice All in one file

Custom Fields Let me choose

Data Included

* Required

Previous Save

History > Document Search > Create and Manage Export Templates > Create And Manage Export Templates

Export Templates

Create Template for...

My Templates

- Cart (0)
- Order (0)
- Invoices (2)
 - Invoice-simple
 - JAD-InvoiceTemplateforDemo**

Shared by Others

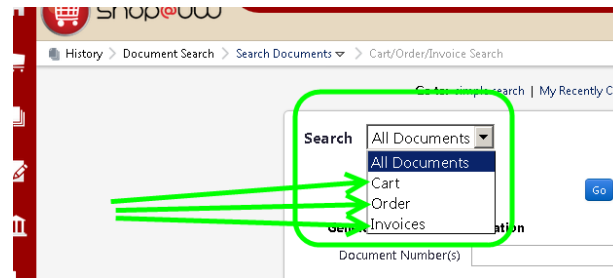
- Cart (0)
- Order (1)
- Invoices (2)

JAD-InvoiceTemplateforDemo

Template Name	JAD-InvoiceTemplateforDemo
Description	
Document Type	Invoices
Visibility	Personal
Author	MD12656-PURCHASING SERVICES FOR DEMOS
Custom Export File Choice	All in one file
System Fields	Invoice No, PO No, PO Line No, Catalog No, Extended Price, PO Line Quantity
Custom Fields	Let me choose
Data Included	* Exchange Rates

Shop@UW Document Search

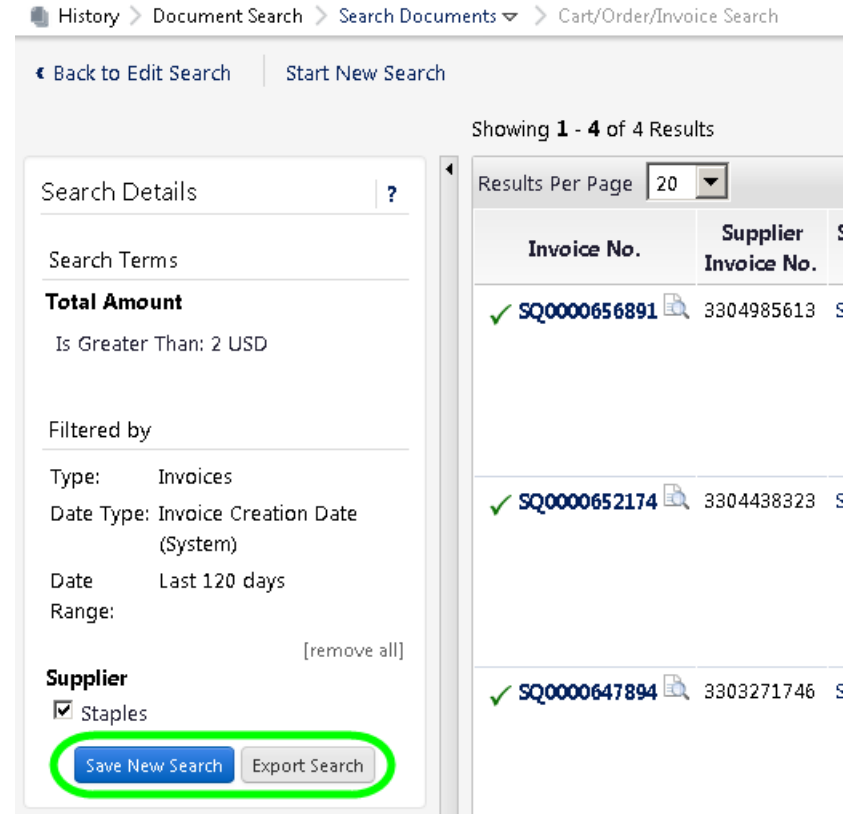
- Use the Advanced search option:
 - History > Document Search > Search Documents
- Choose Carts, Orders, or Invoices



- Enter the criteria for the search results
 - Item SKU, date range, amount, supplier, etc.
- Click on “Go”

Document Search Report Export

- Use the “Save New Search” button if you want to save the search
- Click on the “Export Search” button if you want to review a report

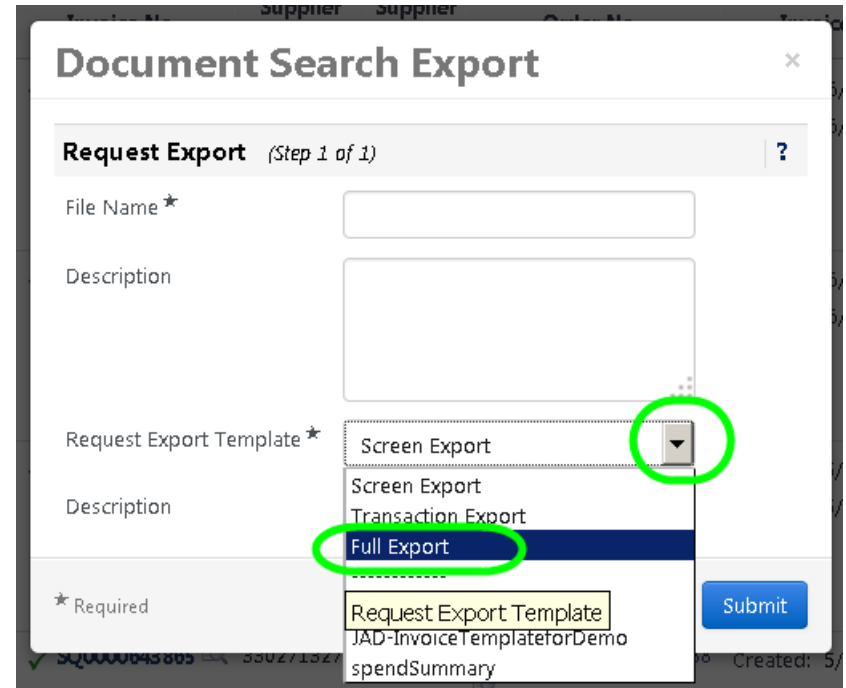


The screenshot displays a web interface for document search. At the top, there is a breadcrumb trail: History > Document Search > Search Documents > Cart/Order/Invoice Search. Below this, there are navigation links: "Back to Edit Search" and "Start New Search". The main content area is divided into two sections. On the left, "Search Details" includes: "Search Terms" (empty), "Total Amount" (Is Greater Than: 2 USD), "Filtered by" (Type: Invoices, Date Type: Invoice Creation Date (System), Date: Last 120 days, Range: [remove all]), and "Supplier" (checked: Staples). At the bottom of this section are two buttons: "Save New Search" and "Export Search", both highlighted with a green circle. On the right, "Showing 1 - 4 of 4 Results" is displayed, with a "Results Per Page" dropdown set to 20. Below this is a table with columns "Invoice No." and "Supplier Invoice No.". The table contains three rows of results, each with a green checkmark, a document icon, and a link to the invoice number.

Invoice No.	Supplier Invoice No.
✓ SQ0000656891	3304985613
✓ SQ0000652174	3304438323
✓ SQ0000647894	3303271746

Document Search Report Export (cont.)

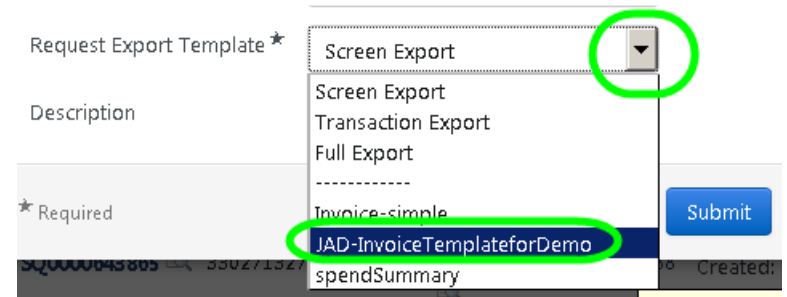
- Select an option from the dropdown at “Request Export Template”
- For the default report, use “Full Export”
 - Default search report
 - Report contains all system data



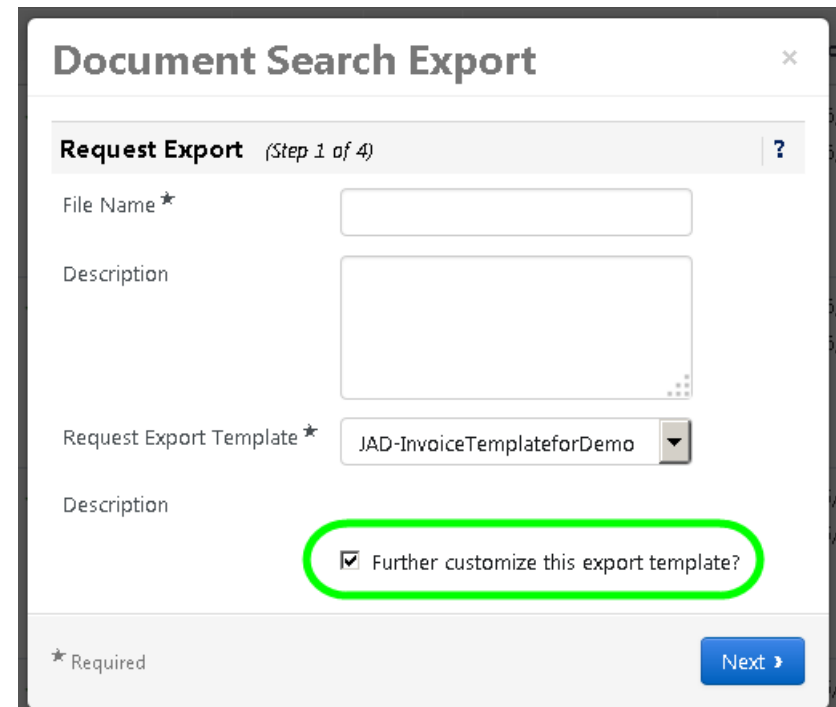
The screenshot shows a web application window titled "Document Search Export" with a close button in the top right corner. Below the title bar, there is a section labeled "Request Export (Step 1 of 1)" with a help icon. The form contains several fields: "File Name" with a text input, "Description" with a larger text area, and "Request Export Template" with a dropdown menu. The dropdown menu is open, showing options: "Screen Export", "Screen Export", "Transaction Export", "Full Export", "Request Export Template", "JAD-InvoiceTemplateforDemo", and "spendSummary". The "Full Export" option is highlighted with a blue background and a green circle. The "Request Export Template" field label and the dropdown arrow are also circled in green. At the bottom left, there is a note "* Required". At the bottom right, there is a blue "Submit" button. The bottom of the window shows a status bar with a green checkmark, a long alphanumeric string, and the text "Created: 5/".

Document Search Report Export (cont.)

- Select the custom template
 - Find the template at the “Request Export Template” dropdown
 - Option: Use the customize checkbox to change system fields in the report



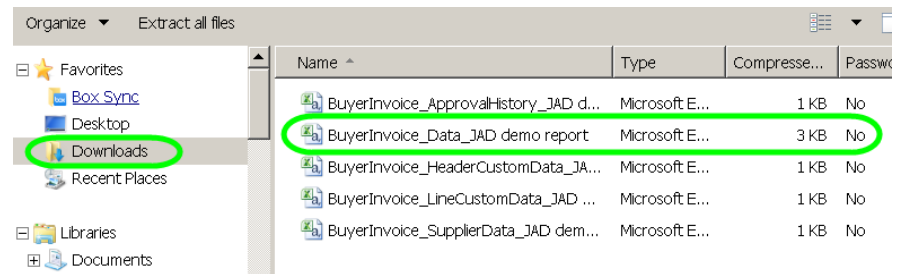
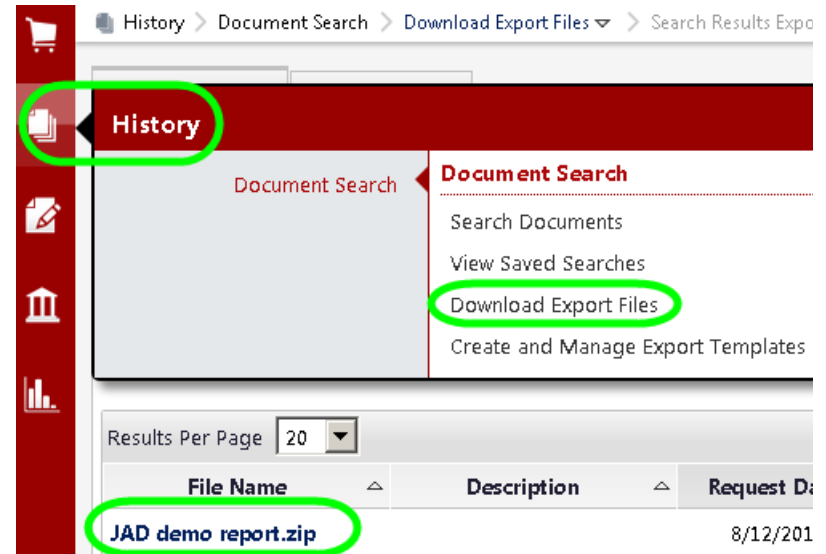
A screenshot of a web form showing a dropdown menu for 'Request Export Template *'. The dropdown is open, displaying several options: 'Screen Export', 'Screen Export', 'Transaction Export', 'Full Export', '-----', 'Invoice-simple', 'JAD-InvoiceTemplateforDemo', and 'spendSummary'. The 'JAD-InvoiceTemplateforDemo' option is highlighted with a green oval. A green circle highlights the dropdown arrow icon. A 'Submit' button is visible to the right of the dropdown.



A screenshot of the 'Document Search Export' form. The form is titled 'Document Search Export' and has a close button (X) in the top right corner. Below the title, there is a section for 'Request Export (Step 1 of 4)' with a help icon (?). The form contains several fields: 'File Name *' (text input), 'Description' (text area), 'Request Export Template *' (dropdown menu showing 'JAD-InvoiceTemplateforDemo'), and another 'Description' field. A checkbox labeled 'Further customize this export template?' is checked and highlighted with a green oval. At the bottom, there is a 'Next >' button and a '* Required' label.

Download Export Files

- Find the report in History > Document Search and select “Download Export Files”
- The export file is XXX.zip
- If using the default export option, select the largest file from the list



Questions???

- Email me at janet.deutsch@wisc.edu
- Contact Shop@UW customer service

Resources

- Shop@UW Tutorial Index
 - <http://www.bussvc.wisc.edu/shopuw/tutorials.html>
 - Download PDF's
 - Watch video
- Shop@UW FAQ
 - <http://www.bussvc.wisc.edu/shopuw/faq.html>

Shop@UW Contacts

- Shop@UW customer service
 - Phone 608-497-4400
 - Email shopuw@bussvc.wisc.edu
- Shopper Feedback Form
 - <http://www.bussvc.wisc.edu/shopuw/shopperfeedback.html>